Infor Infinium HCM Human Resources Guide to Management Functions

Volume 2

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Chapter 7 Implementing Health Administration

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The *Health Administration* menu option in Infinium HR includes the record keeping and report writing that are required of US employers by OSHA (Occupational Safety and Health Act). You use the functions available through this menu option to print the reports that OSHA requires.

In addition to tracking information for industrial accidents and illness, you can use other functions in the *Health Administration* menu option to track a worker's medical exams and medical claims. You can use this information to facilitate a safer work place and to identify and analyze a worker's health problems.

The chapter consists of the following topics:

Objectives

After completing this chapter, you should be familiar with how to:

- Record a worker's occupational accident and illness incidents along with related costs and physician data
- Generate the OSHA 300 log and other related reports
- Record a worker's medical examination information
- Record a worker's medical claims information

Tracking Occupational Accidents and Illnesses

Follow these steps to implement the occupational accident and illness tracking functions within the *Health Administration* menu option:

1. Update employer codes.
2. Update health controls.
3. Update establishment controls.
4. Update accident/OSHA data.
5. Update physician's data.
6. Type cost transactions.
7. Generate OSHA reports.

Updating Employer Codes

Before you can use the options within the *Health Administration* function, you must define code values for certain employer code types.

For Accident/OSHA Reporting, the code types are:

Code Type	Description
AGN	Physical agent
ACC	Incident
BOD	Injured body part
CNT	County
CST	Cost transaction type
INJ	Injury or symptom
LOC	Incident location

Code Type	Description
NET	Non-employee type
OOC	OSHA occupation code
SGP	Safety group
SIC	Standard Industrial Classification
STA	State or province
SU1	Optional safety and health user-defined codes
SU2	Optional safety and health user-defined codes
SU3	Optional safety and health user-defined codes
SU4	Optional safety and health user-defined codes
WAS	Work assignment
WCC	Workers’ compensation

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 Update Employer Codes screen shown in Figure 7-1.

```
 6/20/02    16:12:10          Update Employer Codes          PRGMCD     PRDMCD

Employer  . . . . . . ZUS +      -or-   Employer group  . . . _____ +

Code type . . . . . . AGN +

Code value  . . . . . ASB ______  +









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

Figure 7-1: Update Employer Codes screen

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

Employer

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

Code type

Type the code type you want to use for health administration.

Code value

Type the code value associated with the health administration code type.

5 Press Enter. The system displays the Update Employer Codes description screen shown in Figure 7-2.

```
 6/20/02    16:12:48         Update Employer Codes         PRGMCD     PRDMCD

Employer  . . . . . : ZUS   SAMPLE US COMPANY

Code type   . . . . : AGN   PHYSICAL AGENT

Code value  . . . . : ASB

Description . . . . . ASBESTOS


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


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

Figure 7-2: Update Employer Codes description screen

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

Description

Type a description for the value you designate for the code type.

7 Press Enter.

8 Repeat steps 4 through 6 for each code type you are entering.

Updating Health Controls

You use the *Update Health Controls* function to specify the first incident log number the system should assign. You can also enter descriptions for up to four user-defined code types that you can use to enter information unique to your organization when you record a worker’s occupational injury or illness incident.

1 From the Infinium HR main menu select *Health Administration.*

2 Select *Update Health Data.*

3 Select *Update Health Controls* [USHC]. The system displays the Safety & Health Controls employer selection screen.

4 Specify the employer for whom to set up safety and health controls and press Enter. The system displays the Safety & Health Controls screen shown in Figure 7-3.

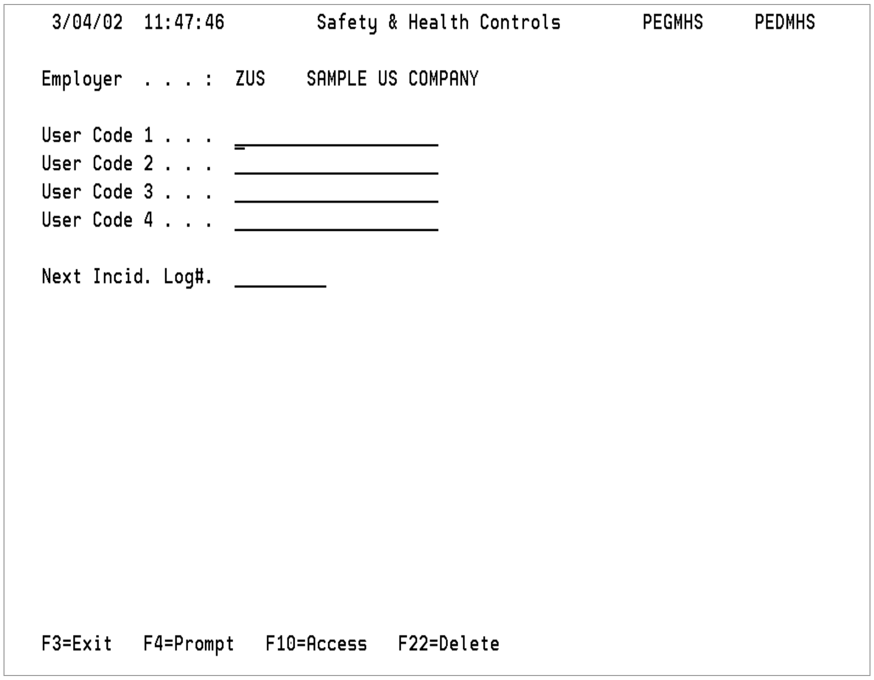


Figure 7-3: Safety & Health Controls screen

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

User Code 1 - 4

These fields are optional. You can type descriptions for one or more of the user-defined code types you plan to use in the *Update Accident OSHA/Data* function.

Next Incid. Log#

Indicate your next incident log number. You generally start the numbering system by entering **1**. You can also assign your own sequence of numbers. The system assigns a log number to each incident your record; it automatically increments the number by one each time you record a new incident.

Many companies preface the number in the *Next Incid. Log#* field with the year. For example, you can type **9744** to indicate that this is the 44th incident in the year 1997.

Updating Establishment Controls

Follow the steps below to update or create OSHA establishments. You must set up at least one establishment for your employer before you can use the *Update Accident/OSHA Data* function to record a worker's occupational injury or illness.

1 From the Infinium HR main menu select *Health Administration.*

2 Select *Update Health Data.*

3 Select *Update Establishment Controls* [PEOSI920]. The system displays the Update OSHA Establishments prompt screen.

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

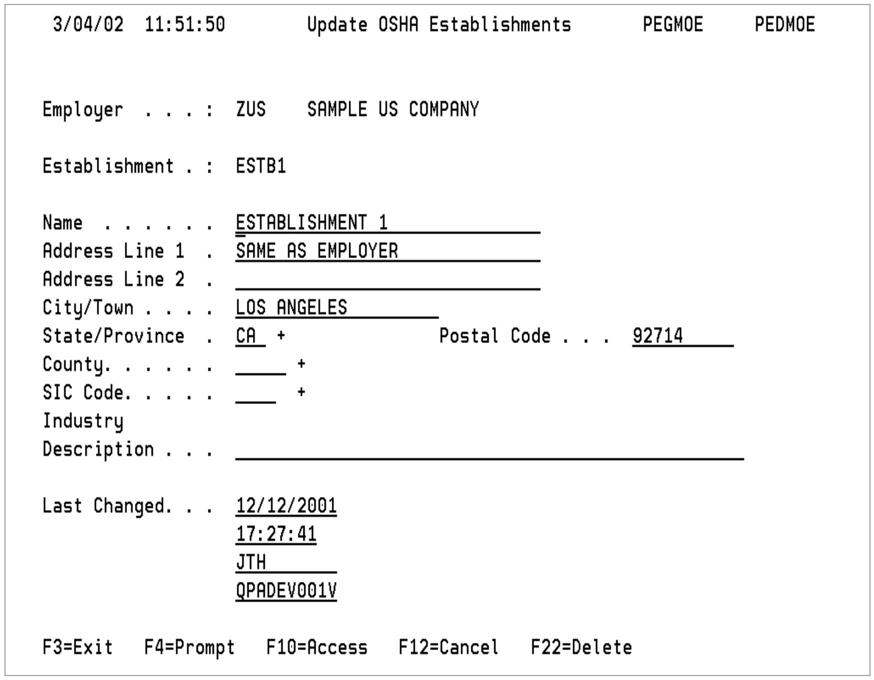
Employer

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

Establishment

Type a value of up to 5 characters to represent your OSHA establishment/employer.

5 Press Enter. The system displays the Update OSHA Establishments screen shown in Figure 7-4.



```
 3/04/02  11:51:50       Update OSHA Establishments       PEGMOE     PEDMOE


Employer  . . . :  ZUS    SAMPLE US COMPANY

Establishment . :  ESTB1

Name  . . . . . .  ESTABLISHMENT 1
Address Line 1  .  SAME AS EMPLOYER
Address Line 2  .
City/Town . . . .  LOS ANGELES
State/Province  .  CA  +             Postal Code . . .  92714
County. . . . . .       +
SIC Code. . . . .       +
Industry
Description . . .

Last Changed. . .  12/12/2001
                   17:27:41
                   JTH
                   QPADEV001V

F3=Exit   F4=Prompt   F10=Access   F12=Cancel   F22=Delete
```

Figure 7-4: Update OSHA Establishments screen

6 Type the name and address of the OSHA establishment/employer. In addition, use the information below to complete the fields on this screen.

County

Specify the value that represents the county in which the worker resides.

Use *Update Employer Codes* and code type **CNT** to set up county values.

SIC Code

Specify the value that represents the SIC (Standard Industrial Classification) code associated with this establishment. Infinium HR includes this information on the OSHA 300A summary of work-related injuries and illnesses.

Use *Update Employer Codes* and code type **SIC** to set up SIC code values.

Industry Description

Type a description of the industry with which this establishment is associated.

Infinium HR includes this information on the OSHA 300A summary of work-related injuries and illnesses.

7 Press Enter.

You can also use the *Display OSHA Establishments* and *List OSHA Establishment Addresses* functions to review information about your OSHA establishments.

Updating Accident/OSHA Data

OSHA requires U.S. employers to prepare and maintain records of every work-related death and every injury or illness that results in restricted work activity or job transfer, days away from work, or medical treatment beyond first aid.

For reporting injury and illness incidents, Infinium HR supports the OSHA 300, 300A and 301 logs.

Use the *Update Accident/OSHA Data* function to record and maintain information about each work-related incident resulting in injury or illness.

You can also use the *Display Accident/OSHA Data* function to review incident information. You can use the *List Incident Data* and *List Incident Summary* functions to print non-statutory reports of your incident information.

Consult with OSHA for current information about what injuries and illnesses to record and reporting regulations.

Follow the steps below to establish and update OSHA case records for a worker’s injuries and illnesses.

1. From the Infinium HR main menu select *Health Administration*.
2. Select *Update Health Data*.
3. Select *Update Accident/OSHA Data* [UAIL]. The system displays the Update Accident & Illness Data prompt screen shown in Figure 7-5.

