



Infor Infinium HCM Human Resources Guide to Management Functions

Volume 1

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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 Management Functions* 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 advanced features of Infinium HR. This guide is intended to be used as a supplement classroom training and as a reference guide after training is complete. It provides detailed information on all of the controls that you must set up to implement optional Infinium HR functions before or after you go live on Infinium HR.

Organization of This Guide

This guide is task oriented. We have grouped related tasks into parts. Each part 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>Work With Controls</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 (page) or dialog box, usually to return to the prior screen (page).	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]	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. Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.	<i>Update Employer Controls [UCO]</i>
Publication and course titles	Unless otherwise stated, titles refer to Infinium applications and use standard name abbreviations.	<i>Infinium Training Administration Guide to Setup and Processing is referred to as <i>Infinium TR Guide to Setup and Processing</i>.</i>

Function Keys

Infinium AM function keys and universal Infinium HR function keys for the AS/400 or are described in the table below. All Infinium HR 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 Type the quick access code in <i>Level</i> . You can change the application designator, such as PY, TR, GL and so forth, by selecting another application.

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 . . _____,0000 -or- Increase % . . . . _____,0000
Updt Payroll Rate 1 (0->4) Payroll Rate . . _____,0000
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 $ 140 50,000.0000 6.0220 2,840.0000 23.80
- 8/20/1995 ADJST 110140 $ 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

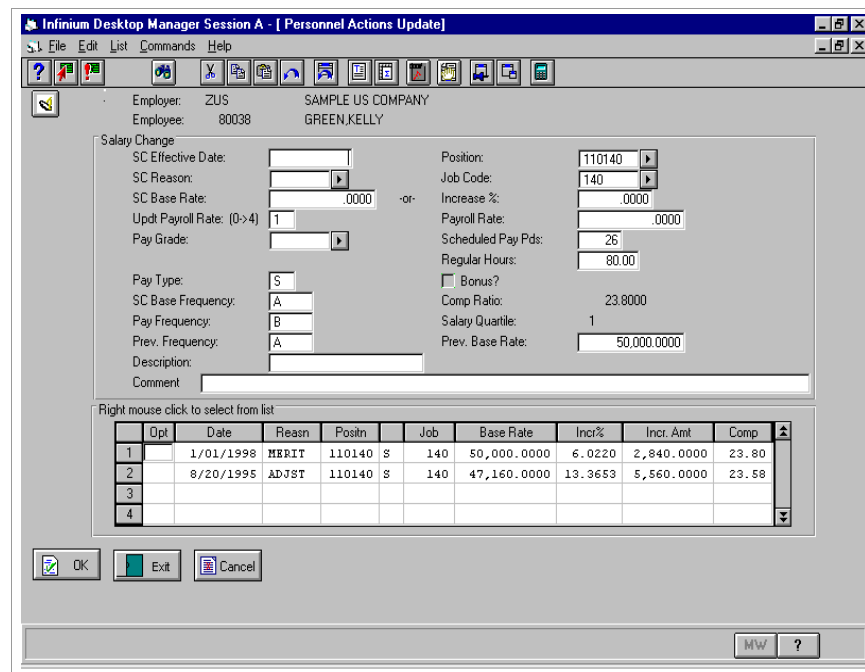


Figure 2: Sample graphical-based screen for Infinium HR suite

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.

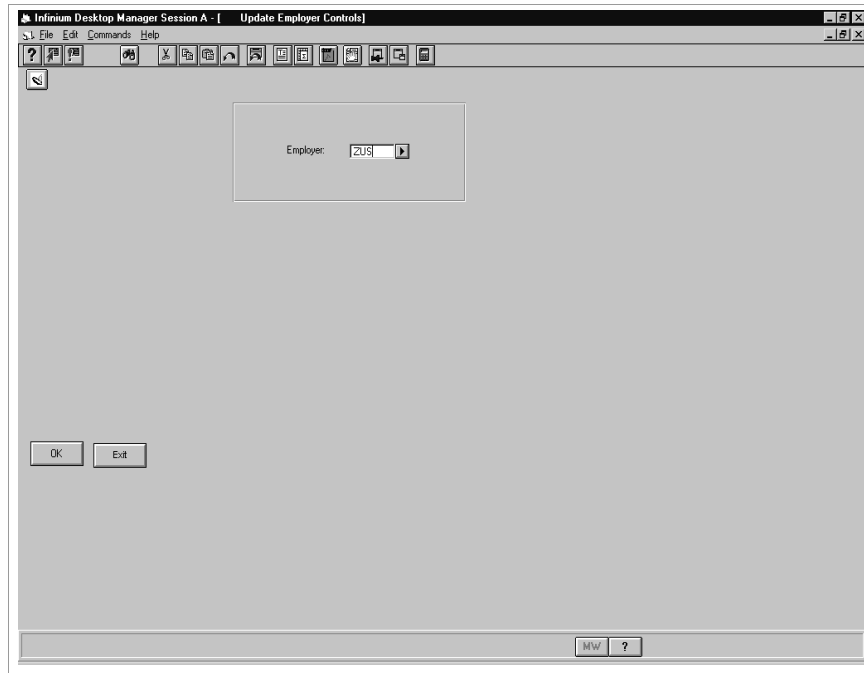


Figure 3: PY prompt screen

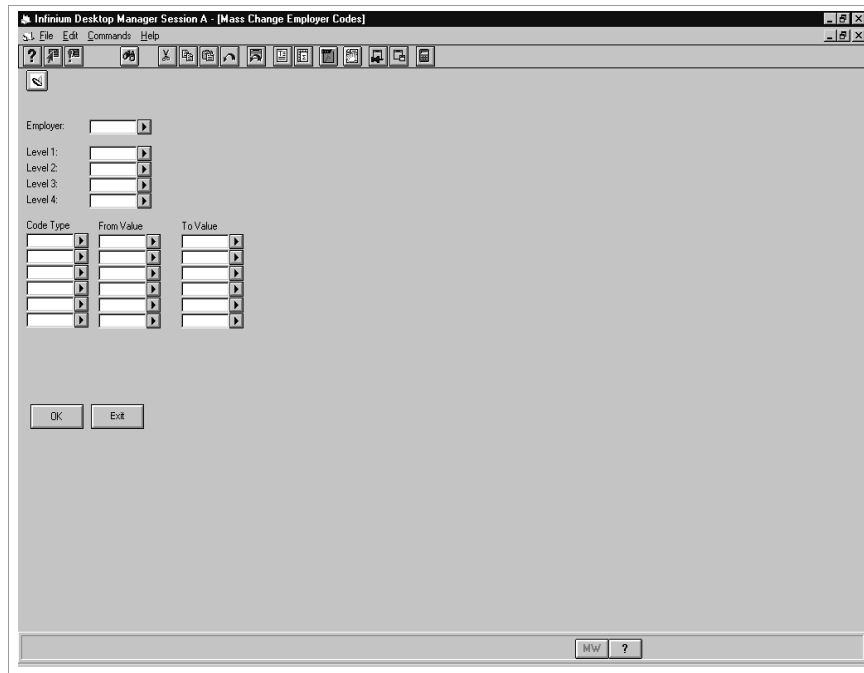


Figure 4: PY selection screen

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 Controls*
 - *Infinium Human Resources Guide to Processing*
-

- 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
 - Program Reference Guide
 - File/Field Descriptions
 - Database Relations
 - Online help
 - Installation instructions and release notes are available on Infor365.
-

Notes

Chapter 1 Infinium Human Resources: An Overview

1

Infinium Human Resources 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 Payroll.

In addition to Infinium PY, Infinium HR also shares information with Infinium Occupational Health, Infinium Flexible Benefits and Infinium Training Administration. Each of these products uses core employee information contained in Infinium HR to avoid redundancy and duplicate maintenance of basic employee data.

The chapter consists of the following topics:

Topic	Page
Infinium Human Resources/Payroll Overview	1-2
Conventions Used in Infinium Human Resources	1-4
Terminology and Concepts	1-8
Commonly Used Fields	1-14

Infinium Human Resources/Payroll Overview

The flowchart that follows identifies key components of both Infinium HR and Infinium PY. Information that is shared between the two systems is positioned in the upper middle and lower middle parts of the chart. For example, the entity control and level controls are shared between Infinium HR and Infinium PY. Similarly, users of both Infinium HR and Infinium PY can hire new employees and both can access the employee basic data record.

Information that is unique to Infinium HR or Infinium PY is shown under each product heading. For example, you set up and maintain salary ranges and benefit controls using Infinium HR while you set up and maintain general ledger controls and income and deduction controls using Infinium PY. In the standard system configuration, only Infinium HR includes applicant data and benefit administration options and only Infinium PY includes cycle processing options.

The flowchart that follows depicts the standard configuration of Infinium HR and Infinium PY. Your system administrator determines the menu options that you can access and can move options between Infinium HR and Infinium PY to suit your organization's needs.

Infinium Human Resources and Infinium Payroll Overview

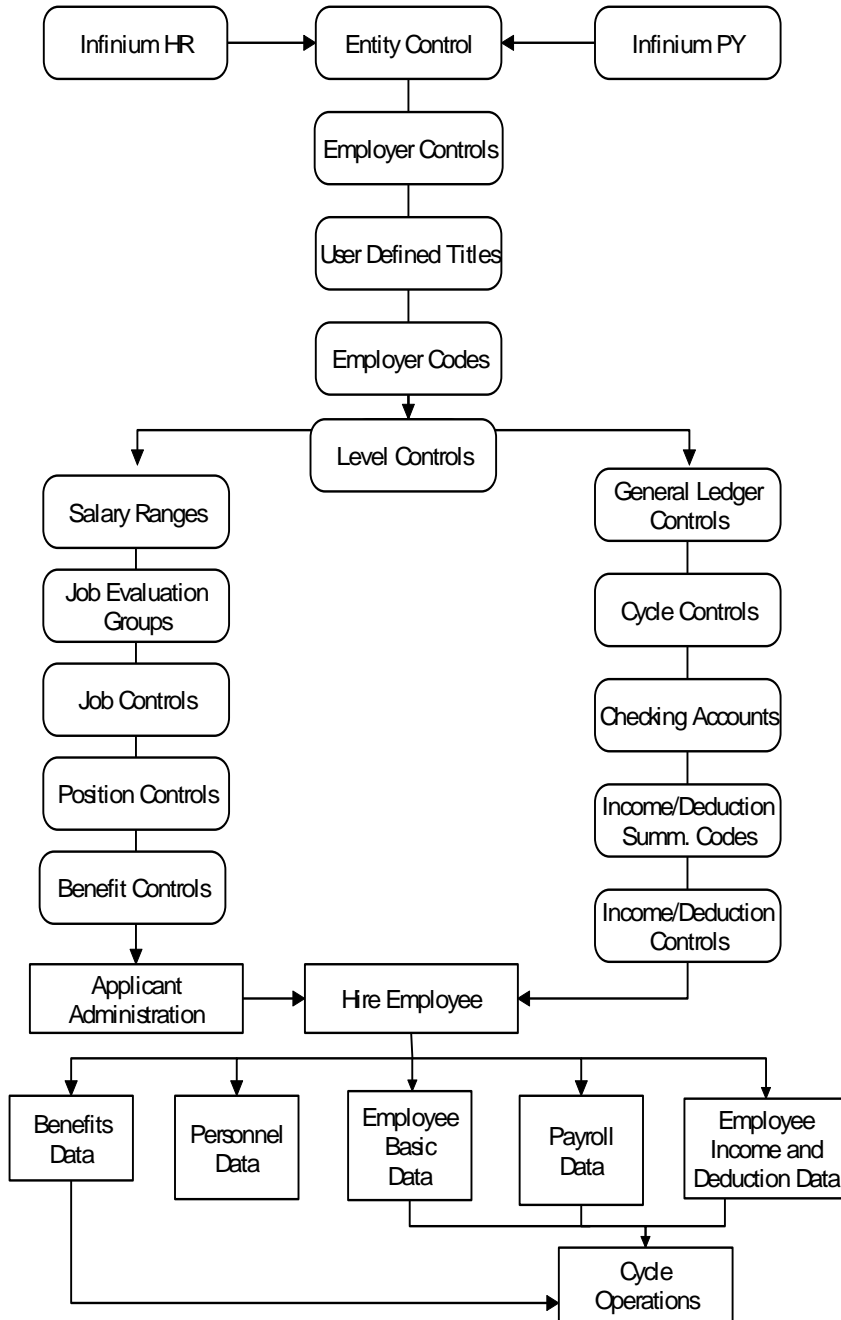


Figure 1-1: Overview of Infinium Human Resources and Infinium Payroll

Conventions Used in Infinium Human Resources

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

Understanding System Names

In this guide and others, Infinium Human Resources is sometimes referred to as HR. Infinium Payroll is sometimes referred to as PY. The combination of the Infinium Human Resources and Infinium Payroll products is identified as Infinium HR/PY.

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. 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 and Selecting

Throughout all Infinium products, including Infinium HR, when you place your cursor on any field that displays +, you can press F4 or click on the 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.

Required Fields

Many screens have a combination of required and optional fields. You must complete the required fields before the system allows you to proceed. To find out which fields are required for a screen, press Enter or click on the Enter button; the system highlights the fields that you must complete.

Field Exit

With numeric and date fields, the text you type will not always fill the entire field. You can press the Field Exit key to complete the field, right justify numeric entries and move your cursor to the next field on the screen.

Exiting a Screen

When you press F3 or click on the F3 button to leave a screen, the system displays the Exit Options window. Type **1**, **2** or **3** and press Enter to leave the screen. The table below explains the options:

- | | |
|----------|--|
| 1 | Leave the screen and save any changes you have made. |
| 2 | Leave the screen but do not save any changes. |
| 3 | Return to the screen. |

The default value is **1**.

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 *Infinium Application Manager Guide to Basics* and the *Infinium Application Manager Guide to Application Manager* for details.

Working with Sub-Files

At the bottom of some screens, the system displays one or more lines of previous information related to the function and specific 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 for a record, you must retrieve it from the sub-file.

The top half of a sub-file screen contains input fields into which you can type new information or change information for an existing sub-file record you have retrieved from the sub-file. When you press Enter to save new information, the system stores it as a new entry in the sub-file. When you press Enter to save updated information for an existing sub-file record, the system replaces the old sub-file record with the updated record.

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.

You must press F3 to exit from sub-file screens. When you press F3, the system makes your sub-file addition, change or deletion permanent.

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.

Career Plan

A career plan identifies positions or roles an employee may be qualified to perform in the future.

Competency

A competency represents an employee's behavior or ability to perform a particular task or responsibility. It is similar to a skill, but generally is more abstract, subjective and harder to measure. For example, competencies might include leadership ability, mentoring capability, planning aptitude, communication effectiveness and so on.

Development Need

A development need is a deficiency the employee must overcome to successfully perform in his or her current position or advance to future positions. Satisfaction of a development need often resolves performance problems or obstacles that prevent the employee from fulfilling the requirements of his or her current position.

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 the *Infinium Payroll Guide to Controls*.

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 approximately 150 code types for Infinium HR/PY. You must define code values for less 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 account number resolution.

HR Controls

Infinium HR controls are files of information that you set up and maintain only in Infinium HR. Infinium HR 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 the employee's 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 may also use job evaluation groups to perform salary surveys and develop salary ranges. You can define a dummy job evaluation group without associated factors if you do not have a formal job evaluation program 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 with jobs.

Management Review

A management review reflects management's assessment of an employee's current value and future roles in the company. This evaluation is often confidential and is usually not discussed with the employee.

Performance Review

A performance review is a formal assessment that typically includes a review of the employee's achievements since his or her last performance review and a discussion of future goals and objectives. The employee's supervisor generally prepares and delivers the review. The *Workforce Development* function also allows you to enter comments and ratings from other reviewers such as the supervisor's manager along the employee's subordinates, peers, customers or vendors. The employee generally takes an active part in this review.

Personal Development Review

A personal development review is an informal meeting between a manager and employee that may include one or more of the following topics: follow up on goals and objectives established in the performance review; identification and resolution of training and development needs; discussion of the employee's career aspirations; and exploration of future roles and assignments.

The personal development review generally occurs on a more frequent basis than the performance review. For example, supervisors in an organization may conduct annual performance reviews and quarterly personal development reviews.

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.

Review (360 Degree)

A 360-degree review is a performance review that incorporates feedback from people in different roles that interact with the employee. For example, review participants can include an employee's immediate supervisor, the supervisor's manager, subordinates, peers, customers, vendors and so on. You can enter 360 degree performance review data using the *Workforce Development* function.

Review Type

A review type specifies the kind of summary performance review given to an employee. You use code type **RTP** to define various kinds of summary performance reviews such as merit reviews, annual reviews, probationary reviews and so on.

Role

A role is a general description of a function an employee can perform such as manager or administrator. It is generally more broadly defined than a job or position.

Skill

A skill is the ability to do something that you can generally measure, for example, typing 70 words per minute or speaking a foreign language.

Succession Planning

The succession planning process identifies candidates who are best qualified to replace an employee when that employee leaves his or her position. You can use the *Succession Inquiry* function to match employees to position openings based on their career plan data and date of availability.

View Type

A view type identifies the general category or perspective of an individual who evaluates an employee's job performance. You can define view types to represent employees' supervisors, managers, subordinates, peers, customers, vendors and so on. You use view types to enter 360-degree employee performance review commentary from various reviewers in the *Workforce Development* function.

Commonly Used Fields

Selecting an Employee

You can use two fields on selection screens in Infinium HR to identify the employee whose information you want to review or update:

- *Employee*
- Last Name

You must specify the employee's number for the system to locate the employee's record.

Using the Employee Field

You can type the number assigned to the employee whose information you want to update or display in the *Employee* field. If you do not know the employee's number, you can press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some of or the employee's 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 you want to update or 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.

Using the Last Name Field

If you know the employee's complete last name, you can type it in the *Last Name* field and then press F4 to display the Employee Locate screen. The system positions your cursor adjacent to 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.

Selecting an Employer

You use the *Employer* field to identify the employer whose information you want to access, or the employer of the employee whose information you want to access. Type the value that represents the employer in this field.

If you do not know the value that represents an employer, you can press F4 to display a list of all of the employers that have been defined in your Infinium HR database.

Notes

Chapter 2 Administering Employee Compensation

2

Compensation administration is a vital function within Human Resources departments. You can use the following options in the *Wage & Salary Administration* function in Infinium HR to perform the compensation tasks described below:

- *Update Salary Planning Data*: Use this function to create “what-if” compensation budgets for each portion of your workforce. You can experiment with the “what-if” budgets before establishing an actual salary budget for your organization.

The salary plan models are only “what if” tools and do not impact actual employee pay rates in Infinium HR or Infinium PY.

- *Mass Wage Change*: Use this function to instantly give the same salary change at the same time to specified employees in your organization. Depending on your system setup, you can update employee pay rates in both Infinium HR and Infinium PY. The system also creates Salary Change history records in the *Enter Personnel Actions* function for each impacted employee.
- *List Compensation* reports: Use the three List Compensation reports to print employee compensation information along with totals and averages by job code, levels or salary ranges.

The chapter consists of the following topics:

Topic	Page
Planning Salary Increases	2-3
Using the <i>Mass Wage Change</i> Function	2-26
Producing Compensation Analysis Reports	2-34

Objectives

At the conclusion of this chapter you should be familiar with how to:

- Develop “what-if” salary budgets, print salary planning worksheets and display and print salary planning results
 - Apply a uniform salary change instantly to groups of employees
 - Print compensation reports to aid in the analysis of your organization’s pay practices
-

Planning Salary Increases

You use the Salary Planning options within the *Wage & Salary Administration* function to develop “what-if” salary budget plans for some or all of the employees in your organization. You first create a work file of salary planning data using the *Update Plan Controls/Worksheets* function. You then use the *Update Salary Planning Data* function to enter salary increases for individual employees or apply mass increases to all employees in the plan.

After you enter salary increases, you can obtain monetary totals for the salary plan based on the time periods you defined when you set up your plan.

Using Salary Planning

You can use the following methods to utilize the *Wage & Salary Administration* function.

- The Human Resources Department produces salary planning worksheets. You can generate these worksheets and distribute them to department managers for the purpose of salary planning.

Managers type or write the anticipated salary increases for the employees in their departments. The Human Resources Department enters this information in the system.

The system generates a document which contains the results of the projected salary increases. Individual managers can review and revise these results.

- The compensation manager can prepare one or more salary plan models based on employee pay type, levels, reports to position, job or union affiliation. Special interactive features allow you to apply mass salary increases to all employees in the plan using the same effective date or on each employee’s anniversary date.
 - You can use method 1 only or you can use method 2 only. You can also combine methods 1 and 2 by using the worksheet results to revise the compensation manager’s salary plan model.
-

Creating Plan Controls/Worksheets

You begin the planning process by creating a salary plan and generating worksheets. You can distribute these worksheets to department managers for salary recommendations.

The system uses the *Base Rate* field in the employee basic data record when it builds the salary planning work file. You apply increases to this rate as you develop your salary plans.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Update Wage & Salary Data*.
- 3 Select *Update Plan Controls/Worksheets* [SPCW]. The system displays the screen shown in Figure 2-1.

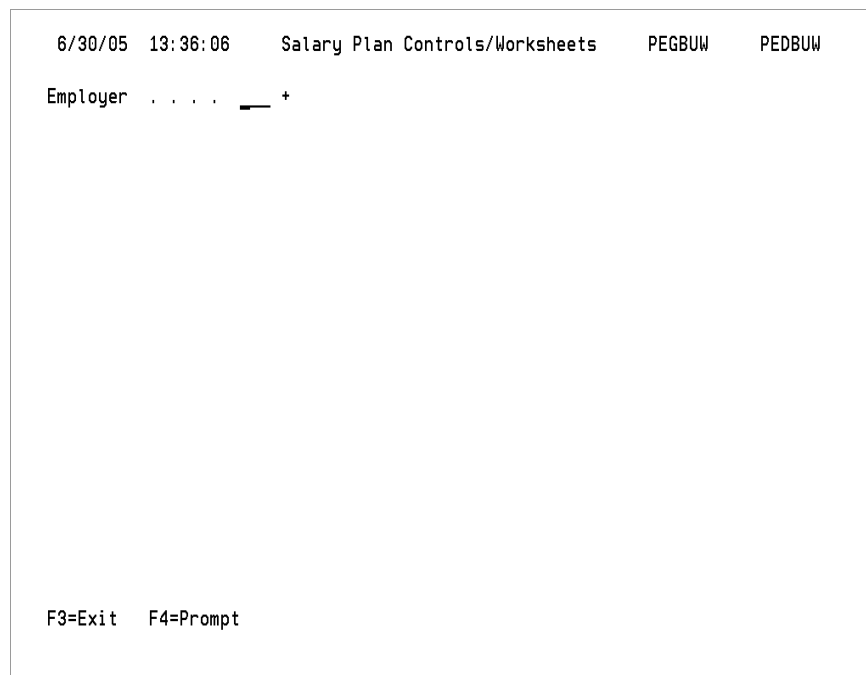


Figure 2-1: Salary Plan Controls/Worksheets prompt screen

- 4 Use the information below to fill in the fields on this screen.

Employer

- 5 Type the employer code.
- 6 Press Enter. The system displays the screen shown in Figure 2-2.

```
6/30/05 13:37:22 Salary Plan Controls/Worksheets PEGBUW PEDBUW

Employer . . . : ZUS  SAMPLE US COMPANY
Salary Plan . . . _____

-or- Select from the existing Plans listed below:

Employer  Plan    Opt    Description          Created By  Last Updated By
ZUS      PLANA    -      SALARY PLAN 1       SAL         5/29/1997
ZUS      PLANB    -      FY98 SALARY PLAN    SD          3/27/1997
ZUS      PLANC    -      QUARTERLY PLAN      SD          3/27/1997
ZUS      TEST     -      TEST SALARY         SBC         5/03/1996

F3=Exit
```

Figure 2-2: Salary Plan Controls/Worksheets screen

- 7 Use the information below to fill in the fields on this screen. On this screen you can either:
 - Type a new salary plan in the *Salary Plan* field.
 - Select a specific plan from the plans displayed.
- 8 Press Enter. The system displays the screen show in Figure 2-3.

```

6/30/05 13:37:37      Salary Plan Controls/Worksheets      PEGBUW      PEDBUW

Employer . . . : ZUS  SAMPLE US COMPANY
Salary Plan . . : PLANA

Description . . . SALARY PLAN 1
Plan Begin Date . 1011998
Period Name      Ending Date
1.  QT1        3311998
2.  QT2        6301998
3.  QT3        9301998
4.  QT4        12311998
5.  ---        -----
6.  ---        -----
7.  ---        -----
8.  ---        -----
9.  ---        -----
10. ---        -----
11. ---        -----
12. ---        -----
13. ---        -----

F3=Exit

```

Figure 2-3: Salary Plan Controls/Worksheets

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

Description

Type a plan description.

Plan Begin Date, Ending Date

Type dates in the *Plan Begin Date* and *Ending Date* fields. The date you specify in the *Plan Begin Date* field must be in the future of the system date. The last date you specify in the *Ending Date* field is the last day you want to include in your salary plan. For calculation purposes, the plan should cover a maximum of one year's time.

Name

Type up to thirteen time periods for your salary plan. Examples of period names are JAN, FEB and MAR, if you are creating an annual budget by month. Other examples are QT1, QT2, QT3 and QT4, if you are creating an annual budget by quarter.

You cannot change the plan period dates on an existing plan. If you need to change the period dates, create another salary plan and define new periods.

- 10 Press Enter. The system displays the screen shown in Figure 2-4.


```

6/30/05 13:37:50 Salary Plan Controls/Worksheets PEGBUW PEDBUW

Employer . . . : ZUS SAMPLE US COMPANY
Salary Plan . . : PLANA

Pay Type . . . . -
Reports To ER . . ___ + - and - Reports To Posit. _____ +

Print Worksheets. 1 (0=No 1=Yes)
Incl. Open Posit. 1 (0=No 1=Yes)
Restr. to Creator 0 (0=No 1=Yes)

F3=Exit F4=Prompt
    
```

Figure 2-4: Salary Plan Controls/Worksheets screen

11 Use the information below to fill in the fields on this screen.

There are no required fields on this screen.

Pay Type

Leave this field blank to include all employees in the plan. If you want to create separate budgets for employees with different pay types, type one of the following values:

- H** Hourly
- S** Salaried
- N** Salaried - nonexempt

Reports To ER

This field enables you to create a budget for a group of employees who report to a specific employer. Specify the value of the employer for the position to whom this position reports.

Reports to Posit

This field enables you to create a budget for a group of employees who report to a specific manager. Type the position code of the manager in this field.

Print Worksheets

If you type **1**, the system prints the worksheets. The worksheets are organized by *Reports to Position*. The worksheet has three sections as follows:

- The first section contains historical data relating to the employee, such as current salary and date of the last increase.
- The two middle columns headed Current Year allow the manager to type pending salary increases which are due prior to the beginning of the salary plan. This step ensures that salary increases for the planning period use the correct base or starting salary.
- The actual planning input area allows you to include up to three increases for each employee, with increase type and performance rating. You can type the increases as a percentage or an amount.

Because the planning worksheets contain highly sensitive data, attention should be given to security. If your printer is in another location you might want to have a member of your staff in that location at the time of printing.

A sample worksheet is provided at the end of this chapter.

Incl. Open Posit

To include open positions in the budget, type **1** in this field. The system uses the midpoint of the salary range associated with the open positions for calculations.

Restr. to Creator

Valid values for this field are:

- | | |
|----------|--|
| 0 | Do not restrict access to this salary plan to the user profile who is creating it. |
| 1 | Restrict access to this salary plan to the user profile who is creating it. |

- 12** Press Enter. The system displays the following message and returns to the Infinium HR main menu:

Building submission request . . .

- 13** Access the Work with Submitted Jobs, Work with All Spooled Files or Work with Job Spooled Files screens to view and print the Salary Planning Worksheets.
-

Updating Salary Planning Data

You use the *Update Salary Planning Data* to enter salary increases for employees included in your salary plan. You can use the *Update Salary Planning Data* option with the budget worksheets or independently.

You can enter data from the completed Salary Planning worksheets or you can use the interactive features to model your budget without worksheet input.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Update Wage & Salary Data*.
- 3 Select *Update Salary Planning Data* [USP]. The system displays the screen shown in Figure 2-5.

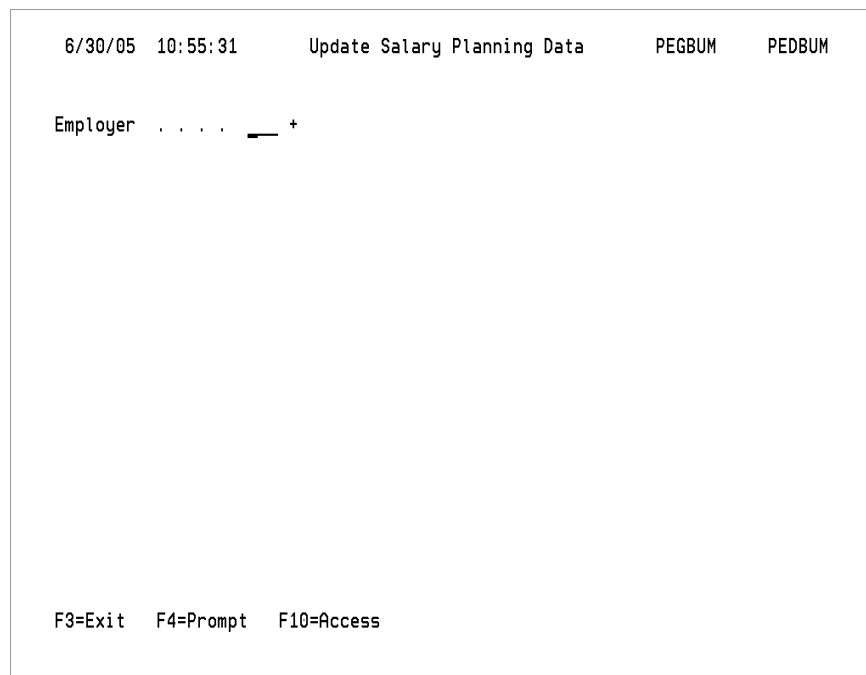


Figure 2-5: Update Salary Planning Data prompt screen

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the employer code.

- 5 Press Enter. The system displays the Update Salary Planning Data screen showing a list of existing plans.

- Type 2 in the *Opt* field to select a plan.
 - Type 4 in the *Opt* field to delete a plan.
 - Type 2 in the *Opt* field next to the plan you want to update.
- 6 Type 2 next to a plan to change.
- 7 Press Enter. The system displays screen shown in Figure 2-6.

```
6/30/05 13:11:58      Update Salary Planning Data      PEGBUM      PEDBUM

Employer . . . : ZUS      SAMPLE US COMPANY
Salary Plan . . : PLANA    SALARY PLAN 1

Created By . . . : SAL                      Last Updated By : SAL
Creation Date . . : 5/29/1997              Last Update Date: 5/29/1997
Creation Time . . : 14:16:30              Last Update Time: 14:16:30

Plan Begin Date : 1/01/1998

Planning Method . A

F3=Exit  F10=Access
```

Figure 2-6: Update Salary Planning Data screen 1

- 8 Use the information below to fill in the fields on this screen.

In the *Planning Method* field, type the value that represents the planning method for this plan. Valid values are:

- A** Budget by the Reports to Position Code
- B** Budget by Level
- C** Budget by Job Codes
- D** Budget by Union Code

- 9 Press Enter. The system displays the screen shown in Figure 2-7.

```

6/30/05 13:13:38      Update Salary Planning Data      PEGBUM      PEDBUM

Employer . . . . : ZUS      SAMPLE US COMPANY
Salary Plan . . . : PLANA    SALARY PLAN 1

Pay Type . . . . : -

Area . . . . : _____ +
Division . . . . : _____ +
Department . . . . : _____ +
Cost Centr . . . . : _____ +

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

Figure 2-7: Update Salary Planning Data screen 2

10 Use the information below to fill in the fields on this screen.

You can model specific groups of employees depending on what planning method you select. You select the planning method on screen 2 of 4.

For example, the screen above displays planning method B, Budget by Level.

11 Press Enter. The system displays the screen shown in Figure 2-8.

```

6/30/05 13:15:08      Update Salary Planning Data      PEGBUM      PEDBUM

Employer . . . : ZUS  SAMPLE US COMPANY
Salary plan . . : PLANA  SALARY PLAN 1
Begin Date . . : 1/01/1998      End Date . . . : 12/31/1998

2=Change  4=Delete

Employee Name          1st Incr Type      Amount 1    % Act Cost Op
100550  0008 Open Position      .00      .0          -
      1044 HAUT          1/01/1998      .00      5.0        1248  -
      1116 WOOD          8/01/1998      .00      5.0        1743  -
      2760 GARDEN        2/01/1998      .00      5.0         1165  -
      3093 WINTER        7/26/1998      .00      5.0       9142221  -
      3097 LAWRENCE      4/01/1998      .00      5.0     13633255  -
      80186 YORKER       3/01/1998      .00      5.0         2179  -
101550  0008 Open Position      .00      .0          -
      1039 LITTER-TEST    .00      .0          -
      1461 KANE           8/03/1998      .00      5.0     7899571  -
      1476 CHAIN         8/01/1998      .00      5.0         503  -
      1655 AXEL          10/13/1998     .00      5.0         569  +

F3=Exit  F4=Prompt  F6=Add  F8=Summary  F9=MassInc  F10=Access
F11=View2  F14=More

```

Figure 2-8: Update Salary Planning Data screen 3

This screen displays all the employees who are Part of this plan. You can change or delete employee records on this screen.

On the Update Salary Planning Data screen you can do the following:

- Press F14 to display the salary at the end of the first increase as well as the full annual cost of the projected increase.
- Press F11 to display the second or third increases. In the example above the system is displaying the first increase. To see the second increase screen press F11 .Press F11 a second time to see the third increase. Press F11 again to return to the first increase.
- Press F9 to enter salary changes for all employees in the plan. The system displays the screen shown in Figure 2-9.

12 Type 2 in the *Opt* field to change an employee's information.