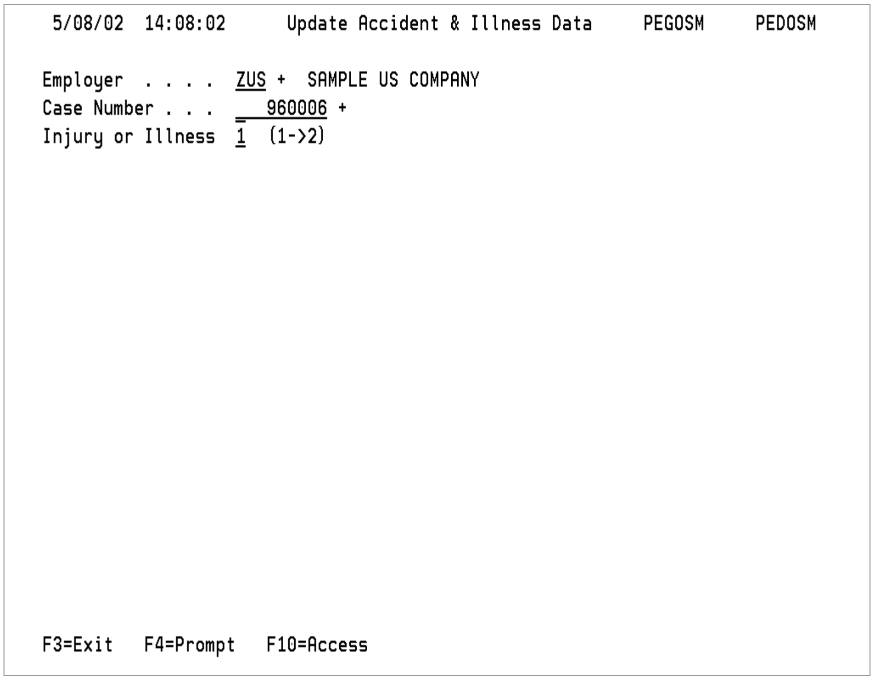


Figure 7-5: Update Accident & Illness Data prompt screen

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

Employer

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

Case Number

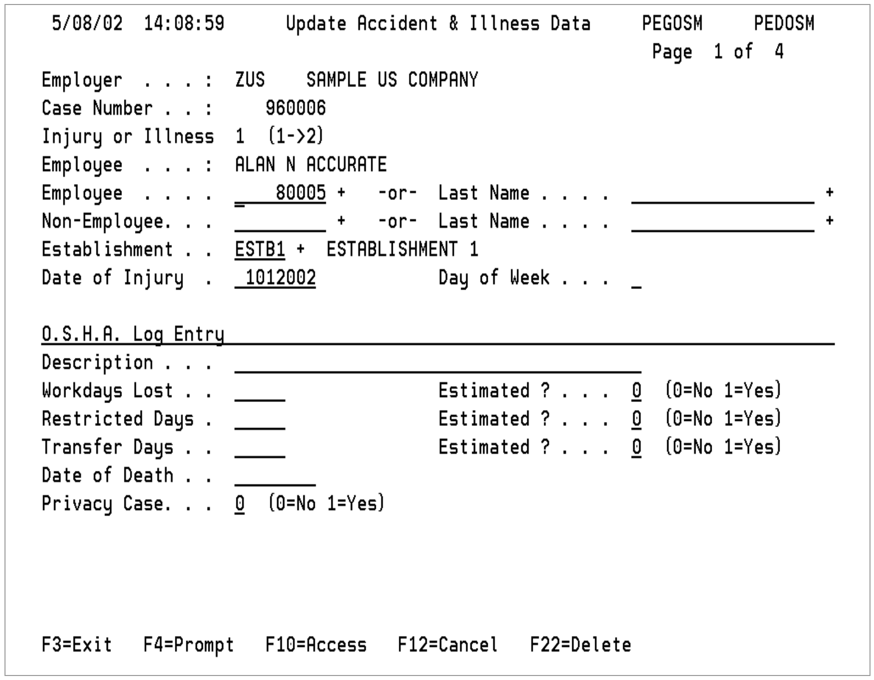
If you are creating a new incident record, leave this field blank for the system to assign the log number based on the value you specified in the *Update Health Controls* function. You can also manually specify a case number if the default number is not appropriate.

If you are updating an existing accident or illness, press F4 to select the case number.

Injury or Illness

Type **1** if this case is associated with a worker's injury. Type **2** if this case is associated with a worker's illness.

5 Press Enter. The system displays the Update Accident & Illness Data OSHA log entry screen shown in Figure 7-6.



```
 5/08/02  14:08:59      Update Accident & Illness Data     PEGOSM     PEDOSM
                                                            Page  1 of  4
Employer  . . . :  ZUS    SAMPLE US COMPANY
Case Number . . :     960006
Injury or Illness  1  (1->2)
Employee  . . . :  ALAN N ACCURATE
Employee  . . . .  _    80005 +   -or-  Last Name . . . .  __________________ +
Non-Employee. . .  _________ +   -or-  Last Name . . . .  __________________ +
Establishment . .  ESTB1 +  ESTABLISHMENT 1
Date of Injury  .   1012002            Day of Week . . .  _

O.S.H.A. Log Entry
Description . . .  ________________________________________
Workdays Lost . .  _____               Estimated ? . . .  0  (0=No 1=Yes)
Restricted Days .  _____               Estimated ? . . .  0  (0=No 1=Yes)
Transfer Days . .  _____               Estimated ? . . .  0  (0=No 1=Yes)
Date of Death . .  ________
Privacy Case. . .  0  (0=No 1=Yes)



F3=Exit   F4=Prompt   F10=Access   F12=Cancel   F22=Delete
```

Figure 7-6: Update Accident & Illness Data OSHA log entry screen

This screen allows you to establish and update records for both injuries and illness to report on the OSHA 300 log of work-related injuries and illnesses.

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

Employee

If you are creating a new incident record, specify the number of the employee for whom you want to create, update or delete an injury or illness incident record.

If you do not know the employee number, you can type the employee’s last name or a portion of it in *Last Name* and press F4 to display a list of names beginning with the letters you typed. After you select the employee from the display, the system completes both *Employee* and *Last Name*.

Last Name (Employee)

If you are creating a new incident record, specify the employee’s last name or a portion of it and press F4 to display a list of names beginning with the letters you specified. After you select the employee from the display, the system completes both *Employee* and *Last Name*.

Left-justify the information at the beginning of *Last Name*.

Non-Employee

If you are creating a new incident record, specify the number of the non-employee for whom you want to create an injury or illness incident record.

If you do not know the non-employee number, you can type the non-employee's last name or a portion of it in *Last Name* and press F4 to display a list of names beginning with the letters you typed. After you select the non-employee from the display, the system completes both *Non-Employee* and *Last Name*.

If the non-employee does not have an Infinium HR record, press F4 to display the Non-Employee Display screen. Then press F6 to display the Create Non-Employee Data screen from which you can create the non-employee record. Refer to the "Updating Non-Employee Data" section in this chapter for information about creating a non-employee record.

Last Name (Non-Employee)

If you are creating a new incident record, specify the non-employee's last name or a portion of it and press F4 to display a list of names beginning with the letters you specified. After you select the non-employee from the display, the system completes both *Non-Employee* and *Last Name*.

Left-justify the information at the beginning of *Last Name*.

Day of Week

Specify the day of the week when the incident occurred.

1	Monday
2	Tuesday
3	Wednesday
4	Thursday
5	Friday
6	Saturday
7	Sunday

Description

Type a description of the illness or injury to report on the OSHA 300 log of work-related injuries and illnesses. Include in the description any parts of the body affected and objects or substances that directly injured the worker or caused the illness.

If the related incident is not an OSHA case, leave *Description* blank. Otherwise, Infinium HR reports the incident on the OSHA 300 log of work-related injuries and illnesses.

Type of Illness

Type a value to identify the nature of the illness to report on the OSHA 300 log of work-related injuries and illnesses.

H	Hearing loss
P	Poisoning
R	Respiratory condition
S	Skin disorder
O	All other illnesses

The values below are valid for injuries recorded before January 1, 2002 only.

A	Disorder caused by a physical agent
D	Dust disease of the lung
T	Disorder caused by repeated trauma

Infinium HR displays this field only when you type **2** in *Illness or Injury* on the Update Accident & Illness Data prompt screen.

Term or Perm Tfr?

Specify **Yes** if the illness results in the worker's termination or permanent transfer. Otherwise, specify **No**.

Infinium HR displays this field only when you type **2** in *Illness or Injury* on the Update Accident & Illness Data prompt screen.

Infinium HR does not include this information in the OSHA 300 log of work-related injuries and illnesses.

Workdays Lost

Type the number of days the worker is unable to work as a result of the illness or injury. Begin counting with the day after the incident occurs.

If an injury or illness involves a combination of days away from work, days of restricted work activity and days transferred to another job, type the applicable total numbers of days in *Workdays Lost*, *Restricted Days* and *Transfer Days*. Do not exceed a combined total of 180 days.

Estimated? (Workdays Lost)

Specify **Yes** if the value you type in *Workdays Lost* is an estimated number of days. Otherwise, specify **No**.

Restricted Days

Type the number of days the worker is on restricted work activity as a result of the injury or illness. Begin counting with the day after the incident occurs.

If an injury or illness involves a combination of days away from work, days of restricted work activity and days transferred to another job, type the applicable total numbers of days in *Workdays Lost*, *Restricted Days* and *Transfer Days*. Do not exceed a combined total of 180 days.

Estimated? (Restricted Days)

Specify **Yes** if the value you type in *Restricted Days* is an estimated number of days. Otherwise, specify **No**.

Transfer Days

Type the number of days the worker is transferred to another job as a result of the injury or illness. Begin counting with the day after the incident occurs.

If an injury or illness involves a combination of days away from work, days of restricted work activity and days transferred to another job, type the applicable total numbers of days in *Workdays Lost*, *Restricted Days* and *Transfer Days*. Do not exceed a combined total of 180 days.

Estimated? (Transfer Days)

Specify **Yes** if the value you type in *Transfer Days* is an estimated number of days. Otherwise, specify **No**.

Date of Death

Specify the worker's date of death if death results from this incident.

If you type a value in the *Date of Death* field at the time the accident or illness record is first created, the system also updates the *Date of Death* field on the employee's personnel data record, PEPMS.

If you update the *Date of Death* field at a later time, as an update for an existing accident or illness record, the system does not update the employee's personnel data record. You must manually change the date of death to the employee's personnel record by using the *Update Personnel Data* function.

Privacy Case

Specify **Yes** if this incident meets the OSHA criteria for a privacy case or if the worker requests anonymity on the OSHA 300 log of work-related injuries and illnesses. Infinium HR replaces the worker's name with **Privacy Case** on the log.

Specify **No** if this incident is not a privacy case.

Use *List OSHA Privacy Cases* to print a list of workers associated with privacy cases.

Refer to the OSHA Web site for current regulatory requirements related to privacy cases.

7 Press Enter. The system displays the Update Accident & Illness Data incident report screen shown in Figure 7-7.

```
  5/08/02  14:11:52      Update Accident & Illness Data     PEGOSM     PEDOSM
                                                             Page  2 of  4
 Employer  . . . :  ZUS    SAMPLE US COMPANY
 Case Number . . :     960006
 Employee  . . . :      80005    ALAN N ACCURATE
 Establishment . :  ESTB1    ESTABLISHMENT 1
 Date of Incident:   1/01/2002
 Job Code  . . . .  100    +              Occ Code. . . . .  __________ +
 Incident Loc. . .  HQ     +
 Loc. Description.  HEADQUARTERS________________________
 Data for Incident Report
 Time of Incident.  _____0                Start of Workday.  _____
 Date Reported . .  ________              Returned to Work.  ________
 What was the employee doing just before the incident occurred?
 ____________________________________________________________
 ____________________________________________________________
 ____________________________________________________________
 What happened?
 ____________________________________________________________
 ____________________________________________________________
 ____________________________________________________________
 Physical Agent. .  _____ +
 F3=Exit   F4=Prompt   F10=Access   F12=Previous  F16=Update/Exit
```

Figure 7-7: Update Accident & Illness Data incident report screen

This screen allows you to establish and update additional information for the OSHA 300 log of work-related injuries and illnesses and for the OSHA 301 injury and illness incident report.

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

Job Code

For employees, specify a value to override the default job code value from the employee's basic data record. Override the default job code if the employee worked in a different job when the incident occurred.

Infinium HR includes the first 15 characters of the job title associated with the specified job code on the OSHA 300 log of work-related injuries and illnesses. To substitute a more descriptive job title on the OSHA 300 log, complete *Occ Code*.

For non-employees, you must type a valid value here or press F4 to select a job code from the list.

Occ Code

Specify the value that represents the job title of the worker involved in this incident.

If you complete this field, Infinium HR prints this occupation code in the job title column of the OSHA 300 log of work-related injuries and illnesses.

If you leave *Occ Code* blank, Infinium HR prints the first 15 characters of the description associated with the specified *Job Code* value in the job title column of the OSHA 300 log.

Use *Update Employer Codes* and code type **OOC** to set up occupation code values.

Incident Loc

Specify the value that represents the location where the incident resulting in the injury or illness occurred.

Use *Update Employer Codes* and code type **LOC** to set up incident location values.

Loc Description

Type a description of the location where the incident occurred.

If you press F4 to select a value for *Incident Loc*, the system enters a default location description associated with the selected location code value in the *Loc Description* field. You can override the default location description to provide a more detailed description of the incident location.

Infinium HR includes the description of the location where the event occurred on the OSHA 300 log of work-related injuries and illnesses.

Time of Incident

Type the time the injury occurred or the illness was first reported. Use a 24-hour clock format (military time), including seconds, to include the correct time of the incident on the OSHA 301 injury and illness incident report.

For example:

- **081500** for 8:15 a.m.
- **143000** for 2:30 p.m.
- **230000** for 11:00 p.m.

Start of Workday

Type the time that the injured or ill person’s shift or workday began. Use a 24-hour clock format (military time).

Date Reported

Type the date the incident was reported.

Returned to Work

Specify the date when the worker returned to work.

What was the employee doing just before the incident occurred?

Type an explanation of what the worker was doing just before the incident resulting in the injury or illness occurred.

Describe the activity as well as the tools, equipment or material the worker was using.

Infinium HR includes this information on the OSHA 301 injury and illness report.

What happened?

Type an explanation of the incident that resulted in the worker’s injury or illness.

Infinium HR includes this information on the OSHA 301 injury and illness report.

Physical Agent

Specify the value that represents the physical agent, object or substance that directly harmed the worker.

Infinium HR includes this information on the OSHA 301 injury and illness report.

Use *Update Employer Codes* and code type **AGN** to set up physical agent values.

9 Press Enter. The system displays the Update Accident & Illness Data employee data and reporting levels screen shown in Figure 7-8.

```
 5/08/02  14:12:17      Update Accident & Illness Data     PEGOSM     PEDOSM
                                                            Page  3 of  4
Employer  . . . :  ZUS    SAMPLE US COMPANY
Case Number . . :     960006
Employee  . . . :      80005    ALAN N ACCURATE
Establishment . :  ESTB1    ESTABLISHMENT 1
Date of Incident:   1/01/2002
Employee Data at the Time of the Incident
Employer  . . . .  ZUS +
Supervisor  . . .  _________ +  -or-   Last Name . . . .  __________________ +
Agricultural  . .  _                   Employee Status .  LOA_  +

Reporting Levels
Area        . . .  200_  +             Division    . . .  ADMIN +
Department  . . .  _____ +             Cost Centr  . . .  _____ +

Safety Group  . .  _____ +             Incident Code . .  _____ +
Workers Comp? . .  0 (0=No 1=Yes)      Work. Comp. Code:  3010
Injury/Symptom  .  _____ +             Body Part . . . .  _____ +
Major or Minor  .  _
Witnessed By  . .  ______________________________

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

Figure 7-8: Update Accident & Illness Data employee data and reporting levels screen

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

Home Dept

Infinium HR displays the *Home Dept* field and field value only for incident records you convert from Infinium EM. This field corresponds to the *Home Department of Employee* field, on the Accident/Illness Data - OSHA 101 screen in Infinium EM.

Inc Dept

Infinium HR displays the *Inc Dept* field and field value only for incident records you convert from Infinium EM. This field corresponds to the *Department at Time of Incident* field on the Accident/Illness Data - OSHA 101 screen in Infinium EM.

Safety Group

Specify the value that represents the safety group associated with the worker affected by this incident.

Examples of safety groups include office workers and manufacturing plant employees.

Use *Update Employer Codes* and code type **SGP** to set up safety group values.

Incident Code

Specify the value that represents the type or cause of the incident that occurred.

Use *Update Employer Codes* and code type **ACC** to set up incident code values.

Workers Comp?

Specify **Yes** if this incident qualifies as a worker's compensation case or if a worker's compensation case is pending. Otherwise, specify **No**.

Work Comp Code

If you specify a value in *Workers Comp* in the employee's basic data record, Infinium HR displays that value here.

Use *Update Employer Codes* and code type **WCC** to set up workers' compensation code values.

Injury/Symptom

Specify the value that represents the worker's injury or the primary symptom of the worker's illness.

Use *Update Employer Codes* and code type **INJ** to set up injury or symptom values.

Body Part

Specify the value that represents the injured body part.

Use *Update Employer Codes* and code type **BOD** to set up body part values.

Major or Minor

Specify **M** if the incident is of major importance based on your employer's guidelines.

Leave blank if the incident is of minor importance.

Witnessed By

Type the name of one or more witnesses to the incident that resulted in the injury or illness.

11 Press [Enter]. The system displays the Update Accident & Illness Data user-defined data and comments screen shown in Figure 7-9.

```
 5/08/02  14:12:49      Update Accident & Illness Data     PEGOSM     PEDOSM
                                                           Page  4 of  4
Employer  . . . :  ZUS    SAMPLE US COMPANY
Case Number . . :     960006
Employee  . . . .      80005    ALAN N ACCURATE
Establishment . :  ESTB1    ESTABLISHMENT 1
Date of Incident:   1/01/2002
User Defined Data
SU1-SAFETY EQUIPMENT _____ +         SU2-SAFETY TRNG REQ? _____ +
SU3-WEATHER COND.?   _____ +         SU4-PREVENTABLE?     _____ +

Comments
_______________________________________ _______________________________________
_______________________________________ _______________________________________
_______________________________________ _______________________________________







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

Figure 7-9: Update Accident & Illness user-defined data and comments screen

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

User Defined Data

Specify a value associated with this safety and health user-defined code type.

Use *Update Health Controls* to type descriptions for the safety and health user-defined fields.

Use *Update Employer Codes* and code types **SU1**, **SU2**, **SU3** and **SU4** to set up safety and health user-defined code values.

Comments

Type additional comments about the incident that resulted in the injury or illness, for informational purposes only.

13 Press Enter.

Deleting an Incident Record

To delete an incident record, you must first delete any physician's data or cost transactions associated with the incident. Use *Update Physicians Data* to delete each associated medical treatment entry and use *Enter Cost Transactions* to delete each associated cost entry. Then use *Update Accident/OSHA Data* to select the incident. From the Update Accident & Illness Data OSHA log entry screen, press F22 to delete the incident record from Infinium HR.

Updating Non-Employee Data

Use the *Update Non-Employee Data* function to record and maintain information about non-employees that you want to have available when reporting OSHA injury and illness incidents.

A non-employee is generally a worker who is not on the employer's payroll but is supervised on a daily basis by one or more persons employed by the employer. Non-employees can include contractors, temporary workers, leased employees and seasonal hires.

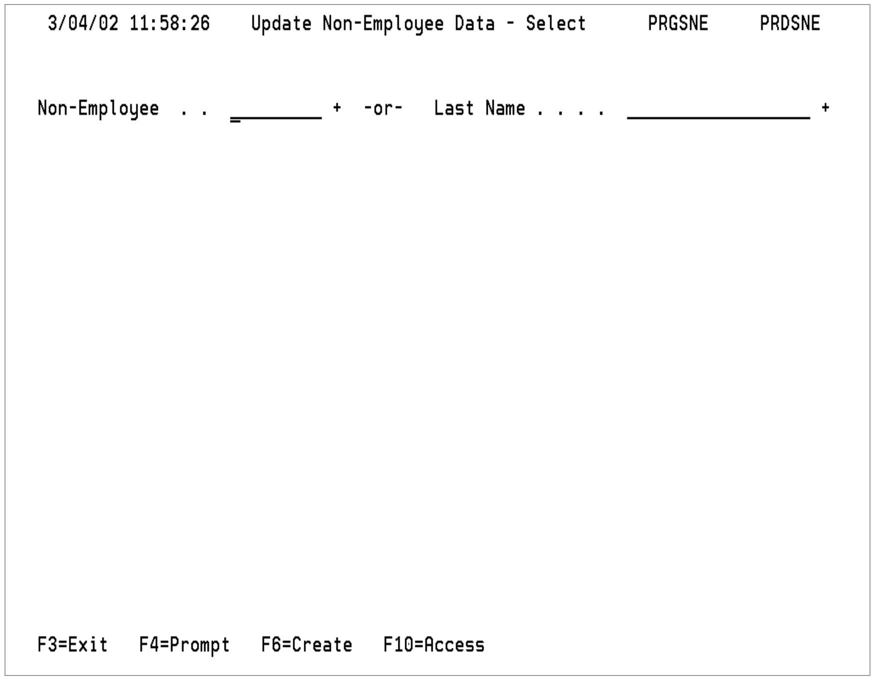
You can also use the *Display Non-Employee Data* function to review non-employee information. You can use the *List Non-Employee Data* function to print information for one or more non-employees.

To create non-employee data, complete these steps:

1 From the Infinium HR main menu select *Health Administration.*

2 Select *Update Health Data.*

3 Select *Update Non-Employee Data* [UNED] to display the Update Non-Employee Data - Select screen shown in Figure 7-10.



```
3/04/02 11:58:26    Update Non-Employee Data - Select      PRGSNE     PRDSNE


Non-Employee  . .  _________ +  -or-   Last Name . . . .  _________________ +



F3=Exit   F4=Prompt   F6=Create   F10=Access
```

Figure 7-10: Update Non-Employee Data - Select screen

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

Non-Employee

Specify the number of the non-employee for whom you want to create, update or delete a record.

For an existing non-employee record, if you do not know the non-employee number, you can type the non-employee's last name or a portion of it in *Last Name* and press F4 to display a list of names beginning with the letters you typed. After you select the non-employee from the display, the system completes both *Non-Employee* and *Last Name*.

If the non-employee does not have an Infinium HR record, you must assign the non-employee a unique identification number. Use one of the following methods to assign a number:

- Press F6 on the Update Non-Employee Data - Select screen to assign the non-employee a system-generated number from the *Next Non-Employee #* field in the *Update Entity Control* function.
- Type a unique number in the *Non-Employee* field on the Update Non-Employee Data - Select screen. Press F6 to assign the non-employee the number without incrementing the value in the *Next Non-Employee #* field in the *Update Entity Control* function. The number you type must be less than the value in the *Next Non-Employee #* field in the *Update Entity Control* function.

- Press F6 on the Update Non-Employee Data - Select screen. Type a unique number in the *Non-Employee #* field on the Create Non-Employee Data screen to assign the non-employee the number and increment, by one, the value in the *Next Non-Employee #* field in the *Update Entity Control* function. The number you type must be equal to or greater than the value in the *Next Non-Employee #* field in the *Update Entity Control* function.

Last Name

Specify the non-employee's last name or a portion of it and press F4 to display a list of names beginning with the letters you specified. After you select the non-employee from the display, the system completes both *Non-Employee* and *Last Name*.

Left-justify the information at the beginning of *Last Name*.

5 Press Enter to display the Update Non-Employee Data screen 1 of 2 shown in Figure 7-11.

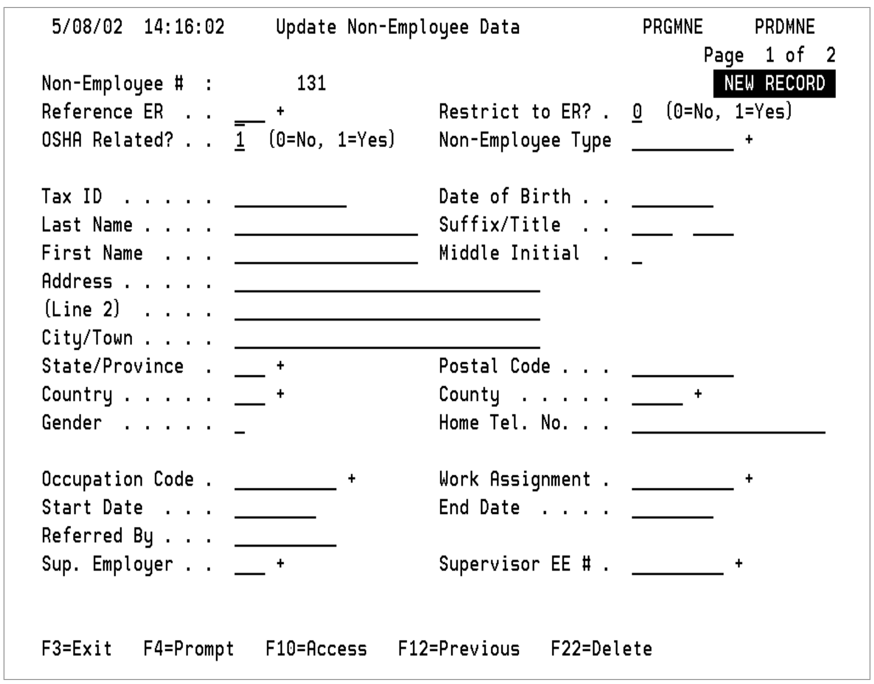


Figure 7-11: Update Non-Employee Data screen 1 of 2

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

Reference ER

Specify an employer for Infinium HR to reference for the date formats and code values of fields associated with this non-employee record.

If you leave *Reference ER* blank, Infinium HR uses the date format from the entity control.

This *Reference ER* value does not restrict the use of the non-employee data to this employer unless you specify **Yes** in *Restrict to ER?*.

You must complete this information if you specify **Yes** in *OSHA Related?.*

Restrict to ER?

Specify **Yes** to use this non-employee record only with the employer specified in *Reference ER*. Otherwise, specify **No**.

OSHA Related?

Specify **Yes** if this non-employee is associated with an OSHA-reportable incident. Otherwise, specify **No**.

Information such as the non-employee's name, address, date of birth and gender is required for OSHA reporting.

Non-Employee Type

Specify the value for the non-employee's general work category

Use *Update Employer Codes* and code type **NET** to set up non-employee type code values.

Tax ID

Type the non-employee's tax identification number. In the United States, this is the Social Security Number (SSN). In Canada, this is the Social Insurance Number (SIN).

Date of Birth

Specify the non-employee's date of birth.

You must complete *Date of Birth* if you specify **Yes** in *OSHA Related?*

Infinium HR highlights the date if it occurs in the 21st century.

Last Name

Type the non-employee's last name.

Suffix

Type a suffix such as **Jr**. or **Sr.** for the non-employee, if applicable.