```

6/30/05 13:16:22      Update Salary Planning Data      PEGBUM      PEDBUM

Employer . . . . : ZUS      SAMPLE US COMPANY
Salary Plan . . . : PLANA      SALARY PLAN 1
Begin Date . . . : 1/01/1998      End Date . . . . : 12/31/1998

Employee . . . . : 100550      0008 Open Position
Pay Type . . . . : H *HOURLY*
Job . . . . . : 550      Position . . . . : 100550
Reports to ER . . :      Reports to Posit: 101160
Level 1 . . . . : 100      Level 2 . . . . : ADMIN
Level 3 . . . . : ACCT      Level 4 . . . . : 100

Current Year Increase
-----
Last Incr Date . . _____      Plan Begin Salary  65520

Plan Period Increases
-----
      Date          % -or- Amount      IncType      Rating
1st Increase . . _____      .0      .00      _____ + _____ +
2nd Increase . . _____      .0      .00      _____ + _____ +
3rd Increase . . _____      .0      .00      _____ + _____ +

F3=Exit  F4=Prompt  F10=Access  F16=Update/Exit
    
```

Figure 2-9: Update Salary Planning Data screen 4

- Use the information below to fill in the fields on the employee’s information. Type up to three increases for the employee. Type the date of each increase.

Plan Period Increases

You can enter either a percentage amount or a dollar amount for the anticipated increment.

Date

Type the date when the first, second or third increase takes effect. The dates you specify must be after the salary plan’s start date.

% or Amount

Type the rate for the increase or the dollar amount of the increase.

The system applies the monetary increase amount you specify differently depending on the pay type of the employee. The system displays the employee’s pay type in the top portion of the screen shown above.

If the employee’s pay type is **H**, the system multiplies the dollar amount you specify by 2080 to determine the annual cost. If the employee’s pay type is **S** or **N**, the system assumes the increase you specify is an annual amount.

The system prorates the annual cost when it calculates the actual cost using the plan's start date and the effective date you specify for the employee's increase. After you enter a salary increase for an employee, the system displays the actual cost in the *Act Cost* field on the screen shown in Figure 2-8.

Inc Type

Type the code value that represents the type of increase.

Rating

Type the code value that represents the performance review rating associated with the increase.

- 14 Press Enter or F16 to exit and save your changes.

Entering Mass Salary Increases

You can use this feature to enter the same salary increase for all employees in your salary plan.

- 1 On the Employee Selection screen (see Figure 2-8), press F9. The system displays the screen shown in Figure 2-10.

```

6/30/05 13:20:27      Apply Mass Salary Increase      PEGBUM      PEDBUM

Employer . . . . : ZUS  SAMPLE US COMPANY
Salary Plan . . . : PLANA  SALARY PLAN 1

Planning Period Increases
      Date          % -or- Amount      IncType      Rating
1st Increase . .  _____  .0      _____  _____  +
2nd Increase . .  _____  .0      _____  _____  +
3rd Increase . .  _____  .0      _____  _____  +

Note: To add to an existing increase, both dates must be the same.

Generate Anniversary Increase
You may enter an anniversary increase percentage. The system will automatically
apply this percentage increase at the date of hire anniversary for each
employee.

Anniv Increase% .  _____.0

F3=Exit  F4=Prompt  F10=Access  F11=remove Salary Increases

```

Figure 2-10: Apply Mass Salary Increases screen

2 Use the following information to fill in the fields on this screen.

You can use the mass increase feature in two ways.

- You can type up to three dates for salary increases with percentage or dollar amounts. The system applies these projected increases to each employee in the plan and calculates the costs of these for each employee.
- In the *Anniversary Increase %* field, you can type a percentage increase amount. The system applies this projected increase to each employee in the plan on the anniversary of their date of hire.

3 Press F3 to exit and save your information.

Adding New Employee Information to a Plan

You can use the Add Employees to Plan screen to add an existing employee or future anticipated employees to the salary plan, if you want to include their salary expense in your salary projection totals.

1 On the employee selection screen (see Figure 2-8) press F6. The system displays the screen shown in Figure 2-11.

```

6/30/05 13:21:52          Add Employee/s to Plan          PEGBUM  PEDBUM

Employer . . . . : ZUS  SAMPLE US COMPANY
Salary Plan . . . : PLANA  SALARY PLAN 1

Existing Employee
-----
Enter an employee number to add an existing employee to the plan.

Employee . . . . : _____ +

-or-

Planned Addition
-----
Complete the section below to add future planned additions to the workforce.

No. of employees. _____      Position . . . . : _____ +
Starting Date . . : _____      Pay Type . . . . : _____
Starting Salary . : _____      -or- Hourly Pay Rate . : _____ .0000
                                           Reg Weekly Hrs . : _____ .00

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

Figure 2-11: Add Employees to Plan screen

2 Use the information below to fill in the fields on this screen.

You use this screen when you anticipate an employee transferring into the department whose budget plan you are preparing.

This screen also allows you to add anticipated future employees to your plan for budget purposes. This feature allows you to be more accurate in your budgeting for a given period.

- 3 Press Enter. The system displays the Update Salary Planning Data screen listing employees enrolled in the plan.
- 4 You can update information for the additional employees by typing 2 next to the employee whose record you want to change.

You can type 4 next to an employee record you want to delete.

- 5 Press F3 to exit and save.

Generating Summary Plan Data

After you enter employee salary planning detail, you can review summary totals for your salary plan.

On the Update Salary Planning screen press F8. The system displays the screen shown in Figure 2-12.

```

_ 6/30/05 13:23:46      Salary Planning Summary      PEGBUM  PEDBUM

Employer . . . : ZUS  SAMPLE US COMPANY
Salary Plan . . : PLANA  SALARY PLAN 1

                Total Base      Ending      Total  %Incr      Total  %Incr
                Salaries      Salaries      Annual  Ann.      Actual  Act.

Totals          508,933,405  817,929,532  308,996,127  60.7  116,456,956  22.9

Open Posit     512,885,280  512,885,280           0    .0           0    .0

Planned Addit           0           0                       0    .0

F3=Exit
    
```

Figure 2-12: Salary Planning Summary screen

The summaries are divided into three categories as follows:

- Existing Employees
- Cost of Open Positions
- Cost of Planned Additions

You can press F8, at any time during the salary planning process, to view a summary of the entries you have made.

Displaying Salary Planning Data

Use the *Display Salary Planning Data* option to display the budget information. This option can aid you in the decision making process.

The display shows the proposed budget in detail, including the beginning and ending salaries for each employee. The display also shows the full annual costs of the increases and the actual costs for the allotted time period.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Display Wage & Salary Data*.

- 3 Select *Display Salary Planning Data* [SPI]. The system displays the screen shown in Figure 2-13.

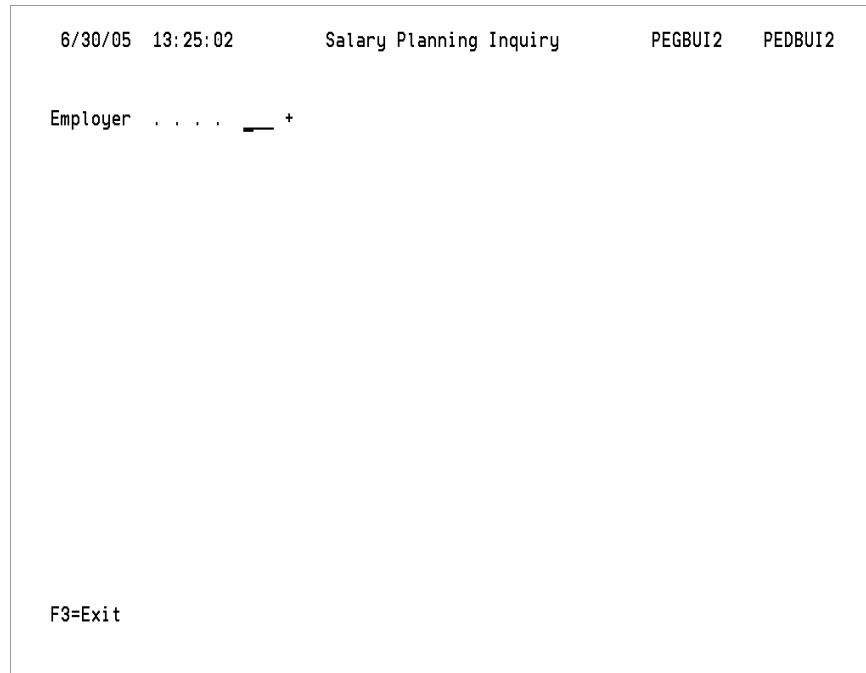


Figure 2-13: Salary Planning Inquiry prompt screen

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

Employer

Type the employer code.

- 5 Press Enter. The system displays the screen shown in Figure 2-14.
-

```

6/30/05 13:26:07      Salary Planning Inquiry      PEGBUI2  PEDBUI2

Select from the existing Plans listed below:

Employer  Plan   Opt   Description      Created By  Last Updated By
ZUS       PLANA  -     SALARY PLAN 1   SAL         5/29/1997
ZUS       PLANB  -     FY98 SALARY PLAN SD         3/27/1997
ZUS       PLANC  -     QUARTERLY PLAN  SD         3/27/1997
ZUS       TEST   -     TEST SALARY     SBC         5/03/1996

F3=Exit
    
```

Figure 2-14: Salary Planning Inquiry Plan Selection screen

6 Use the information below to fill in the fields on this screen.

Select a plan by typing any character in the *Opt* field next to the plan you want to display.

7 Press Enter. The system displays the screen shown in Figure 2-15.

```

6/30/05 13:27:12      Salary Planning Inquiry      PEGBUI2  PEDBUI2

Employer . . . : ZUS  SAMPLE US COMPANY
Salary Plan . . : PLANA  SALARY PLAN 1

You may select either by levels OR by one of the other codes below:

Area . . . _____ +      Division . . . _____ +
Department . . . _____ +      Cost Centr . . . _____ +

Reports To ER . . . ___ + - and - Reports to Posit. _____ +

Job Code . . . . . _____ +      Location . . . . . _____ +
Salary Range . . . _____ +      Union Code . . . _____ +
Perf. Rating . . . _____ +      Increase Type . . . _____ +

F3=Exit  F4=Prompt

```

Figure 2-15: Salary Planning Inquiry screen

- 8 Use the information below to fill in the fields on this screen.

There are no required fields on this screen. You can select a specific group of employees by typing a valid value in any of the fields that meet your selection criteria.

You can also leave all fields blank to display the salary budget and information for this plan.

- 9 Press Enter. The system displays the screen shown in Figure 2-16.

```

_ 6/30/05 13:29:27      Salary Planning Inquiry      PEGBUI2  PEDBUI2

Employer . . . . : ZUS  SAMPLE US COMPANY
Salary plan . . . : PLANA  SALARY PLAN 1

      Employees  Base Salary  End Salary  FullAnnual  Actual Cst
Totals . . . . : 211    267,296,681  490,904,964  309,090,703  116,495,323
Employee Average:      266,808    326,563    464,884    552,110

Employee  Name          Base Salary  End Salary  FullAnnual  Actual Cst
      OPEN POSITION      220,500      0           0           0
1147 MEGABUCKS      208,000      0           0           0
2615 SMITH          100,000      0           0           0
2631 CHIEF          26,000       0           0           0
2793 LIABILITY      2,400,000    0           0           0
80039 KAPPA         41,600       0           0           0
80226 LASAGNA       40,000       0           0           0
      OPEN POSITION      220,500      0           0           0
      OPEN POSITION      220,500      0           0           0
      OPEN POSITION      882,000      0           0           0
2660 TANK           50,000       0           0           0 +

F3=Exit  F8=Period Costs
    
```

Figure 2-16: Salary Planning Inquiry screen

This screen displays the designated salary budget and information from the *Update Salary Planning Data* function.

- 10 Press F8 to display period costs. The system displays the screen shown in Figure 2-17.

```

_ 6/30/05 13:30:28          Costs By Plan Period          PEGBUI2  PEDBUI2
Employer . . . : ZUS  SAMPLE US COMPANY
Salary Plan . . : PLANA  SALARY PLAN 1

Period          Cost of increases    Gross Salary Costs
QT1              984,945          232,885,526
QT2             1,994,418          240,384,275
QT3             3,641,296          243,867,049
QT4             6,875,489          239,546,064

Total Costs . . :      13,496,148          956,682,914

F3=Exit

```

Figure 2-17: Costs By Plan Period screen

Use this screen for a visual display of the budget for a period by period breakdown. This provides a cash flow analysis of the actual increase costs and the gross salary costs.

You establish the period by period breakdown in the option *Update Plan Controls/Worksheets*.

- 11 Press F3 three times to exit to the main menu

Printing Salary Planning Results

You can print the results of the salary planning by using the *List Salary Planning Results* option and return the results to the managers for their assessment. You can also print the salary planning data from the worksheets you receive from managers.

Your organization should take precautions to protect the highly sensitive data on these reports.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *List Wage & Salary Data*.

- 3 Select *List Salary Planning Results* [PSPR]. The system displays the screen as shown in Figure 2-18.

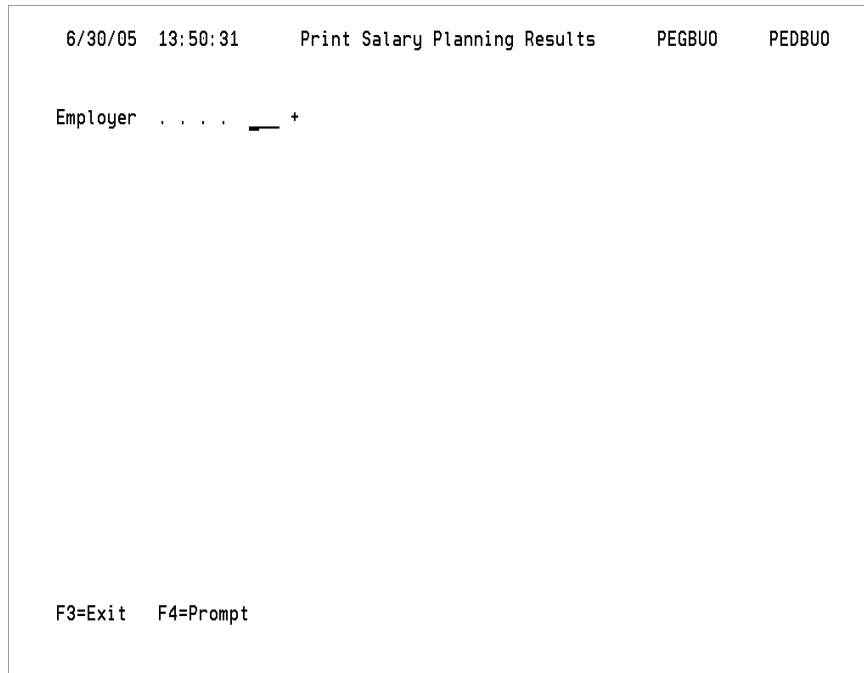


Figure 2-18: Print Salary Planning Results prompt screen

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

Employer

Type the employer code.

- 5 Press Enter. The system displays the screen shown in Figure 2-19.

```

6/30/05 13:50:50      Print Salary Planning Results      PEGBUO      PEDBUO

Employer  Plan   Opt   Description      Created By  Last updated by
ZUS      PLANA  -     SALARY PLAN 1   SAL         5/29/1997
ZUS      PLANB  -     FY98 SALARY PLAN SD         3/27/1997
ZUS      PLANC  -     QUARTERLY PLAN SD         3/27/1997
ZUS      TEST   -     TEST SALARY     SBC         5/03/1996

F3=Exit

```

Figure 2-19: Print Salary Planning Results screen

- 6 Select a plan by typing any character in the *Opt* field adjacent to it.
- 7 Press Enter. The system displays the screen shown in Figure 2-20.

```

6/30/05 13:51:08      Print Salary Planning Results      PEGBUO      PEDBUO

Employer . . . : ZUS SAMPLE US COMPANY
Salary Plan . . : PLANA

Created By . . . : SAL
Create Date . . : 5/29/1997      Create Time . . : 14:16:30
Last Updated By : SAL
Update Date . . : 5/29/1997      Update Time . . : 14:16:30
Description . . : SALARY PLAN 1
Plan Begin Date : 1/01/1998

Plan Method . . . -

F3=Exit

```

Figure 2-20: Print Salary Planning Results screen

8 Use the following information to fill in the fields on this screen.

Type a valid value in the *Plan Method* field.

For example, the system is displaying planning method B on the screen above.

9 Press Enter. The system displays the screen shown in Figure 2-21.

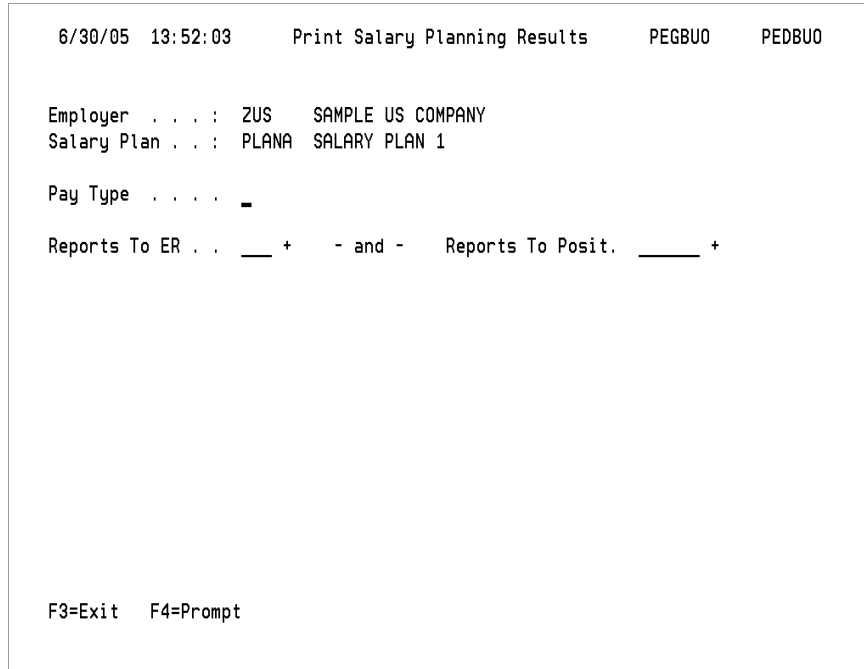


Figure 2-21: Print Salary Planning Results screen

10 Use the information below to fill in the fields on this screen.

Planning method B (from the previous screen) allows you to select by pay type and level(s) that you want to include in the report.

Depending on the plan method you select, type the appropriate information to select employees for this report.

11 Press Enter. The system prints the Salary Planning Results you specified and returns you to the Infinium HR main menu.

Using the *Mass Wage Change* Function

You use the *Mass Wage Change* option to update pay rates for groups of employees who are receiving the same wage change. You can process salary increases or decreases using this function. You can choose to make the salary change effective immediately or create the changes in the personnel action transaction file (PEPTR) as future dated transactions. The system generates a salary change transaction for each employee included within the parameters you specify.

You can specify a percentage or flat amount for each wage increase or decrease. The system restricts a flat amount increase or decrease to employees with both:

- An hourly base rate frequency and
- An hourly pay type

Making Mass Wage Changes

The system automatically creates a salary change history record for each employee you process using the *Mass Wage Change* function. You can specify whether the system should include terminated employees in this process.

You can use the *Mass Wage Change* option to update only the personnel base rate in the employee basic data record or to update one or more of the employee's payroll rate(s) in the employee payroll data record in Infinium PY.

You must first determine if Infinium HR users are allowed to update pay rates in Infinium PY. Infinium HR users can update pay rates in Infinium PY if the value in the *PE Updt Pay Rates* field in the *Update Employer Controls* option in Infinium PY is 1.

If you type 0 in this field (indicating that Infinium HR users cannot update payroll rates) and you type a 1 in the *Updt PY Rate* field in the *Mass Wage Change* option, the system displays an error message stating that you are not authorized to change payroll rates.

You should use the *Trial Mass Wage Change* option before you run the *Mass Wage Change* option. Doing so verifies that the proposed changes in base rates are accurate. The system prints current and proposed changes to base rates in Infinium HR and Infinium PY when you run the *Trial Mass Wage*

Change option. The report also prints the current and proposed comp ratios. When you run the *Mass Wage Change* option, the system prints the old and new salary information.

To use the options *Trial Mass Wage Change* and *Mass Wage Change*, follow these steps.

- 1 Define one or more Salary Change Reason code values.
- 2 Run the *Trial Mass Wage Change* function.
- 3 Run the *Mass Wage Change* function.

Defining Salary Change Reason Code Values

You must create code values for all salary change reasons using code type **SAL**. Refer to the *Infinium HR Guide to Controls* for detailed information on setting up code values.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Employer Codes [UCC]*. The system displays the screen shown in Figure 2-22.
-

```
6/20/02 17:58:04 Update Employer Codes PRGMCD PRDMCD
-----
Employer . . . . . ZUS + -or- Employer group . . . ____ +
Code type . . . . . SAL +
Code value . . . . . CONTR ____ +

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

Figure 2-22 Update Employer Codes prompt screen

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

Employer

Type the value that represents your employer.

Code type

Type **SAL** to identify the salary change reason code table.

Code value

Type a value of up to five characters to represent a salary change reason.

- 5 Press Enter. The system displays the screen shown in Figure 2-23.

6/20/02	17:58:33	Update Employer Codes	PRGMCD	PRDMCD
<hr/>				
Employer	ZUS	SAMPLE US COMPANY		
Code type	SAL	SALARY CHANGE REASON CODE		
Code value	CONTR			
Description	<u>UNION CONTRACT</u>			
Active/Inactive	<u>0</u>	(0=Act./1=Inact)		
<hr/>				
F3=Exit F10=QuikAccess F12=Cancel F18=Message line F22=Delete				

Figure 2-23: Update Employer Codes Screen

- 6 Type up to a 30 character alphanumeric description of the code value.
- 7 Repeat steps 4 through 6 to set up additional code values or press F3 to return to the Infinium HR main menu.

Performing a Trial Run

We recommend that you use the *Trial Mass Wage Change* function before you use the *Mass Wage Change* option in case the results contain errors. Select the option *Trial Mass Wage Change*. This option presents you with all the parameters necessary to define the mass change.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Mass Update Wage & Salary Data*.
- 3 Select *Trial Mass Wage Change [TMWC]*. The system displays the screen shown in Figure 2-24.

Figure 2-24: Trial Mass Wage Change screen

You can identify the group of employees who should be included in the Mass Wage Change processing using the *Pay Type*, *Union Code* and *Job Code* fields. You can also leave all of the selection criteria fields blank to update pay rates for all employees in the specified employer.

You must type either a value in the *Percentage Incr.*, *Amount Incr.* or *Date of Increase* fields.

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

Sal. Chg. Reason

Type a valid value in the *Sal Chg. Reason* field.

Percentage Incr

Type the percentage amount of the increase. For example, type 5 for a 5% increase. Do not use a decimal point. If a decrease is desired, type a negative amount. For example, type 1- for a 1% decrease.

Amount Incr

If you are mass updating pay rates for only those employees whose pay type and base rate frequency are hourly, you can enter an amount increase or decrease. Type the exact amount of the increase or decrease. You can specify up to four decimal point values.

For example, type **.50** to represent an increase of fifty cents per hour. Type **-** after the value to enter a salary decrease. For example, type **.50-** to represent a decrease of fifty cents per hour.

Date of Increase

Type the effective date of the salary increase.

Updt PY Rate?

Indicate if you want the system to update the employee's pay rates in Infinium PY.

Valid values for this field are:

- 0** Do not update pay rates in the employee payroll data record in Infinium PY. Only update the *Base Rate* field in the employee basic data record.
- 1** Update both the *Base Rate* field in the basic data record and the *Pay Rate* field in the payroll data record in Infinium PY.
- 2** Update only the *2nd Pay Rate* field in the payroll data record in Infinium PY.
- 3** Update only the *3rd Pay Rate* field in the payroll data record in Infinium PY.

Infinium HR users cannot change payroll rates 1, 2 or 3 if you enter **0** in the *PE Updt Pay Rates* field in the employer control record in Infinium PY. The system displays an error message stating that the user is not authorized to change payroll rates.

Description, Comment

Type additional information related to the salary change in the *Description* and *Comment* fields. The system keeps this information in each employee's salary change history record.

- 5 Press Enter. The system displays the following message and returns to the Infinium HR main menu:

Building submission request . . .

- 6 The system uses batch processing to generate a report showing the previous and proposed new pay rates in Infinium HR and Infinium PY. The report also shows the proposed rate increase amount and the old and proposed new comp ratios. A sample report is provided at the end of this chapter.

Performing a Mass Wage Change

After you have verified the results you obtained when you ran the *Trial Mass Wage Change* option, you can proceed to the *Mass Wage Change* function.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Mass Update Wage & Salary Data*
- 3 Select *Mass Wage Change [MWC]*. The system displays the screen shown in Figure 2-25.

The screenshot shows the 'Infinium: Mass Wage Change (PE-303)' window. The title bar includes standard window controls. The menu bar contains 'File', 'Edit', 'Tools', 'Window', and 'Help'. The main area displays the following fields and values:

- 6/30/98 11:59:17 Mass Wage Change PRGJC50 PRDJC50
- Employer ZUS
- Level 1 100
- Level 2
- Level 3
- Level 4
- Pay Type F
- Union Code TMR3
- Job Code
- Sal. Chg. Reason. CONTR
- Percentage Incr -or- Amount Incr5000
- Date of Increase. 88811998
- Include term? (0=No 1=Yes) Termination code
- Updt PY Rate?
- Description CONTRACT INCREASE DUE 8/1/98
- Comment
- Update Type F (I, F)

At the bottom, there are function key shortcuts: F3=Exit, F4=Prompt, F10=Access. The status bar at the very bottom shows 'Field Action: 5' and 'Background Action: F12' with navigation arrows.

Figure 2-25: Mass Wage Change screen

- 4 Use the information in the “Performing a Trial Run” section to enter mass wage change data on this screen.
- 5 Use the following information to fill in the additional field on this screen:

Update Type

Type the value that indicates the process you want to use for this mass wage change.

Valid values for this field are:

- I Process the mass wage change as an immediate salary change and update to the employee payroll master and employee root master records for each employee.
- F Process the mass wage change as a future dated salary change transaction.

Caution: When salary changes are created as future dated transactions, you must run the *Mass Update PE Actions* function to change the employee payroll master file and the employee root master file.

- 6 Press Enter. The system displays the following message and returns to the Infinium HR main menu:

Building submission request . . .

- 7 The system uses batch processing to update employee pay rates in Infinium HR and Infinium PY. It generates a report showing the previous and new pay rates in Infinium HR and Infinium PY. The report also shows the rate increase amount and the old and new comp ratios. A sample is provided at the end of this chapter.

When you run the *Mass Wage Change* option, the system updates the information in the following fields in the employee basic data record:

- *Base Rate*
 - *Previous Rate*
 - *Comp. Ratio & Quartile*
 - *Last Inc.%*
 - *Last Inc. Amt.*
 - *Last Inc. On*
 - *Last Inc. Reason*
- 8 You can use the following functions to review the pay rate changes made by the system when you ran the *Mass Wage Change* option:
 - Select the *Salary Change* choice in the *Enter Personnel Actions* function; the system displays the salary change history record in the sub-file of the screen. Type *2* in the *Opt* field adjacent to the record to review complete salary change transaction information.
 - Select the *Salary Change* choice in the *Display Employee History* function.
 - Select the *Basic Data* choice in the *Display Employee Data* function.

Producing Compensation Analysis Reports

This section introduces you to three reports that provide an analysis of employee compensation based on the employee's assigned job, levels or salary range.

The system analyzes compensation data for both full time and part time employees on the List Compensation reports. When you run the List Compensation reports, you identify full time employees by specifying the number of annual scheduled work hours for full time employees. The system calculates annual scheduled hours for each employee by multiplying the values in the *Regular Hours* and *Scheduled Pay Pds* fields in each employee's basic data record. Employees are part-time if their calculated annual hours value is less than the full time value you specify.

By varying the value for full time hours at the time you generate the report, you can generate reports that show compensation for different types of full or part time employees.

When you generate the List Compensation reports, you can elect to express all employee salaries and salary ranges in annual amounts so that the report totals and averages provide meaningful results. For example, if in your employer you store pay rates for hourly employees on an hourly basis, pay rates for non-exempt employee on a biweekly basis and pay rates for management employees on a monthly basis, the report totals and averages produced by the system are not accurate unless you convert all pay rates to a common basis such as annual.

If you want to generate the List Compensation reports using employer groups, you must set up employer group code values and assign the appropriate employers to these groups prior to running the reports.

List Compensation by Job Code

You can select employees for this report based on each employee's assigned job. The system sorts the employees by their job code.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
 - 2 Select *List Wage & Salary Data*.
-

- 3 Select *List Compensation By Job Code* [CAJC]. The system displays the screen shown in Figure 2-26.

Figure 2-26: List Compensation By Job Code screen

- 4 Use the information below to fill in the fields on this screen.

Employer or Employer Group

Type the employer code or employer group code.

Job Code

Leave this field blank to include all job codes or type a valid code.

Full Time Hrs/Yr

You use this to define the number of work hours per year that constitute full time employment. The system distinguishes full and part time employees using the value you type in this field.

Convert to Annual

Type 1 if you want to view all salaries and salary range amounts in annual figures.

- 5 Press Enter. The system generates the Compensation Analysis by Job Code report. A sample is provided at the end of this chapter.

List Compensation by Salary Range

You can select employees for this report based on each employee's assigned salary range. The system sorts the employees by their salary range.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *List Wage & Salary Data*.
- 3 Select *List Compensation By Sal Range [CABSG]*. The system displays the screen shown in Figure 2-27.

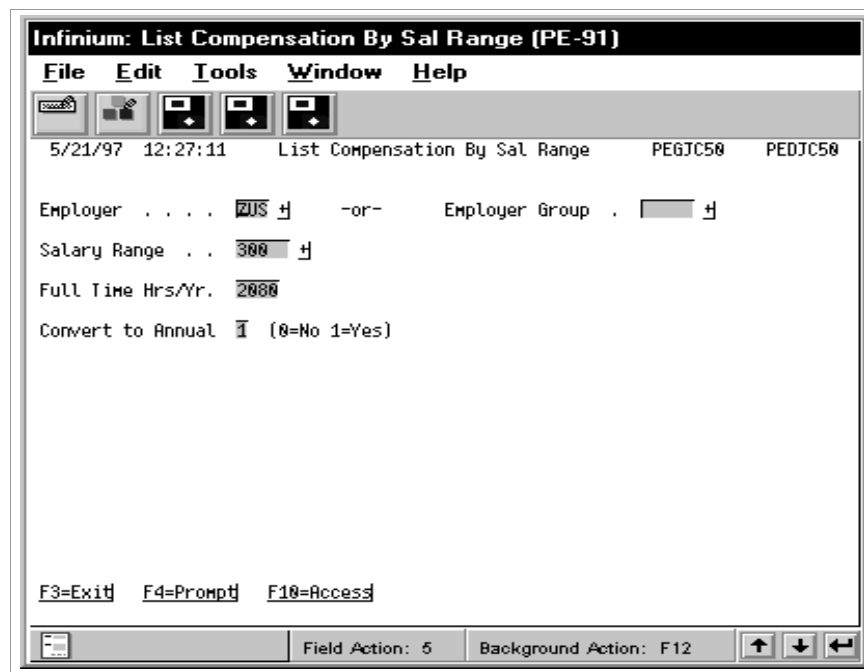


Figure 2-27: List Compensation By Sal Range screen

- 4 Use the information in the “List Compensation by Job Code” section to fill in most of the fields on this screen.

Salary Range

Leave this field blank to include all salary ranges or type a valid code.

- 5 Press Enter. The system generates the Compensation by Salary Range report.

List Compensation by Level

You can select employees for this report based on each employee's assigned organizational level(s). The system sorts the employees by their levels.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *List Wage & Salary Data*.
- 3 Select *List Compensation By Level [CABL]*. The system displays the screen shown in Figure 2-28.

Figure 2-28: List Compensation By Levels screen

- 4 Use the information in the “List Compensation by Job Code” section to fill in most of the fields on this screen.

Level 1, 2, 3, 4

Leave these fields blank to include all organizational levels ranges or type valid values.

- 5 Press Enter. The system generates the Compensation by Level report.

6/30/05 15:57:39

EMPLOYER . . . : ZUS
 LEVELS . . . : Area 100 Division
 SAMPLE US COMPANY
 Department Cost Centr
 PLAN: PLANA SALARY PLAN 1 PLAN BEGINS ON: 1/01/1998

EMPLOYEE NAME	EMPLOYEE NUMBER/ JOB CODE POSITION	DATE/AMT OF LAST INCREASE	%OF MID/ RNGE	PLANNED % INC	AMOUNT OF INCREASE	DATE OF INCREASE	INCR TYPE	PERF RATNG	ENDING SALARY	ANNUAL INCREASE	ACTUAL INCREAS
BREEDON	355 300 100400	10/04/2001	100.0						50,000		
BUM	3412 210 WRITER	9/02/2004	836.7						260		
SMITH	3761 300 100400		62.4						31,200		
JONES	4968 210 WRITER		2.9						1,950		
SMITH	5017 210 WRITER		1.5						1,040		
5535	52,520 12/28/2004 300 100400	105.0				52,520					AAATEST
CLARK	5601 300 100400		90.0						45,000		
GOODWINCHKPECY	11006 300 100400		41.6						20,800		
BILL	14049 210 WRITER		47.6						31,200		
ALDORSIO	16902 300 100400	3/05/1999	69.8						34,944		
BOYLE	21111 210 WRITER	9/01/2004	79.3						416		
CONCEPTS	DESCON 210 WRITER		294.7						195,000		
ENGLISH	000005614								83,200		

	BASE SALARY	ENDING SALARY	ANNUAL INCREASE	ACTUAL INCREASE
TOTALS FOR ALL POSITIONS (EXCLUDING ADDITIONS) (AND OPEN POSITIONS)	941,249,872	941,249,872		
*AVERAGES FOR 244 EMPLOYEES	3,857,581	3,857,581		
			PERCENTAGE INCREASES OVER BASE	
TOTALS OF ADDITIONS *TOTALS FOR OPEN POSITIONS*	728,587,820	728,587,820		
TOTALS ALL TYPES	669,837,692	669,837,692		