Title

Type a title such as **Mr.**, **Mrs.** or **Dr.** for the non-employee.

First Name

Type the non-employee's first name.

Middle Initial

Type the non-employee's middle initial.

Address

Type the first line of the non-employee's street address.

You must complete *Address* if you specify **Yes** in *OSHA Related?*

(Line 2)

Type the second line of the non-employee's address, if applicable.

City/Town

Type the name of the city or town where the non-employee resides.

You must complete *City/Town* if you specify **Yes** in *OSHA Related?*

State/Province

Specify the state or province where the non-employee resides.

You must complete *State/Province* if you specify **Yes** in *OSHA Related?*

Postal Code

Type the non-employee's postal code.

You must complete *Postal Code* if you specify **Yes** in *OSHA Related?*

Country

Specify the country where the non-employee resides.

Use *Update Employer Codes* and code type **CTR** to set up country code values.

County

Specify the county in which the non-employee resides.

Use *Update Employer Codes* and code type **CNT** to set up county code values.

Gender

Specify **F** if the non-employee is female or **M** if male.

You must complete *Gender* if you specify **Yes** in *OSHA Related?*

Home Tel No

Type the non-employee's home telephone number. Include the area code, country code, if applicable, and any separator characters such as hyphens.

Occupation Code

Specify the value that represents the non-employee's occupation.

Use *Update Employer Codes* and code type **OOC** to set up occupation code code values.

Work Assignment

Specify the value that represents the non-employee's work assignment, project or task.

Use *Update Employer Codes* and code type **WAS** to set up work assignment type code values.

Start Date

Specify the start date of the non-employee's current or most recent work assignment.

End Date

Specify the end date of the non-employee's most recent work assignment.

Referred By

Type the name of the person who referred the non-employee for the related work assignment.

Sup Employer

Specify the value that represents the employer of the non-employee's supervisor.

Supervisor EE #

Specify the employee number of the non-employee's supervisor.

7 Press Enter to display the Update Non-Employee Data screen 2 of 2 shown in Figure 7-12.

```
 5/08/02  14:18:21     Update Non-Employee Data           PRGMNE     PRDMNE
                                                                Page  2 of  2
Non-Employee #  :       131

                        Contact Information
Misc Phone #2 . .  _______________
Misc Phone #3 . .  _______________
Misc Phone #4 . .  _______________
Misc Phone #5 . .  _______________
Email Address #1.  _______________________________________
Email Address #2.  _______________________________________
URL Address #1  .  _______________________________________

Comments #1 . . .  __________________________________________________
Comments #2 . . .  __________________________________________________








F3=Exit   F10=Access  F12=Previous
```

Figure 7-12: Update Non-Employee Data screen 2 of 2

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

Misc Phone #2, 3, 4, 5

Type additional telephone numbers for this non-employee. Include the area code, country code, if applicable, and any separator characters such as hyphens.

Email Address #1, 2

Type an e-mail address for this non-employee. For example:

- John Smith@hotmail.com
- JnSmith@aol.com

URL Address #1

Type a Website URL (Uniform Resource Locator) for this non-employee, if applicable. For example:

- www.infinium.com

- www7.infinium.com/WebLink

Comments #1, 2

Type any comments about this non-employee.

9 Press Enter.

Updating Physicians Data

The *Update Physicians Data* function allows you to type additional information about the accident or illness required for the OSHA 301 injury and illness incident report.

You can use the *Display Physicians Data* function to review medical treatment information for a particular case.

To update physicians' data, complete these steps:

1 From the Infinium HR main menu select *Health Administration*.

2 Select *Update Health Data*.

3 Select *Update Physicians Data* [UPL]. The system displays the Update Physicians Data prompt screen.

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

Employer

Specify the employer code.

Case Number

Specify the case number.

5 Press Enter. The system displays the Update Physicians Data screen shown in Figure 7-13.

```
 3/04/02  12:11:59          Update Physicians Data         PEGPLM     PEDPLM

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005    ACCURATE,ALAN N
Case Number . . :     960005 TRIPPED OVER CABLE LEFT ON SHOP FLOOR
Treatment Date  .  ________
Physician/Other .  _______________________________________
Facility  . . . .  ______________________________
Address Line 1. .  ______________________________
Address Line 2. .  ______________________________
City/Town . . . .  ____________________
State/Province. .  ___ +   County. . _____ +   Postal Code. __________
Hospital. Req?. .  0  (0=No 1=Yes)
Treated in ER?. .  0  (0=No 1=Yes)
2=Change  3=Copy   4=Delete
Sel Date      Physician/Other                         Facility       Hosp? ER?
 _  3/04/2002 DR JONES                                INFIRMARY         1 1




F3=Exit   F10=Access   F12=Cancel
```

Figure 7-13: Update Physicians Data screen

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

Treatment Date

Specify the date of the treatment that the worker received for the illness or injury resulting from this case number incident.

Physician/Other

Type the name of the physician or other health care professional individual or organization, such as a hospital, pharmacy or physical therapist, for the treatment the worker received for the illness or injury that resulted from this case number incident.

Infinium HR includes the information from the first treatment record on the OSHA 301 injury and illness incident report.

Facility

Type the name of the facility or location where the worker received treatment for the illness or injury resulting from this case number incident.

Address Line 1

Type the street address of the facility where the worker received treatment for the illness or injury resulting from this case number incident.

Infinium HR includes this address information on the OSHA 301 injury and illness incident report.

Address Line 2

Type additional address information for the facility where the worker received treatment for the illness or injury resulting from this case number incident.

Infinium HR does not include this additional address information on the OSHA 301 injury and illness incident report.

City/Town

Type the name of the city or town of the facility where the worker received treatment for the illness or injury resulting from this case number incident.

State/Province

Specify the value for the state or province of the facility where the worker received treatment for the illness or injury resulting from this case number incident.

Use *Update Employer Codes* and code type **STA** to set up state or province values.

County

Specify the value for the county of the facility where the worker received treatment for the illness or injury resulting from this case number incident.

Use *Update Employer Codes* and code type **CNT** to set up county values.

Postal Code

Type the postal code for the facility where the worker received treatment for the illness or injury resulting from this case number incident.

Hospital Req?

Specify **Yes** if the worker was hospitalized overnight as an in-patient for this case number incident. Otherwise, specify **No**.

Infinium HR includes this information on the OSHA 301 injury and illness incident report.

Treated in ER?

Specify **Yes** if the worker required emergency room treatment for the illness or injury resulting from this case number incident. Otherwise, specify **No**.

Infinium HR includes this information on the OSHA 301 injury and illness incident report.

Sel

Type a value next to the physician’s data record that you want to change, copy or delete.

2	Change a record.
3	Copy information from an existing record to a new record. Infinium HR copies all information except the *Treatment Date* value.
4	Delete a record.

7 Press Enter.

Entering Cost Transactions

Follow the steps below to track the costs for each recorded occupational injury or illness.

1 From the Infinium HR main menu select *Health Administration.*

2 Select *Update Health Data.*

3 Select *Type Cost Transactions* [CTE]. The system displays the Enter Cost Transactions prompt screen.

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

Employer

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

Case Number

Type the case number for which you want to record costs.

5 Press Enter. The system displays the Enter Cost Transactions screen shown in Figure 7-14.

```
 3/04/02  12:17:42        Enter Cost Transactions        PEGMOC     PEDMOC

Employer  . . . :  ZUS    SAMPLE US COMPANY

Case Number . . :     960005    TRIPPED OVER CABLE LEFT ON SHOP FLOOR
Employee  . . . :      80005    ACCURATE,ALAN N
Cost Type . . . .  _____ +            Cost Date . . . .  _______0
Description . . .  __________________ Cost Amount . . .  _______.00
Area        . . .  _____ +            Division    . . .  _____ +
Department  . . .  _____ +            Cost Centr  . . .  _____ +

2=Change   4=Delete
Opt  Type  Cost Date    Description       Cost Amount  Lvl 1 Lvl 2 Lvl 3 Lvl 4
 _   AMB    3/04/2002 TRANSPORT TO ER        150.00






F3=Exit   F4=Prompt   F10=Access   F12=Cancel
```

Figure 7-14: Enter Cost Transactions screen

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

The values for the organizational level fields do not default automatically into this screen. You can allocate costs to specific level combinations by entering those levels in the level section of the screen.

Cost Type

Type the code value that represents the costs for this incident.

Description

Type a description.

Level 1, 2, 3, 4

Type the value(s) that describes the level(s) associated with this incident.

7 Press Enter.

Generating OSHA Reports

To comply with OSHA reporting requirements, you can use the following functions, available through the *Health Administration* menu option in Infinium HR, to generate OSHA reports:

- *List OSHA 300 Log* to generate the OSHA 300 Log of Work-Related Injuries and Illnesses
- *List OSHA 300A Summary* to generate the OSHA 300A Summary of Work-Related Injuries and Illnesses
- *List OSHA 301 Incident by Est* to generate the OSHA 301 Injury and Illness Incident Report by establishment
- *List OSHA 301 Incident by Level/EE* to generate the OSHA 301 Injury and Illness Incident Report by your employer's organizational levels or by employee
- *List OSHA Privacy Cases* to generate a confidential list of case numbers and employee names for injury and illness incidents defined as privacy cases

Consult with OSHA for current information about what injuries and illnesses to record and reporting regulations.

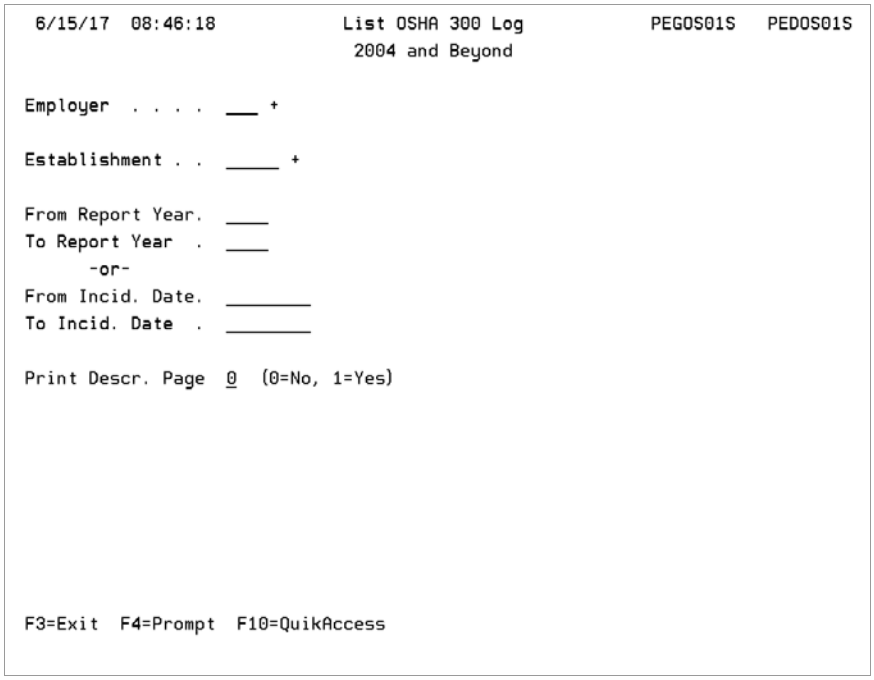
Generating the OSHA 300 Log

The OSHA 300 Log, or the log of work-related injuries and illnesses, classifies the work-related injuries and illnesses and notes the severity of each case. You use the log to record details about each incident.

Note: Infinium prints the data necessary to complete the OSHA 300 Form. Printing of the OSHA 300 Form is not supported.

To generate the OSHA 300 Log, complete these steps:

1. From the Infinium HR main menu select *Health Administration.*
2. Select *List Health Data.*
3. Select *List OSHA 300 Log* [O300] to display the List OHSA 300 Log screen similar to Figure 7-15.



```
 6/15/17  08:46:18           List OSHA 300 Log          PEGOS01S   PEDOS01S
                              2004 and Beyond

Employer  . . . .  ___ +

Establishment . .  _____ +

From Report Year.  ____
To Report Year  .  ____
      -or-
From Incid. Date.  ________
To Incid. Date  .  ________

Print Descr. Page  0  (0=No, 1=Yes)










F3=Exit  F4=Prompt  F10=QuikAccess
```

Figure 7-15: List OSHA 300 Log screen

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

Employer

Specify an employer.

Establishment

Specify the value that represents the establishment for which you are generating the OSHA 300 log, if applicable.

From Report Year

Type the first report year to include on the OSHA 300 log.

You must type values here and in *To Report Year*, or you must type values in *From Incid Date* and *To Incid Date*.

To Report Year

Type the last report year to include on the OSHA 300 log.

You must type values here and in *From Report Year*, or you must type values in *From Incid Date* and *To Incid Date*.

From Incid Date

Specify the date of the first incident to include on the OSHA 300 log.

You must type values here and in *To Incid Date*, or you must type values in *From Report Year* and *To Report Year*.

Use the OSHA 300 log generated by incident date for audit purposes only. Do not use for OSHA 300 reporting.

To Incid Date

Specify the date of the last incident to include on the OSHA 300 log.

You must type values here and in *From Incid Date*, or you must type values in *From Report Year* and *To Report Year.*

Use the OSHA 300 log generated by incident date for audit purposes only. Do not use for OSHA 300 reporting.

Print Descr Page

Specify whether to generate a separate page listing the official descriptions associated with each column on the OSHA 300 log. Valid values are:

0	No
1	Yes

5 Press Enter.

Generating the OSHA 300A Summary

The OSHA 300A Summary, or the summary of work-related injuries and illnesses, provides year-to-date totals for the number of cases, lost workdays and injury and illness types.

Note: Infinium prints the data necessary to complete the OSHA 300A Form. Printing of the OSHA 300A Form is not supported.

To generate the OSHA 300A Summary, complete these steps:

1 From the Infinium HR main menu select *Health Administration.*

2 Select *List Health Data.*

3 Select *List OSHA 300A Summary* [O300A] to display the List OHSA 300A Summary screen similar to Figure 7-16.

```
  3/04/02  12:24:14        List OSHA 300A Summary          PEGOS01S   PEDOS01S


 Employer  . . . .       ___ +

 Establishment . .       _____ +

 From Report Year.       ____
 To Report Year  .       ____
       -or-
 From Incid. Date.       ________
 To Incid. Date  .       ________

 Annual Avg. # of EEs    _________
 Total Hours Worked      _________






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

Figure 7-16: List OSHA 300A Summary screen

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

Employer

Specify an employer.

Establishment

Specify the value that represents the establishment for which you are generating the OSHA 300A summary, if applicable.

From Report Year

Type the first report year to include on the OSHA 300A summary.

You must type values here and in *To Report Year*, or you must type values in *From Incid Date* and *To Incid Date*.

To Report Year

Type the last report year to include on the OSHA 300A summary.

You must type values here and in *From Report Year*, or you must type values in *From Incid Date* and *To Incid Date*.

From Incid Date

Specify the date of the first incident to include on the OSHA 300A summary.

You must type values here and in *To Incid Date*, or you must type values in *From Report Year* and *To Report Year*.

Use the OSHA 300A summary generated by incident date for audit purposes only. Do not use for OSHA 300A reporting.

To Incid Date

Specify the date of the last incident to include on the OSHA 300A summary.

You must type values here and in *From Incid Date*, or you must type values in *From Report Year* and *To Report Year.*

Use the OSHA 300A summary generated by incident date for audit purposes only. Do not use for OSHA 300A reporting.

Annual Avg # of EEs

Type the value that represents the annual average number of workers who work at the specified establishment during the calendar year.

For steps on how to compute this value, refer to the worksheet in the OSHA publication on forms for recording work-related injuries and illnesses.

Total Hours Worked

Type the value that represents the total number of hours worked at the specified establishment for the calendar year by all employees and non-employees who receive day-to-day supervision.

Do not include vacation, sick leave, holidays or other non-work time, even if you pay the worker for the non-work time.

For steps on how to compute this value, refer to the worksheet in the OSHA publication on forms for recording work-related injuries and illnesses.

5 Press Enter.

Generating OSHA 301 Incidents by Establishment

OSHA 301 Incidents by Establishment, or the injury and illness incident report, provides detailed information about each injury and illness incident. Infinium HR offers you the option of generating these reports for an entire establishment, for a specific organizational level or for all cases within a specified year or date range.

Note: Infinium prints the data necessary to complete the OSHA 301 Form. Printing of the OSHA 3001 Form is not supported.

To generate OSHA 301 incidents by establishment, complete these steps:

1 From the Infinium HR main menu select *Health Administration.*

2 Select *List Health Data.*

3 Select *List OSHA 301 Incident by Est* [O301E] to display the List OSHA 301 Incident by Est screen shown in Figure 7-17.

```
 3/04/02  12:27:30      List OSHA 301 Incident by Est      PEGOS01S   PEDOS01S


Employer. . . . . . . . . .   ___ +

Establishment . . . . . . .   _____ +

OSHA Case Number. . . . . .   _________ +   (Blank for all)

Reporting Year. . . . . . .   ____
         -or-
From Incident Date. . . . .   ________
To Incident Date. . . . . .   ________

Exclude Confidential Info.?   0  (No=0 Yes=1)






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

Figure 7-17: List OSHA 301 Incident by Est screen

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

Employer

Specify an employer.

Establishment

Specify the value that represents the establishment for which you are generating the OSHA 301 injury and illness incident report.

OSHA Case Number

Specify the case number of the incident from the OSHA 300 log for which you want to generate an OSHA 301 injury and illness incident report.

Leave blank to include all incidents from the OSHA 300 log on the OSHA 301 report.

Reporting Year

Type the reporting year for the incidents to include on the OSHA 301 injury and illness incident report.

You must type a value here or in *From Incident Date* and *To Incident Date*.

From Incident Date

Specify the date of the first incident to include on the OSHA 301 injury and illness incident report.

You must type values here and in *To Incident Date*, or you must type a value in *Reporting Year*.

To Incident Date

Specify the date of the last incident to include on the OSHA 301 injury and illness incident report.

You must type values here and in *From Incident Date*, or you must type a value in *Reporting Year*.

Exclude Confidential Info?

Specify **Yes** to exclude confidential information from printing in the following sections of the OSHA 301 report:

- Information about the worker
- Information about the physician or other health care professional

Otherwise, specify **No**.

OSHA regulations dictate that you exclude personal and physician information from the OSHA 301 injury and illness incident report when you provide copies of the report to authorized employee representatives. Refer to the OSHA Web site for current regulatory requirements.

5 Press Enter.

Generating OSHA 301 Incidents by Level or Employee

OSHA 301 Incidents by Level or Employee, or the injury and illness incident report, provides detailed information about each injury and illness incident. Infinium HR offers you the option of generating these reports for an entire establishment, for a specific organizational level, for a specific employee or non-employee, or for all cases within a specified date range.

Note: Infinium prints the data necessary to complete the OSHA 301 Form. Printing of the OSHA 3001 Form is not supported.

To generate OSHA 301 incidents by organizational level or employee, complete these steps:

1 From the Infinium HR main menu select *Health Administration.*

2 Select *List Health Data.*

3 Select *List OSHA 301 Incident Level/EE* [O301L] to display the List OSHA 301 Incident Level/EE employer selection screen.

4 Specify an employer and press Enter. The system displays the List OSHA 301 Incident Level/EE screen shown in Figure 7-18.

```
 3/04/02  12:30:09     List OSHA 301 Incident Level/EE     PEGOS01S   PEDOS01S


Employer. . . . . . . . . .   ZUS   SAMPLE US COMPANY

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

         ---OR---

Employee. . . . . . . . . .   _________  +  -or- Last Name __________________  +
Non-Employee. . . . . . . .   _________  +  -or- Last Name __________________  +

         ---OPTIONAL---

From Incident Date. . . . .   ________
To Incident Date  . . . . .   ________

Exclude Confidential Info.?   0  (No=0 Yes=1)

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

Figure 7-18: List OSHA 301 Incident Level/EE screen

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

Level 1, 2, 3, 4

Specify the value that represents level 1, 2, 3 or 4 for this organization to limit the OSHA 301 injury and illness incident report to employees and non-employees whose incidents occurred within this specified level.

Infinium HR uses the information from the Reporting Levels section of the incident record to select cases for the OSHA 301 injury and illness incident report.

Employee

Specify the number of the employee for whom you want to print an OSHA 301 injury and illness incident report.

If you do not know the employee number, you can type the employee's last name or a portion of it in *Last Name* and press F4 to display a list of names beginning with the letters you typed. After you select the employee from the display, the system completes both *Employee* and *Last Name*.

Leave *Employee* and *Non-Employee* blank to include all incidents on the report.

Last Name

Specify the employee's last name or a portion of it and press F4 to display a list of names beginning with the letters you specified. After you select the employee from the display, the system completes both *Employee* and *Last Name*.

Non-Employee

Specify the number of the non-employee for whom you want to print an OSHA 301 injury and illness incident report.

If you do not know the non-employee number, you can type the non-employee's last name or a portion of it in *Last Name* and press F4 to display a list of names beginning with the letters you typed. After you select the non-employee from the display, the system completes **both *Non-Employee* and *Last Name*.**

Leave *Employee* and *Non-Employee* blank to include all incidents on the report.

Last Name (Non-Employee)

Specify the non-employee's last name or a portion of it and press F4 to display a list of names beginning with the letters you specified. After you select the non-employee from the display, the system completes both *Non-Employee* and *Last Name*.

From Incident Date

Specify the date of the first incident to include on the OSHA 301 injury and illness incident report.

To Incident Date

Specify the date of the last incident to include on the OSHA 301 injury and illness incident report.

Exclude Confidential Info?

Specify **Yes** to exclude confidential information from printing in the following sections of the OSHA 301 report:

- Information about the worker
- Information about the physician or other health care professional

Otherwise, specify **No**.

OSHA regulations dictate that you exclude personal and physician information from the OSHA 301 injury and illness incident report when you provide copies of to authorized employee representatives. Refer to the OSHA Web site for current regulatory requirements.

6 Press Enter.

Generating a Report of Privacy Cases

OSHA allows you to exclude workers' names from OSHA Form 300, the log of work-related injuries and illnesses. You can use *List OSHA Privacy Cases* to generate a confidential list of case numbers and workers' names so that you can update the cases and provide information to the government if you are asked to do so.

Consult with OSHA for current information about what circumstances constitute a privacy case.

To generate a list of OSHA privacy cases, complete these steps:

1 From the Infinium HR main menu select *Health Administration.*

2 Select *List Health Data.*

3 Select *List OSHA Privacy Cases* [LPRIVACY] to display the List OSHA Privacy Cases screen shown in Figure 7-19.

```
 3/04/02  12:32:41        List OSHA Privacy Cases        PEGOS01S   PEDOS01S


Employer  . . . .  ___ +

Establishment . .  _____ +

From Report Year.  ____
To Report Year  .  ____
      -or-
From Incid. Date.  ________
To Incid. Date  .  ________










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

Figure 7-19: List OSHA Privacy Cases screen

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

Employer

Specify an employer.

Establishment

Specify the value that represents the establishment for which you are generating the report of privacy cases listed on the OSHA 300 log of work-related injuries and illnesses.

From Report Year

Type the first report year for the work-related injuries and illnesses privacy cases to include on the OSHA privacy cases report.

You must type values here and in *To Report Year*, or you must type values in *From Incid Date* and *To Incid Date*.

To Report Year

Type the last report year for the work-related injuries and illnesses privacy cases to include on the OSHA privacy cases report.

You must type values here and in *From Report Year*, or you must type values in *From Incid Date* and *To Incid Date*.

From Incid Date

Specify the date of the first incident of work-related injuries and illnesses privacy cases to include on the OSHA privacy cases report.

You must type values here and in *To Incid Date*, or you must type values in *From Report Year* and *To Report Year*.

To Incid Date

Specify the date of the last incident of work-related injuries and illnesses privacy cases to include on the OSHA privacy cases report.

You must type values here and in *From Incid Date*, or you must type values in *From Report Year* and *To Report Year*.

5 Press Enter.

Recording Employee Medical Exams

You use the *Update Employee Medical Exams* function to record an unlimited history of employee medical examinations. You can record previously completed exams and schedule exams that are due in the future.

Before you enter employee medical exam data, you must define code values for the following code types:

- **MET** (Medical Examinations), which you use to identify the type of medical exam being recorded such as pre-employment, annual, random screening and so on
- **EPR** (Medical Exam Providers), which you use to identify the person or facility that conducts the exam such as a particular doctor or health care facility
- **MRS** (Medical Exam Results), which you use to record the results of the medical exam such as passed, failed or other ratings

Use the *Display Employee Medical Exams* option to display the exam history by last or next exam date, exam type, result code, provider code, supervisor and employee number.

Use the *List Medical Exams by Level* option to print employee medical exam history by organizational level and by last or next exam date within that level.

Use the *List Medical Exams by Date* option to list the medical exam history in either last or next exam date order across all organizational levels.

Updating Employee Medical Exams

Use the *Update Employee Medical Exams* function to maintain employee medical examination records.

Follow these steps to enter employee medical examination data:

1. From the Infinium HR main menu select *Health Administration.*
2. Select *Update Health Data.*
3. Select *Update Employee Medical Exams* [UEM]. The system displays the screen shown in Figure 7-20.