```

PRGMWC      PRTMWC                      T R I A L  M A S S  W A G E  C H A N G E                      PAGE    1
 8/03/00    14:22:22                      LAS
EMPLOYER      : ZUS                      SAMPLE US COMPANY
PAY TYPE      : H
JOB CODE      : 550                      FILE CLERK
SALARY CHANGE REASON: ADJST          ADJUSTMENT
INCREASE AMOUNT :                      .5000
INCREASE DATE  : 6/01/2000
UPDATE PAYROLL RATE : 1
INCREASE DESCRIPTION: GENERAL INCREAST
COMMENT       : BASED ON 5/15/00 SALARY SURVEY
EMPLOYEE      EMPLOYEE                  CURRENT  PROPOSED
NUMBER        NAME                      RATIO    RATIO
-----
    2760 GARDEN,ROSE                      37.3000  38.8900
PERSONNEL - OLD RATE:          11.7500  NEW RATE:          12.2500  INCREASE AMOUNT:          .5000
PAYROLL - OLD RATE:          11.7500  NEW RATE:          12.2500  INCREASE AMOUNT:          .5000
    1044 HAUT,DAN                          36.5000  38.1000
PERSONNEL - OLD RATE:          11.5000  NEW RATE:          12.0000  INCREASE AMOUNT:          .5000
PAYROLL - OLD RATE:          11.5000  NEW RATE:          12.0000  INCREASE AMOUNT:          .5000
Area      100  Division  ADMIN
Department ACCT  Cost Centr 100
TOTAL INCREASE:          1.0000          1.0000  TOTAL EMPLOYEES:          2
    2309 MOSS,PETE                          31.7400  33.3300
PERSONNEL - OLD RATE:          10.0000  NEW RATE:          10.5000  INCREASE AMOUNT:          .5000
PAYROLL - OLD RATE:          10.0000  NEW RATE:          10.5000  INCREASE AMOUNT:          .5000
    2002 NIMBLE,JACK B                      33.3300  34.9200
PERSONNEL - OLD RATE:          10.5000  NEW RATE:          11.0000  INCREASE AMOUNT:          .5000
PAYROLL - OLD RATE:          10.5000  NEW RATE:          11.0000  INCREASE AMOUNT:          .5000
Area      100  Division  ADMIN
Department ACCT  Cost Centr 102
TOTAL INCREASE:          1.0000          1.0000  TOTAL EMPLOYEES:          2
Area      100  Division  ADMIN Department ACCT
TOTAL INCREASE:          2.0000          2.0000  TOTAL EMPLOYEES:          4
Area      100  Division  ADMIN
TOTAL INCREASE:          2.0000          2.0000  TOTAL EMPLOYEES:          4
Area      100
TOTAL INCREASE:          2.0000          2.0000  TOTAL EMPLOYEES:          4
EMPLOYER      ZUS
TOTAL INCREASE:          2.0000          2.0000  TOTAL EMPLOYEES:          4

***** E N D O F  R E P O R T *****

```

PRGMWC PRTMWC
8/03/00 14:26:52

M A S S W A G E C H A N G E

PAGE 1
LAS

IMMEDIATE UPDATE WASSELECTED - SALARY CHANGES WILL UPDATE MASTER FILES

EMPLOYER : ZUS SAMPLE US COMPANY
PAY TYPE : H
JOB CODE : 550 FILE CLERK
SALARY CHANGE REASON: ADJST ADJUSTMENT
INCREASE AMOUNT : .5000
INCREASE DATE : 6/01/2000
UPDATE PAYROLL RATE : 1
INCREASE DESCRIPTION: GENERAL INCREASE
COMMENT : BASED ON 5/15/00 SALARY SURVEY

EMPLOYEE NUMBER	EMPLOYEE NAME	OLD RATIO	NEW RATIO				
2760	GARDEN, ROSE	37.3000	38.8900				
PERSONNEL - OLD RATE:	11.7500	NEW RATE:	12.2500	INCREASE AMOUNT:		.5000	
PAYROLL - OLD RATE:	11.7500	NEW RATE:	12.2500	INCREASE AMOUNT:		.5000	
1044	HAUT, DAN	36.5000	38.1000				
PERSONNEL - OLD RATE:	11.5000	NEW RATE:	12.0000	INCREASE AMOUNT:		.5000	
PAYROLL - OLD RATE:	11.5000	NEW RATE:	12.0000	INCREASE AMOUNT:		.5000	
Area	100 Division ADMIN						
Department ACCT	Cost Centr 100			TOTAL INCREASE:	1.0000	1.0000	TOTAL EMPLOYEES: 2
2309	MOSS, PETE	31.7400	33.3300				
PERSONNEL - OLD RATE:	10.0000	NEW RATE:	10.5000	INCREASE AMOUNT:		.5000	
PAYROLL - OLD RATE:	10.0000	NEW RATE:	10.5000	INCREASE AMOUNT:		.5000	
2002	NIMBLE, JACK B	33.3300	34.9200				
PERSONNEL - OLD RATE:	10.5000	NEW RATE:	11.0000	INCREASE AMOUNT:		.5000	
PAYROLL - OLD RATE:	10.5000	NEW RATE:	11.0000	INCREASE AMOUNT:		.5000	
Area	100 Division ADMIN						
Department ACCT	Cost Centr 102			TOTAL INCREASE:	1.0000	1.0000	TOTAL EMPLOYEES: 2
Area	100 Division ADMIN Department ACCT			TOTAL INCREASE:	2.0000	2.0000	TOTAL EMPLOYEES: 4
Area	100 Division ADMIN			TOTAL INCREASE:	2.0000	2.0000	TOTAL EMPLOYEES: 4
Area	100			TOTAL INCREASE:	2.0000	2.0000	TOTAL EMPLOYEES: 4
EMPLOYER	ZUS			TOTAL INCREASE:	2.0000	2.0000	TOTAL EMPLOYEES: 4

***** E N D O F R E P O R T *****

80186 YORKER,NEWT	102	ACCTS RECEIVABLE CLERK	N	13,104.00	17,472.00	21,840.00	20,800.0000	5	119.04	.00	.00
FULL											
JOB CODE	540	TOTAL	TOTAL	TOTAL	TOTAL AVERAGE	TOTAL AVERAGE					
		EMPLOYEES	MIDPOINTS	SALARIES	SALARY	COMPA-RATIO					
* FULLTIME*		17	314,496.00	403,520.00	23,736.47	128.30					
* PARTTIME*		3	28,392.00	47,560.00	15,853.33	167.51					
* PARTTIME IF FULLTIME *				47,560.00	15,853.33	167.51					

***** E N D O F R E P O R T *****

Notes

Chapter 3 Comparing Budget and Actual Salary and Hours Data

3

The chapter consists of the following topics:

Topic	Page
Overview	3-2
Implementing Salary Budgeting	3-5
Implementing FTE Processing	3-21

Overview

You can use two features in Infinium HR to compare budget information you enter on positions in Infinium HR to the actual data you process through payroll cycles using Infinium PY. The system combines budget information and payroll data in a salary budget history file in Infinium HR when you run either of the following functions:

- *Close Salary Budget History* within the *Wage & Salary Administration* function
- *Close To FTE History* within the *FTE Operations* function

You must use both Infinium HR and Infinium PY to implement either the salary budgeting feature or the FTE processing feature.

The *Close Salary Budget History* function extracts salary information from Infinium PY and compares it to salary budget information on your position controls. The *Close to FTE History* function can extract both hours and salary data from Infinium PY and compare it to hours and salary budget information on your position controls.

You must use either the *Close Salary Budget History* function or the *Close To FTE History* function in your employer because the salary budgeting and FTE processing functions share the same salary budget history file.

You use salary budget and FTE reports and displays in Infinium HR to review and analyze budgeted salary and hours on Infinium HR to actual salary and hours processed through pay cycles in Infinium PY.

Note that you can run both the salary budgeting reports and the FTE reports described in this chapter after you run the *Close to FTE History* function since it captures the same salary budget history data that the *Close Salary Budget History* function captures. It also captures hours worked data from Infinium PY.

Prerequisites on Infinium HR

Before you can use either the salary budgeting or FTE processing functions, you must define positions on Infinium HR. When you define positions, you select one the following budget methods:

- 0 Budget by headcount
- 1 Budget by FTE units
- 2 Budget by hours per pay period

You use the *Close to Salary Budget History* function only for positions that you define using budget type 0. When you type 0 in the *Budget Type* field on the Update Organization screen, you specify that you budget for the position using headcount rather than FTE units or the number of hours per pay period. The system extracts only salary information from Infinium PY when you run the *Close Salary Budget History* function.

You use the *Close To FTE History* function to extract Infinium PY data for positions you define using budget type 2 (pay period hours.) The system can extract salary data, hours data or both types of information from Infinium PY when you run the *Close To FTE History* function.

You cannot extract Infinium PY data for positions you define using budget type 1 (FTE units).

Before you use the salary budgeting or FTE processing features, you must update your position controls with salary budget data. The following sections provide you with brief information on how to enter salary budget information on position controls. Refer to the *Infinium HR Guide to Controls* for complete details on how to set up position controls.

Prerequisites on Infinium Payroll

You must define the following controls in Infinium PY to use the salary budgeting and FTE processing functions:

- Income controls
- Income reporting groups

In addition, you must process pay cycles on Infinium PY to generate the actual salary and hours worked data used in these functions.

Objectives

At the conclusion of this chapter you should be able to do the following:

- Enter salary budget and FTE data on position controls
-

- Set up salary budgeting and FTE controls
 - Extract salary and hours data from Infinium PY using the *Close Salary Budget History* and the *Close To FTE History* functions
-

Implementing Salary Budgeting

You use the salary budget options to extract actual income data from Infinium PY and compare it to budgeted salary data on position controls in Infinium HR.

You follow these steps to set up and maintain salary budgeting data:

- 1 Update authorized and budgeted salary amounts on position controls.
- 2 Define income reporting groups and assign incomes to them (Infinium PY).
- 3 Verify employee income authorizations (Infinium PY).
- 4 Establish salary budget controls.
- 5 Continue with payroll cycle processing (Infinium PY).
- 6 Run the *Trial Close to Salary Budget Hist* function.
- 7 Run the *Close to Salary Budget History* function.
- 8 Generate salary budgeting reports.

You generally perform steps 2 through 4 only once on your system when you set up the Salary Budgeting feature. You perform step 1 as often as you update position budgeting information for your organization. You perform steps 5 through 7 on a regular basis to pay employees, extract Infinium PY data and compare salary budget data to actual results.

Caution: If you are using the *FTE Processing* functions, you cannot use the *Update Salary Budget Controls* or *Close Salary Budget History* options for salary budgeting in the same employer since these functions share the same files.

Updating Authorized and Budgeted Salary Amounts

Before you extract data from Infinium PY, you must enter authorized and budgeted salary amounts on your position controls.

You can use the *Update Position Data* function to enter salary budget information and to verify the budget type assigned to each position. Press F8

from the Update Organization screen to access the Update Authorized/Budget FTEs screen on which you enter budgeting information.

You can also update the authorized and budgeted salary amounts for each position by using the *Update Workforce Levels* function or the *Update Salary Budget Data* function as described below.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Update Wage & Salary Data*.
- 3 Select *Update Salary Budget Data [USBP]*. The system displays the screen shown in Figure 3-1.

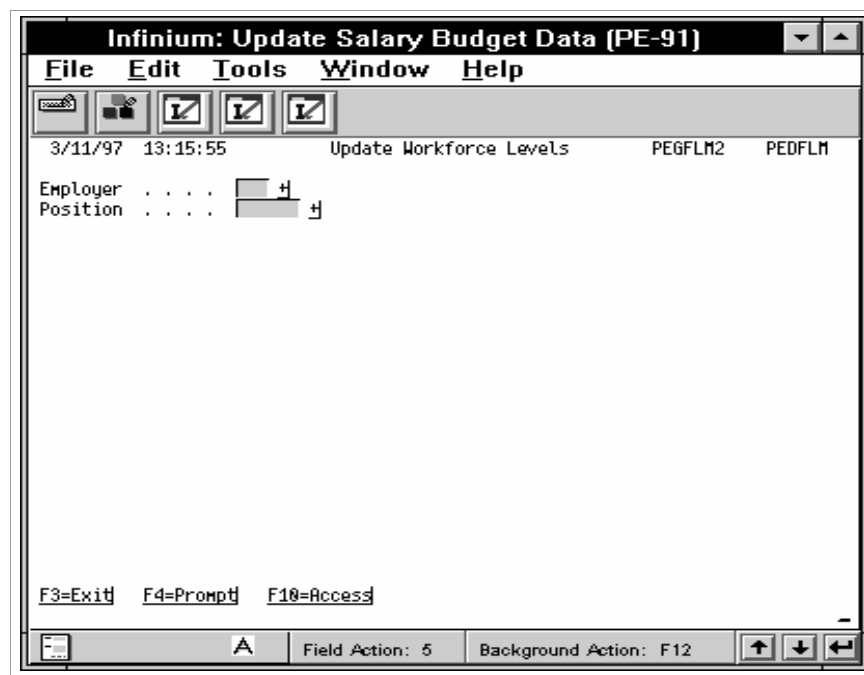


Figure 3-1: Update Authorized/Budgeted FTSs screen

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the employer code.

Position

Type the code for the position you want to update.

- 5 Press Enter. The system displays the screen shown in Figure 3-2.

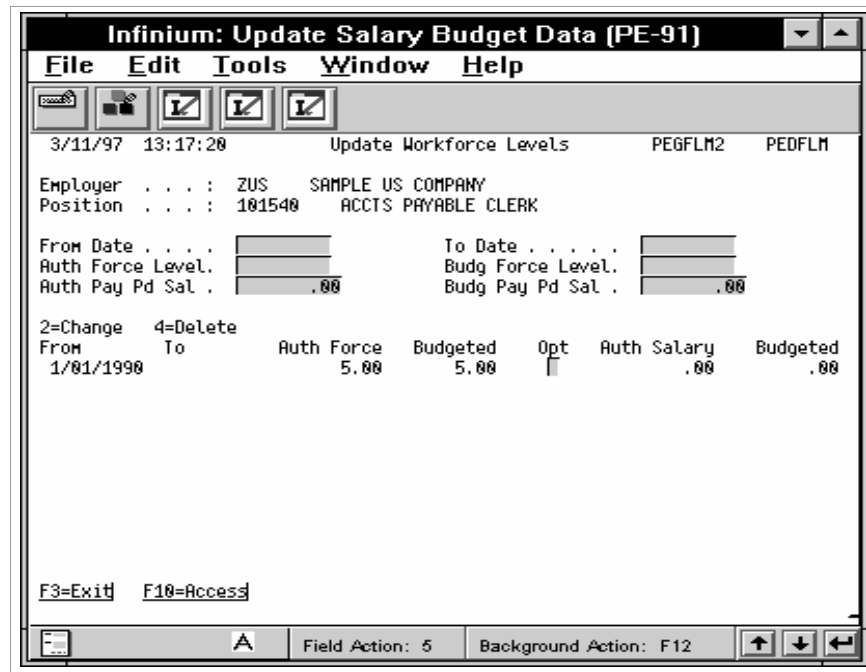


Figure 3-2: Update Authorized Force levels screen

The system displays the most current and previous budget periods for the position in the sub-file at the bottom of the screen. You can enter salary budget information for an existing budget period by typing 2 in the *Opt* field adjacent to the record. You can enter a new budget period by typing in the top portion of the screen.

- 6 Use the information below to fill in the fields on this screen.

From Date

Type the earliest date for which you are creating a budget. The date you specify must follow the *To date* associated with the most current budget period in the sub-file of the screen.

To Date

Type the latest date for which you are creating a budget

Auth Force Level

Type the highest number of employees authorized to work in this position.

Budg Force Level

Type the highest number of employees budgeted to work in this position.

Auth Pay Pd Sal

Type the amount of salary authorized for this position per pay period for all authorized employees.

Budg Pay Pd Sal

Type the budgeted salary amount for this position per pay period for all budgeted employees.

The amount in the *Budg Pay Pd Sal* field should remain fixed for the budget period. You can change the amount in the *Auth Pay Pd Sal* field throughout the year to adjust for your current business needs.

- 7 Press Enter to store your budget information in the sub-file at the bottom of the screen.
- 8 Press F3 to exit from the screen.
- 9 Follow steps 4 through 7 to update budget information for other positions or press F3 to return to the Infinium HR main menu.

Setting Up Income Reporting Groups (Infinium PY)

You use income reporting groups to identify the incomes for which the system should extract salary data from Infinium PY.

To set up income reporting groups you must:

- Define income reporting groups.
- Assign incomes to the income reporting groups.

Defining Income Reporting Groups

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

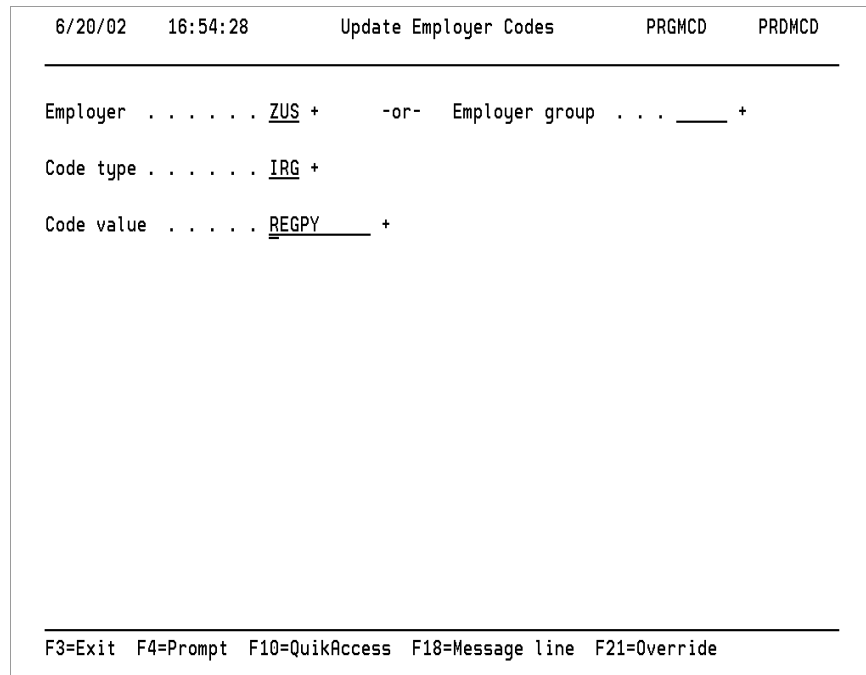


Figure 3-3: Update Employer Codes screen

4 Use the information below to fill in the fields on this screen.

Employer

Type the value that represents the employer whose records you are updating.

Code Type

Type **IRG**.

Code Value

Type the value that you want associated with this code type. To use the salary budgeting feature, you must define income reporting groups for the three categories of incomes listed below:

- Regular pay types
All normal, standard salary and hourly pay types
- Overtime pay types
All overtime types
- Benefit types
All vacation, sick and bonus pay types

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

```
6/20/02  16:55:14      Update Employer Codes      PRGMCD  PRDMCD
-----
Employer . . . . . : ZUS  SAMPLE US COMPANY
Code type . . . . . : IRG  INCOME REPORTING GROUP
Code value . . . . . : REGPY
Description . . . . . : REGULAR PAY INCOMES
Active/Inactive . . . . @      (0=Act./1=Inact)