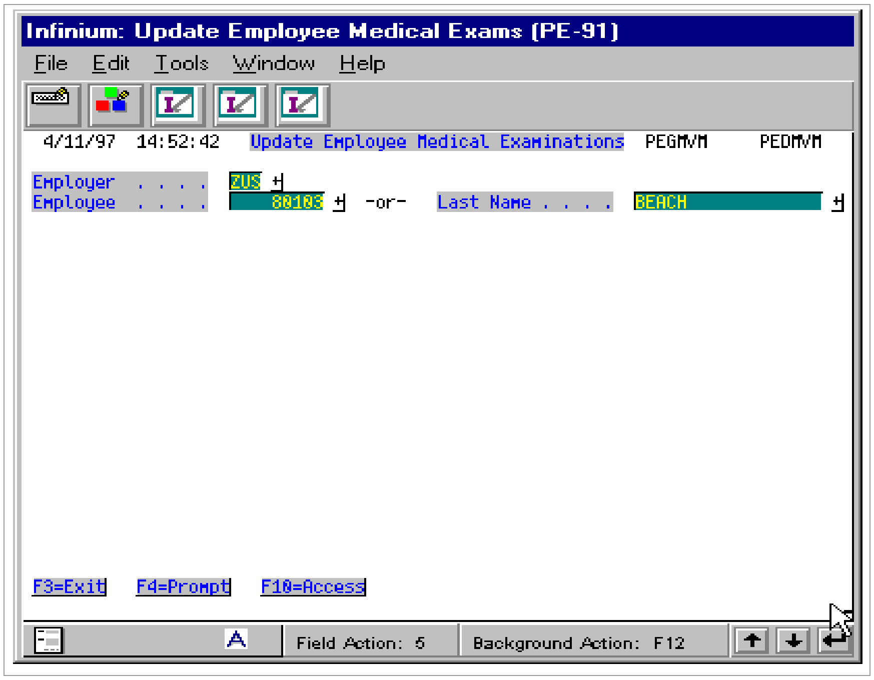


Figure 7-20: Update Employee Medical Examinations screen

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

Employer

Type the employer code.

Employee or Last Name

Type the employee number or employee last name.

5 Press Enter. The system displays the screen shown in Figure 7-21.

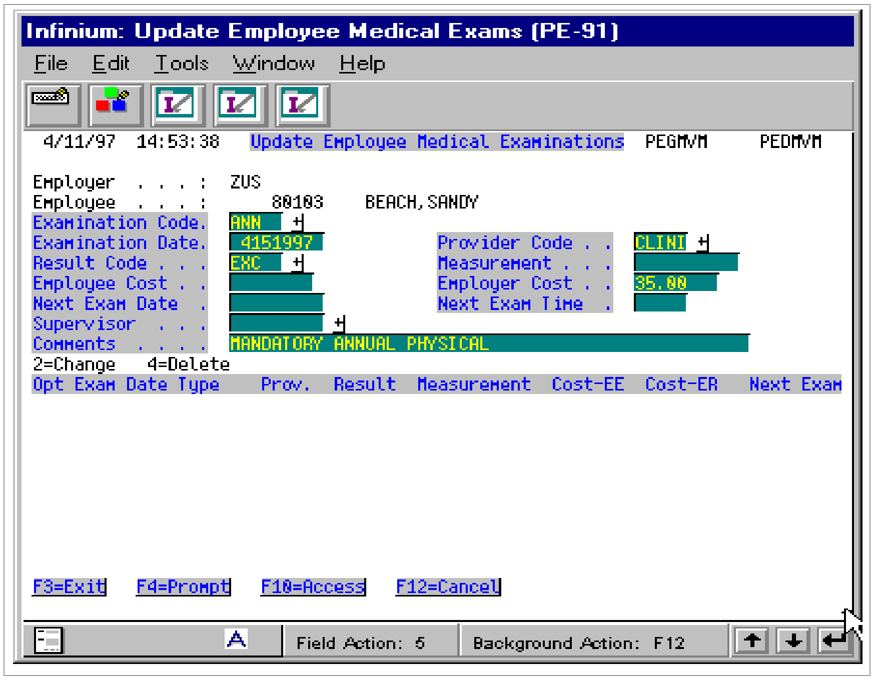


Figure 7-21: Update Employee Medical Examinations screen

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

Examination Code

Type the code value that identifies the type of medical examination. Examples of types of exams are annual physicals, regulatory compliance exams (such as exams mandated by OSHA or the Department of Transportation), executive physicals, pre-employment physicals, random screenings and so on.

Examination Date

Type the date of the examination.

Provider Code

Type the code value that represents the provider for this examination.

Result Code

Type the code value that represents the results of this examination.

Leave this field blank if the exam has not yet taken place.

Measurement

Type the employee’s blood pressure measurement, cholesterol level or other readings resulting from this exam. This is a free-form field.

Employee Cost

Type the employee’s portion of the cost for this exam.

Employer Cost

Type the employer’s portion of the cost for this exam.

Next Exam Date

Type the date for the next exam.

Next Exam Time

Type the time for the next exam.

Supervisor

Type the employee number of this employee’s supervisor.

Comments

Type any comments about this exam.

7 Press Enter. The system stores your information in the sub-file at the bottom of the screen.

8 Press F3 to exit from this screen. The system displays the screen shown in Figure 7-20.

9 Repeat steps 4 through 6 to enter additional medical exam information or press F3 to return to the Infinium HR main menu.

Tracking Employee Medical Claims

You use the *Update Employee Medical Claims* option to enter and maintain the status of an employee's health insurance claims. You can track claims submitted for the employee and for the employee's dependents. The system uses the dependent data you enter using the *Update Dependents Data* function or the *Update Employee Enrollments* function.

Before you use the *Update Employee Medical Claims* option, you must define code values for code type **MCL** (Medical Claims). You set up code values to identify the type of claim you are recording, such as medical, dental and vision insurance claims.

Follow these steps to enter employee health claim data:

1 From the Infinium HR main menu select *Health Administration.*

2 Select *Update Health Data.*

3 Select *Update Employee Medical Claims* [UEMC]. The system displays the screen shown in Figure 7-22.

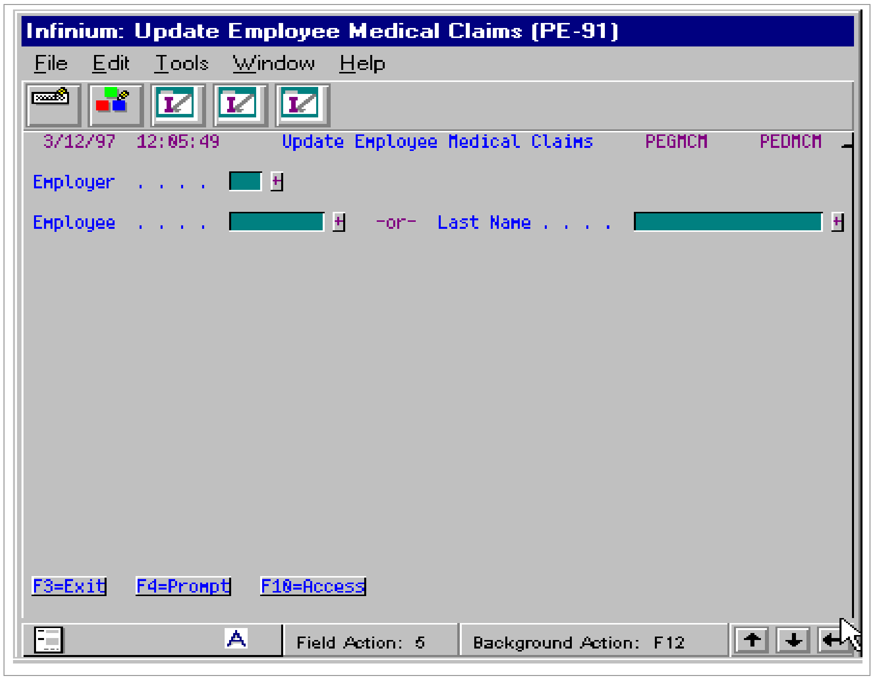


Figure 7-22: Update Employee Medical Claims prompt screen

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

Employer

Type the employer code.

Employee

Type the number of the employee for whom you are entering a medical claim.

5 Press Enter. The system displays the screen shown in Figure 7-23.

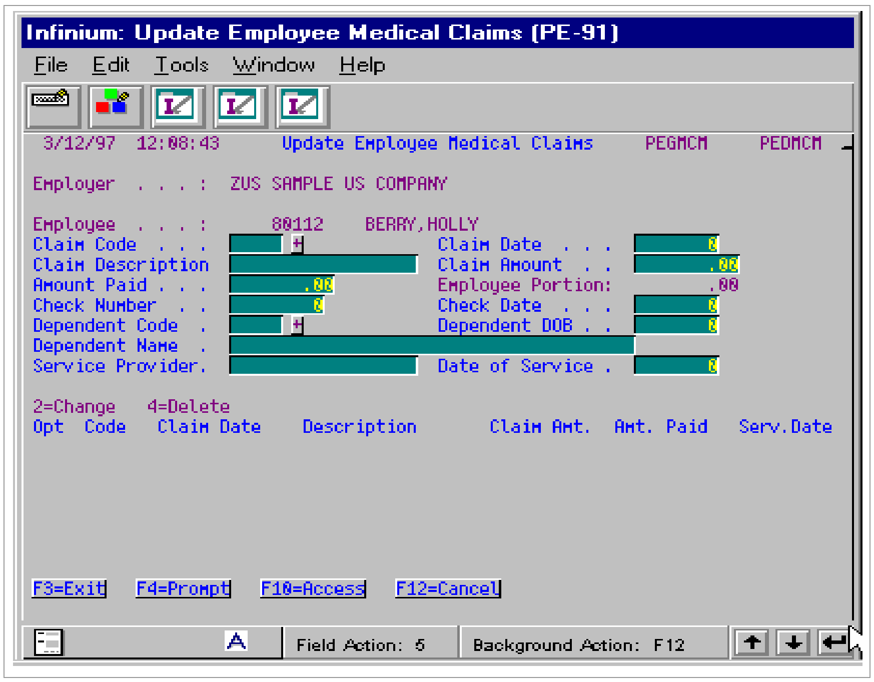


Figure 7-23: Update Employee Medical Claims screen

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

Claim Code

Type the code value that describes this claim.

Claim Date

Type the date of this claim.

Claim Description

Type a description for this claim.

Claim Amount

Type the total amount of this claim.

Amount Paid

Type the amount the employer paid for this claim.

Employee Portion

When you press Enter to store the claim data in the sub-file on this screen, the system instantly calculates the amount that the employee is responsible for paying by subtracting the employer amount paid from the total claim amount.

Check Number

Type the number for the check that paid this claim.

Check Date

Type the check date.

Dependent Code

Type the value that identifies the dependent for whom this claim was submitted if applicable.

When you press F4, the system displays dependent data you entered using the *Update Dependents Data* or *Update Employee Enrollments* functions. If you select one of the dependents from this list, the system automatically completes the *Dependent DOB* and *Dependent Name* fields using information you have already entered into the system.

Dependent DOB

Type the dependent's date of birth.

Dependent Name

Type the name of the dependent.

Service Provider

Type the name of the provider.

Date of Service

Type the date of service.

7 Press Enter. The system stores your information in the sub-file at the bottom of the screen.

8 Press F3 to exit from this screen. The system displays the screen shown in Figure 7-22.

9 Repeat steps 4 through 6 to enter additional medical claim information or press F3 to return to the Infinium HR main menu.

Chapter 8 Working with the Personnel Calendar

8

The *Personnel Calendar Operations* function of Infinium HR provides you with an absence tracking and calendar system for employees.

You first define standard public holidays for each employer and set up exception holidays/non-workdays by calendar code. You then enter employee absence data. After you enter employee absence data, you can use powerful displays and reports to analyze the absenteeism trends of your workforce.

The *Personnel Calendar Operations* function does not interface with the accrual processing in Infinium PY. The *Personnel Calendar Operations* function does interface with the *Close Absences to PE* function in Infinium PY. Use the *Close Absences to PE* function to update the personnel calendar with the days and hours worked that are associated with paid time off that you entered using the *Update Daily Time Data* function. *Personnel Calendar Operations* is a self-contained function and does not affect any other files in the Infinium HR system.

The chapter consists of the following topics:

Objectives

After completing this chapter, you should be familiar with how to:

- Set up code values for the two code types used in the *Personnel Calendar Operations* function
- Set up global and exception holidays and non-workdays for your employer
- Assign employees to calendars
- Enter employee absence data
- Use the reports and displays provided to analyze your organization's attendance and absence patterns

Setting Up Personnel Calendars

The five steps to implement the *Personnel Calendar Operations* function are:

1. Set up code values for code types **PAB** (required) and **CAL** (optional).
2. Define holidays and non-workdays for your employer.
3. Define exception holidays and non-workdays for your employer (optional).
4. Assign employees to calendars (optional).
5. Maintain employee absentee records.
6. Review absence data using reports and displays.