-----
F3=Exit F10=QuikAccess F12=Cancel F18=Message line F22=Delete
```

Figure 3-4: Update Employer Codes screen

- 6 Use the information below to fill in the fields on this screen.

Description

Type a description of the code value typed on the previous screen.

- 7 Press Enter.
- 8 Repeat steps 4 through 7 for each income reporting group you need to define.

Assigning Incomes to Income Reporting Groups

- 1 From the Infinium PY main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Income Reporting Group [UIRG]*. The system displays the screen shown in Figure 3-5.

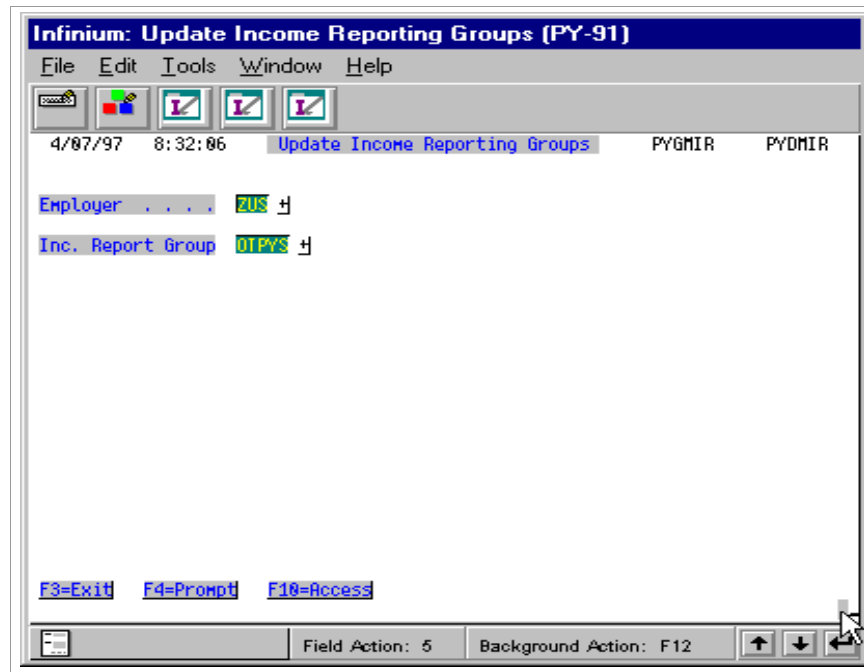


Figure 3-5: Update Income Reporting Groups screen

4 Use the information below to fill in the fields on this screen.

Type a valid value in the *Inc. Report Group* field.

5 Press Enter. The system displays the screen shown in Figure 3-6.

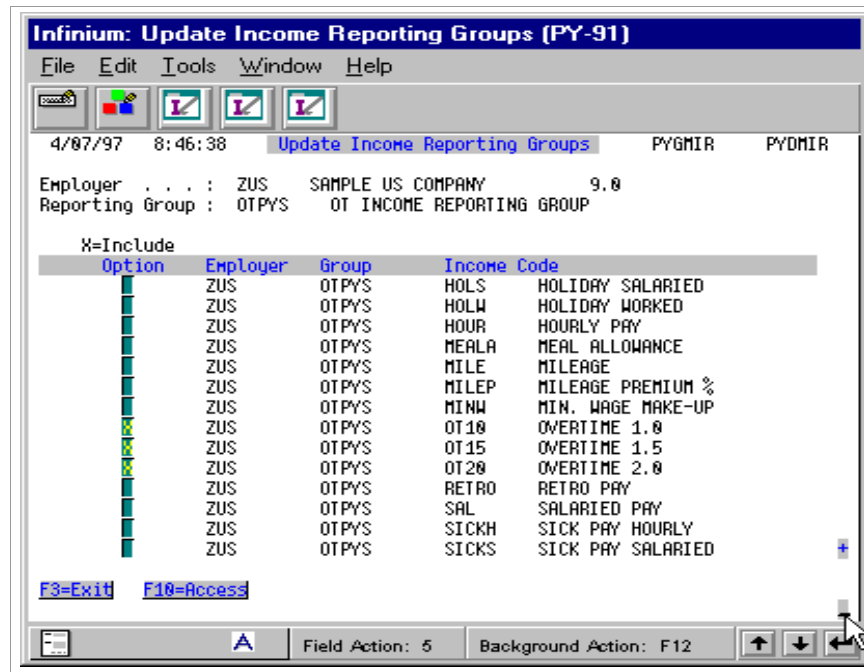


Figure 3-6: Update Income Reporting Groups screen

- 6 Type X in the *Option* field next to each of the incomes that you want to include in the specified income reporting group. The salary budget history file in Infinium HR includes pay data for only the incomes that you include in income reporting groups associated with the salary budgeting function.

The income reporting groups must contain the incomes you use to pay employees in Infinium PY.

- 7 Press Enter.
- 8 Repeat steps 4 through 6 to assign incomes to other income reporting groups.
- 9 Press F3 to return to the Infinium PY main menu.

Verifying Employee Income Authorizations (Infinium PY)

To verify that you have assigned the correct incomes to the salary budgeting income reporting groups, select an employee that is representative of the employees for whom you will be extracting payroll data.

- 1 From the Infinium PY main menu select *Employee Data*.

- 2 Select *Update Employee Data*.
- 3 Select *Update Income Data [UIE]*. The system displays the screen shown in Figure 3-7.

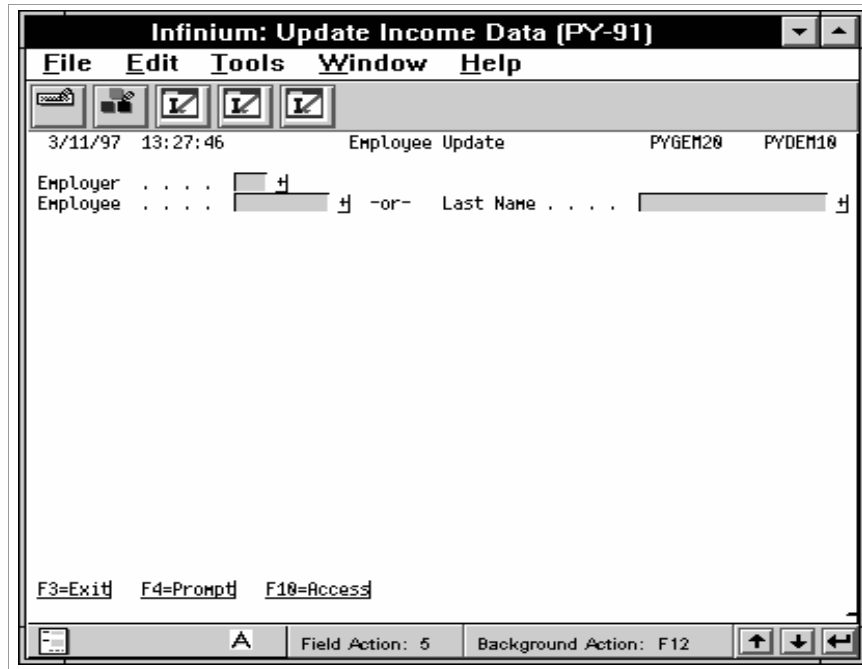


Figure 3-7: Employee Update screen

- 4 Use the information below to fill in the fields on this screen.

Employer, Employee, Last Name

Type the employer and the employee's number or last name.

- 5 Press Enter. The system displays the screen shown in Figure 3-8.

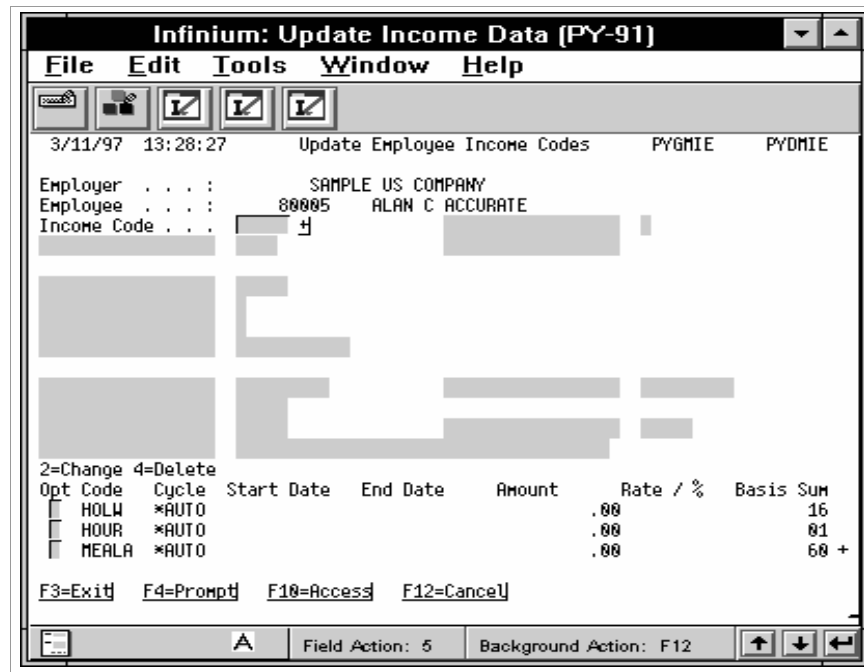


Figure 3-8: Update Employee Income Codes screen

- 6 Verify that the appropriate incomes exist on the employee's income record by checking the list of incomes shown in the sub-file in the bottom section of the screen.
- 7 Press F3 to exit from the screen. You can verify income data for another employee or press F3 to return to the Infinium PY main menu.

Establishing Salary Budget Controls

You use the *Update Salary Budget Controls* function to link the salary budgeting feature on Infinium HR to incomes in Infinium PY by specifying the income reporting groups that correspond to each category of salary data.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Update Wage & Salary Data*.
- 3 Select *Update Salary Budget Controls [USBC]*. The system displays the screen shown in Figure 3-9.

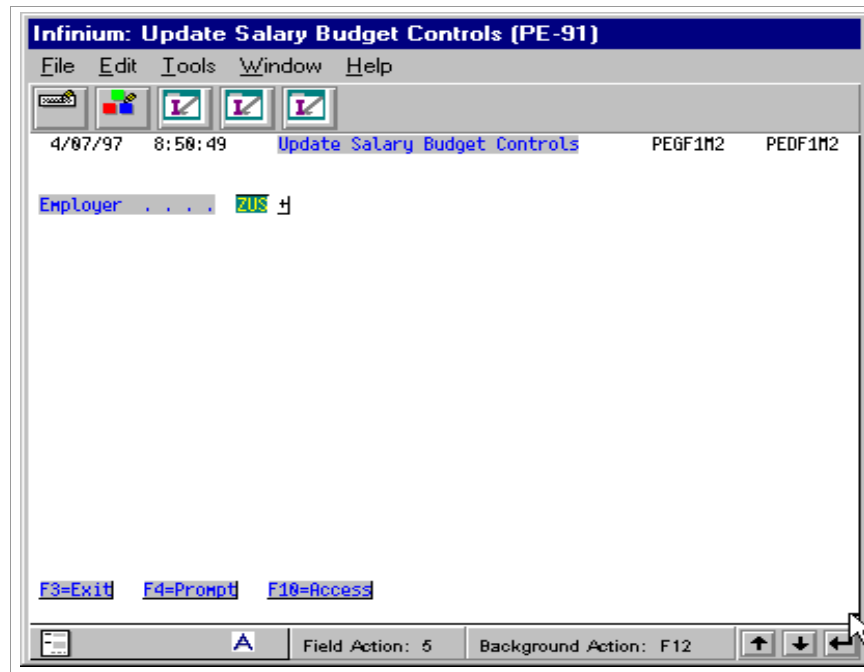


Figure 3-9: Update Salary Budget Controls screen

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

Employer

Type the employer code.

- 5 Press Enter. The system displays the Update Salary Budget Controls screen shown in Figure 3-10.

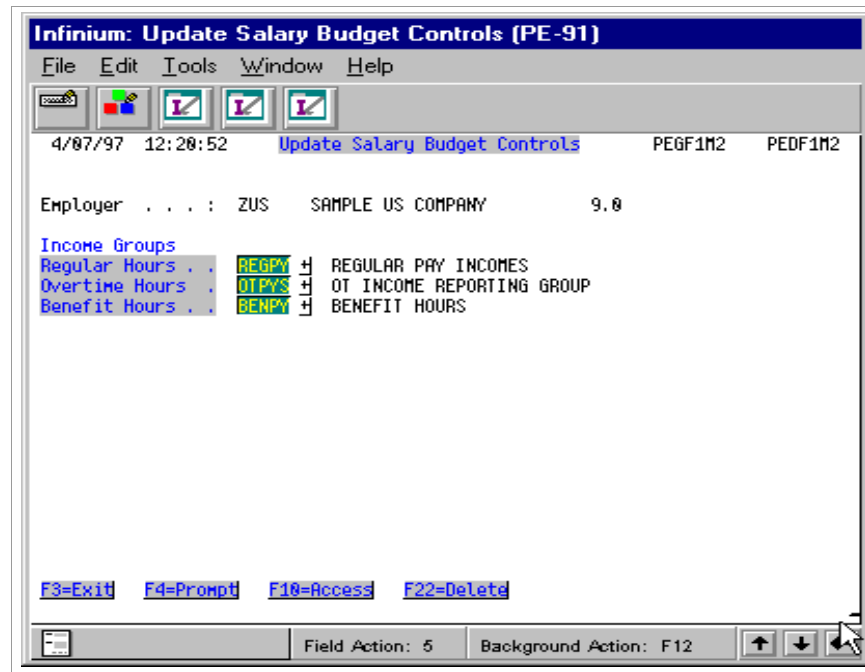


Figure 3-10: Update Salary Budget Controls screen

- 6 Use the information below to fill in the fields on this screen.

Regular Hours

Type the code value that identifies the income group that contains regular incomes in Infinium PY.

Overtime Hours

Type the code value that identifies the income group that contains overtime incomes in Infinium PY.

Benefit Hours

Type the code value that identifies the income group that contains benefit incomes in Infinium PY.

- 7 Press Enter and then press F3 to return to the Infinium HR main menu.

Continuing with Payroll Cycle Processing

In Infinium PY you must post all cycles with the same period ending date before you can extract payroll data to the salary budget history file.

The basic cycle processing steps are:

- 1 Begin cycle.
- 2 Enter timesheet data.
- 3 Prove timesheet data.
- 4 Release timesheet data.
- 5 Post cycles and print checks.

Refer to the *Infinium PY Guide to Processing* for more information.

Performing a Trial Run

Before you close salary budget history to Infinium HR, first run the trial close. If any information on the trial close is incorrect, you can modify it and re-run the trial close. When all the information is correct, run the close.

The *Trial Close Salary Budget Hist* function provides a report showing the salary history records that the system will select when you run the actual *Close to Salary Budget History* option. This function does not update any history records.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
 - 2 Select *Mass Update Wage & Salary Data*.
 - 3 Select *Trial Close Salary Budget Hist* [TCSBH]. The system displays the screen shown in Figure 3-11.
-

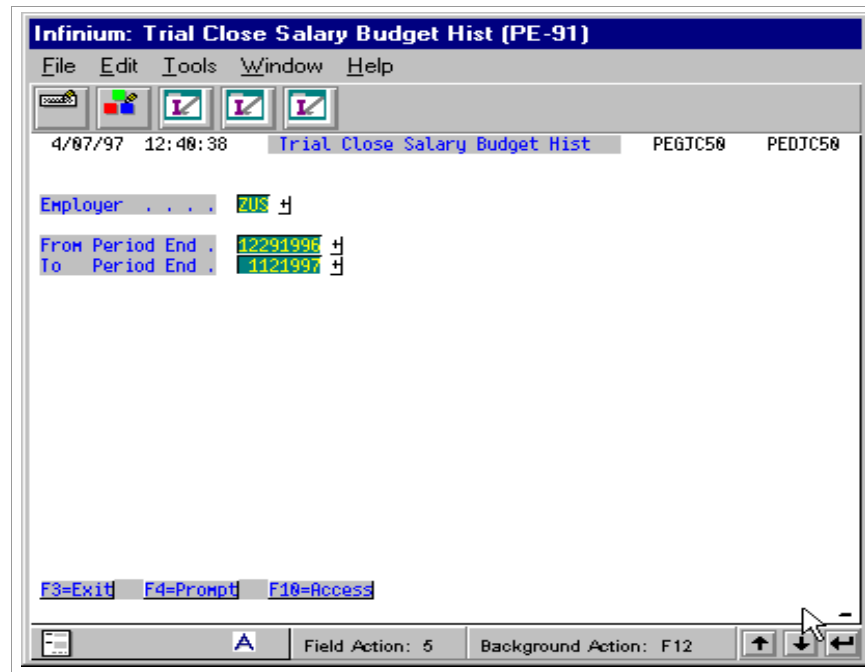


Figure 3-11: Trial Close Salary Budget Hist screen

You can specify a range of dates using the *From Period End* and *To Period End* fields to combine income ledger data from more than one payroll period ending date in Infinium PY into one salary budgeting period date. If you close each pay period separately, you specify the same pay period end dates in both the *From Period End* and *To Period End* fields.

The date you specify in the *To Period End* field becomes the salary budgeting period ending date. You must use this date on all salary budgeting reports.

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the value that represents the employer for whom you are processing information

From Period End

Type the earliest Infinium PY payroll period ending date for which you are closing salary budget history.

If you are unsure of the exact pay period beginning or ending dates, press F4 to display the Completed Cycle History screen. Type a value in the *Beginning* and/or *Ending Date* fields at the top of the screen and then press Enter. The system displays all posted payroll cycles for the specified date range.

To Period End

Type the latest Infinium payroll period ending date for which you are closing salary budget history.

- 5 After you run the *Trial Close Salary Budget Hist* option, you can run the *Close Salary Budget History* option.

Running the Close to Salary Budget History

After you obtain the correct results from the *Trial Close Salary Budget Hist* option, you can run the *Close Salary Budget History* option. You can close a payroll period to salary budget history only once.

Caution: Do not use this function if you are using the *FTE Processing* function.

- 1 From the Infinium HR main menu select *Wage & Salary Administration*.
- 2 Select *Mass Update Wage & Salary Data*.
- 3 Select *Close Salary Budget History* [CSBH]. The system displays the screen shown in Figure 3-12.

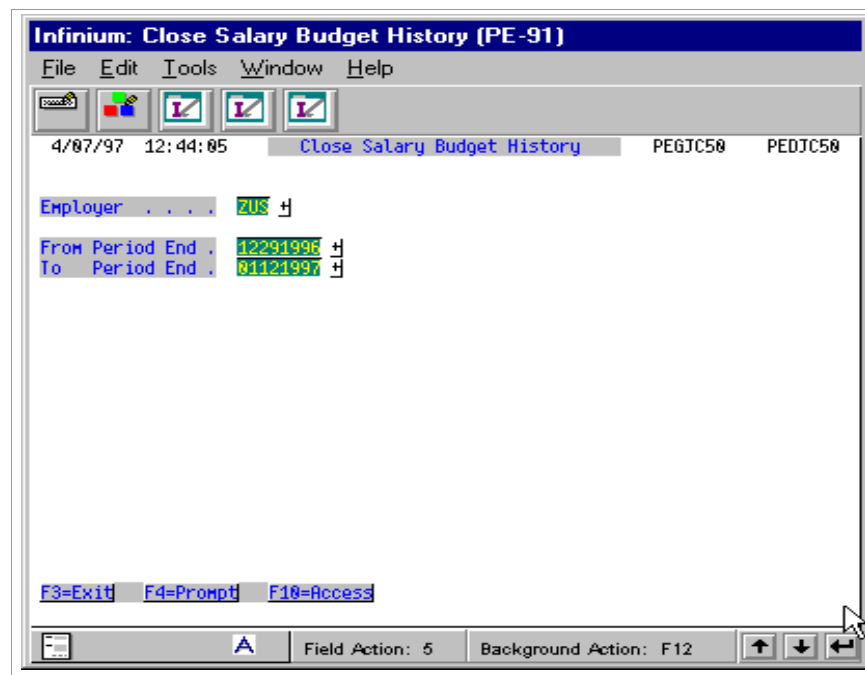


Figure 3-12: Close Salary Budget History screen

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the value that represents the employer for whom you are processing information

From Period End

Type the earliest period ending date for which you are closing salary budget history.

If you are unsure of the exact pay period beginning or ending dates, press F4 to display the Completed cycle History screen. Type a value in the *Beginning* and/or *Ending Date* fields at the top of the screen and then press Enter. The system displays all posted payroll cycles on Infinium PY for the specified date range.

To Period End

Type the latest period ending date for which you are closing salary budget history.

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

Building submission request . . .

Generating Salary Budgeting Reports

Salary budgeting reporting provides a comprehensive analysis of budgeted salary dollars versus actual dollars you pay through Infinium PY and shows the variances in different sequences.

There are seven reports available. Select those reports which are useful to your organization.

- List Budget Salaries – Level
 - List Budget Salaries – Position
 - List Budget Salary vs. Paid – Job
 - List Budget Salary vs. Paid – Level
 - List Salary Paid – Level
 - List Average Salary Paid – Job
 - List Average Salary Paid – Level
-

Implementing FTE Processing

You use Full Time Equivalent (FTE) processing to compare budgeted hours on position controls in Infinium HR to actual hours worked in Infinium PY. FTE processing allows you to maintain a history for the following types of hours data:

- Authorized hours
- Budgeted hours
- Scheduled hours
- Regular hours
- Overtime hours
- Benefit hours

You can also track salary budget information using the *FTE Processing* function.

Follow these steps to implement FTE processing:

- 1 Update FTE data on position controls.
- 2 Update authorized and budgeted hours and salary amounts on position controls.
- 3 Define income reporting groups and assign incomes to them (Infinium PY).
- 4 Verify employee income authorizations (Infinium PY).
- 5 Establish FTE controls.
- 6 Continue with payroll cycle processing (Infinium PY).
- 7 Run the *Trial Close to FTE Hist* function.
- 8 Run the *Close to FTE History* function.
- 9 Generate FTE reports.

You generally perform steps 1 and 3 through 5 only once on your system when you set up the *FTE Processing* function. You perform step 2 as often as you update position budgeting information for your organization. You

perform steps 6 through 9 on a regular basis to pay employees, extract Infinium PY data and compare salary budget data to actual results.

Caution: If you are using the *FTE Processing* functions, you cannot use the *Update Salary Budget Controls* or *Close Salary Budget History* options for salary budgeting in the same employer since these functions share the same files.

Using FTE Processing

The *FTE Processing* function is available to you if you use both Infinium PY and Infinium HR. To implement FTE processing you should understand both the Infinium HR and the Infinium PY systems.

Data for FTE processing comes from:

- **Payroll check history:** the system extracts regular, overtime and benefit hours from the income ledger files in Infinium PY. In addition, if you define your FTE budget controls on Infinium HR to collect salary data, the system also extracts regular, overtime and benefit income amounts.
- **Position controls:** the system uses data from the *Auth Hours* and *Budg Hours* fields on your position controls to determine authorized and budgeted hours for employees. It uses the *FTE Hours* field on position control records and the *Regular Hours* field in the employees' basic data records to determine scheduled hours.

When you use FTE processing, you must capture hours from payroll check history for all employees. Therefore, it is essential that you generate hours for all employees, even salaried employees, during payroll cycle operations. You can use the auto pay feature in Infinium PY to generate hours for all types of employees, regardless of whether you actually use these hours to calculate salaried pay.

Updating FTE Data on Position Controls

Before you can extract information from Infinium PY, you must set up your position controls for FTE processing. You can use the *Update Position Data* function to enter or verify FTE information for each position.

Follow these steps to review or update FTE data, including authorized and budgeted hours, on your position controls:

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

- 2 Select *Update Master Files*.
- 3 Select *Update Position Data* [UO]. 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 your employer.

Position

Type the position code you want to update.

- 5 Press Enter. The system displays the Update Organization screen.

- 6 Use the following information to fill in the FTE-related fields on this screen. Refer to the *Infinium HR Guide to Controls* for details on the other fields on this screen.

FTE Hours

Type the number of hours per pay period that constitutes a full time equivalent. For example, type **40** for a position you fill with full time weekly paid employees. Type **20** for a position you fill with part time weekly paid employees.

Budget Type

Type **2** in the *Budget Type* field to indicate that you budget using hours. You can use FTE processing only for positions whose budget type is 2. Do not type **1** in the *Budget Type* field, even though its description refers to FTE Units.

Position Group 1, Position Group 2

You can use these optional fields to group positions together for FTE reporting and analysis. These are unique groupings that do not have to correspond to your organization's standard level reporting structure. Type valid position group code values in one or both fields.

To use the *Position Group 1* and *Position Group 2* fields, you must first create valid code values for code types **PG1** and **PG2** through the option *Update Employer Codes*.

- 7 Press Enter if you are setting up a new position or press F8 if you are updating an existing position. The system displays the Update Authorized/Budgeted Hours screen.
-

- 8 Use the information below to fill in the fields on this screen.

From Date

Type the earliest date for which you are creating a budget. The date you specify must follow the *To date* associated with the most current budget period in the sub-file of the screen.

To Date

Type the latest date for which you are creating a budget

Auth Pay Hours

Type the highest number of hours per pay period authorized for this position.

Budg Pay Hours

Type the highest number of hours per pay period budgeted for this position.

The amount in the *Budg Pay Hours* field should remain fixed for the budget period. You can change the amount in the *Auth Pay Hours* field throughout the year to adjust for your current business needs.

Auth Pay Pd Sal

Type the amount of salary authorized for this position per pay period for all authorized employees.

Budg Pay Pd Sal

Type the budgeted salary amount for this position per pay period for all budgeted employees.

The amount in the *Budg Pay Pd Sal* field should remain fixed for the budget period. You can change the amount in the *Auth Pay Pd Sal* field throughout the year to adjust for your current business needs.

- 9 Press Enter to store your budget information in the sub-file at the bottom of the screen.
- 10 Press F3 to exit from the screen.
- 11 If you updated an existing position, the system displays the Update Organization screen. Press Enter to save your information.
- 12 If you set up a new position, the system displays the Organization Update screen.
-

- 13 Follow steps 4 through 11 to update budget information for other positions or press F3 to return to the Infinium HR main menu.

Updating Authorized and Budgeted Hours

You use this option if you have previously defined authorized and budgeted hours for positions and want to update the information while you are working within the *FTE Processing* option.

- 1 From the Infinium HR main menu select *FTE Operations*.
- 2 Select *Update FTE Data*.
- 3 Select *Update Authorized/Budgeted Hours [UABH]*. The system displays the screen shown in Figure 3-13.

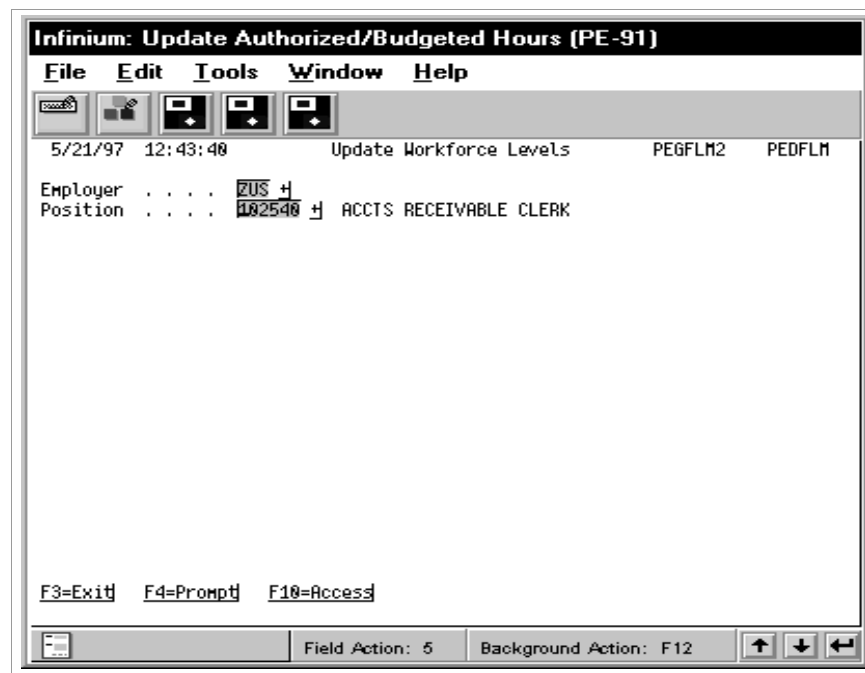


Figure 3-13: Update Workforce Levels screen

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the value that represents your employer.

Position

Type the value that represents the position whose authorized and budgeted hours you want to update.

- 5 Press [Enter]. The system displays the screen shown in Figure 3-14.

Infinium: Update Authorized/Budgeted Hours (PE-91)

File Edit Tools Window Help

5/21/97 12:43:57 Update Authorized/Budgeted Hours PEGFLM2 PEDFLM

Employer . . . : ZUS SAMPLE US COMPANY
 Position . . . : 102540 ACCTS RECEIVABLE CLERK

From Date . . . : [] To Date : []
 Auth Pay Hours : [] Budg Pay Hours : []
 Auth Pay Pd Sal : [] .00 Budg Pay Pd Sal : [] .00

2=Change 4=Delete

From	To	Auth Hours	Budgeted	Opt	Auth Salary	Budgeted
1/01/1990	12/31/1996	200.00	200.00	[]	3000.00	2500.00
1/01/1997	5/31/1997	240.00	240.00	[]	3000.00	3000.00
6/01/1997		240.00	240.00	[]	3300.00	3000.00

F3=Exit F10=Access

Field Action: 5 Background Action: F12

Figure 3-14: Update Authorized/Budgeted Hours screen

You can use this screen to add a new budget record or change or delete existing budget records. Follow these steps to change and delete existing budget records stored in the sub-file at the bottom of this screen:

- To change a record type 2 in the *Opt* field next to the record and press Enter.
- To delete a record type 4 in the *Opt* field next to the record and press Enter.

- 6 Use the information below to fill in the fields on this screen.

From Date

Type the earliest date for which you are creating a budget. The date you specify must follow the *To date* associated with the most current budget period in the sub-file of the screen.

To Date

Type the latest date for which you are creating a budget

Auth Pay Hours

Type the highest number of hours per pay period authorized for this position.

Budg Pay Hours

Type the highest number of hours per pay period budgeted for this position.

The amount in the *Budg Pay Hours* field should remain fixed for the budget period. You can change the amount in the *Auth Pay Hours* field throughout the year to adjust for your current business needs.

Auth Pay Pd Sal

Type the amount of salary authorized for this position per pay period for all authorized employees.

Budg Pay Pd Sal

Type the budgeted salary amount for this position per pay period for all budgeted employees.

The amount in the *Budg Pay Pd Sal* field should remain fixed for the budget period. You can change the amount in the *Auth Pay Pd Sal* field throughout the year to adjust for your current business needs.

- 7 Press Enter to store your budget information in the sub-file at the bottom of the screen.
- 8 Press F3 to exit from the screen.
- 9 Follow steps 4 though 8 to update budget information for other positions or press F3 to return to the Infinium HR main menu.

Setting Up Income Reporting Groups (Infinium PY)

You use income reporting groups to identify the incomes for which the system should extract salary data from Infinium PY.

To set up income reporting groups you must:

- Define income reporting groups
 - Assign incomes to the income reporting groups
-

Defining Income Reporting Groups

- 1 From the Infinium HR or Infinium PY main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Employer Codes* [UCC on Infinium HR or UCD on Infinium PY]. The system displays the screen shown in Figure 3-15.

6/20/02	16:54:28	Update Employer Codes	PRGMCD	PRDMCD
<hr/>				
Employer	ZUS +	-or-	Employer group . . .	_____ +
Code type	IRG +			
Code value	REGPY _____ +			

Figure 3-15: Update Employer Codes screen

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the value that represents the employer whose records you are updating.

Code type

Type **IRG**.

Code value

Type the value that you want associated with this code type. To use the salary budgeting feature, you must define income reporting groups for the three categories of incomes listed below:

- Regular pay types
 - All normal, standard salary and hourly pay types

- Overtime pay types
All overtime types
 - Benefit types
All vacation, sick and bonus pay types
- 5 Press Enter. The system displays the screen shown in Figure 3-16.

```

6/20/02  16:55:14      Update Employer Codes      PRGMCD  PRDMCD
-----
Employer . . . . . : ZUS  SAMPLE US COMPANY
Code type . . . . . : IRG  INCOME REPORTING GROUP
Code value . . . . . : REGPY
Description . . . . . : REGULAR PAY INCOMES
Active/Inactive . . . . @      (0=Act./1=Inact)

-----
F3=Exit F10=QuikAccess F12=Cancel F18=Message line F22=Delete
    
```

Figure 3-16: Update Employer Codes screen

- 6 Use the information below to fill in the fields on this screen.
- Description*
- Type a description of the code value typed on the previous screen.
- 7 Press Enter.
- 8 Repeat steps 4 through 7 for each income reporting group you need to define.

Assigning Incomes to Income Reporting Groups

- 1 From the Infinium PY main menu *select Master Files*.
- 2 *Select Update Master Files*.
- 3 *Select Update Income Reporting Group [UIRG]*. The system displays the screen shown in Figure 3-17.

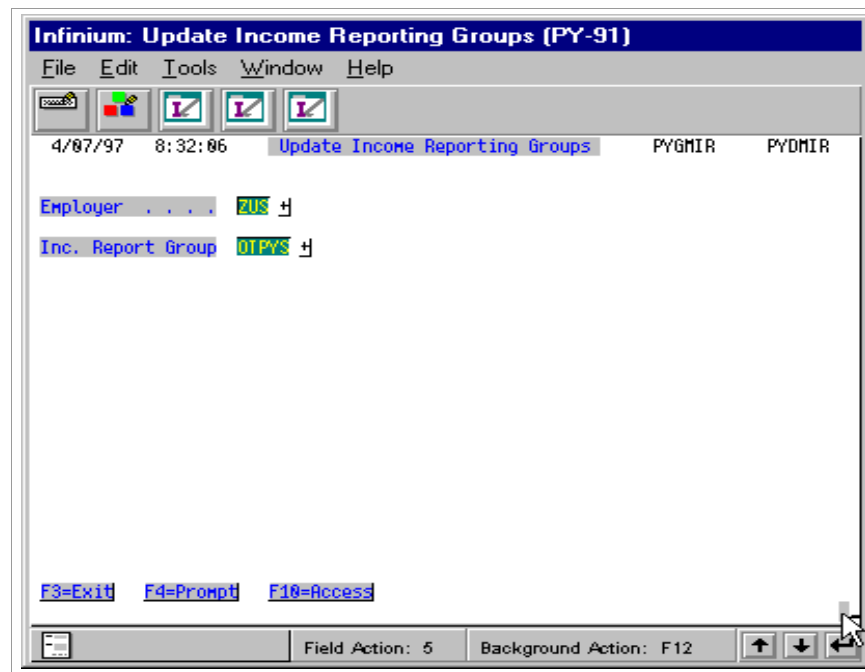


Figure 3-17: Update Income Reporting Groups screen

4 Use the information below to fill in the fields on this screen.

Type a valid value in the *Inc. Report Group* field.

5 Press Enter. The system displays the screen shown in Figure 3-18.

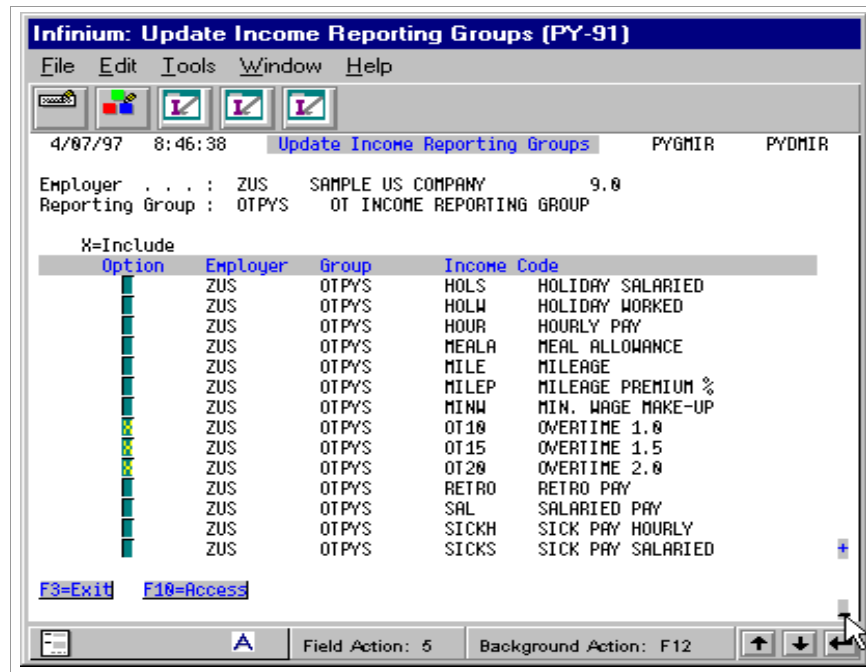


Figure 3-18: Update Income Reporting Groups screen

- 6 Type X in the *Option* field next to each of the incomes that you want to include in the specified income reporting group. The salary budget history file in Infinium HR includes pay data for only the incomes that you include in income reporting groups associated with the salary budgeting function.

The income reporting groups must contain the incomes you use to pay employees in Infinium PY.

- 7 Press Enter.
- 8 Repeat steps 4 through 6 to assign incomes to other income reporting groups.
- 9 Press F3 to return to the Infinium PY main menu.

Verifying Employee Income Authorizations (Infinium PY)

To verify that you have assigned the correct incomes to the income reporting groups you are using for the *FTE Processing* function, select an employee that is representative of the employees for whom you will be extracting payroll data.

- 1 From the Infinium PY main menu select *Employee Data*.

- 2 Select *Update Employee Data*.
- 3 Select *Update Income Data [UIE]*. The system displays the screen shown in Figure 3-19.

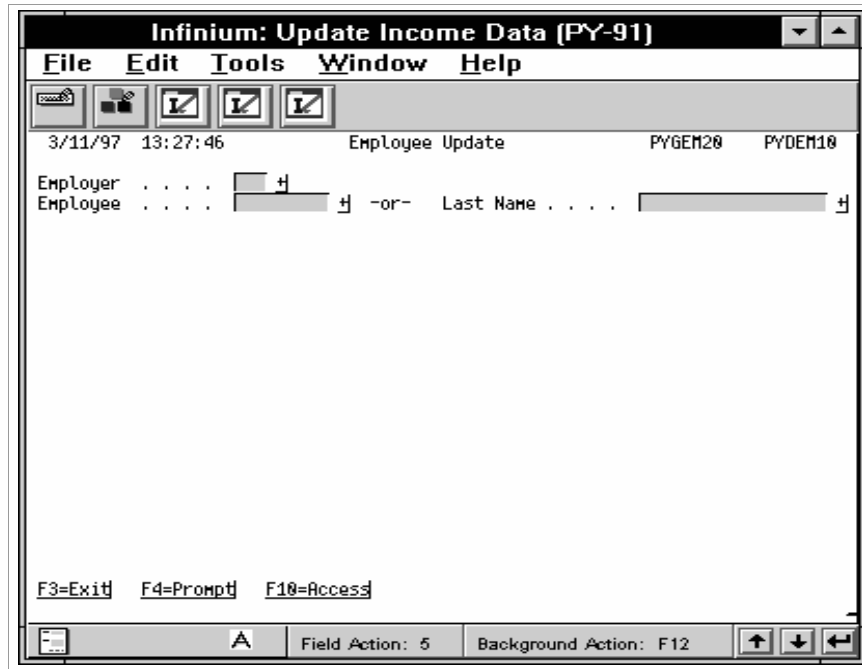


Figure 3-19: Employee Update screen

- 4 Use the information below to fill in the fields on this screen.

Employer, Employee, Last Name

Type the employer and the employee's number or last name.

- 5 Press Enter. The system displays the screen shown in Figure 3-20.

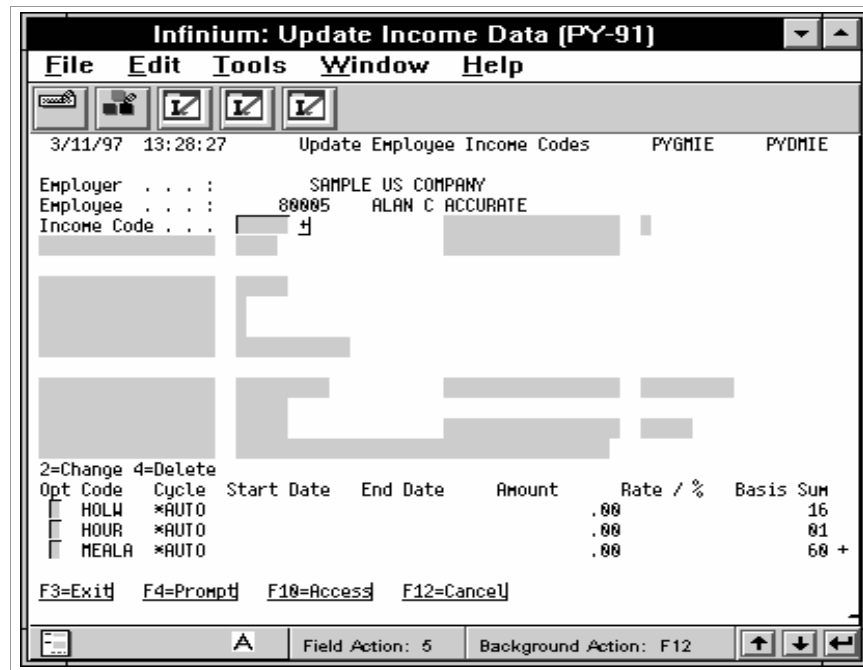


Figure 3-20: Update Employee Income Codes screen

- 6 Verify that the appropriate incomes exist on the employee's income record by checking the list of incomes shown in the sub-file in the bottom section of the screen.
- 7 Press F3 to exit from the screen. You can verify income data for another employee or press F3 to return to the Infinium PY main menu.

Establishing FTE Controls

You use the *Update FTE Controls* function to link the FTE processing option on Infinium HR to incomes in Infinium PY by specifying the income reporting groups that correspond to each category of FTE data.

- 1 From the Infinium HR main menu select *FTE Operations*.
- 2 Select *Update FTE Data*.
- 3 Select *Update FTE Controls [UFTE]*. The system displays the screen shown in Figure 3-21.

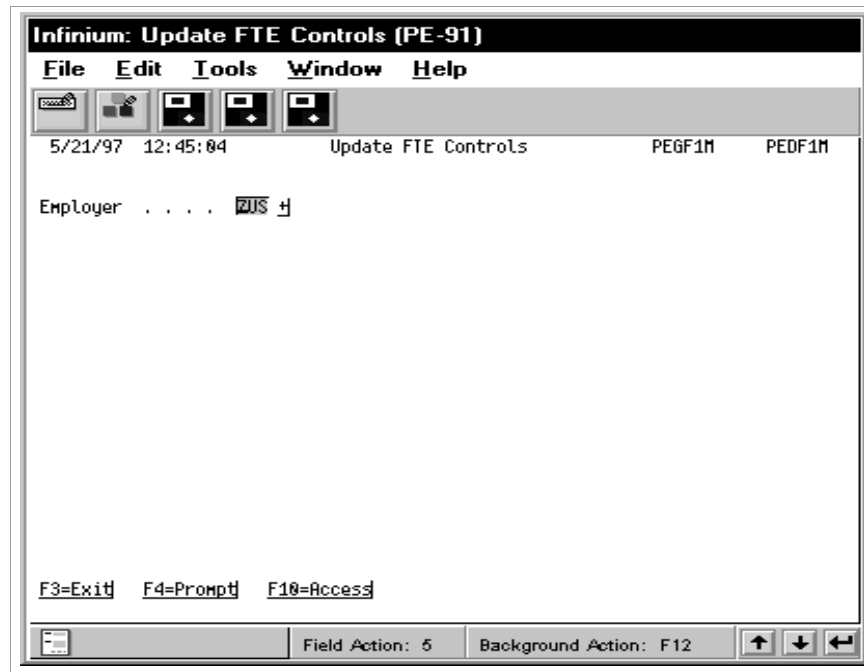


Figure 3-21: Update FTE Controls screen

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the employer code.

- 5 Press Enter. The system displays the screen shown in Figure 3-22.

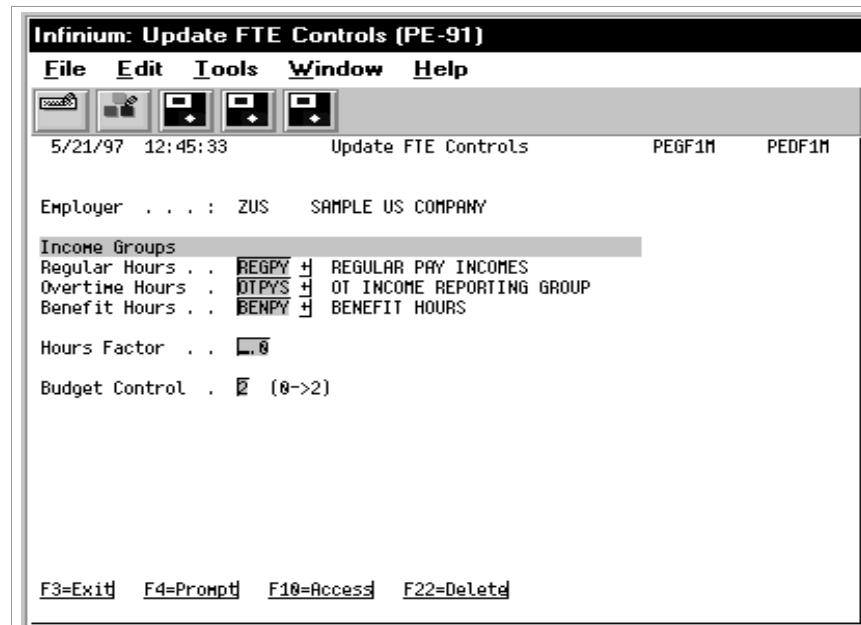


Figure 3-22: Update FTE Controls screen

6 Use the information below to fill in the fields on this screen.

Regular Hours

Type the code value that identifies the income group that contains regular incomes in Infinium PY.

Overtime Hours

Type the code value that identifies the income group that contains overtime incomes in Infinium PY.

Benefit Hours

Type the code value that identifies the income group that contains benefit incomes in Infinium PY.

Hours Factor

Use this field if you need to scale the authorized and budgeted hours on your position controls to the payroll frequency of employees in those positions. For example, if you type the authorized and budgeted data in weekly figures on your position controls but pay employees in Infinium PY on a biweekly basis, type 2 for the system to make the appropriate adjustments when you run the *Close to FTE History* function.

Budget Control

Use this field to indicate whether you want the system to extract hours, amounts or both from Infinium PY. If you choose amounts or both, you can use the salary budgeting reports as well as the FTE reports.

Valid values are:

- 0 Extract only hours data from Infinium PY.
 - 1 Extract only salary data from Infinium PY.
 - 2 Extract both hours and salary data from Infinium PY.
- 7 Press Enter and then press F3 to return to the Infinium PY main menu.

Continuing Cycle Processing

You must post all cycles up to the period ending date you want to extract before you can execute the *Close to FTE History* option.

The basic steps to cycle processing are:

- 1 Begin cycle.
- 2 Enter timesheet data.
- 3 Prove timesheet data.
- 4 Release timesheet data.
- 5 Post cycles and print checks.

Refer to the *Infinium PY Guide to Processing* for more information.

Performing a Trial Run

Before you close FTE data to Infinium HR, first run the trial close. If any information on the trial close is incorrect, you can modify it and re-run the trial close. When all the information is correct, run the close.

The *Trial Close to FTE History* function provides a report showing the FTE data that the system will select when you run the actual *Close to FTE History* option. This function does not update any history records.

If you run the *Trial Close to FTE History* function and the *Close to FTE History* function after each pay period, the system processes the payroll income ledger information for that pay period and creates FTE history data for each position.

The system extracts the number of hours the employee actually works in the incomes associated with the specified income reporting groups for regular time, overtime and benefits.

- 1 From the Infinium HR main menu select *FTE Operations*.
- 2 Select *Close FTE Functions*.
- 3 Select *Trial Close to FTE History* [TCTFH]. The system displays the screen shown in Figure 3-23.

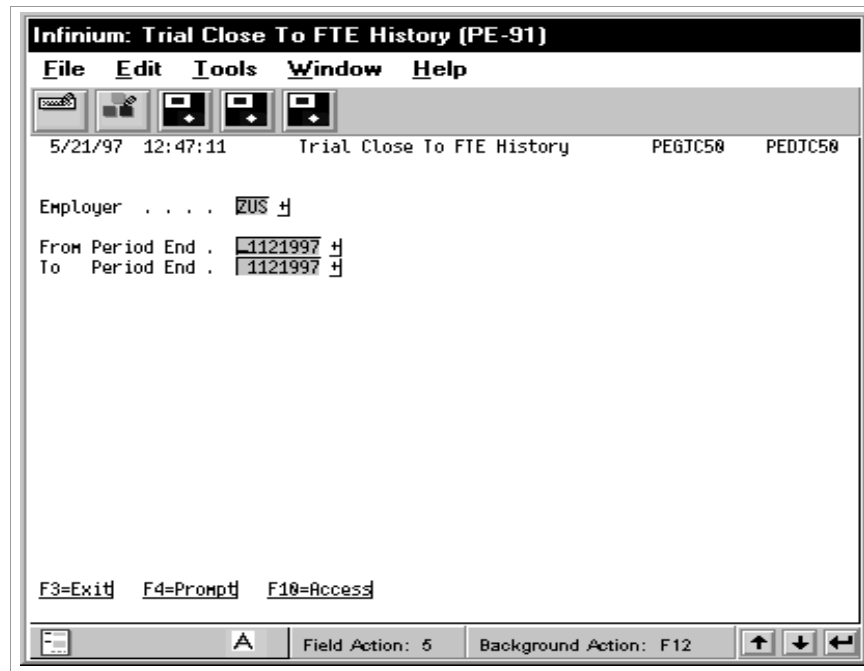


Figure 3-23: Trial Close To FTE History screen

You can specify a range of dates using the *From Period End* and *To Period End* fields to combine income ledger data from more than one payroll period ending date in Infinium PY into one FTE period date. If you close each pay period separately, you specify the same pay period end dates in both the *From Period End* and *To Period End* fields.

The date you specify in the *To Period End* field becomes the FTE period ending date. You must use this date on all FTE and salary budgeting reports.

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the value that represents the employer for whom you are processing information

From Period End

Type the earliest Infinium PY payroll period ending date for which you are closing FTE history.

If you are unsure of the exact pay period beginning or ending dates, press F4 to display the Completed Cycle History screen. Type a value in the *Beginning* and/or *Ending Date* fields at the top of the screen and then press Enter. The system displays all posted payroll cycles for the specified date range.

To Period End

Type the latest Infinium payroll period ending date for which you are closing FTE history.

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

Building submission request . . .

- 6 The system generates the Trial Close To FTE History report. Carefully review the information to verify that your setup and pay period ending dates are correct.

After you run the *Trial Close To FTE History* option, you can run the *Close To FTE History* option.

Running the Close to FTE History

After you obtain the correct results from the *Trial Close To FTE History* option, you can run the *Close To FTE History* option. You can close a payroll period to FTE history only once.

Caution: Do not use this function if you are using the *Salary Budgeting* function.

Follow these steps to extract FTE data from Infinium PY:

- 1 From the Infinium HR main menu select *FTE Operations*.
- 2 Select *Close FTE Functions*.
- 3 Select *Close to FTE History* [CTFH]. The system displays the screen shown in Figure 3-24.

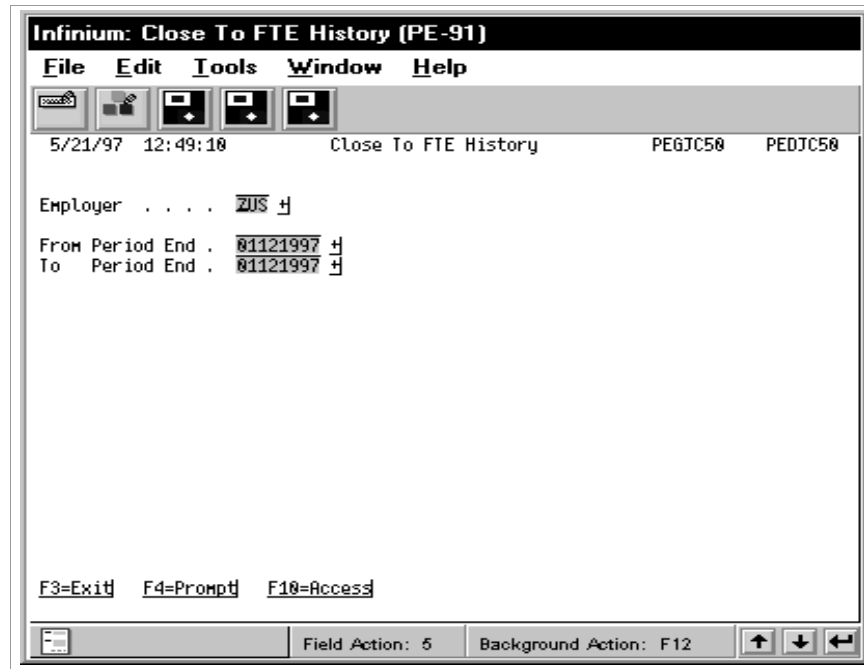


Figure 3-24: Close To FTE History screen

- 4 Use the information below to fill in the fields on this screen.

From Period End

Type the earliest Infinium PY payroll period ending date for which you are closing FTE history.

If you are unsure of the exact pay period beginning or ending dates, press F4 to display the Completed Cycle History screen. Type a value in the *Beginning* and/or *Ending Date* fields at the top of the screen and then press Enter. The system displays all posted payroll cycles for the specified date range.

To Period End

Type the latest Infinium payroll period ending date for which you are closing FTE history.

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

Building submission request . . .

- 6 The system generates the Close to FTE History report.

Processing FTE Reports

The FTE history reports allow you to compare the authorized and budgeted hours on positions and the scheduled hours in employee basic data records to the actual hours employees work that are processed through the pay cycle in Infinium PY. The system expresses variances in both hours and FTE units.

There are six reports available for FTE reporting. Select those reports which are useful to your organization. You can access all reports using the *List FTE Data* menu option. The FTE reports are as follows:

- List Budget/Schedule by Position
- List Hours by Job
- List Hours by Levels
- List Accumulated Hours Worked
- List Average Hours by Job
- List Average Hours by Levels

You cannot run reports for a pay period ending date unless you have first run the option *Close to FTE History* for that pay period ending date.

The system uses the code values associated with the *Position Group 1* and *Position Group 2* fields on your position controls to sort and provide sub-totals on these reports:

- List FTE Recap
- List Average FTE Recap

To use position groups you must:

- Set up code values for code types **PG1** (Position Group 1) and **PG2** (Position Group 2)
 - Assign code values for one or both position groups to positions
-

Chapter 4 Producing Statutory EEO Reports

4

In this chapter you learn how to generate statutory Equal Employment Opportunity reports for U.S. employers.

All of the statutory EEO reports sort employees by gender, ethnicity and EEO categories as defined by the Equal Employment Opportunity Commission. Before you can generate these reports, you must define code values for code types **EEO** and **ETH** and assign each employee the appropriate EEO and ethnic code values.

You can use code values you define for code type **LOC** with address and EEO data you enter for each location code value, to generate separate EEO-1 reports for each establishment in your employer. This is an introductory paragraph that gives the user a high-level overview about the information in this chapter. The chapter consists of the following topics:

Topic	Page
Overview of EEO Reporting	4-3
Setting Up Code Values for EEO Reporting	4-5
Defining Values for Code Type EEO	4-7
Entering EEO Location Addresses	4-10
Generating the EEO-1 Government Data Report	4-12
Generating EEO Information in a Magnetic Media Work File	4-39
Updating EEO-1 Prior Year Totals	4-41
Generating the EEO-1 Employer Data Report	4-45
Generating the EEO-3 Local Union Data Report	4-47
Generating the EEO-4 State & Local Data Report	4-49

Objectives

At the conclusion of this chapter you should be able to accomplish the following:

- Set up standard code values for code types **EEO** and **ETH**
 - Enter address and EEO information for EEO locations
 - Generate the EEO-1 report in various formats
 - Generate an EEO magnetic media work file and .txt file
 - Generate the EEO-3 report
 - Generate the EEO-4 report
-

Overview of EEO Reporting

You use options within the *EEOC/Affirmative Action/EEA* function to generate reports that private sector and public sector U.S. employers can use to make required submissions to the Equal Employment Opportunity Commission (EEOC). The functions that you use to generate the reports and magnetic media work files are listed below.

- *List EEO-1 Government Data*
- *List EEO-1 Mag. Media Work File*
- *List EEO-1 Employer Data*
- *List EEO-3 Local Union Data*
- *List EEO-4 State & Local Data*

The table below describes each of the statutory EEO reports in Infinium HR.

Report name	Description
EEO-1 Government Data	For private sector employers with U.S. government contracts Can generate by employer or employer group Can specify date range of report Can sort by levels or location code Can produce 5 different versions of the report Can exclude inactive locations
EEO-1 Form 100 (EEO-1 Magnetic Media Work File)	For private sector employers with U.S. government contracts Can generate by employer or employer group Can specify date range of report Can sort by levels or location code Can produce 5 different versions of the report Information is in a work file and a .txt file that you can use to create a diskette or CD or to upload to the EEOC Web site
EEO-1 Employer Data	For private sector employers with U.S. government contracts Use for internal analysis only Can only generate by employer Provides a “snapshot” of employees as of the date the report is generated Can sort by levels
EEO-3 Local Union Report	For union locals with 100 or more members Use to prepare report to submit to the EEOC Can generate only by employer Provides a “snapshot” of employees as of the date the report is generated Can sort by levels

Report name	Description
EEO-4 State & Local Data Report	For U.S. state and local municipalities only Use for preparing report to submit to the EEOC Can generate by employer or employer group Generate on the federal government's fiscal year end date Can sort by EEO-4 function

Establishing values for the EEO and ETH code types

Before you can process any of the reports listed above, you must establish values for code types **EEO** and **ETH** and assign a value from each code type to each employee. The system also uses the *Sex* field in the employee basic data record to place each employee into the proper column on these reports.

Submitting EEO Information on Magnetic Media

Employers with more than 50 employees must submit EEO report information on magnetic media. See the "Generating EEO Information in a Magnetic Media Work File" section in this chapter.

Setting Up Code Values for EEO Reporting

The system uses the **EEO** (EEO category), **ETH** (ethnic identification), **SIC** (Standard Industrial Classification) and **NAI** (NAICS, North American Industry Classification System) code types to generate Equal Employment Opportunity reports. The system uses the EEO and ethnic identification code values in employee basic data records along with the employee's gender to calculate the totals for columns on the EEO reports. It uses the SIC and the NAI code when you produce the EEO-1 report.

- Code Type **EEO** (EEO category)

You assign an appropriate **EEO** code value to each job or position control that you define. When you assign an employee to a job and position, the system automatically assigns the employee to the **EEO** category associated with the employee's job or position.

See the *Infinium HR Guide to Controls* for details on how to define job and position controls. See the *Infinium HR Guide to Processing* for details on how to set up and maintain employee information using jobs and positions.

- Code Type **ETH** (ethnic identification)

You specify the appropriate ethnic code value for each employee during the *Enter New Hire* function. You may update this value later if necessary.

- Code Type **SIC** (Standard Industrial Classification)

If the EEO-1 form you submit includes the SIC code, you set up values for code type **SIC** to represent the standard industrial classification codes that pertain to your organization. If you set up location addresses, you can assign a SIC value to each location or you can specify a SIC code when you run the *List EEO-1 Government Data* report.

- Code Type **NAI** (NAICS, North American Industry Classification System)

If the EEO-1 form you submit includes the NAICS code, you set up values for code type **NAI** to represent the standard industrial classification codes that pertain to your organization. If you set up location addresses, you can assign a NAICS value to each location or you can specify a NAICS code when you run the *List EEO-1 Government Data* report.

You can use code values you define for code type **LOC** to represent your EEO establishments and you can enter address and EEO data for the locations. You can use the *List EEO-1 Government Data* function to generate a separate EEO-1 report for each establishment within your employer.

In this section you learn the correct values for code types **EEO** and **ETH**. See the *Infinium HR Guide to Controls* for details on how to define code values.

Defining Values for Code Type EEO

The values you establish for code type **EEO** must correspond to the standard categories defined by the EEOC for EEO-1 or EEO-4 Reports as shown below.

You set up values for the EEO-1 report if you are a private sector U.S. employer. You set up values for the EEO-4 report if you are a public sector U.S. employer.

EEO-1		EEO-4	
Value	Description	Value	Description
1.1	Executives/Senior Level Officials and Managers	1	Officials & 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 Worker	5	Para-Professional
6	Craft Workers	6	Adm/Support
7	Operatives	7	Skill Craft
8	Laborers	8	Service/ Maintenance
9	Service Workers		

Creating EEO Sub-Categories

You can create sub-categories of these values if you want to do detailed analysis using the EEO reports listed below or your own Infinium Query reports. For example, you want to analyze employees in EEO category 2

(Professionals) by further sorting these employees into categories 2A (Non-Technical Professionals) and 2B (Technical Professionals.)

You can define values of up to five characters in length for the **EEO** code type. However, since the system uses only the first character in the code value when it generates the EEO-1 or EEO-4 reports, ensure that you start code values that represent sub-categories with the standard EEO numeric values shown in the tables above.

Defining Values for Code Type ETH

In addition to defining values for code type **EEO**, you must also establish values for code type **ETH** (ethnic identification). Infinium programs use the code values shown below to represent the standard ethnic categories established by the EEOC. Therefore, you must set up these code values for code type **ETH** to ensure accurate results when you generate EEO and affirmative action reports using Infinium HR.

ETH - Ethnic Identification

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

Defining Values for Code Type LOC

You can define code values for code type **LOC** to identify EEO establishments for the EEO-1 report. The EEOC requires you to report separately on any locations within your organization that have 50 or more employees assigned to them.

Refer to the section entitled “Entering EEO Location Addresses” for details on how to enter address information along with unit number and NAICS (North American Industry Classification System) or SIC (Standard Industrial Classification) codes for one or more of your location code values. Refer to the “Generating the Multi-Establishment EEO-1 Government Data Report” section for details on how to include the location information in your EEO-1 reports.

Entering EEO Location Addresses

You can use the *List EEO-1 Government Data* function to generate a separate EEO-1 report for each establishment in your organization based on values you define for code type **LOC**. You can enter address and EEO information for the locations using the *Update EEO/EEA Location Address* function. The system uses the address and EEO data for each location when you generate the multi-establishment version of the EEO-1 report.

The system uses different sources in different reports to complete the *Parent Company*, *Parent Address*, *Establishment Company* and *Establishment Address* fields. See the individual report sections for details.

To set up EEO locations, you must complete the following steps:

- Define code values to represent your locations using code type **LOC** through the *Update Employer Codes* function.
- Assign a location code value to each position control using the *Update Position Data* function. If the value in the *Posit File Used?* field on your employer control is **1**, when you press Enter on the Update Organization screen after updating the value in the *Location Code* field on a position control, the system automatically updates the value in the *Location* field in the basic data records of all employees assigned to the position.
- Set up location names, addresses and EEO data using the *Update EEO/EEA Location Address* function.

Follow these steps to enter addresses for your EEO locations:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update EEO/EEA Location Address* [UPDEEOLA]. The system displays the Update Location Address location selection screen.

Update Location Address Location Selection Screen

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

Employer

Type the value that represents your employer.

Location

Specify the value that represents an EEO location.

You use *Update Employer Codes* and code type **LOC** to set up location code values.

- 5 Press Enter. The system displays the Update Location Address screen.

Update Location Address Screen

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

Address, Address Line 2, City, State/Prov, Zip, County

Type the address information for the specified location.

Other Postal Code

Leave this field blank. It is used only by Canadian employers when setting up location information for Employment Equity Act (EEA) reporting.

Unit/Division Location/Plant Code

Type the assigned identification code to identify wages by work site. See online help text for state specific information for this field.

NAICS Code

SIC Code

Type the NAICS (North American Industry Classification System) code value or the SIC (Standard Industrial Classification) code assigned by the EEOC to the specified location. You use code type **NAI** to define values for the *NAICS Code* field. You use code type **SIC** to define values for the *SIC Code* field.

Enter a value in one of these fields, depending on which code is provided on the pre-printed EEO-1 form sent to you by the EEOC. Leave these fields blank when setting up a new location for which the EEOC has not yet assigned a code.

Establishment Activity

Type a brief description of the location's business activities.

- 7 Press Enter. The system displays the Update Location Address prompt screen.
 - 8 Enter address information for another EEO location or press F3 to return to the Infinium HR main menu.
-

Generating the EEO-1 Government Data Report

You can use the *List EEO-1 Government Data* function to generate a report that has been specially designed to conform to the Equal Employment Opportunity Commission standards for computer-generated EEO-1 reports. You can specify a date range and select from among several standard report formats. Depending on the format you specify, you can submit your system-generated report to the EEOC. You can specify that you want to exclude inactive locations on the report.

In contrast, you use the *List EEO-1 Employer Data* function to generate an EEO-1 report that reflects your workforce as of the date you run the report for internal analysis only.

If you exclude inactive locations from the report, the system generates an exception report that includes the inactive locations along with the employer, employee number, and name of employees who are at the inactive location.

When you specify that you want to include inactive locations on the report, the EEO-1 Government Data report includes all employees who are actively employed in active locations by the specified employer during the date range you type on the selection screen for this report. For example, if you run the report for January 1 through December 31 of the same year, an employee who terminates in June, of that year is included in this report. An employee who terminates before January 1 of that year is not included, nor is an employee who is hired after December 31 of that year.

Verifying Your Report Results

When you use the *List EEO-1 Government Data* function, in addition to the EEO-1 report the system can also generate the additional reports described below.

- If your employee records contain blank or invalid **EEO** or **ETH** code values, the system automatically generates an error listing identifying the employees with erroneous data. You can use the *Update Employee Basic Data* function to correct erroneous ethnic code values. You can use the *Update Job Controls* or *Update Position Data* functions to correct invalid EEO code values
 - You can specify that the system should generate a detail audit report. The report lists information for each employee counted in the EEO-1
-

report totals, including the employee's EEO category, gender and ethnic code value. You can use this report to validate your EEO-1 report results.

- Employees in inactive locations

You can specify that you want to exclude inactive locations from the EEO-1 Government report results. If you exclude inactive location information from the report, the system generates the Employees in Inactive Locations report, which lists active employees in the inactive location. If no employees are in an inactive location, that location is not included on the report.

Working with the EEO-1 Work File

When you use the *List EEO-1 Government Data* function, you can specify that you want the system to create a magnetic media work file. When you create the work file, the system creates an integrated file system (IFS) text file (eeo-1.txt) with the report format. You can specify whether to clear the work file or append the new record to the existing records in the work file.

If you use an employer code that is different from the employer code used for the last record you created and you do not clear the existing work file, the system displays a message informing you that a work file exists. You can override the message and the system adds the new work file to the existing work file.

Use the reports discussed above to verify your results before create the EEO-1 work file records.

Selecting the EEO-1 Report Format

The system produces various versions of the EEO-1 Government Data report. You can submit three of the versions to the Equal Employment Opportunity Commission. You use the *Report Type* field on the List EEO-1 Government Data selection screen to specify the version of the report you want to produce.

The following table describes each version and identifies the printed versions you can submit to the EEOC. You can use all report types for magnetic media reporting.

Report format	Type	Description
Single Establishment	1	A report for a single location employer
Consolidated Report – Multi-Establishment	2	A report that includes all locations, including the headquarters location, of a multiple establishment employer
Headquarters Unit - Multi-Establishment	3	A report for the headquarters unit of a multiple establishment employer
Individual Establishment - Multi-Establishment	4	A separate report for each non-headquarters location with over 50 employees of a multiple establishment employer
Special	5	A report for internal use only
Under 50 Employees	8	A report used only for audit purposes in locations of under 50 employees if submitting the report in paper format. Use this type of report to report on the EEOC work file your locations of under 50 employees.

You can generate the EEO-1 Government Data report in other ways that do not conform to the EEOC computer-generated report standards. For example, you can generate the report for multiple employers by specifying an employer group on the report selection screen or produce a single report that includes a page for every location within an employer. Normally you do not submit non-conforming EEO-1 Government Data reports to the EEOC.

When you generate the EEO-1 Government Data report, you can save the totals from the report; they will be included the next time you produce the EEO-1 Government Data report for the specified employer and level(s). You can manually update these totals or type new information for a prior year using the menu option *Update EEO-1 Prior Year Totals*; this option is discussed at the end of this section.

Generating the Single Establishment EEO-1 Government Data Report

You generate the Single Establishment Employer (Type 1) version of the EEO-1 Government Data report to provide the EEOC with summary information on the ethnicity and gender of employees sorted by EEO category within a single location employer.

Follow the steps below to produce the Single Establishment Employer version of the EEO-1 Government Data report.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *List EEO Data*.
- 3 Select *List EEO-1 Government Data [E1G]*. The system displays the screen shown in Figure 4-1.

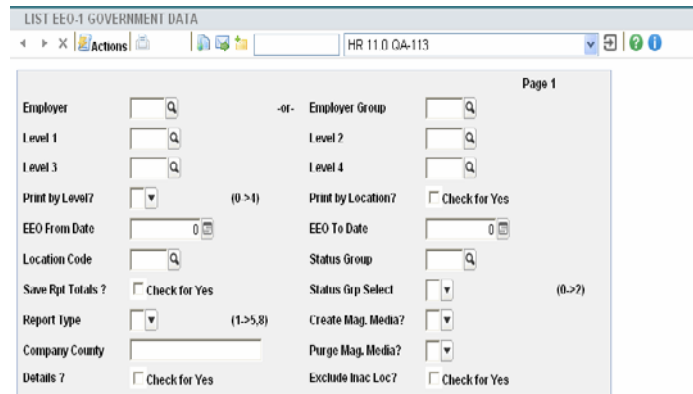


Figure 4-1: List EEO-1 Government Data screen 1 of 3

- 4 Use the information below to fill in the fields on this screen. Fields that are not used for this version of the EEO-1 report are documented later in this chapter when other versions of this report are discussed. The system uses the information you type on this screen to select the employees for the report.

Employer

Type the value that represents the employer for which you want to generate the EEO-1 Single Establishment Employer Report. Press F4 to display a list of valid employers.

Employer Group

Leave this field blank.

Levels 1 - 4

Leave these fields blank.

Print by Level?

Type **0**. This field causes the system to produce an EEO-1 report for each reporting level defined for this employer.

Print by Location?

Type **0**. This field causes the system to produce an EEO-1 report for each location defined for this employer.

EEO From Date

Type the earliest date the system should use to select employees for this report. This date is compared to each employee's termination date. Employees who terminate before this date are not included in this report. Employees who are active on or after this date are included in this report.

EEO To Date

Type the last date the system should use to select employees for this report. This date is compared to each employee's hire date. Employees who are hired after this date are not included in this report. Employees who are active on or before this date are included in this report.

Location Code

Leave this field blank.

Status Group

Use this field and the *Status Grp Select* field to restrict the types of employees included in the report based on the value in the *Status* field in each employee's basic data record. Leave this field blank to include all employees who are active during the specified time period in the report.

To limit the employees included in the report, type a code value. You define code values for this field using code type **STG**. You use the *Update Status Reporting Group* function to assign status code values to the group.

Save Rpt Totals?

You use this field to specify if the system should save the EEO category totals computed when you generate this report. The system uses these totals to fill the *Previous Reported Total* line on the EEO-1 report you generate next year.

You can manually adjust prior year totals before you run the EEO-1 report next year using the *Update EEO-1 Prior Year Totals* function discussed at the end of this section.

Status Grp Select

If you entered a value in the *Status Group* field, indicate whether the system should include or exclude employees whose status code values belong to the specified status group.

Valid values are:

- | | |
|----------------------|---|
| Blank
or 0 | Leave this field blank if you have not specified a value in the <i>Status Group</i> field. |
| 1 | Include in the report only those employees whose status code value is associated with the specified status group. |
| 2 | Exclude from the report employees whose status code value is associated with the specified status group. |

Report Type

Type **1** in this field to indicate that the system should generate the EEO-1 Single Establishment Employer report.

Create Mag. Media?

Specify whether to create a magnetic media work file in addition to the printed report. Valid values are:

- | | |
|----------|---|
| 0 | Print only a report. |
| 1 | Print a report and create a magnetic media work file. |

If you type **1**, the system creates a physical file, PEPEEO, and a fixed length ASCII text file, eeo-1.txt, in the EEO1 folder. You can use the eeo-1.txt file for electronic reporting.

Company County

Type the county in which this employer is located. This information is required by the EEOC and will print on the report. This is a 16-character free-form field that does not use pre-established values.

Purge Mag. Media?

Specify whether to purge the existing data in the magnetic media work file before creating the new file. Valid values are:

- | | |
|----------|---|
| 0 | Do not purge the existing data in the magnetic media work file. The system adds a new record to the existing work file. |
|----------|---|
-

- 1 Purge the existing data in the work file and create a new record.

If you are purging data for one employer and then want to purge data for a different employer and you specify **0**, the system displays a message that informs you if you override the message, the new employer's data is added to the existing data in the work file.

Details?

Indicate if the system should generate an audit report containing details about the employees included in the EEO-1 report totals.

Valid values are:

- | | |
|----------------------|-----------------------------------|
| Blank
or 0 | Do not generate the audit report. |
| 1 | Generate the audit report. |

Exclude Inact Loc?

Specify yes to exclude inactive locations from the report. Otherwise, specify no. If you specify yes and active employees are assigned to the inactive locations, the system generates an exception report that lists the inactive locations and the employees associated with those locations.

- 5 When you press Enter, the system displays the second selection screen for the List EEO-1 Government Data report shown in Figure 4-2.
-

LIST EEO-1 GOVERNMENT DATA

Page 2 of 3

Section C - 1 Section C - 2

Section C - 3 Duns No

Parent Co. Name

Parent Co. Addr

Parent Co. City Parent Co. County

Parent Co. State Parent Co. Zip

Establishment Information

Co. Code U Code

NAICS Code -or- SIC Code

Report last year ? Check for Yes E I No

Figure 4-2: List EEO-1 Government Data screen 2 of 3

6 Use the information below to fill in the fields on this screen. The system prints the information you type on this screen on the List EEO-1 Government Data report.

Section C-1

Type Y in this field if the employer has at least 100 employees in the payroll period for which you are reporting.

Section C-2

Type Y in this field if the employer is affiliated through common ownership and/or centralized management with other entities in an enterprise with a total workforce of 100 or more employees.

Section C-3

Type Y in this field if the employer or any of its establishments meet the following conditions:

- they have 50 or more employees and
- they are not exempt as provided by section 41 CFR 60-1.5 and
- they:

- are either prime government contractors or first-tier sub-contractors and have a contract, sub-contract or purchase order amounting to \$50,000 or more, or
- serve as a depository of government funds in any amount or are a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes.

If you type **Y** in this field, you must type the employer's Dun & Bradstreet identification number in the *Duns No.* field on this screen.

Duns No.

Type the employer's Dun & Bradstreet identification number. This is a 9-character free-form field that does not use pre-defined values. The system automatically places dashes as illustrated below when this field is printed on the EEO-1 Government Data report.

XX-XXX-XXXX

Parent Co. Name

Type the name of the parent company of the employer for whom you are generating this report if the name is different from that on the employer control. This is a 35-character free-form field which does not require pre-defined values. If you type this field, you must also type the *Parent Co. Addr*, *Parent Co. City*, *Parent Co County*, *Parent Co. State* and *Parent Co. Zip* fields. If you leave this field blank, the system uses the name and address from the employer control for the specified employer.

Parent Co. Addr.

Type the street address of the parent company of the employer. This is a 35-character free-form field which does not require pre-defined values.

Parent Co. City

Type the city in which the parent company of the employer for whom you are generating this report is located. This is a 13-character field that does not require pre-defined values.

Parent Co. County

Type the county in which the parent company of the employer is located. This is a 16-character free-form field that does not require pre-defined values.

Parent Co. State

Type the value that represents the state in which the parent company of the employer is located. You define values for this field using code type **STA**. Press F4 to display a list of the valid values for this code type.

Parent Co. Zip

Type the zip code of the parent company of the employer. This is a 5-character free-form field that does not require pre-defined values.

Establishment Information

Type a brief but precise description of the major business activity for the employer or headquarters unit. This field consists of four lines; each line is 40 characters in length.

Co. Code

Type the company's identification number as supplied by the EEOC. This is a 7-character free-form field.

U Code

Type the unit number assigned by the EEOC to the employer or headquarters unit. This is a 7-character free-form field.

NAICS Code, SIC Code

Type the NAICS or SIC code value assigned by the EEOC to the employer or headquarters unit for which you are generating the report. You use code type **NAI** to define values for the *NAICS Code* field. You use code type **SIC** to define values for the *SIC Code* field.

Report last year?

Type whether you filed an EEO-1 report last year. Valid values for this field are:

Y	Yes
N	No

E I No.

Leave this field blank. This field is required only when you produce multi-establishment EEO-1 reports. This is a 9-character free-form field.

- 7 Press Enter. The system displays the third selection screen for the List EEO-1 Government Data report as shown in Figure 4-3.
-

LIST EEO-1 GOVERNMENT DATA

HR 11.0 QA-113

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Certif. Name: MARY SMITH

Certif. Title: EEO COMPLIANCE OFFICER

Certif. Tel. Num: 4152222222

Certif. Fax Num: 4151111111

Certif. E-Mail: [Empty]

Contact's Name: ALAN ACCURATE

Contact's Title: VICE PRESIDENT HUMAN RESOURCES

Address: 2010 MAIN STREET

City: IRVINE

State: CA

Zip Code: [Empty]

Phone #: [Empty]

Phone Extension: [Empty]

Figure 4-3: List EEO-1 Government Data screen 3 of 3

- 8 Use the information below to fill in the fields on this screen. The system displays this screen only when you type 1 in the *Report Type* field on the first selection screen to generate a Single Establishment EEO-1 report and prints this information only on the Single Establishment EEO-1 report.

Certif. Name

Type the name of the official who certifies that the information on this EEO-1 form is accurate and prepared in accordance with the EEOC instructions. This is a 25-character free-form field.

Certif. Title

Type the title of the official named in the *Certif. Name* field above. This is a 25-character free-form field.

Certif. Tel. Num

Type the telephone number of the certifying official. This information is only for electronic filing.

Certif. Fax Num

Type the fax number of the certifying official. This information is only for electronic filing.

Certif E-Mail

Type the e-mail address of the certifying official. This information is only for electronic filing.

Contact's Name

Type the name of the person the EEOC can contact reporting the information on the EEO-1 report. This is a 37-character free-form field.

Contact's Title

Type the title of the person named in the *Contact's Name* field above. This is a 37-character free-form field.

Address

Type the address of the person named in the *Contact's Name* field above. This is a 33-character free-form field.

City

Type the city of the person named in the *Contact's Name* field above. This is a 16-character free-form field.

State

Type the value that defines the state in which the person named in the *Contact's Name* field above resides. You define values for this field using code type **STA**.

Zip Code

Type the zip code of the person named in the *Contact's Name* field above. This is a 5-character free-form field.

Phone #

Type the telephone number of the person named in the *Contact's Name* field above. This is a 10-character field that must be completed as follows with the area code in the first three positions:

XXX XXX XXXX

Phone Extension

Type the telephone extension, if applicable, of the person named in the *Contact's Name* field above

- 9 After you type information in the selection field(s) you require, press Enter. The system produces the following message at the bottom of the List EEO-1 Government Data selection screen and returns you to the Infinium HR main menu:

Building submission request...

- 10 The system generates the List EEO-1 Government Data report, the Employee Detail listing, if selected, and an error report, if applicable, using batch processing. From the Infinium HR main menu, 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.

Generating the Headquarters Unit EEO-1 Government Data Reports

You generate the Multiple Establishment Headquarters Unit (Type 3) version of the EEO-1 Government Data report to provide the EEOC with summary information on the ethnicity and gender of employees sorted by EEO category within the headquarters location of a multi-establishment employer.

You use only two selection screens to generate the Headquarters Unit version of the EEO-1 Government Data report. The system does not print the certification information or contact information on these versions of the report so the selection screen that contains this information is not displayed.

Follow the steps below to produce the Multiple Establishment Headquarters Unit version of the EEO-1 Government Data report.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
 - 2 Select *List EEO Data*.
 - 3 Select *List EEO-1 Government Data* [E1G]. The system displays the screen shown in Figure 4-4.
-

Figure 4-4: List EEO-1 Government Data screen 1

You use the *Level* fields and/or the *Location Code* field to identify the establishment for which you are generating the report. The system selects employees assigned to the levels or location code you specify to generate the Type 3 version of the List EEO-1 Government Data report.

You can use one or more of the level fields to identify the appropriate location for the report. If you select by levels, the system prints the description associated with the lowest level you specify as the establishment name in Section 2.a. of the report if you leave the *Est. Name* field on the List EEO-1 Government Data screen 2 blank.

The system does not use information in the EEO location address file for this version of the EEO-1 report.

- 4 Use the information below to fill in the fields on this screen. Refer to the preceding section entitled “Generating the Single Establishment EEO-1 Government Data Report” for additional information.

Employer

Type the value that represents the employer for which you want to generate the EEO-1 Headquarters Unit Report. Press F4 to display a list of valid employers.

Employer Group

Leave this field blank.

Level 1

Type the code value of the level 1 location for this employer that represents the headquarters location for which you want to generate the EEO-1 Government Data report.

Level 2

Type the code value of the level 2 location within the specified level 1 location for this employer.

Level 3

Type the code value of the level 3 location within the specified level 2 location for this employer.

Level 4

Type the code value of the level 4 location within the specified level 3 location for this employer.

Print by Level?

Type **0** in this field.

Print by Location?

Type **0** in this field.

Location Code

Type the value that represents the location code assigned to the employees in the headquarters unit for which you are generating the List EEO-1 Government Data report.

You define values for this field using code type **LOC**. You assign location code values to each position control; the system automatically fills the *Location* field in the employee's basic data record with the location code value from the employee's assigned position.

The system does not use information in the EEO location address file when you generate the Headquarters Unit version of the EEO-1 report.

Report Type

Type **3** in this field to produce the Headquarters Unit report for a multiple-establishment employer.

Company County

Type the county in which the establishment for which you are generating the report is located. This information is required by the EEOC and will print on the report. This is a 16-character free-form field that does not use pre-established values.

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

The screenshot shows a web-based form titled "LIST EEO-1 GOVERNMENT DATA". The browser address bar shows "HR 11.0 QA-113". The form is on "Page 2 of 3". It contains several sections of input fields:

- Section C - 1**: A dropdown menu with "Y" selected.
- Section C - 2**: A dropdown menu with "Y" selected.
- Section C - 3**: A dropdown menu with "Y" selected.
- Duns No**: An empty text field.
- Est. Name**: A text field containing "SAMPLE US EMPLOYER".
- Est. Address**: A text field containing "2010 MAIN STREET".
- Est. City**: A text field containing "IRVINE".
- Est. County**: A text field containing "COOK".
- Est. State**: A dropdown menu with "CA" selected.
- Est. Zip Code**: A text field containing "90210".
- Establishment Information**: A section with three text fields containing "SALES, MARKETING, ACCOUNTING, CUSTOMER", "SERVICE, MANUFACTURING AND", and "TRANSPORTATION ACTIVITIES".
- Co. Code**: A text field containing "1234567".
- U Code**: A text field containing "1234567".
- NAICS Code**: A text field with a search icon.
- or- SIC Code**: A text field containing "1234" with a search icon.
- Report last year ?**: A checkbox labeled "Check for Yes" which is checked.
- E I No**: A text field containing "123456789".

Figure 4-5: List EEO-1 Government Data screen 2

- 6 Use the information in the "Generating the Single Establishment EEO-1 Government Data Report" section to fill in the fields on this screen.

When you enter a value in the *Employer* and the *Location code* fields and the *Est. Name* and *Est. Address* fields are blank, the system uses the name and address in the location address file, PEPEL, for the parent company or establishment.

- 7 Press Enter. The system displays a screen similar to Figure 4-6.

LIST EEO-1 GOVERNMENT DATA

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Certif. Name

Certif. Title

Certif. Tel. Num

Certif. Fax Num

Certif. E-Mail

Contact's Name

Contact's Title

Address

City

Zip Code

Phone #

State

Phone Extension

Figure 4-6: List EEO-1 Government Data screen 3

- 8 Refer to the preceding section entitled “Generating the Single Establishment EEO-1 Government Data Report” for information about completing this page.
- 9 Press Enter. The system displays the following message:

Building submission request . . .
- 10 The system generates the List EEO-1 Government Data report using batch processing. From the Infinium HR main menu, 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.

Generating the Multi-Establishment EEO-1 Government Data Report

You generate the multi-establishment (type 4) version of the EEO-1 Government Data report to provide the EEOC with summary information on the ethnicity and gender of employees sorted by EEO category within one or more specific locations of a multi-establishment employer.

The EEOC defines an establishment as any location within an enterprise to which 50 or more employees are assigned. When you generate a multi-establishment EEO-1 report, you must include the unique name, address, activity description, unit code and standard industrial classification code for each location. Therefore, to generate a multi-establishment EEO-1 form that you can submit to the EEOC, you must set up code values using code type LOC to represent your EEO locations and enter address and EEO data for them using the *Update EEO/EEA Location Address* function.

You can use levels to generate a multi-establishment EEO-1 report for informational use only. You cannot submit the multi-establishment version of the EEO-1 report to the EEOC when you generate it using levels because you cannot enter address and EEO information specific to each of your levels.

The system prints establishment name and address information in Section 2.a of the EEO-1 report. It obtains the information from different places depending upon on the selection criteria you specify for the report:

- If you generate the EEO-1 multi-establishment report using locations and you have set up EEO location addresses, the system prints the location's name and address in Section 2.a. If you have not set up location addresses, the system uses the address from the employer control.
- If you use levels to generate the report, the system prints the description associated with the lowest level you specify as the establishment name and uses the address from your employer control.
- If you use both levels and locations to generate the report, the system prints the level description as the name of the establishment and prints the location address.

To generate the multi-establishment employer data file, you must use the *List EEO-1 Government Data* function three times and generate three versions of information.

You use only two selection screens to generate the multi-establishment versions of the EEO-1 Government Data report. The system does not print the certification information or contact information on these versions of the report so the selection screen that contains this information is not displayed. You run this report with the consolidated and headquarters report for submission on magnetic media.

- Consolidated Report (Status 2) - Include all employees in the fifty (50) states and the District of Columbia, which includes employment in list establishments.

The Consolidated Report has three screens of data:

- Use screen one for EEO data
- Use screen two for section C and establishment information.
- Use screen three to complete the Certificate and contact information
- Headquarters Report (Status 3) - Include only those employees working in the main office location of the parent company.

To generate the Headquarters Report, you complete two screens.

- Use screen one for EEO data
-

- Use screen two for section C and establishment information.
- Establishment Reports (Status 4) - Locations where 50 or more persons work.

To generate the Establishment Report, you complete two screens.

- Use screen one for EEO data
- Use screen two for section C information establishment information.

To properly generate EEO information and create the PEPEEO file to use to submit magnetic media for a multi-establishment employer, you must complete the steps described below.

Consolidated Report

Follow the steps below to produce the Consolidated Report step of the Multiple Establishment version of the EEO-1 Government Data report.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *List EEO Data*.
- 3 Select *List EEO-1 Government Data [E1G]*. The system displays the screen similar to Figure 4-7.

The screenshot shows a software interface for generating EEO-1 Government Data reports. The window title is "LIST EEO-1 GOVERNMENT DATA" and the version is "HR 11.0 QA-113". The interface is divided into two columns of input fields. The left column includes: Employer (ZUS), Level 1, Level 3, Print by Level? (0), EEO From Date (6022008), Location Code (HQ), Save Rpt Totals? (unchecked), Report Type (4), Company County, and Details? (unchecked). The right column includes: Employer Group, Level 2, Level 4, Print by Location? (unchecked), EEO To Date (9012008), Status Group, Status Grp Select (0), Create Mag. Media? (1), Purge Mag. Media? (0), and Exclude Inac Loc? (unchecked).

Figure 4-7: List EEO-1 Government Data screen for a consolidated report

- 4 Use the information below to fill in the fields on this screen. Refer to the preceding section entitled “Generating the Single Establishment EEO-1 Government Data Report” for additional information.

Employer

Type the value that represents the employer for which you want to generate the EEO-1 multi-establishment report. Press F4 to display a list of valid employers.

Employer Group

Leave this field blank.

Print by Level?

Specify no.

Print by Location?

Specify yes to generate a separate EEO-1 report for each location in the specified employer.

Specify no to generate the report for a specific location.

Location Code

If you are generating the EEO-1 report for a specific location, type the code value that represents that location. Leave this field blank and type 1 in the *Print by Location?* field to generate an EEO-1 report for each location in the specified employer.

Report Type

Type 2 in this field to generate the EEO-1 Individual Establishment Employer report.

Create Mag Media?

Specify yes.

Company County

Type the county in which the headquarters unit associated with the establishment for which you are generating the report is located. This information is required by the EEOC and will print on the report. This is a 16-character free-form field that does not use pre-established values.

Purge Mag Media?

Specify yes to purge the data in the work file and add new records.

- 5 Press Enter. The system displays the screen shown in Figure 4-8.

The screenshot shows the 'LIST EEO-1 GOVERNMENT DATA' application window. The interface includes a toolbar with 'Actions' and a search bar containing 'HR 11.0 QA-113'. The main area is a form with the following fields and options:

- Employer:** ZUS
- Employer Group:** (blank)
- Level 1:** (blank)
- Level 2:** (blank)
- Level 3:** (blank)
- Level 4:** (blank)
- Print by Level?:** 0 (0->4)
- Print by Location?:** Check for Yes
- EEO From Date:** 010108
- EEO To Date:** 063008
- Location Code:** (blank)
- Status Group:** (blank)
- Save Rpt Totals?:** Check for Yes
- Status Grp Select:** (blank) (0->2)
- Report Type:** 4 (1->5,8)
- Create Mag. Media?:** (blank)
- Company County:** (blank)
- Purge Mag. Media?:** (blank)
- Details?:** Check for Yes
- Exclude Inac Loc?:** Check for Yes

Figure 4-8: List EEO-1 Government Data screen for a consolidated report

- 6 Use the following information to complete the fields on this screen for the consolidated portion of a multi-establishment EEO-1 report. Use the information in the “Generating the Single Establishment EEO-1 Government Data Report” section in this chapter to fill in the balance of the fields on this screen.

U Code

Leave this field blank if you are generating the report for a specific location or for all locations in the employer and you have entered unit codes for each location using the *Update EEO/EEA Location Address* function.

NAICS Code, SIC Code

Type the NAICS or SIC code value assigned by the EEOC to the location for which you are generating the report. You use code type **NAI** to define values for the *NAICS Code* field. You use code type **SIC** to define values for the *SIC Code* field.

Leave these fields blank if you are generating the report for a specific location or for all locations in the employer and you have entered NAICS or

SIC code values for each location using the *Update EEO/EEA Location Address* function.

E I No.

Type the company identifier of the controlling company. You must enter this value only when you produce multi-establishment EEO-1 reports. This is a 9-character free-form field.

Establishment Information

Leave this field blank if you are generating the report for a specific location or for all locations in the employer and you have entered a description of the major business activity for each location using the *Update EEO/EEA Location Address* function.

The system uses the information on this screen for the establishment when:

- you entered information in the *Employer* field on the first List EEO-1 Government Data screen
- the value in the *Print by level?* field is 1
- you enter information in the *Est. Name* and *Est. Address* fields

7 Press Enter. The system displays the third List EEO-1 Government Data screen similar to Figure 4-9.

The screenshot shows a web-based form titled "LIST EEO-1 GOVERNMENT DATA". The form contains the following fields:

- Certif. Name
- Certif. Title
- Certif. Tel. Num
- Certif. Fax Num
- Certif. E-Mail
- Contact's Name
- Contact's Title
- Address
- City
- State
- Zip Code
- Phone #
- Phone Extension

The page number "Page 3 of 3" is displayed in the top right corner of the form area.

Figure 4-9: List EEO-1 Government Data screen for a consolidated report

8 See the “Generating the Single Establishment EEO-1 Government Data Report” section for information about completing this screen.

Headquarters report

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *List EEO Data*.
- 3 Select *List EEO-1 Government Data* [E1G]. The system displays the screen shown in Figure 4-10.

Figure 4-10: List EEO-1 Government Data screen for a headquarters report

Use the information below to complete this screen.

Report Type

Type **3**, Headquarters Report.

Create Mag Media?

Specify yes.

Purge Mag, Media?

Specify no. When you specify no, the system adds the data created for this report to the file that you generate for the consolidated report and that contains the certification information.

- 4 Complete the remaining fields on this screen as you normally would.
- 5 Press Enter.

Multi-Establishment Report

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.

- 2 Select *List EEO Data*.
- 3 Select *List EEO-1 Government Data [E1G]*. The system displays the screen similar to Figure 4-11.

The screenshot shows a web-based form titled "LIST EEO-1 GOVERNMENT DATA". The form is organized into two columns. The left column includes fields for "Employer" (with value "ZUS"), "Level 1", "Level 3", "Print by Level?" (dropdown "0", "(0->4)"), "EEO From Date" (calendar icon, value "010108"), "Location Code", "Save Rpt Totals ?" (checkbox "Check for Yes"), "Report Type" (dropdown "4", "(1->5,8)"), "Company County", and "Details ?" (checkbox "Check for Yes"). The right column includes fields for "Employer Group", "Level 2", "Level 4", "Print by Location?" (checkbox "Check for Yes"), "EEO To Date" (calendar icon, value "063008"), "Status Group", "Status Grp Select" (dropdown, "(0->2)"), "Create Mag. Media?" (dropdown), "Purge Mag. Media?" (dropdown), and "Exclude Inac. Loc?" (checkbox "Check for Yes"). The top right corner of the form area says "Page 1".

Figure 4-11: List EEO-1 Government Data screen for a multi-establishment report

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

Report Type

Type 4, multi-establishment.

Create Mag. Media?

Specify yes.

Purge Mag. Media?

Specify no. When you specify no, the system adds the data created for this report to the file that you generate for the consolidated report and that contains the certification information.

- 5 Complete the remaining fields as you normally would.
- 6 Press Enter. The system displays the second List EEO-1 Government Data screen similar to Figure 4-12.

LIST EEO-1 GOVERNMENT DATA

Page 2 of 3

Section C - 1 [] Section C - 2 []

Section C - 3 [] Duns No []

Parent Co. Name [SAMPLE US EMPLOYER]

Parent Co. Addr [2010 MAIN STREET]

Parent Co. City [IRVINE] Parent Co. County [COOK]

Parent Co. State [CA] Parent Co. Zip [90210]

Establishment Information

[SALES, MARKETING, ACCOUNTING, CUSTOMER]

[SERVICE, MANUFACTURING AND]

[TRANSPORTATION ACTIVITIES]

Co. Code [1234567] IJ Code [1234567]

NAICS Code [] -or- SIC Code [1234]

Report last year 7 Check for Yes EINO [1234567]

Figure 4-12: List EEO-1 Government Data screen for a multi-establishment report

- 7 See the “Generating the Single Establishment EEO-1 Government Data Report” section in this chapter for information about the fields on this screen.
- 8 Press Enter. The system displays a screen similar to Figure 4-13.

LIST EEO-1 GOVERNMENT DATA

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Certif. Name []

Certif. Title []

Certif. Tel. Num []

Certif. Fax Num []

Certif. E-Mail []

Contact's Name []

Contact's Title []

Address []

City [] State []

Zip Code []

Phone # [] Phone Extension []

Figure 4-13: List EEO-1 Government Data screen

- 9 See the “Generating the Single Establishment EEO-1 Government Data Report” section in this chapter for information about the fields on this screen.
- 10 After you complete generating the multi-establishment information, use the information in the “Generating EEO Information in a Magnetic Media Work File” section in this chapter to generate the magnetic media work file.

Generating the Consolidated, Special and Under 50 Employees EEO-1 Government Data Reports

You can generate the Consolidated (Type 2), Special (Type 5), and Under 50 Employees (Type 8) versions of the EEO-1 Government Data report. They provide summary information on the ethnicity and gender of employees sorted by EEO category within an employer group, employer or location within the specified employer.

You use only two selection screens to generate the Consolidated and Special versions of the EEO-1 Government Data report. The system does not print the certification information or contact information on these versions of the report. The third selection screen that would contain this information is not displayed.

Follow the instructions in the preceding sections, “Generating the Headquarters Unit EEO-1 Government Data Reports” for type 3 reports and “Generating the Multi-Establishment EEO-1 Government Data Report” for type 4 reports, to generate the consolidated, special version of the List EEO-1 Government Data report with the following differences:

- For the consolidated version of the report, type **2** in the *Report Type* field.
 - For the special version of the report, type **5** in the *Report Type* field.
 - For the report for establishments of under 50 employees, type **8** in the *Report Type* field.
 - When you enter a value in the *Employer* field and the *Est. Name* and *Est. Address* fields are blank, the system uses the name and address of the parent company or establishment from the employee controls file. However, since the EEO does not allow submission of consolidated special printed reports and under 50 employees printed reports, the *Company Address*, *Est. Name* and *Est. Address* fields are left blank on the printed report to prevent accidentally using the consolidated special reports and under 50 employees reports to report to the EEOC. You can submit these reports electronically; the *Company Address*, *Est. Name* and *Est. Address* fields are not required on the magnetic media reports.
 - When a value exists in the *Employer group* field and the *Est. Name* and *Est. Address* fields are blank, the system uses the name and address of the parent company or establishment in the employee controls file, PRPCO, for each employer code in the employer group. However, since the EEO does not allow submission of consolidated special printed reports and under 50 employees printed reports, the *Company Address*, *Est. Name* and *Est. Address* fields are left blank on the printed reports to prevent accidentally using the consolidated special reports and under 50 employees reports to report to the EEOC. You can submit these reports
-

electronically; the *Company Address*, *Est. Name* and *Est. Address* fields are not required on the magnetic media reports.

Generating EEO Information in a Magnetic Media Work File

You use the *List EEO-1 Mag. Media Work File* function to generate the EEO-1 work file, *eeo-1.txt*.

Follow the steps below to generate the EEO-1 work file.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *List EEO Data*.
- 3 Select *List EEO-1 Mag. Media Work File [E1GWF]*. The system displays the screen shown in Figure 4-14.

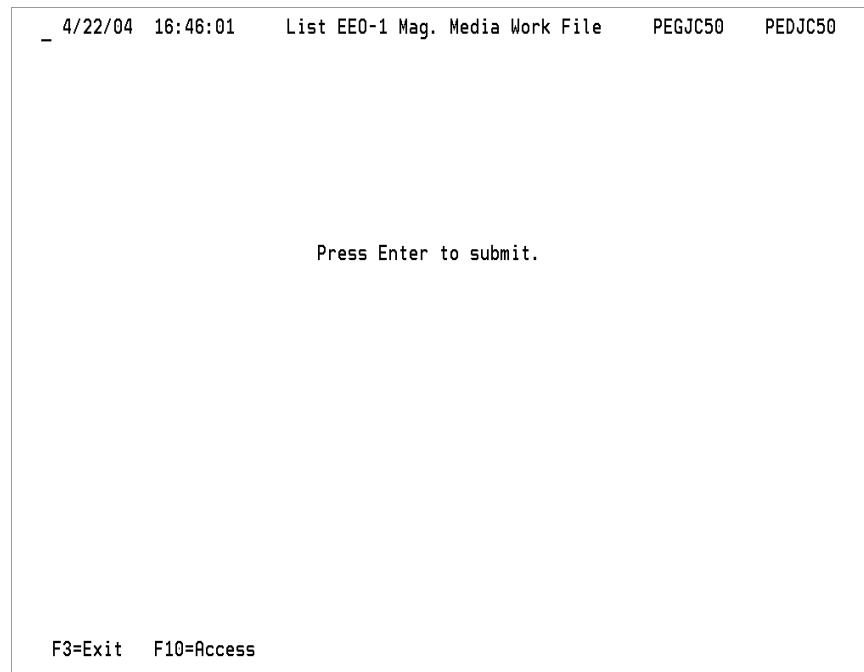


Figure 4-14: List EEO-1 Mag. Media Work File screen

- 4 Press Enter. The system generates the EEO-1 work file report.

Electronic Filing of the EEO-1 Report

Use the information below for electronic filing of the EEO-1 government report. See the *Infinium HR/PY Technical Guide* for more information about using text files on the integrated file system (IFS).

Follow the steps below to access the eeo-1.txt file.

- 1 On your PC, use a standard PC function such as Windows Explorer and map a network drive to the EEO1 folder that is located in the root folder of the IFS on the iSeries machine.
- 2 Copy the eeo-1.txt file from the EEO1 folder on the iSeries machine to the drive that contains the media to be used for electronic filing, such as a diskette or zip file or review the instructions on the EEOC Web site to submit this file through the internet.

Updating EEO-1 Prior Year Totals

You use this option to type prior year EEO-1 totals which appear on the EEO-1 Government Report. You can change totals you saved when you typed 1 in the *Save Rpt Totals?* field on the List EEO-1 Government Data selection screen. You can also type new information for prior years using this option.

Follow the steps below to type Prior Year EEO-1 Totals.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *Update EEO/Affirmative Data*.
- 3 Select *Update EEO-1 Prior Year Totals* [EPYT]. The system displays the screen shown in Figure 4-15.