You normally perform step 1 only during your initial implementation of the *Personnel Calendar Operations* function. You perform steps 2 and 3 during your initial implementation of the function and on an annual basis thereafter. You perform steps 4 through 6 on an ongoing basis to track and analyze employee absence data.

Setting Up Code Values

To implement the *Personnel Calendar Operations* function, you must set up code values for code type **PAB**, personnel absence types. You can also set up code values for code type **CAL**, calendar code, if different groups of employees within your employer are entitled to different types of holidays or non-workdays. Each code type is described below.

Setting up Values for Code Type PAB

For each type of employee absence that you track on the system, you must set up a one-character code value for code type **PAB**, personnel absence type. For example, you can define **H** to represent public holidays and **S** to represent sick days.

You associate each of your code values with one of the standard Infinium HR absence type categories.

The system groups your employees' absences into these categories when you view the Absence Analysis By Day screen in the *Display Employee Calendar Data* function and print the *List Absence Analysis Data* function.

Follow the steps below to create code values.

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

2 Select *Update Master Files*.

3 Select *Update Employer Codes* [UCC]. The system displays the screen shown in Figure 8-1.

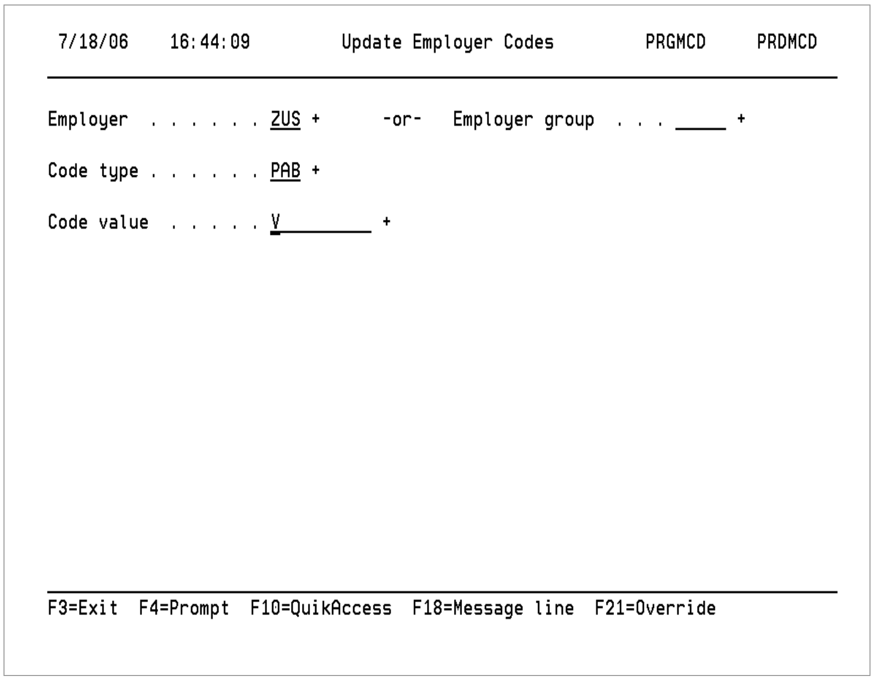


Figure 8-1: Update Employer Codes prompt screen

On this screen you create code values for the personnel absence code type **PAB**. You are limited to defining one-character code values so that they can be easily shown on the on-screen calendar when you use the *Display Employee Calendar Data* function. The code values indicate the reason an employee is not at work for some or all of a given day.

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

Employer

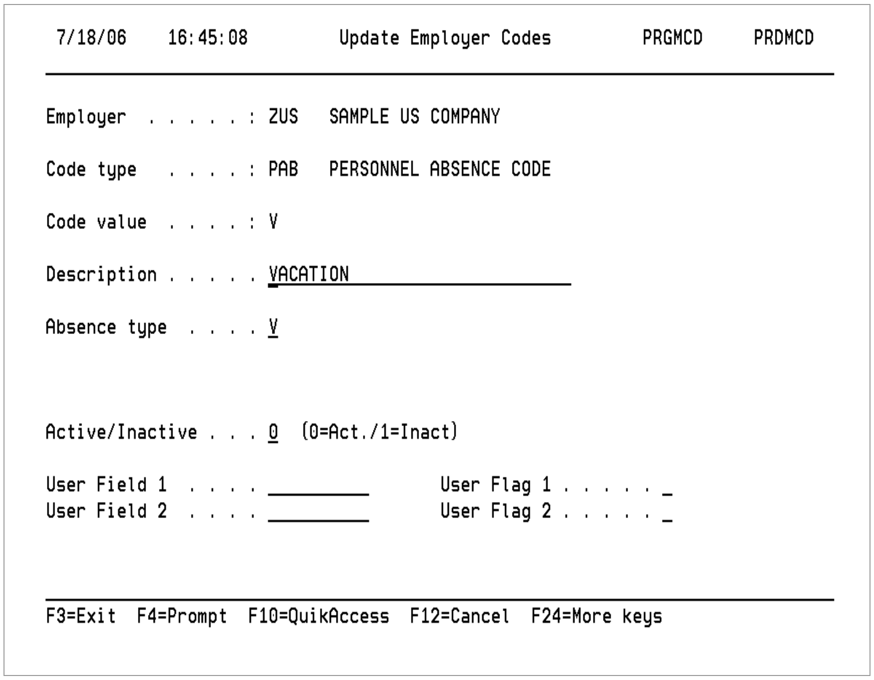
Type the value associated with the employer whose records you are updating.

Code type

Type **PAB**.