```
6/26/07 11:54:03      Update EEO-1 Prior Year Totals      PEGEOM      PEDEOM

Employer . . . . _ +

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

Figure 4-15: Update EEO-1 Prior Year Totals selection screen 1 of 2

- 4 Use the information below to fill in the fields on this screen.

Employer

Type the employer code and press Enter. The system displays the screen shown in Figure 4-16.

```
6/26/07 12:01:52      Update EEO-1 Prior Year Totals      PEGEOM      PEDEOM

Employer . . . . : ZUS      SAMPLE US COMPANY
Year . . . . . : _____
Area . . . . . : _____ +
Division . . . . : _____ +
Department . . . : _____ +
Cost Centr . . . : _____ +
Location . . . . : _____ +

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

Figure 4-16: Update EEO-1 Prior Year Totals selection screen 2 of 2

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

Year

Type the year for which you are updating EEO-1 totals. You must make an entry in this field.

Level 1

Type the code value of the level 1 location for the specified employer that identifies the totals you want to update. Leave this field blank to update totals for all levels for the specified employer.

Level 2

Type the code value of the level 2 location within the specified level 1 location for this employer. Leave this field blank to update totals for all level 2 locations.

Level 3

Type the code value of the level 3 location within the specified level 2 location for this employer. Leave this field blank to update totals for all level 3 locations.

Level 4

Type the code value of the level 4 location within the specified level 3 location for this employer. Leave this field blank to include all level 4 locations.

Location

Type the code value that represents the location for which you are updating EEO-1 prior year totals. You establish values for this field using code type **LOC**.

- 6 Press Enter to display the screen shown in Figure 4-17.

```

6/26/07 12:02:14      Update EEO-1 Prior Year Totals      PEGEOM      PEDEOM

Employer . . . . : ZUS  SAMPLE US COMPANY
Year . . . . . : 2007
Area . . . . . :
Division . . . . :
Department . . . :
Cost Centr . . . :
Location . . . . :
    
```

Male							
Hispanic Latino (A)	White (C)	Black Or African (D)	Native Hawaiian Or Pacific (E)	Asian (F)	American Alaska Native (G)	Two/More Races (H)	
2	79	23	3	15	5	0	
Female							
Hispanic Latino (B)	White (I)	Black Or African (J)	Native Hawaiian Or Pacific (K)	Asian (L)	American Alaska Native (M)	Two/More Races (N)	Total (A-N)
4	92	20	1	13	8	0	265

F3=Exit F10=Access F22=Delete

Figure 4-17: Update EEO-1 Prior Year Totals screen

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

If you typed 1 in the *Save Rpt Totals?* field on the EEO-1 Government Data selection screen for the same period as you typed in the previous screen, the system displays the prior year EEO-1 totals for the specified employer, levels and/or location.

You can change or delete the totals for the individual ethnic categories. The system automatically updates the grand total displayed in the left-hand side of the screen based on your entries.

If this screen is blank, you can type new EEO-1 total information for the period you specified on the preceding selection screen.

- 8** After you update the EEO-1 prior year totals, press Enter to save your changes.
 - 9** The system displays the prompt screen shown in Figure 4-16. You can update totals for other organizational locations or press F3 to exit from this screen and return to the prompt screen shown in Figure 4-15.
 - 10** Press F3 again to return to the Infinium HR main menu.
-

Generating the EEO-1 Employer Data Report

You use the *EEO-1 Employer Data* function for internal purposes only and cannot be filed with the EEOC. The system includes employees in this report who are active as of the moment the report is generated. You do not specify a date range for this report.

Follow the steps below to generate the EEO-1 Employer Data report.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *List EEO Data*.
- 3 Select *List EEO-1 Employer Data [E]*. The system displays the screen shown in Figure 4-18.

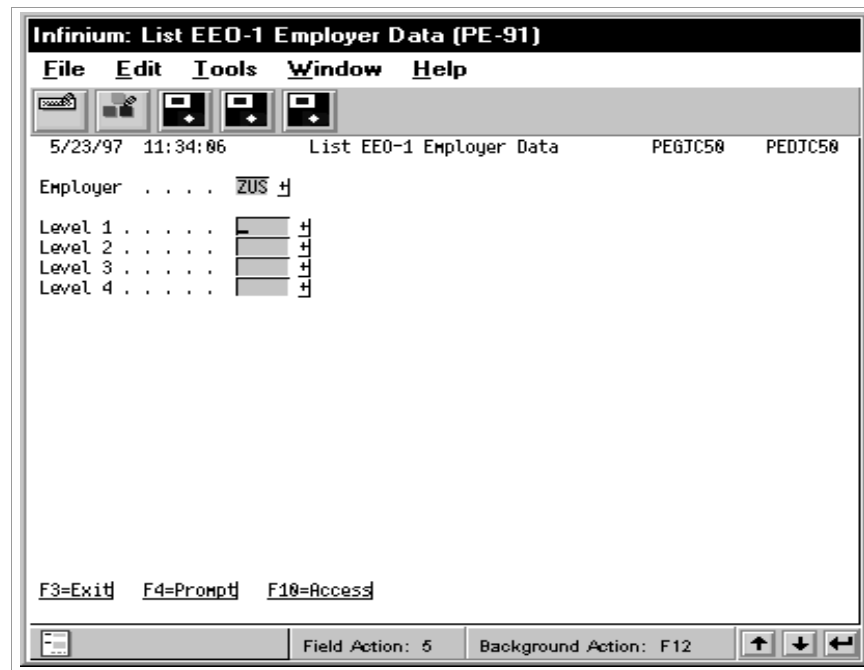


Figure 4-18: List EEO-1 Employer Data selection screen

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

You can generate this report for all employers, for a particular employer or for certain level(s) within a specified employer.

If you specify an employer on the selection screen, you can use the *Level* fields to identify the location within an employer for which you are generating

the report. The system selects employees assigned to the levels you specify to generate the List EEO-1 Employer Data report. You can type one or more of the *Level* fields to identify the appropriate location for the report or you can leave all the *Level* fields blank to include all employees within a specified employer.

Employer

Type the value that represents the employer for which you want to generate the List EEO-1 Employer Data Report. Press F4 to display a list of valid employers. Leave this field blank to include all active employees assigned to all employers.

Level 1

Type the code value of the level 1 location for the specified employer that identifies the employees you want to include in this report. Leave this field blank to include all active employees in the specified employer.

Level 2

Type the code value of the level 2 location within the specified level 1 location for this employer. Leave this field blank to include all active employees in the specified level 1 location.

Level 3

Type the code value of the level 3 location within the specified level 2 location for this employer. Leave this field blank to include all employees within the specified level 2 location.

Level 4

Type the code value of the level 4 location within the specified level 3 location for this employer. Leave this field blank to include all employees within the specified level 3 location in this report.

- 5 When you press Enter the system displays the following message:

Building submission request . .

- 6 The system generates the List EEO-1 Employer Data report using batch processing. From the Infinium HR main menu, 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.
-

Generating the EEO-3 Local Union Data Report

Use the *List EEO-3 Local Union Data* function to generate information for the EEO-3 Local Union Report.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *List EEO Data*.
- 3 Select *List EEO-3 Local Union Data [LUI]*. The system displays the screen shown in Figure 4-19.

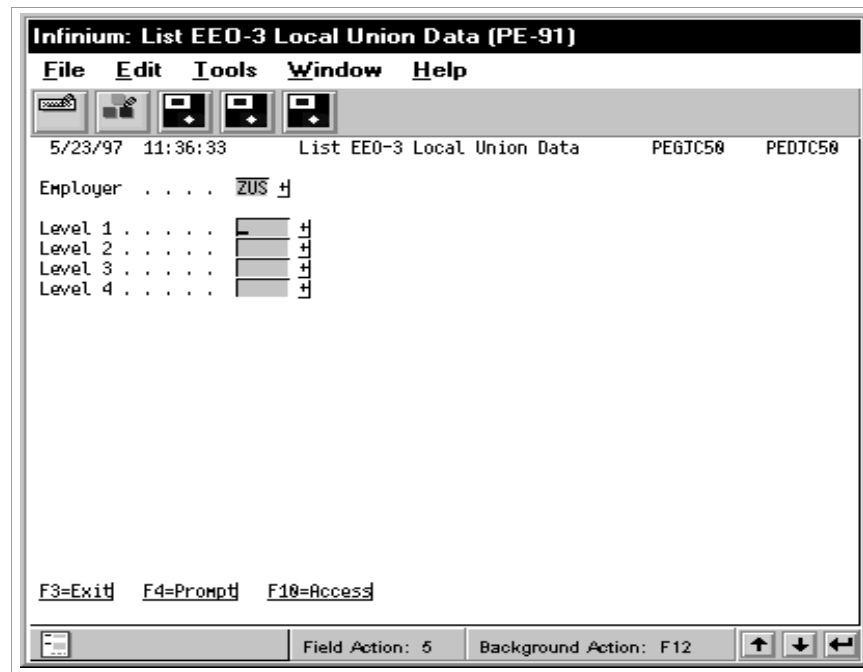


Figure 4-19: List EEO-3 Local Union Data selection screen

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

You can generate this report for all employers, for a particular employer or for certain level(s) within a specified employer.

If you specify an employer on the selection screen, you can use the *Level* fields to identify the location within an employer for which you are generating the report. The system selects employees assigned to the levels you specify to generate the List EEO-3 Local Union Data report. You can type one or more of the level fields to identify the appropriate location for the report or

you can leave all the level fields blank to include all employees within a specified employer.

Employer

Type the value that represents the employer for which you want to generate the List EEO-1 Apprenticeship Data Report. Press F4 to display a list of valid employers. Leave this field blank to include all active employees assigned to all employers.

Level 1

Type the code value of the level 1 location for the specified employer. Leave this field blank to include all active employees in the specified employer.

Level 2

Type the code value of the level 2 location within the specified level 1 location for this employer. Leave this field blank to include all active employees in the specified level 1 location.

Level 3

Type the code value of the level 3 location within the specified level 2 location for this employer. Leave this field blank to include all employees within the specified level 2 location.

Level 4

Type the code value of the level 4 location within the specified level 3 location for this employer. Leave this field blank to include all employees within the specified level 3 location.

- 5 When you press Enter the system displays the following message:

Building submission request

- 6 The system generates the List EEO-3 Local Union Data report using batch processing. From the Infinium HR main menu, 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.
-

Generating the EEO-4 State & Local Data Report

If you are a state or local municipality employer, you use this function to print the EEO-4 State & Local Information Report.

This report includes all employees who are actively employed by the specified employer(s) on the Effective Date you specify on the selection screen for the EEO-4 State & Local Data report. For example, if you run the report for June 30, an employee who terminates in May is not included in this report. An employee who terminates before June 30 is not included nor is an employee who is hired after June 30.

The system sorts employees into the proper section and column of the report using the hierarchy shown in the following table; the system sorts from the top down starting with *EEO-4 Function*.

The system sorts using this criteria:	On this screen . . .	Using these values . . .
EEO-4 function	Job Control: <i>EEO-4 Function</i> field on screen 1 of 2	1-15 ; values are pre-defined by Infinium in accordance with EEOC requirements
Employment status	Employee basic data record: <i>Full Time?</i> field on Screen 2 of 5	1 = Full Time 0 = Part Time Values are pre-defined by Infinium in accordance with EEOC requirements.
EEO category	Job Control: <i>EEO Category</i> field on screen 1 of 2	1-8 ; user defines values for code type EEO in accordance with EEOC requirements
Salary category	Employee basic data record; system uses the <i>Base Rate</i> , <i>Base Frequency</i> , <i>Regular Hours</i> and <i>Scheduled Pay Pds</i> fields on screen 4 of 5 to place employee into proper category.	Eight categories pre-defined by Infinium in accordance with EEOC requirements.

The system sorts using this criteria:	On this screen . . .	Using these values . . .
Gender	Employee basic data record; <i>Sex</i> field on screen 1 of 5	M or F values pre-defined by Infinium
Ethnic category	Employee basic data record; <i>Ethnic ID</i> field on screen 2 of 5	0-6 ; user defines values for code type ETH in accordance with EEOC requirements.

Follow the steps below to generate the EEO-4 State & Local Data report.

- 1 From the Infinium HR main menu select *EEOC/Affirmative Action/EEA*.
- 2 Select *List EEO Data*.
- 3 Select *List EEO-4 State & Local Data [SLI]*. The system displays the screen shown in Figure 4-20.

```

6/15/16 18:07:46      List EEO-4 State & Local Data      PEGJC50      PEDJC50

Employer . . . . ZUS +

Effective Date . 06302015

Control Number . 12345678

EEO-4 Function .   

Contact Name . . JANE SMITH
Contact Title . . EEO COMPLIANCE OFFICER
Contact Address . 200 ELM STREET, OAK BROOK, IL 60000
Contact Phone # . 630-555-1212

Official's Name . ALAN ACCURATE
Official's Title. VP, HUMAN RESOURCES

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

Figure 4-20: List EEO-4 State & Local Data selection screen

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

The *Effective Date* field is the only required field that you must complete on the above screen. If you leave all of the other fields blank, the system

generates a report that includes all active employees in all employers in all EEO-4 functions.

Employer

Type the value that represents the employer for which you want to generate the List EEO-4 State & Local Data Report. Press F4 to display a list of valid employers. Leave this field blank to include all active employees assigned to all employers in this report.

Effective Date

Type the date that the system should use to select employees for this report. This date is compared to each employee's hire and termination dates; only employees who are active on the specified date are included in this report. Generally you type the fiscal year end date as defined by the U.S. federal government.

Control Number

Type the control number that has been assigned to your jurisdiction by the State and Local Reporting Committee of the EEOC. This number prints on the EEO-4 report. The first seven characters of this field are numeric; the eight position of the control number may be alphabetic.

EEO-4 Function

Type the EEO-4 function for which you want the system to generate a report. You type a value in the *EEO-4 Function* field on each job control record. When you assign an employee to a job, the system automatically associates the employee with the job's EEO-4 function. Leave this field blank to generate a report of employees in all EEO-4 functions.

Valid values for this field have been pre-defined by Infinium and correspond to the official categories defined by the EEOC listed below.

- | | |
|-----------|--------------------------|
| 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

Contact Name

Type the name of the person that the EEOC can contact to answer questions about this report. This is a 25-character free-form field.

Contact Title

Type the title of the person specified the *Contact Name* field. This is a 25-character free-form field.

Contact Address

Type the street address, city, state and zip code of the person specified in the *Contact Name* field. This is a 50-character free-form field.

Contact Phone #

Type the telephone number of the person specified in the *Contact Name* field. This is an 18-character free-form field.

Official's Name

Type the name of the authorized official who certifies the information on the EEO-4 report is correct. This is a 25-character free-form field.

Official's Title

Type the title of the person specified in the *Official's Name* field. This is a 25-character free-form field.

When you press Enter the system displays the following message:

Building submission request . . .

- 5 The system generates the List EEO-4 State & Local Data report using batch processing. From the Infinium HR main menu, 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.

Sample reports are shown below.

CO= - EQUAL EMPLOYMENT OPPORTUNITY

U= - 200X EMPLOYER INFORMATION REPORT EEO-1
 SIC/NAICS=

SINGLE-ESTABLISHMENT EMPLOYER REPORT (TYPE 1)

SECTION B - COMPANY IDENTIFICATION

1. JENNIFER ANNES BUSINESS
 100 CAMBRIDGE STREET
 HYANNIS
 MA 02601

2.a. JENNIFER ANNES BUSINESS
 100 CAMBRIDGE STREET
 HYANNIS
 MA 02601

SECTION C - TEST FOR FILING REQUIREMENT

1-Y 2-Y 3-Y DUNS NO.: - -

SECTION E - ESTABLISHMENT INFORMATION

1-

b. EI=

c. (WAS AN EEO-1 REPORT FILED FOR THIS ESTABLISHMENT LAST YEAR?)

SECTION D - EMPLOYMENT DATA

NON-HISPANIC OR LATINO

JOB CATEGORIES	HISPANIC/LATINO		NON-HISPANIC OR LATINO													TOTAL A-N
	MALE (A)	FEMALE (B)	***** (C)	***** (D)	MALE (E)	***** (F)	***** (G)	***** (H)	***** (I)	***** (J)	FEMALE (K)	***** (L)	***** (M)	***** (N)		
EXECUTIVE/SENIOR LEVEL OFFICIALS AND MANAGERS.. (1.1)	1	1	1	0	0	1	0	1	0	1	1	1	0	1	9	
FIRST/MID LEVEL OFFICIALS AND MANAGERS..... (1.2)	1	3	11	11	1	7	7	1	13	11	2	3	10	2	83	
PROFESSIONALS..... (2)	1	3	4	9	0	4	2	0	9	7	0	5	0	2	46	
TECHNICIANS..... (3)	1	1	1	1	0	2	1	0	2	0	0	1	1	1	12	
SALES WORKERS..... (4)	0	0	0	0	0	0	1	0	2	0	0	0	0	0	3	
ADMINISTRATIVE SUPPORT WORKERS..... (5)	3	2	16	9	0	13	5	1	9	17	1	13	6	1	96	
CRAFT WORKERS..... (6)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
OPERATIVES..... (7)	2	1	9	3	0	2	1	0	5	3	0	1	1	0	28	
LABORERS AND HELPERS..... (8)	0	1	9	3	1	0	2	0	4	3	0	7	3	0	70	
SERVICE WORKERS..... (9)	2	0	20	6	0	7	4	0	17	4	4	33	22	7	373	
TOTAL	(10)	11	12	71	42	2	36	23	3	61	46	0	0	0	0	
PREVIOUS REPORTED TOTAL	(11)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

* OTHER QUESTIONS *

1-01/01/2007 THRU 12/31/2007 (DATES{S} OF PAYROLL PERIOD USED)

SECTION G - CERTIFICATION

THIS REPORT IS ACCURATE AND WAS PREPARED IN ACCORDANCE WITH THE INSTRUCTIONS

CERTIFYING OFFICIAL:

TITLE:

SIGNATURE:

DATE: / /

NAME OF PERSON TO CONTACT REGARDING THIS REPORT:

TITLE:

STREET ADDRESS:

CITY/ST:

AREA CODE/TELEPHONE: 000-000-0000 EXT.: 0000

Employee	Name	Sex M/F	Ethnic 0 - 6	Category 1 - 9
80005	ACCURATE, JR, ALAN N	* M *	* 6 *	* 1.1*
80103	BEACH, SANDY	* F *	* 0 *	* 2 *
3711	BENEFITS, AGEEIGHT	* F *	* 6 *	* 5 *
3700	BENEFITS, ALL PLANS	* F *	* 4 *	* 1.1*
2631	CALIFORNIA, CAROL	* M *	* 0 *	* 1.1*
3341	DALE, ANDREW	* M *	* 0 *	* 5 *
5783	DEEN, PAULA	* F *	* 2 *	* 1.1*
3369	DIVER, PEARL	* F *	* 1 *	* 5 *
5781	ERICKSON, TAMMY	* F *	* 5 *	* 1.1*
5582	FREEZE-ONE, FRANCES	* F *	* 6 *	* 1.1*
5698	GARNISHEE, MR, GAVIN	* M *	* 1 *	* 5 *
1137	GUAMMY, HARRIET	* F *	* 2 *	* 5 *

////////////////////////////////////

Employee	Name	Sex M/F	Ethnic 0 - 6	Category 1 - 9
REPORT TOTAL	373			

PEGO005 PETO006 E M P L O Y E E S W I T H I N V A L I D D A T A PAGE
 XX/XX/XX 12:11:08

Employer	Employee	Name	Sex M/F	Ethnic 0 - 6	Category 1 - 9	* * = Value of Blank
JAB	4626	ABBOTT, ABBY		* 7 *		
JAB	80113	BLOSSOM, CHERRY			* 10 *	
JAB	2320	TIME, JUSTIN			* 10 *	
JAB	80110	TURNER, PAIGE			* 1A *	
JAB	4199	ALLOCATION, ALBERT D			* 1 *	
JAB	5754	MARABELLI, MARK			* 1 *	
JAB	2113	SCHMOE, JOE			* 10 *	
JAB	80045	WINDE, AUGUSTA			* 10 *	
JAB	2241	ZIMMERMAN, ROBERT			* 10 *	
JAB	1079	STARR, ROBERT			* 1A *	

CO= -
 U= -
 SIC/NAICS=

EQUAL EMPLOYMENT OPPORTUNITY
 2007 EMPLOYER INFORMATION REPORT EEO-1

HEADQUARTERS REPORT - TYPE 3

SECTION B - COMPANY IDENTIFICATION

1. JENNIFER ANNES BUSINESS
 100 CAMBRIDGE STREET
 HYANNIS
 MA 02601

2.a. JENNIFER ANNES BUSINESS
 100 CAMBRIDGE STREET
 HYANNIS
 MA 02601

SECTION C - TEST FOR FILING REQUIREMENT

1-Y 2-Y 3-Y DUNS NO.: - -

SECTION E - ESTABLISHMENT INFORMATION

1-

b. EI=

c. (WAS AN EEO-1 REPORT FILED FOR
 THIS ESTABLISHMENT LAST YEAR?)

SECTION D - EMPLOYMENT DATA

NON-HISPANIC OR LATINO

JOB CATEGORIES	HISPANIC/LATINO		NON-HISPANIC OR LATINO												TOTAL A-N
	MALE (A)	FEMALE (B)	***** (C)	***** (D)	MALE (E)	***** (F)	***** (G)	***** (H)	***** (I)	***** (J)	***** (K)	FEMALE (L)	***** (M)	***** (N)	
EXECUTIVE/SENIOR LEVEL OFFICIALS AND MANAGERS.. (1.1)	1	1	1	0	0	1	0	1	0	1	1	1	0	1	9
FIRST/MID LEVEL OFFICIALS AND MANAGERS..... (1.2)	1	3	11	11	1	7	7	1	13	11	2	3	10	2	83

PEGO005 PETO007 EEO - 1 GOVERNMENT DETAIL REPORT PAGE 1
XX/XX/XX 10:10:12
Employer: JAB

Table with 5 columns: Employee, Name, Sex (M/F), Ethnic (0-6), Category (1-9). Lists 30 employees with their respective demographic data.

Separator line consisting of a row of forward slashes.

PEGO005 PETO007 EEO - 1 GOVERNMENT DETAIL REPORT PAGE 16
XX/XX/XX 10:10:12
Employer: JAB

Summary table with 5 columns: Employee, Name, Sex (M/F), Ethnic (0-6), Category (1-9). Row 1: REPORT TOTAL, 373. Row 2: ***** END OF REPORT *****

Employer	Employee	Name	Sex M/F	Ethnic 0 - 6	Category 1 - 9	* * = Value of Blank
JAB	4626	ABBOTT, ABBY		* 7 *		
JAB	80113	BLOSSOM, CHERRY			* 10 *	
JAB	2320	TIME, JUSTIN			* 10 *	
JAB	80110	TURNER, PAIGE			* 1A *	
JAB	4199	ALLOCATION, ALBERT D			* 1 *	
JAB	5754	MARABELLI, MARK			* 1 *	
JAB	2113	SCHMOE, JOE			* 10 *	
JAB	80045	WINDE, AUGUSTA			* 10 *	
JAB	2241	ZIMMERMAN, ROBERT			* 10 *	
JAB	1079	STARR, ROBERT			* 1A *	

PEGO030 PETO030
 XX/XX/XX 13:03:50
 UNION CNA
 EMPLOYER JAB

E E O - 3 U N I O N R E P O R T

JENNIFER ANNES BUSINESS

EEO GROUPS	-- ALL EMPLOYEES --				----- M A L E -----				----- F E M A L E -----			
	TOTAL	MALE	FEMALE	BLACK	ASIA AMER.	INDIAN	HISPANIC	BLACK	ASIA AMER.	INDIAN	HISPANIC	
1 PROFESSIONALS	1	0	1	0	0	0	0	0	0	0	0	
3 TECHNICIANS	8	4	4	1	1	1	1	0	1	1	1	

UNION TOTALS	9	4	5	1	1	1	1	0	1	1	1	

////////////////////////////////////

UNION TOTALS		14	7	7	1	2	1	1	3	2	0	0
PEGO030 PETO030												
6/26/07 13:03:50												
UNION TMR3												
EMPLOYER JAB												

E E O - 3 U N I O N R E P O R T

JENNIFER ANNES BUSINESS

EEO GROUPS	-- ALL EMPLOYEES --				----- M A L E -----				----- F E M A L E -----			
	TOTAL	MALE	FEMALE	BLACK	ASIA AMER.	INDIAN	HISPANIC	BLACK	ASIA AMER.	INDIAN	HISPANIC	
7 OPERATIVES	10	7	3	2	1	0	0	0	0	0	1	
UNION TOTALS	10	7	3	2	1	0	0	0	0	0	1	

SAMPLE US COMPANY
STATE AND LOCAL GOVERNMENT INFORMATION
XXXX EEO-4 REPORT

SAMPLE US COMPANY
SUITE 411
2010 MAIN STREET
ANYTOWN, MA 92111
FUNCTION 01 FINANCIAL ADMINISTRATION

RUN XX/XX/XX
18:12:

AS OF XX/XX/XX

CONTROL NUMBER 12345678

1. FULL-TIME EMPLOYEES

JOB CATEGORY	SALARIES	- HISPANIC -		NON-HISPANIC OR LATINO												TOTAL
		MALE	FEMALE	MALE						FEMALE						
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
OFFICIAL/ADM 01	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
02	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
03	20.0-24.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
04	25.0-32.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
05	33.0-42.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
06	43.0-54.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
07	55.0-69.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
08	70.0 PLUS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
PROFESSIONALS 09	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	20.0-24.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	25.0-32.9	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1
13	33.0-42.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	43.0-54.9	1	0	2	2	0	0	0	0	0	0	0	0	0	0	5
15	55.0-69.9	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1
16	70.0 PLUS	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1
TECHNICIANS 17	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	20.0-24.9	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1
20	25.0-32.9	0	0	0	1	0	0	1	0	1	1	0	0	0	0	4
21	33.0-42.9	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1
22	43.0-54.9	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
23	55.0-69.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	70.0 PLUS	1	0	1	0	0	0	0	0	2	0	0	0	0	0	4
PROTECT/SVC 25	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	20.0-24.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	25.0-32.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
29	33.0-42.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	43.0-54.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
31	55.0-69.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
32	70.0 PLUS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
PARA-PROF 33	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
34	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
35	20.0-24.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
36	25.0-32.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SAMPLE US COMPANY
 SUITE 411
 2010 MAIN STREET
 ANYTOWN, MA 92111
 FUNCTION 01 FINANCIAL ADMINISTRATION

CONTROL NUMBER 12345678

RUN XX/XX/XX
 18:12:

AS OF XX/XX/XX

JOB CATEGORY	SALARIES	- HISPANIC -		NON-HISPANIC OR LATINO												TOTAL		
		MALE	FEMALE	----- MALE -----						----- FEMALE -----								
		A	B	C	D	E	F	G	H	I	J	K	L	M	N		O	
ADM/SUPPORT	41	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	42	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	43	20.0-24.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	44	25.0-32.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	45	33.0-42.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	46	43.0-54.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	47	55.0-69.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	48	70.0 PLUS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SKILL CRAFT	49	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	50	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	51	20.0-24.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	52	25.0-32.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	53	33.0-42.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	54	43.0-54.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	55	55.0-69.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	56	70.0 PLUS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SERV/MAINT	57	\$ 0.1-15.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	58	16.0-19.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	59	20.0-24.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	60	25.0-32.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	61	33.0-42.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	62	43.0-54.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	63	55.0-69.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	64	70.0 PLUS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL																		
FULL TIME	65		2	0	4	4	0	0	2	0	4	2	0	0	1	0	19	

REV. EEO-4 XXXX

SAMPLE US COMPANY
STATE AND LOCAL GOVERNMENT INFORMATION
XXXX EEO-4 REPORT

Page 3 OF 3

SAMPLE US COMPANY
SUITE 411
2010 MAIN STREET
ANYTOWN, MA 92111
FUNCTION 01 FINANCIAL ADMINISTRATION

RUN XX/XX/XX
18:12:

AS OF XX/XX/XX

CONTROL NUMBER 12345678

2. OTHER THAN FULL-TIME EMPLOYEES

JOB CATEGORY	- HISPANIC -		NON-HISPANIC OR LATINO												TOTAL	
	MALE	FEMALE	MALE						FEMALE							
	A	B	C	D	E	F	G	H	I	J	K	L	M	N		O
OFFICIAL/ADM 66	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
PROFESSIONALS 67	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TECHNICIANS 68	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
PROTECT/SVC 69	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
PARA-PROF 70	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ADM/SUPPORT 71	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SKILL CRAFT 72	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SERV/MAINT 73	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL OTHER THAN F-T 74	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

3. NEW HIRES DURING FISCAL YEAR - PERMANENT FULL-TIME ONLY

JOB CATEGORY	- HISPANIC -		NON-HISPANIC OR LATINO												TOTAL	
	MALE	FEMALE	MALE						FEMALE							
	A	B	C	D	E	F	G	H	I	J	K	L	M	N		O
OFFICIAL/ADM 75	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
PROFESSIONALS 76	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1
TECHNICIANS 77	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	2
PROTECT/SVC 78	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
PARA-PROF 79	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ADM/SUPPORT 80	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SKILL CRAFT 81	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SERV/MAINT 82	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL NEW HIRES 83	1	0	2	0	0	0	0	0	0	0	0	0	0	0	0	3

CERTIFICATION. I CERTIFY THAT THE INFORMATION GIVEN IN THIS REPORT IS CORRECT AND TRUE TO THE BEST OF MY KNOWLEDGE AND WAS REPORT IN ACCORDANCE WITH ACCOMPANYING INSTRUCTIONS. (WILLFULLY FALSE STATEMENTS ON THIS REPORT ARE PUNISHABLE BY LAW, U.S. CODE, TITLE 1 SECTION 1001.)

NAME OF CONTACT PERSON: JANE SMITH
ADDRESS: 200 ELM STREET, OAK BROOK, IL 60000
AUTHORIZED OFFICIAL: VP, HUMAN RESOURCES
NAME TYPED: ALAN ACCURATE
SIGNATURE:

TITLE OF CONTACT PERSON: EEO COMPLIANCE OFFICER
TELEPHONE NUMBER: 630-555-1212

DATE:

...

Chapter 5 Employment Equity Reporting - Canada

5

In this chapter you learn how to produce a file of data that you can transfer to a PC to generate Employment Equity reports in compliance with Canada's Employment Equity Act (EEA). You use the *Employment Equity (CAN)* function on Infinium HR to create and convert a file of employee information on the AS/400 or iSeries. You use a file transfer utility to download the file from the AS/400 or iSeries to your personal computer.

After you create the file on your personal computer, you use the Employment Equity program to generate the required reports. Infinium does not provide the personal computer reporting programs. You must obtain this personal computer software package separately.

You transfer employee data that must be included on the Employment Equity reports to comply with Canada's Employment Equity Act. The information includes the employee's name, number, date of hire, termination date, status, sex, prior or current year's earnings, occupational group, NOC codes, whether the employee is a visible minority or aboriginal, has a disability and so on.

The chapter consists of the following topics:

Topic	Page
Overview of Employment Equity Reporting	5-3
Setting Up Code Values for Employment Equity Reporting	5-4
Entering Location Addresses	5-15
Creating the Employment Equity File	5-19
Converting the Employment Equity File	5-24
Using PC Programs for EEA Reporting	5-28

Objectives

At the conclusion of this chapter you should be able to accomplish the following:

- Define code values used in Employment Equity Act (EEA) reporting
- Set up location addresses
- Update employee records for EEA reporting
- Generate files of EEA data on the AS/400 or iSeries
- Convert the EEA files to an AS/400 or iSeries PC file

Overview of Employment Equity Reporting

The *Employment Equity (CAN)* function provides you with the ability to extract employee information from Infinium HR on the AS/400 or iSeries and transfer it to the Employment Equity program installed on your PC. You use the information transferred to the PC with the reporting program to satisfy the Employment Equity Act reporting requirements.

Caution: Infinium strongly recommends that you use the *Employment Equity (CAN)* function as close to January 1 as possible each year. The system captures current employee information along with each employee's prior year gross earnings. That is, the system captures a "snapshot" of the information as it exists the day you use the *Employment Equity (CAN)* function.

This means that any employee information affecting the Employment Equity report that you change between January 1 and the date you use the *Employment Equity (CAN)* function will be incorrect on the report. You will have to modify the employee's information in the PC file to accurately reflect the employee's information as of January 1.

For further information about Employment Equity Act reporting or to obtain the personal computer reporting program, contact Human Resources Development Canada.

Setting Up Code Values for Employment Equity Reporting

The system includes values from the code types listed below in the employment equity file. You must set up the values and assign them to employees before you extract employment equity data from Infinium HR.

The term “standard values” means that the values you define must exactly match those mandated by the Canadian federal government for EEA reporting. The standard values and related employee fields are described in detail below.

The system uses this Code Type:		To identify:	Standard Values Required?
CNT	County	The Census Metropolitan Area (CMA) location of each employee	Yes
EEO	Equal Employment Opportunity Category	The EEA employment category of each employee	Yes
ETH	Ethnic Identification	Employees to include in the Visible Minority and Aboriginal categories	Yes
HDC	Handicap Code	Disabled employees	No
NOC	National Occupation Classification	Each employee’s specific occupation within an EEA category	Yes
SIC	Standard Industrial Classification	The SIC associated with each employee’s organization	Yes
STA	Personnel State/Province	The residence province of each employee	Yes

The system uses this Code Type:		To identify:	Standard Values Required?
STS	Status Code	The work status of each employee (full time, part time, temporary, other or casual)	User must define values beginning with F, P, T, O or C
STP	Payroll State/Province	The work province of each employee	Yes

With the exception of the **SIC** code value, you assign employees a value from each of the tables described above using fields in the employees' basic data record or personnel data record. You enter the SIC code value in your location address records.

Defining Values for Code Type CNT

One of the categories of information on the Employment Equity report is Census Metropolitan Area or CMA. The system uses the values you define for code type **CNT**, County, as the CMA locations. You type a value from the **CNT** code type in the *County* field on the first screen of each employee's basic data record.

The standard values you must define to identify each CMA are described in the table below. Set up the values you need to assign employees in your organization to the correct Census Metropolitan Area.

CMA Code (CNT Code Value)	Description	Used in which PC reporting program?
01	Calgary	Employment Equity Reporting
02	Edmonton	
03	Halifax	
04	Montreal	
05	Regina	

CMA Code (CNT Code Value)	Description	Used in which PC reporting program?
06	Toronto	
07	Vancouver	
08	Winnipeg	

Defining Values for Code Type EEO

The system uses the values in the *EEO Cat* and *Occ Grp* fields in each employee's basic data record to place the employee into the correct employment categories for employment equity reporting. The values you define for the **EEO** and **NOC** code types must correspond to the categories established by the Canadian government. Each EEO category has many national occupational groups associated with it. National occupational groups are discussed in detail in the next section.

You can use one of two methods to assign the appropriate **EEO** code value to employees:

- If you type **0** or **1** in the *EEO Unit Control* field on the employer control, you assign an EEO code value to each job control that you define. When you set up positions, you associate each position with the appropriate job.
- If you type **2** in the *EEO Unit Control* field on the employer control, you assign an EEO code value to each position control that you define.

In either case, when you assign an employee to a position, the *EEO Cat* field in the employee's basic data record is automatically updated with the EEO code value associated with the employee's job or position. See the *Infinium HR Guide to Controls* for details on how to define job and position controls. See the "Generating EEO Unit Reports" chapter in this guide for further information about setting up and using EEO units.

The Canadian government has established 15 employment categories for the Employment Equity report; you must define corresponding code values for code type **EEO** as shown in the table below.

Standard Values for Code Type EEO For Canadian Employment Equity Reporting

Code 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

Defining Values for Code Type ETH

You assign a value from code type **ETH** to each employee in the *Ethnic ID* field in the employee's basic data record. The system uses this value to determine if the employee should be included in the Visible Minority or Aboriginal categories on Employment Equity reports.

The values you define for code type **ETH** must match those shown in the table below. The table below also illustrates the relationship between the ethnic code values you use in Infinium HR and whether the employee is

categorized as a “Visible Minority” or “Aboriginal” on Employment Equity reports.

Standard Values for Code Type ETH for Canadian EEA Reporting

Value	Description	Visible Minority?	Aboriginal?
0	Caucasian		
1	Black	Yes	
2	Asian/Arab/Pacific Islander/Indo-Pakistani	Yes	
3	Indian		Yes
4	Hispanic	Yes	
5	Inuit		Yes
6	Metis		Yes

Defining Values for Code Type HDC

The system uses the code value you enter into the *Handicap Code* field on the employee personnel data record for employment equity reporting. The report shows any employee who is assigned a handicap code as disabled, regardless of the code value. You can define any code values that are helpful to you in identifying disabled employees.

Defining Values for Code Type NOC

The system uses values defined for code type **NOC**, National Occupational Classification, to sort employees within each EEO category for employment equity reporting. You type a value in the *Occ Grp* field in each employee’s basic data record. The system uses values from the *EEO Cat* and *Occ Grp* fields in each employee’s basic data record to produce Employment Equity reports.

The Canadian government has established a lengthy list of standard values for code type **NOC**. You can set up the appropriate codes for your organization using the *Update Employer Codes* function.

Each of the EEO categories includes specific occupations described by a National Occupation Code. For EEO and occupational information to appear correctly on your Employment Equity reports, you must use the correct combination of EEO category and National Occupation Code as defined by the Canadian government. In other words, the National Occupation Code you assign to an employee must be one that is associated with the employee's EEO Category. Refer to the information provided by Human Resources Development Canada for additional details.

The following example associates three National Occupation Code values with EEO category 1.

EEO Category Value	EEO Category Description	National Occupational Group Description	OCC (NOC) Value
		Legislators	0011
1	Senior Managers	Senior Government Managers and Officials	0012
		Senior Managers - Financial, Communication Carriers and Other Business Services	0013

Defining Values for Code Type SIC

The system uses the code value you enter into the *SIC Code* field in the Update Location Address screen to determine the SIC code for each employee. You follow these steps to set up SIC codes for Employment Equity reporting:

- 1 Set up code values for code type **LOC**, Personnel Location.
- 2 Set up a location address for each **LOC** code value applicable to EEA reporting and assign the appropriate **SIC** code value to each location.
- 3 Assign a location code value to each of your positions.
- 4 Assign a position to each employee using the hire, transfer, promotion, demotion or rehire transactions in the *Enter PE Actions* function. The system defaults the location code value from the position into each employee's basic data record.

When you extract employment equity data, the system includes the SIC code associated with the location assigned to each employee's position in the file.

A partial list of SIC codes is displayed in the table below.

Partial List of Standard Values for Code Type SIC for Canadian Employment Equity Reporting

Code Value	Description
000	Federal Crowns
011	Livestock farms
021	Services including livestock
022	Services including agricultural crops
031	Fishing industries
032	Services incidental to fishing
061	Metal mines
062	Non-metal mines
063	Coal mines
071	Crude petroleum and natural gas

Defining Values for Code Types STA and STP

You define standard code values for code types **STA** (Personnel State/Province) for employment equity reporting and **STP** (Payroll State/Province) for payroll processing. The standard provincial code values are shown in the table below.

You type the value representing the province in which the employee resides in the *State/Province* field in each employee's basic data record; this field uses values defined for code type **STA**. For employment equity reporting, the system converts the **STA** provincial code value associated with each employee into a numeric value, which appears on the report. The provincial codes you should use and the corresponding Employment Equity report numeric values are described in the table below.

Province	STA Value	Report Code
Alberta	AB	18

Province	STA Value	Report Code
British Columbia	BC	15
Foreign	ZZ	98
Manitoba	MB	14
New Brunswick	NB	13
Newfoundland and Labrador	NL	19
Nova Scotia	NS	12
Northwest Territories	NT	21
Nunavut	NU	22
Ontario	ON	10
Prince Edward Island	PE	16
Quebec	QC	11
Saskatchewan	SK	17
Yukon	YT	20

Defining Values for Code Type STS

The employee status codes you must use and the corresponding Employment Equity report numeric values are described in the table below.

List of Standard Values for Code Type STS for Canadian Employment Equity Reporting

STS Value	Report Code	Description
F	01	Full-time
P	02	Part-time
T	03	Temporary

List of Standard Values for Code Type STS for Canadian Employment Equity Reporting

STS Value	Report Code	Description
O	04	Other
C	05	Casual

The system uses the first character of the values you define for code type **STS**, status, to determine the employee's status on the Employment Equity report. You type a value in the *Status* field in each employee's basic data record.

The system categorizes as full-time those employees whose *Status* code value begins with **F**. Employees whose *Status* value begins with **P** are categorized as part-time, those whose *Status* value begins with **T** as temporary, those whose *Status* value begins with **O** as other, and those whose *Status* value begins with **C** as casual. In addition, the system categorizes as full-time any employee whose *Status* value begins with a letter or number other than **P**, **T**, **O** or **C**.

For example, you define the value **F40** to identify a full time employee working 40 hours per pay period and update the *Status* field in an employee's basic data record with this value. The system identifies this employee as full-time on the Employment Equity report.

When you terminate an employee whose *Status* is temporary (status code values beginning with **T**), the report shows the termination date under the Employment Dates Completed column. When you terminate an employee whose *Status* is full-time (status code values beginning with **F**) or part-time (status code values beginning with **P**), the report shows the termination date under the Employment Dates Terminated column.

If you use status code **T** or **C** to identify the status of an employee, the Employment Equity Computerized Reporting System (EECRS) program requires that a termination or completion date is associated with the employee's record. To accommodate this requirement, create a termination (TE) transaction with the anticipated end date of the employee's contract. If no TE transaction is created, the system prints the warning message ****Enter TE Transaction for T or C**** on the E.E. File Creation Review Listing report.

Mass Changing Code Values

You must redefine your employment equity code values according to the standards described above and update the fields in each employee's basic data record with one of the new values if:

- Your previously defined values for code types used in employment equity reporting differ from those described above, and
- You want to use the standard Infinium HR employment equity programs

You can type the new value in each employee's record manually or you can use the *Mass Change Employer Codes* function to have the system update the values programmatically based on the old and new values you type on the *Mass Change Employer Codes* selection screen. The system uses batch processing to automatically update the fields listed below for large groups of employees at once:

- Ethnic Identification (ETH)
- Handicap (HDC)
- Location (LOC)
- Personnel State/Province (STA)
- Status (STS)

Refer to the *Infinium HR Guide to Controls* for details on mass changing code values.

If you want to use values for code types that are different from those described above but also want to use the *Employment Equity (CAN)* function, a programmer at your site must customize the Infinium HR program used by the *Create E.E. PC File & Review* function (PEGEE010) to correctly interpret and replace your values with the standard values used in employment equity reporting.

Verifying Values in Employee Records

After you verify that the values you defined for the code types used in employment equity reporting correspond with the standard required values described in the preceding section, you should check the code-related fields in each employee's basic data and personnel data records to ensure their accuracy. You can also verify other key information about the employee that is included in the employment equity file as listed in the following table.

You can access the employee basic data record using Infinium HR or Infinium PY. Information that is accessible through only Infinium HR or only Infinium PY is noted in the following table:

Field Name	Related Code Type	Location in Employee Record
<i>Last Name, First Name</i>		Basic Data screen 1
<i>Date of Hire</i>		
<i>Sex</i>		
<i>State/Province</i>	STA	
<i>County</i>	CNT	
<i>Location</i>	LOC	
<i>EEO Category</i>	EEO	Basic Data screen 2
<i>Occ Grp</i>	NOC	
<i>Status</i>	STS	
<i>Ethnic ID</i>	ETH	
<i>Termination Date</i>		Basic Data screen 5
<i>Handicap Code</i>	HDC	Personnel Data screen 1 in Infinium HR only
<i>YTD Gross Pay or PYR Gross Pay</i>		Payroll Totals screen in Infinium PY only
<i>Promotion Date</i>		Promotion transaction(s) in personnel action history in Infinium HR only

Entering Location Addresses

You enter an address and the Standard Industrial Classification (SIC) code for each of your work locations using the *Update EEO/EEA Location Address* function. The system includes a SIC code in the employment equity file for each employee based on the employee's assigned work location.

To set up location information, you must complete the following steps:

- Define code values to represent your locations using code type **LOC** through the *Update Employer Codes* function.
- Assign a location code value to each position control using the *Update Position Data* function. If the value in the *Posit File Used?* field on your employer control is **1**, when you press Enter on the Update Organization screen after updating the value in the *Location Code* field on a position control, the system automatically updates the value in the *Location* field in the basic data records of all employees assigned to the position.
- Enter the name, address and SIC code for each location using the *Update EEO/EEA Location Address* function.

Refer to the *Infinium Human Resources Guide to Controls* for details on how to set up code values and position controls.

Follow these steps to enter SIC codes for your locations:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update EEO/EEA Location Address* [UPDEEOLA]. The system displays the screen shown in Figure 5-1.
-

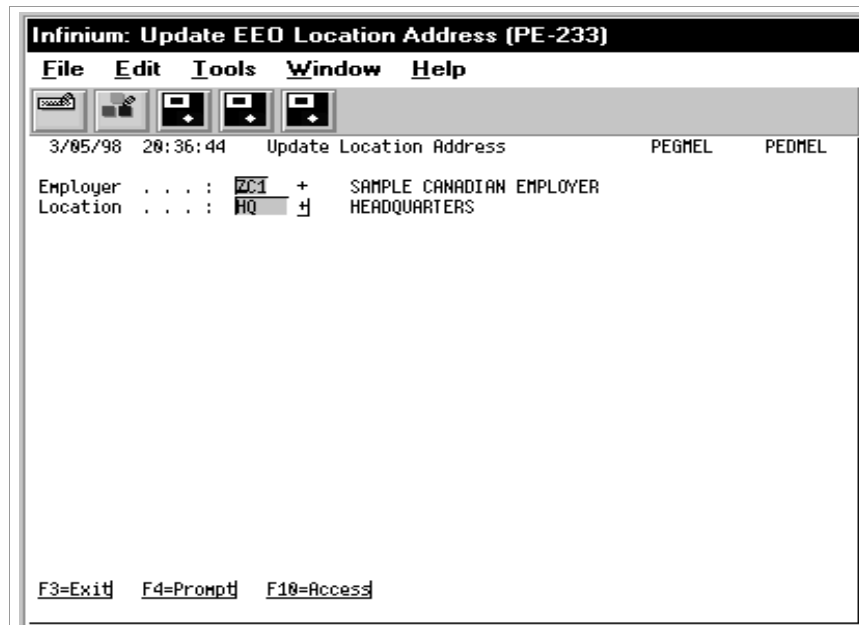


Figure 5-1: Update Location Address prompt screen

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

Employer

Type the value that represents your employer.

Location

Type the code value that represents an EEA location. You define values for this field using code type **LOC**.

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

```

6/08/00 13:34:13  Update Location Address          PEGMEL  PEDMEL

Employer . . . . : ZC1  SAMPLE CANADIAN EMPLOYER
Location. . . . : HQ   HEADQUARTERS

Address . . . . . : 2010 MAIN STREET
Address Line 2 : _____
City. . . . . : MISSISSAUGA State/Prov . . . . : ON
Zip . . . . . : 00000 -or- Other Postal Code: _____
County. . . . . : CANADA

Unit/Division Location/Plant Code: _____

NAICS Code. . . . : _____ -or- SIC Code . . . . : 7770 +
Unit Code . . . . : _____
Establishment
Activity. . . . . : MANAGEMENT CONSULTING SERVICES
                    _____

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

Figure 5-2: Update Location Address screen

6 Use the following information to complete the fields on this screen:

Address, Address Line 2, City, State/Prov, Other Postal Code

Type the address information for the specified location.

Unit/Division Location/Plant Code

Leave this field blank.

Unit Code

Leave this field blank. It is used only for U.S. EEO reporting.

NAICS Code

Leave this field blank. It is used only for U.S. EEO reporting.

SIC Code

Type the standard industrial classification code value assigned to the specified location. You define values for this field using code type **SIC**.

Establishment Activity

Type a brief description of the location’s business activities.

- 7** Press Enter. The system displays the Update Location Address prompt screen.
- 8** Enter address information for another location or press F3 to return to the Infinium HR main menu.

Creating the Employment Equity File

After you have set up the required code values and updated employee records in Infinium HR, you take these steps to generate Employment Equity reports for your organization:

- 1 Use the *Create E.E. PC File & Review* function to create an AS/400 or iSeries file of employment equity data based on information in Infinium HR.
- 2 Make any necessary corrections to the data in the employment equity file.
- 3 Run the *Convert to AS/400 or iSeries PC File* option to convert the AS/400 or iSeries file to an AS/400 or iSeries PC file.
- 4 Transfer the AS/400 or iSeries PC file to a personal computer on which you have installed the Employment Equity Computerized Reporting System (EECRS) program.
- 5 Use the EECRS software to generate Employment Equity reports.

Generating the Employment Equity File

You use the *Create E.E. PC File & Review* to generate Employment Equity data files on the AS/400 or iSeries. Follow the steps below to create this file.

- 1 From the Infinium HR main menu, select *EEOC/ Affirmative Action/EEA*.
 - 2 Select *Employment Equity (CAN)*.
 - 3 Select *Create E.E. PC File & Review [CANEEA]*. The system displays the screen shown in Figure 5-3.
-

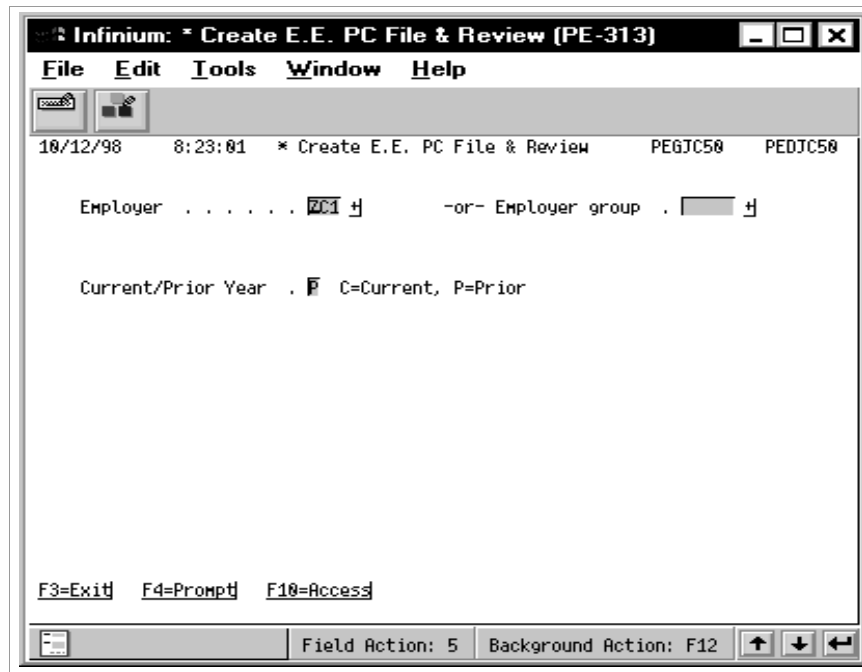


Figure 5-3: Create E.E. PC File & Review screen

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

Employer

Type the code that represents the employer for which you want to create the employment equity information file. Press F4 to display a list of valid employer codes.

You must complete either this field or the *Employer group* field.

Employer group

Type the code that represents the group of employers for which you want to create the employment equity information file. Press F4 to display a list of valid employer groups. You define values for this field using code type **ERG**. See the *Infinium Human Resources Guide to Controls* for details on defining employer groups.

You must complete either this field or the *Employer* field.

Current/Prior Year

Indicate whether the system should use current year or prior year earnings to select employees for inclusion in the employment equity file. The system also uses this field to determine whether to include current year or prior year salary information in the employment equity file.

The system uses values in either the *YTD Gross Pay* or *PYR Gross Pay* fields on the Payroll Totals screen in Infinium Payroll in conjunction with this field. You can use the *Display Employee YTD Totals* or the *Correct Employee YTD Totals* functions to review the gross pay fields.

Valid values for this field are:

- C** Include in the file only those employees who have earnings in the current calendar year.
- P** Include in the file only those employees who have earnings in the previous calendar year.

5 When you press Enter, the system displays the following message:

Building submission request...

The system uses batch processing to create the employment equity file and generates an audit report showing the employee information included in the file.

6 From the Infinium HR main menu, access the Work with Submitted Jobs screen, the Work with All Spooled files screen or the Work with Printer Output screen to view or print the audit report.

Correcting Employment Equity Information

Review the employee information on the audit report the system generates when you execute the *Create E.E. PC File & Review* function. Depending upon the accuracy of the information, do one of the following:

- If all of the employee information is correct, proceed to the “Confirming Directory Entries” section.
 - If the report has incorrect information on it, you can use one of three methods to correct the information in the employment equity file:
 - Update the information on the appropriate screen in Infinium HR or Infinium PY and repeat steps 1 through 6 of this section to recreate the employment equity file.
 - Use a file utility to directly update the employment equity file (PEPEEWK) and then convert and transfer the file to your personal computer. Note that the information you transfer to your personal computer will no longer match the data in Infinium HR.
 - Transfer the employment equity file to your personal computer and use the EECRS program to make corrections.
-

If you elect to update the employee information in Infinium HR screens, use the following table to locate the information. The first column of the table identifies the heading under which data appears on the audit report resulting from the *Create E.E. PC File & Review* function.

To correct the data under this EEA

Audit Report Column Heading	Go to this field	On this screen	In this Infinium Function
Employee			Run the <i>Change Employee Number</i> function (Infinium HR or PY)
Employee Name	<i>Last Name, First Name</i>	Screen 1	<i>Update Basic Data</i> (Infinium HR or PY)
Sex	<i>Sex</i>		
CMA	<i>County</i>		
PRV	<i>State/Province</i>		
EMPLOYMENT DATES: HIRED	<i>Date of Hire</i>		
OCC GRP (NOC Code)	<i>Occ Grp</i>	Screen 2	
VSB MIN (Visible Minority)	<i>Ethnic ID</i>	Screen 2	
ABG (Aboriginal)	<i>Ethnic ID</i>		
STS	<i>Status</i>		
EMPLOYMENT DATES: TERMNTD	<i>Termination Date</i>	Screen 5	
COMPLTD			
DIS (Disabled)	<i>Handicap Code</i>	Screen 1	<i>Update Personnel Data</i> (Infinium HR)

To correct the data under this EEA

Audit Report Column Heading	Go to this field	On this screen	In this Infinium Function
PROMOTION DATES: DATE 1 DATE 2 DATE 3 DATE 4	<i>PR Effective Date</i>	Personnel Actions Update screen for Promotion	<i>Enter Personnel Actions</i> (Infinium HR)
EEA GRP	<i>EEO Cat</i>	Update Job Controls or Update Organization	<i>Update Job Controls</i> (Infinium HR or PY) or <i>Update Position Data</i> (Infinium HR)
DIVSN (this column appears only on the Federal Contractor's Report)	<i>Level 1</i>	Update Organization	<i>Update Position Data</i> (Infinium HR)
SIC	<i>SIC Code</i>	Update Location Address	<i>Update EEO/EEA Location Address</i> (Infinium HR)
Salary	<i>PYR Gross Pay or YTD Gross Pay</i>	Payroll Totals	<i>Correct Employee YTD Totals</i> (Infinium PY)

Converting the Employment Equity File

After you create a file of employment equity data in Infinium HR, you must convert it and then transfer it to your personal computer to generate Employment Equity reports. You use the *Convert to AS/400 or iSeries PC File* function to convert the file from AS/400 or iSeries format to AS/400 or iSeries PC format. You then use a file transfer utility to transfer the file from the AS/400 or iSeries to your personal computer.

Before you can convert the file, you must complete the following tasks:

- Set up a directory entry on the AS/400 or iSeries for each user who runs the *Convert to AS/400 or iSeries PC File* function or imports data from the AS/400 or iSeries into the employment equity program on a personal computer
- Create an AS/400 or iSeries folder to contain the employment equity file after it is converted to PC format and before it is transferred to a personal computer

Information on each task is provided below.

Confirming Directory Entries

Before you can convert the employment equity file from AS/400 or iSeries format to AS/400 or iSeries PC format, or import the data into a personal computer program, you must ensure that you have a directory entry on the AS/400 or iSeries.

The technical member of your team can refer to information on the **WRKDIRE** command in the *IBM CL Command Reference Guide* for more details.

Creating an AS/400 or iSeries Folder

Before you can convert the employment equity file from AS/400 or iSeries format to AS/400 or iSeries PC format, you must designate or create an AS/400 or iSeries folder for the employment equity file. The system updates the folder with the converted employment equity files (Employee.txt,

Promo.txt, and Term.txt). You copy the files from this folder to your personal computer.

WARNING! You must create the AS/400 or iSeries folder for the interface between the AS/400 or iSeries and your personal computer to function correctly.

Follow the steps below to create an AS/400 or iSeries folder:

- 1 Sign onto the AS/400 or iSeries as the user **AM2000**.
- 2 Access the command line on the AS/400 or iSeries.
- 3 Type the following command:

CRTFLR FLR(XXXXX)

where **XXXXX** is the name of your AS/400 or iSeries folder.

- 4 Press Enter. The system creates the required AS/400 or iSeries folder.

Converting to a PC File

WARNING! The user who is executing the *Convert to AS/400 or iSeries PC File* function described below must have a directory entry on the AS/400 or iSeries. Otherwise, the system will halt. See the “Confirming Directory Entries” section for more information.

The following table describes the names of the employment equity files on the AS/400 or iSeries and their corresponding text file names on your personal computer after conversion.

Employment Equity File Names

AS/400 or iSeries	Personal Computer
PEPEEWK	Employee.txt
PEPEEWK1	Promo.txt
PEPEEWK2	Term.txt

Follow the steps below to convert the employment equity files to AS/400 or iSeries PC files that you can transfer to your personal computer for further processing.

- 1 From the Infinium HR main menu select *EEOC/ Affirmative Action/EEA*.
- 2 Select *Employment Equity (CAN)*.
- 3 Select *Convert to AS/400 or iSeries PC File [CANEEAPC]*. The system displays the screen shown in Figure 5-4.

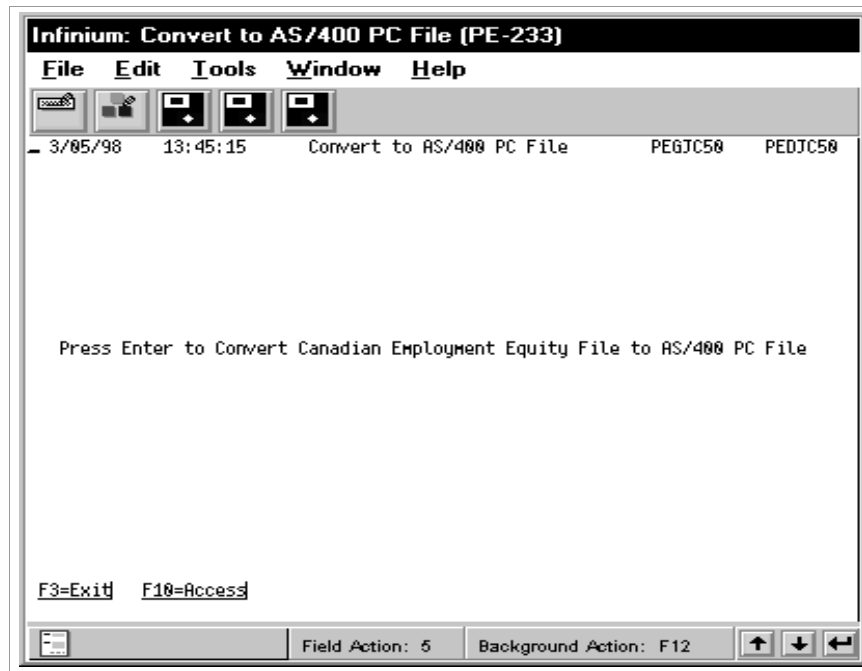


Figure 5-4: Convert to AS/400 or iSeries PC File screen

- 4 Use the following information to work with this screen:

This screen displays the following message:

Press Enter to Convert Canadian Employment Equity File to AS/400 or iSeries PC File

- 5 Take one of the following actions:
 - Press F3 if you do not want to convert the employment equity file to the AS/400 or iSeries personal computer format.
 - Press Enter to convert your employment equity file to an AS/400 or iSeries PC file.
- 6 The system uses batch processing to convert the file. After you press Enter, the system displays the following message:

Building submission request...

The system returns you to the Infinium HR main menu. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen to view the status of your job.

- 7 Move the three files to the directory where you installed the EECRS application.
 - 8 Convert the files into a database or text tab delimited format required by the EECRS application. To convert the files into a text tab delimited file, import the file into Microsoft[®] Excel and follow the guidelines provided with Microsoft[®] Excel.
 - 9 Save the changed file in the EECRS directory.
 - 10 Import the converted data into the EECRS application.
-

Using PC Programs for EEA Reporting

You can use a file transfer utility to transfer the employment equity AS/400 or iSeries PC file to the personal computer on which employment equity or federal contractor reporting software is installed.

After you download the employment equity information to your personal computer, you use the EECRS application to comply with the Employment Equity Act.

If necessary, you can use either of the PC programs to make changes to the data you have downloaded to your personal computer. To ensure that employee data in Infinium HR is consistent with the employee data on your personal computer, when you make changes to the PC file you should also update Infinium HR with the same changes.

If you use Microsoft[®] Excel to create a text tab delimited format, use the tables below for a description of the required EECRS formats.

Employee File (Employee.txt)

Field Name	Type	Width	Comments	Null Values
employee_number	Character	9	left justify, unique	not null
cma_code	Character	2	from valid list	allow null
province_code	Character	2	from valid list	not null
noc_code	Character	4	from valid list	not null
sic_code	Character	5	from valid list, left justify	not null
employee_type_code	Character	2	from valid list	not null
employee_type_comment	Character	50	left justify, only for employee type Other	allow null
gender	Character	1	M/F	not null
last_name	Character	20	left justify	allow null
given_name	Character	15	left justify	allow null
salary	Numeric	6	unsigned, whole dollars	not null
aboriginal	Character	1	Y/N	not null

Field Name	Type	Width	Comments	Null Values
visible_minority	Character	1	Y/N	not null
disabled	Character	1	Y/N	not null
hire_date	Character	10	YYYY/MM/DD format	allow null/ not null if permanent full-time or part-time
termination_date	Character	10	YYYY/MM/DD format	allow null

Promotions File (Promo.txt)

Field Name	Type	Width	Comments	Null Values
employee_number	Character	9	left justify, must be in employee file	not null
promotion_number	Integer		chronological order	not null
promotion_date	Character	10	YYYY/MM/DD format	not null

Temporary Terms File (Term.txt) for temporary employees only

Field Name	Type	Width	Comments	Null Values
employee_number	Character	9	left justify, must be in employee file, must be a temporary employee	not null
term_number	Integer		chronological order	not null
start_date	Character	10	YYYY/MM/DD format	not null
end-date	Character	10	YYYY/MM/DD format	not null
termination_date	Character	10	YYYY/MM/DD format	allow null

Notes

Chapter 6 Producing VETS-4212 Reports

6

In this chapter you learn how to generate VETS-4212 reports for US employers.

The chapter consists of the following topics:

Topic	Page
Objectives	6-2
Overview of VETS-4212 Reporting	6-3
Defining Employee Military Information	6-5
Generating the Veterans List	6-9
Generating the Federal Contractor Veteran's VETS-4212 Employment Report	6-11
Generating the VETS-4212 Work File	6-19

Objectives

At the conclusion of this chapter you should be able to accomplish the following:

- Generate the veterans list
 - Generate the VETS-4212 Federal Contractor Report on Veteran's Employment
 - List the VETS-4212 work file
-

Overview of VETS-4212 Reporting

You use the *Update Personnel Data* function to enter military information about an employee and associate the employee with the VETS-4212 veteran category.

You use functions within the *Miscellaneous Reporting* menu option within the *Administrative Reporting* menu option to generate reports that US employers can use to make required submissions. The functions that you use to generate the reports are listed below.

- *List Veterans*
- *List Vet VETS-4212 Report*
- *List Vet VETS-4212 Work File*

List Veterans

This report lists military veterans who are employed or have been employed by your organization. You can select five employer code types whose code values will be included in the listing. You can generate this report for one employer or all employers and one veteran code value or all veteran code values. You can specify that terminated employees should be included on the report.

List VETS-4212 Report

This report lists the number of employees by job category and veteran status. The previous veteran status categories were:

- Disabled veteran
 - Other protected veteran
 - Armed Forces Service Medal veteran
 - Disabled veteran and other protected veteran
 - Disabled veteran and Armed Forces Service Medal veteran
 - Armed Forces Service Medal veteran and other protected veteran
-

- Disabled veteran, other protected veteran, and Armed Forces Service Medal veteran

For the VETS-4212, the previous categories are summarized into one Protected Veteran category.

The report includes two columns that reflect your new hires in the 12 months that precede your report date; the new hire total column includes both veteran and non-veteran new hires.

When you use the *List VETS-4212 Report* function, you can specify that you want the system to create a magnetic media work file. When you create the work file, the system creates an IFS text file (VETS-4212.csv) with the report format. You can specify whether to clear the work file or append the new record to the existing records in the work file.

Each year, you must submit a test electronic file to the Veterans' Employment and Training Service for approval before final submission.

If you do not clear the existing work file, the system displays a message informing you that a work file exists. You can override the message, and the system appends the new work file to the existing work file.

List VETS-4212 Work File

Use the *List VETS-4212 Work File* function to list the header information in the work file. The information includes the parent company and hiring location.

Defining Employee Military Information

Use the *Update Personnel Data* function to enter military information about an employee and associate the employee with the VETS-4212 veteran category.

Complete the steps below to define military information about an employee.

- 1 From the Infinium HR main menu select *Employee Data*.
 - 2 Select *Update Employee Data*.
 - 3 Select *Update Personnel Data [UEP]*.
 - 4 Press Enter. The system displays the Employee Update prompt screen.
 - 5 Specify the employer and employee.
 - 6 Press Enter. The system displays the first Update Employee Personnel Data screen.
 - 7 Complete this screen as you normally would and press Enter. The system displays a screen similar to screen shown below.
-

```

6/09/15 15:34:07 Update Employee Personnel Data PEGMMS PEDMMS
Page 2 of 3
Employer . . . : ZUS SAMPLE US COMPANY
Employee . . . : 80005 ALAN D ACCURATE

Physician Information
-----
Physician . . . . DR. HARVEY GRANT
Physicians Tel# . _____

Military Information
-----
Veterans Code . . RESER + Vet 100 Category. 3 +
Military Branch . ARMY + Vet 4212 Category _ +
Military Occ. . . ACCOUNTANT Discharge Date . 8011988
Discharge . . . . HON +

Health and Disability Information
-----
Disability? . . . - Disability Begin Date _____
Smoker? . . . . - Disability End Date _____

F3=Exit F4=Prompt F8=I-9 F9=Contacts F10=Access F24=More keys

```

Figure 6-1: Update Employee Personnel Data

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

Vet 100 Category

Note: VET-100 reporting was discontinued in 2015.

For US federal contractor employers, specify a Vets-100 report category code value (Veterans' Employment and Training Service). The code values are associated with the VET code type. Columns on the report that correspond to each category are listed below. Valid values are:

blank or 0	Non-veteran
1	Special disabled veteran (L)
2	Vietnam-era veteran (M)
3	Special disabled veteran and Vietnam-era veteran (L, M)
4	Other protected veteran (N)
5	Special disabled veteran and other protected veteran (L, N)
6	Vietnam-era veteran and other protected veteran (M, N)

7 Special disabled veteran, Vietnam-era veterans, and other protected veteran (L, M, N)

Information about employees who are veterans and who are hired during the twelve months before the date in the *To Date* field is in one or more of columns P, Q, R, and S in addition to columns L, M, N, and O.

Information for employees hired during the 12 months before the date in the *To Date* field is in column T.

Vet 4212 Category

For US federal contractor employers, specify a VETS-4212 report category code (Veterans' Employment and Training Service). The code values are associated with the VTA code type.

Employers can continue to track veteran codes separately by specific category; however, all veterans are summarized into one set of counts for column A, Protected Veterans, on the VETS-4212 report.

Valid values are:

blank or 0	Non-veteran
1	Disabled veteran
2	Other protected veteran
3	Armed Forces Service Medal veteran
4	Disabled veteran and other protected veteran
5	Disabled veteran and Armed Forces Service Medal veteran
6	Armed Forces Service Medal veteran and other protected veteran
7	Disabled veteran, other protected veteran, and Armed Forces Service Medal veteran
8	Protected Veteran

Information about employees who are veterans and who are hired during the twelve months before the date in the *To Date* field is in column C in addition to column A. Information for all employees hired during the 12 months before the date in the *To Date* field are in column D.

The VETS-4212 category is stored in the PESURG field of personnel master file, PEPMS, in position 1.

- 9 Complete the other fields on this screen as you normally would and press Enter.
 - 10 Complete the third Update Employee Personnel Data screen and press Enter to return to the Employee Update prompt screen.
 - 11 Press F3 to exit to the main menu.
-

Generating the Veterans List

You generate the employee veteran report to provide a preview of the information that is on the Federal Contractor Employee Veteran report.

Follow the steps below to produce the Employee Veteran list.

- 1 From the Infinium HR main menu select *Administrative Reporting*.
- 2 Select *Miscellaneous Reporting*.
- 3 Select *List Veterans [VR]*. The system displays the screen shown in Figure 6-2.

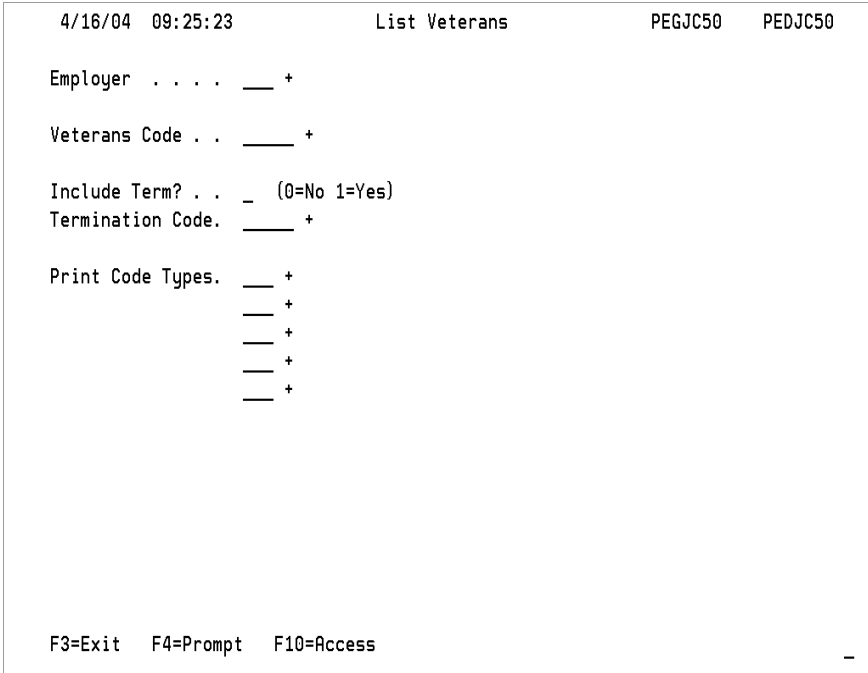


Figure 6-2: List Veterans screen

- 4 Use the information below to fill in the fields on this screen.

Employer

Specify the employer for whom you are generating veterans' information. Leave blank for all employers.

Veterans Code

Specify the value that represents the group of veterans for whom you are generating this report. Leave blank for all veterans.

Include Term?

Specify whether to include terminated employees on the report. Valid values are:

- 0** Do not include terminated employees.
- 1** Include terminated employees.

Termination Code

Specify the value that represents the group of terminated employees to include on this report. Leave blank for all terminated employees.

Print Code Types (up to five)

Specify the code type that identifies the group of employees to be included on the report.

- 5** Press Enter. The system generates the Federal Contractor Employee Veteran report.

Generating the Federal Contractor Veteran's VETS-4212 Employment Report

Use the *List VETS-4212 Report* function to generate the Federal Contractor Veteran Employment report.

Follow the steps below to produce the Federal Contractor Veteran Employment report.

- 1 From the Infinium HR main menu select *Administrative Reporting*.
- 2 Select *Miscellaneous Reporting*.
- 3 Select *List VETS-4212 Report [VET4212]*. The system displays the screen shown in Figure 6-3.

```

6/09/15 15:49:49          List VETS-4212 Report          PEGJC50  PEDJC50

Employer . . . . . ___ +          Company Number . . _____
Type of Rpt Org . _          Type of Form . . _____
Level 1 . . . . . _____ +    Level 2 . . . . . _____ +
Level 3 . . . . . _____ +    Level 4 . . . . . _____ +
From Date . . . . . _____    To Date . . . . . _____
Location . . . . . _____ +    Status Group . . _____ +
Unit Number . . . _____    Status Group Sel. _ (1->2)
NAICS Code . . . _____ +    DUNS Number . . . _____
Parent Co. Name . _____
Address . . . . . _____
Address 2 . . . . . _____
City . . . . . _____
State/Province . _
Postal Code . . . _____
County . . . . . _____
EIN Number (Ovr). _____

Max # Employees . _____
Min # Employees . _____

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

Figure 6-3: List VETS-4212 Report screen 1 of 2

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

Employer

Specify the employer for whom you are generating veterans' information.

Company Number

Type the company number. The number is assigned by the Department of Labor.

Type of Rpt Org

Type the value that represents the type of reporting organization. This information is on the report heading. Valid values are:

- P** Prime contractor
- S** Subcontractor
- B** Both prime contractor and subcontractor

Type of Form

Type the value that represents the type of form. This information is included in the report heading. Valid values are:

- S** Single establishment
- MHQ** Multiple establishment headquarters
- MHL** Multiple establishment hiring location

Infinium HR does not currently support form MSC (multiple establishment - state consolidated).

Level 1, Level 2, Level 3, Level 4

Type the code value that describes the level of the organization to be reported. Leave these fields blank if you specify a location in the *Location* field or you are reporting for one employer with only one location. You can complete either the *Level* fields or the *Location* field.

If you do not set up your levels to reflect location data, you may not want to use these fields for reporting purposes.

From Date

Type the earliest date for which to include information on this report. This date should represent the beginning date of a payroll period in the current year between July 1 and September 1. The report information includes active employees who are not terminated as of this date and terminated employees whose termination dates are after this date.

To Date

Type the latest date for which to include information on this report. This date represents the ending date of a payroll period in the current year between July 1 and September 1. The report information includes active employees whose hire dates are before this date and terminated employees whose hire dates are before this date and whose termination dates are after the date you enter here. The system includes as new hires those employees whose hire dates fall within the twelve-month period that ends with this date.

Location

Specify the value that represents the location for which you are generating this report. The system prints the name and address associated with this value in the hiring location section of the report header. If the value in this field does not reflect actual location information, you may not want to use this field.

Leave blank if you specify values in any of the *Level* fields or if you are reporting for one employer with only one location.

Use the *Update Employer Codes* function and the LOC code type to set up location code values. Use the *Update EEO/EEA Location Address* function to set up location addresses.

Status Group

Type a valid status report group code value. If you enter a value in this field, you must enter 1 or 2 in the *Status Group Sel* field.

You define code values for this field by using the STG code type. You can use the *Update Status Reporting Groups* option to assign status code values to a status group.

Unit Number

Type the unit number, if applicable. The number is assigned by the Department of Labor.

If you are running the report for the employer's headquarters location or for a company with a single location, the company number and unit number assigned by the Department of Labor may be the same.

Status Group Sel

Type the status group selection value that is associated with the value that you enter in the *Status Group* field. Valid values are:

- 1** Include employees who are associated with the value that you enter in the *Status Group* field.
- 2** Exclude employees who are associated with the value that you enter in the *Status Group* field.

NAICS Code

Specify the value that represents the appropriate North American Industrial Classification Code.

Use the *Update Employer Codes* function and the NAI code type to define NAICS code values.

DUNS Number

Type the Dun and Bradstreet Data Universal Numbering System (DUNS) number to print in the header of the report.

Parent Co. Name

Type the parent company name, or leave all parent company and address fields blank to print the employer's address data from the employer control on the report.

Address

Type the parent company street address, or leave all parent company address fields blank to print the employer's address data from the employer control on the report.

Address 2

Type the second line of the parent company street address, or leave all parent company address fields blank to print the employer's address data from the employer control on the report.

City

Type the parent company city, or leave all parent company address fields blank to print the employer's address data from the employer control on the report.

State/Province

Type the parent company state, or leave all parent company address fields blank to print the employer's address data from the employer control on the report.

Postal Code

Type the standard five- or ten-character ZIP code, or leave all parent company address fields blank to print the employer's address data from the employer control on the report.

County

Type the appropriate parent company county name.

EIN Number (Ovr)

Type the employer identification number (EIN) to print in the header of the report. Leave this field blank to use the EIN from the employer control.

Max # Employees

Specify the total maximum number of regular employees working during the time period covered by this report.

Min # Employees

Specify the total minimum number of regular employees working during the time period covered by this report.

5 Press Enter. The system displays the screen shown in Figure 6-4.

```

6/09/15  15:50:50          List VETS-4212 Report          PEGJC50  PEDJC50

Hiring Loc. No.  _____
Hiring Loc. Name _____
Address . . . . . _____
Address 2 . . . . . _____
City . . . . . _____
State/Province .  _
Postal Code . . .  _____
County . . . . . _____
Contact Name. . . _____
Contact Phone . . _____
Contact E-Mail. . _____

Magnetic Media Work File
-----
Create Magnetic Media Work File?  _ (0=No 1=Yes)
Purge Existing Data in Work File?  _ (0=No 1=Yes)

F3=Exit  F10=Access  F12=Previous  F21=Override
    
```

Figure 6-4: List VETS-4212 Report screen 2 of 2

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

Hiring Loc. No.

Type a number that identifies the hiring location for this report. This number can be any combination of up to 20 characters.

Hiring Loc. Name

If you type **MHL** (multiple establishment hiring location) in the *Type of Form* field, type the hiring location (unit) name. Leave all hiring location name and address fields blank to print the employer's name and address from the employer control on the VETS-4212 report.

If you are running a report for the employer's headquarters location or for a company with a single location, the parent company address and the hiring location address information may be the same.

Address and Address 2

Type the hiring location (unit) address in this field, or leave all hiring location address fields blank to print the employer's address data from the employer control on the report.

Your entry here is valid only if you enter **MHL** in the *Type of Form* field.

City

Type the hiring location (unit) city in this field, or leave all hiring location address fields blank to print the employer's address data from the employer control on the report.

Your entry here is valid only if you enter **MHL** in the *Type of Form* field.

State/Province

Type the hiring location (unit) state in this field, or leave all hiring location address fields blank to print the employer's address data from the employer control on the report.

Your entry here is valid only if you enter **MHL** in the *Type of Form* field.

Postal Code

Type the standard 5- or 10-character hiring location (unit) ZIP code in this field, or leave all hiring location address fields blank to print the employer's address data from the employer control on the report.

Your entry here is valid only if you enter **MHL** in the *Type of Form* field.

County

Type the appropriate hiring location (unit) county name in this field. Your entry is valid only if you enter **MHL** in the *Type of Form* field.

Contact Name

Type the name of the person in your organization to contact for the VETS-4212 report.

Contact Phone

Type the telephone number of the company contact.

Contact E-Mail

Type the e-mail address of the company contact.

Create Magnetic Media Work File?

Specify whether to create a magnetic media work file in addition to the printed report. Valid values are:

- 0** Print only a report.
- 1** Print a report and create a magnetic media work file.

If you type **1**, the system creates a physical file, PEPVT, and a fixed length ASCII text file, VETS-4212.csv, in the VET100A folder. You can save the file to the appropriate media for magnetic media reporting.

Purge Existing Data in Work File?

Specify whether to purge the existing data in the magnetic media work file before creating a new or updated work file. Valid values are:

- 0** Do not purge the existing data in the magnetic media work file. The system adds a new record to the existing work file.
- 1** Purge the existing data in the work file and add a new record.

- 7** If you specify **0** in the *Purge Existing Data in Work File?* field, the system displays a message informing you that if you proceed, new information will be added to the information already in the work file. Press F21 to override the message and generate the report and the magnetic media file.
-

- 8 Press Enter. The system generates the VETS-4212 report and, if specified, the magnetic media work file.

Generating the VETS-4212 Work File

You use the *List VETS-4212 Work File* function to generate the VETS-4212 work file.

Follow the steps below to generate the VETS-4212 work file.

- 1 From the Infinium HR main menu select *Administrative Reporting*.
- 2 Select *Miscellaneous Reporting*.
- 3 Select *List VETS-4212 Work File* [PEVTB100A2]. The system displays the screen shown below.

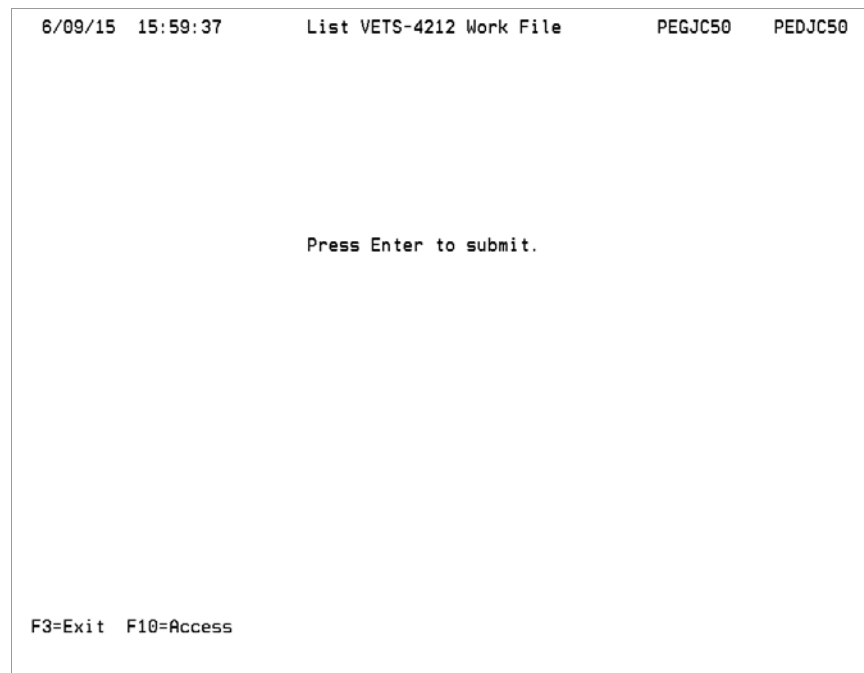


Figure 6-5: List VETS-4212 Work File screen

- 4 Press Enter. The system lists the header information for the VETS-4212 work file.

Electronic Filing of the VETS-4212 Report

Use the information below for electronic filing of the VETS-4212 report. See the *Infinium HR/PY Technical Guide* for more information about using text files on the integrated file system (IFS).

Follow the steps below to access the VETS-4212.csv file.

- 1 On your PC, use a standard PC function such as Windows Explorer and map a network drive to the VET100A folder that is located in the root folder of the IFS on the System i machine.
 - 2 Copy the VETS-4212.csv file from the VET100A folder on the System i machine to the drive that contains the media, such as a diskette or zip file, to use for electronic filing.
-