Code value

5 Type a one-character code value to represent an employee absence reason. Press Enter. The system displays the screen shown in Figure 8-2.



```
 7/18/06    16:45:08        Update Employer Codes        PRGMCD     PRDMCD

Employer  . . . . . : ZUS   SAMPLE US COMPANY

Code type   . . . . : PAB   PERSONNEL ABSENCE CODE

Code value  . . . . : V

Description . . . . . VACATION______________________

Absence type  . . . . V


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

User Field 1  . . . . __________       User Flag 1 . . . . . _
User Field 2  . . . . __________       User Flag 2 . . . . . _


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

Figure 8-2: Update Employer Codes screen

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

Description

Type a description of the employee absence reason.

Absence type

You must associate each of your code values with one of the standard Infinium HR absence types. Type one of the following fixed values:

S	Sick
E	Excused
U	Not Excused
H	Holiday

L	Leave of Absence
V	Vacation
F	Family medical leave
O	Other
C	Comment

7 Press Enter. The system displays the Update Employer Codes prompt screen.

8 Repeat steps 4 through 7 to set up additional code values or press F3 to return to the Infinium HR main menu.

Setting up Values for Code Type CAL

When you implement the *Personnel Calendar Operations* function, you define standard holidays and non-workdays for your employer on a global basis to avoid having to enter this information manually for each individual employee. If some groups of employees in your employer have different standard holidays or other types of non-workdays than others, you can set up one or more calendars within your employer and associate the exception holidays and non-workdays with it.

When you assign employees to a calendar code value, the system automatically defaults the standard employer holidays and the exception holidays associated with their calendar code value into each employee's absence record.

For example, all employees in your company receive New Year's Day as a holiday so you set up New Year's Day as an employer holiday. Union employees also receive the day after New Year's Day as a holiday; therefore, you set up a calendar for union employees and enter January 2 as a holiday within that calendar. When you assign an employee to the union calendar, the system automatically defaults January 1 and January 2 as holidays into that employee's personal absence record.

Follow the steps in the preceding section entitled "Setting up Values for Code Type **PAB**" to set up calendar code values. Note that you do not associate calendar code values with standard Infinium HR absence types.

Defining Holidays and Non-Workdays

You use the *Update Holidays/Non-workdays* function to set up global holidays and non-workdays for your employer. You can also use this option to enter exception holidays and non-workdays for calendars that apply to only certain groups of employees within your employer. If all employees share the same holiday/non-workday schedule, you do not need to create separate calendars within your employer.

Do not specify the same holiday or non-workday for your employer and for specific calendars within your employer, as this creates duplicate entries in your employee's absence history records when you use the *Display Employee Calendar Data* function.

You set up holidays and non-workdays by specifying their day, month and year. Therefore, you must set up holidays and non-workdays for each calendar year that you enter employee absence data.

Follow these steps to set up holidays and non-workdays for your employer or for a calendar within your employer.

1 From the Infinium HR main menu select *Personnel Calendar Operations*.

2 Select *Update Calendar Data*.

3 Select *Update Holidays/Non-workdays* [UHN]. The system displays the screen shown in Figure 8-3.

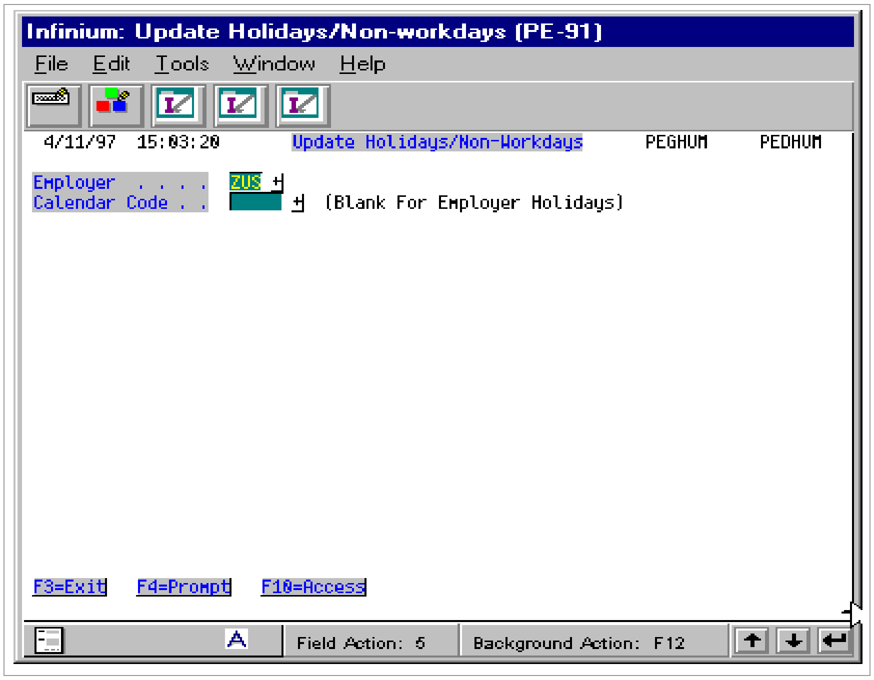


Figure 8-3: Update Holidays/Non-Workdays prompt screen

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

Employer

Type the value that represents your employer.

Calendar Code

To enter global holidays and non-workdays for your employer, leave this field blank.

To enter exception holidays and non-workdays for specific groups of employees within your employer, type the calendar code value that applies to those employees.

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

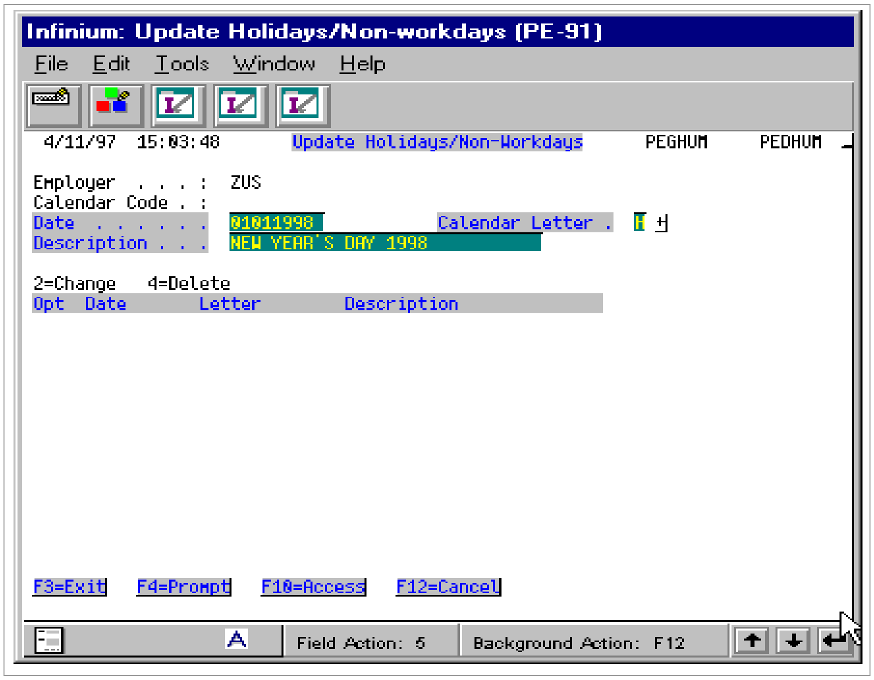


Figure 8-4: Update Holidays/Non-Workdays screen

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

Date

Type the date of the holiday or non-workday.

Description

Type a description of the holiday or non-workday.

Calendar Letter

Type a personnel absence code value for the non-workday.

7 Press Enter. The system stores your entry in the sub-file at the bottom of the screen.

8 Repeat steps 6 and 7 to set up additional holidays and non-workdays for the specified employer and calendar, or press F3 to return to the Update Holidays/Non-Workdays prompt screen.

9 Repeat steps 4 through 8 to setup additional holidays and non-workdays or press F3 to return to the Infinium HR main menu.

Assigning Employees to Calendars (optional)

If you set up calendars in your employer, you use the *Update Personnel Data* function to assign some or all of your employees to the appropriate calendar. You type the code value that identifies the set of exception holidays/non-workdays to which an employee is entitled in the *Calendar Code* field on the Update Employee Personnel Data screen 1 of 3.

Refer to the *Infinium HR Guide to Processing* for details on accessing and updating employee personnel data.

Maintaining Employee Absence Data

You use the *Update Employee Absence Data* function to enter absences for a specific employee. You can enter a one-day absence or an absence incident that spans a specified date range.

Creating Absence Information

Follow these steps to create employee absence data:

1. From the Infinium HR main menu select *Personnel Calendar Operations.*
2. Select *Update Calendar Data.*
3. Select *Update Employee Absence Data* [UEA]. The system displays the Update Employee Absence Data prompt screen.
4. Specify the employer and employee.
5. Press Enter. The system displays the Update Employee Absence Data selection screen.

   On this screen you can:

   - Create an absence by selecting **Create**
   - Delete an absence by selecting **Delete**
   - Change an absence by selecting **Change**
   - Display an absence by selecting **Display**
6. Press F6 to create a new record. The system displays a screen similar to Figure 8-5.

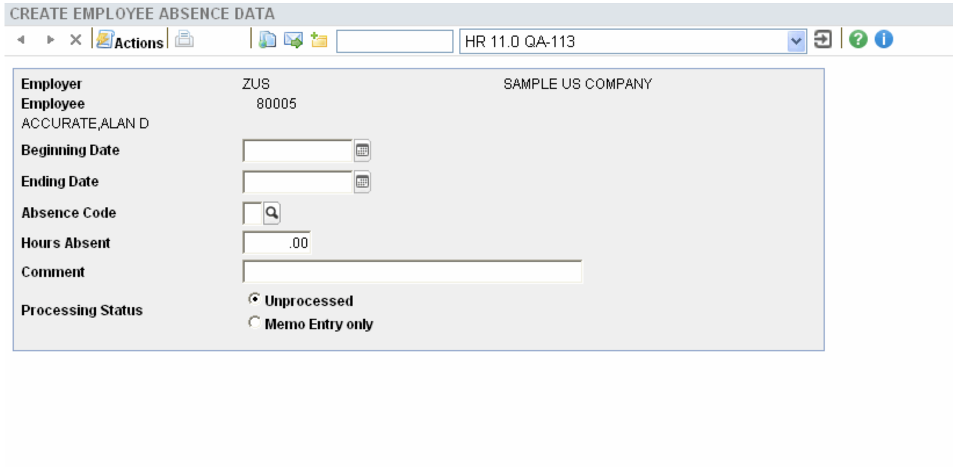


Figure 8-5: Create Employee Absence Data screen

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

Beginning Date

Specify the date when the employee's absence from work started.

If this absence is longer than one day, indicate the duration of the absence by specifying the ending date. If the absence is one day or less, leave the *Ending Date* field blank.

Ending Date

If the duration of the employee's absence from work was greater than one day, specify the last day the employee was absent. If the duration of the absence was one day or less, leave this field blank.

Absence Code

Specify the value that represents the reason the employee is not at work on the specified day(s).

Before you enter absence days for an FMLA-related absence code, you must create an FMLA event.

Hours Absent

Specify the number of hours per day the employee was not at work. To make a correction for a previously processed absence, enter a negative value (xx.xx-). If you are entering an absence that does not require hours, such as a comment to document an absence-related action, you can leave this field blank.

For example, if an employee is absent for three days and normally works eight hours per day, type **8** in the *Hours Absent* field. The system multiplies the number of hours, (8) per day, by the number of days (3) absent to calculate a total number of 24 hours absent. The system displays total hours data in the display and list options within the *Personnel Calendar Operations* function.

If you are recording an absence due to tardiness, type the number of hours the employee was late for work. The system tracks the hours you enter in the employee's absence history.

Comment

Type additional information regarding the absence in this field. The system stores the comment with each day included in the absence incident you are entering.

Processing Status

Specify whether this transaction is **Unprocessed** or **memo only**.

8. Press Enter.
9. Repeat the above steps to enter absences for other employees or press F3 to return to the Infinium HR main menu.

Updating Absence Information

You can update only absence information that is not closed to payroll.

Follow these steps to update employee absence data:

1. From the Infinium HR main menu select *Personnel Calendar Operations.*
2. Select *Update Calendar Data.*
3. Select *Update Employee Absence Data* [UEA]. The system displays the Update Employee Absence Data prompt screen.
4. Specify the employer and employee.
5. Press Enter. The system displays the Update Employee Absence Data selection screen.
6. Specify **Change** next to the absence record to update. The system displays a screen similar to.

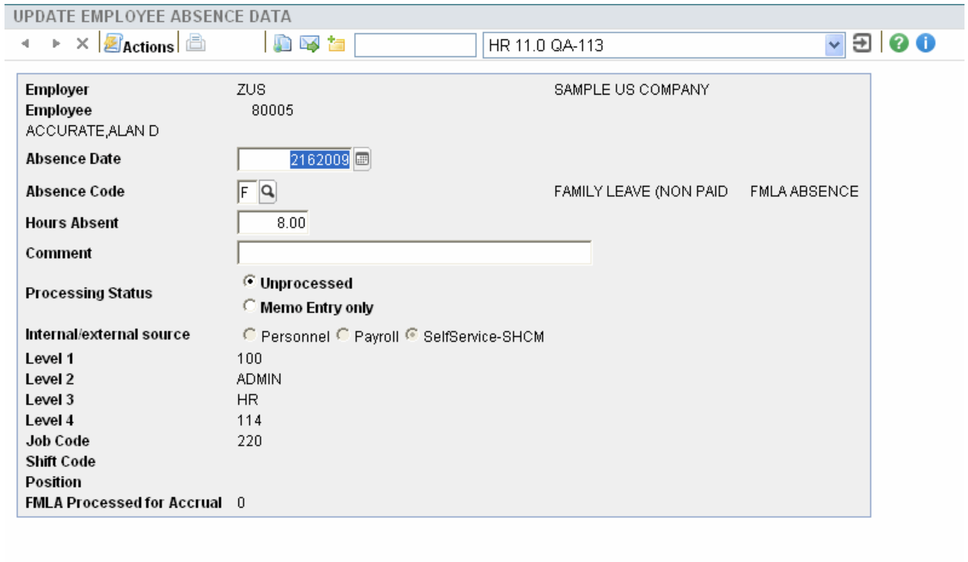


Figure 8-6: Update Employee Absence Data screen

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

Absence Date

Specify the date when the employee was absent from work.

Absence Code

Specify the value that represents the reason the employee is not at work on the specified day(s).

Before you enter absence days for an FMLA-related absence code, you must create an FMLA event.

Hours Absent

Specify the number of hours per day the employee was not at work. To make a correction for a previously processed absence, enter a negative value (xx.xx-). If you are entering an absence that does not require hours, such as a comment to document an absence-related action, you can leave this field blank.

If you are recording an absence due to tardiness, type the number of hours the employee was late for work. The system tracks the hours you enter in the employee's absence history.

Comment

Type additional information regarding the absence in this field. The system stores the comment with each day included in the absence incident you are entering.

Processing Status

Specify whether this transaction is **Unprocessed** or **memo only**.

Internal/External source

This field displays the value that represents the source of the absence information:

1	Personnel (Infinium HR)
3	Payroll (Infinium PY)
4	Self-Service (SHCM)

Level 1, Level 2, Level 3, Level 4

These are the levels associated with this employee.

Job Code

This is the employee's job code.

Shift Code

This is the employee's shift code.

Position

This is the employee's position.

FMLA Processed for Accrual

This field indicates whether this is an FMLA record that was process for accrual.

8 Press Enter.

9 Repeat the above steps to enter absences for other employees or press F3 to return to the Infinium HR main menu.

Mapping Absences to Incomes

You use the *Update Absence Mapping* function to map absence codes to Infinium Payroll income and accrual codes. This is used to interface absences from the Personnel Calendar to the Infinium Payroll time entry file, PYPWK.

If you are mapping absences to income codes only, you can map the paid time off only to the following Infinium PY income methods:

- Method 2 - Hours Extension incomes
- Method 4 - Base Hours Extension incomes
- Method 6 - Custom Calculation incomes

An employee must be authorized to the income in Infinium PY. Otherwise, the employee's paid time-off requests cannot be closed to PYPWK.

Complete the steps below to map absences to incomes.

1. From the Infinium HR main menu select *Personnel Calendar Operations.*
2. Select *Update Calendar Data.*
3. Select *Update Absence Mapping* [UAM]. The system displays the Map PTO to Incomes screen similar to Figure 8-7.

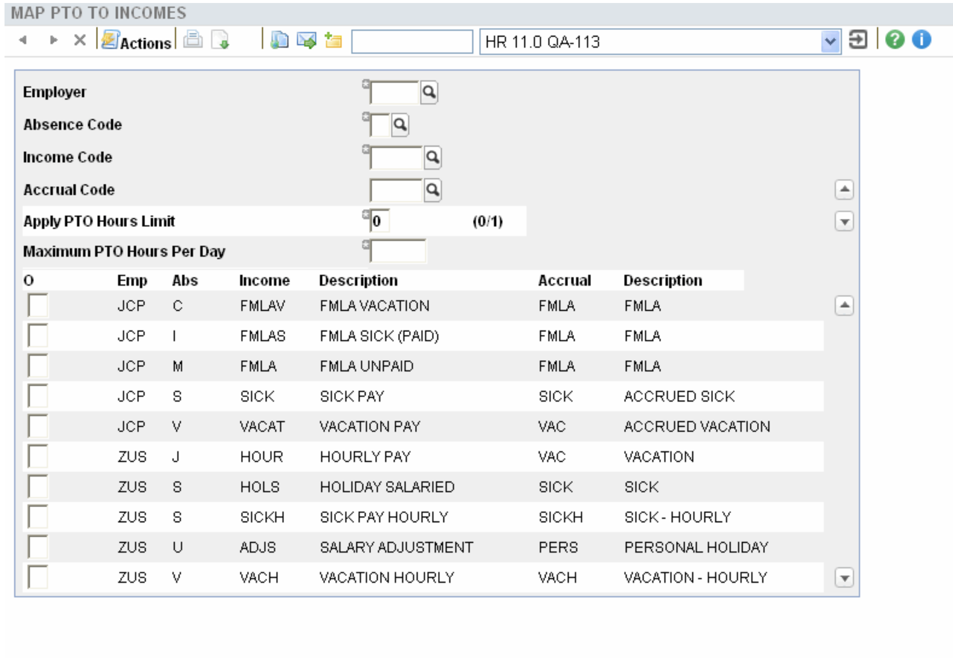


Figure 8-7: Map PTO to Incomes screen

On this screen you can:

- Create a new mapping record by completing the fields at the top of the screen
- Change a mapping record by selecting a record from the list and changing the appropriate field information

You can define an income code to track the same hours in one accrual category or more than one accrual category. When you map an absence code to an income code that changes more than one accrual category, the system tracks the time the employee uses in all of the accrual categories defined for the selected income code. You can map an absence code to an income code that changes more than one accrual category for situations where an employee receives pay for several types of absence, for example, vacation or sick pay, during the FMLA leave.

For example, if your employer defines accrual category 1 as Vacation and accrual category 6 as FMLA leave, when you define an income code such as FMLAV, you can enter minus (**-**) in the Accrual Controls section for both category 1 and category 6 on screen 2 of 4 of Update Income Controls. This causes the system to add the hours paid for income FMLAV into the “taken” bucket for both of the selected categories. The hours paid for FMLAV are added to the taken hours in category 1 and to the taken hours in category 6.

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

Employer

Specify the employer for whom you are mapping paid time off to incomes.

Absence Code

Specify the code value that represents the absence, such as vacation, holiday, or illness, for which you are mapping paid time off to incomes. This code value is associated with the Personnel Absence code type, PAB.

Income Code

Specify the income code value that represents the Infinium PY income to which to map the employees' paid time off. Infinium HR creates the income code for the selected absence type in the payroll time entry file, PYPWK.

If you map hours to income codes only, you can map the paid time off only to the following Infinium PY income methods:

- Method 2 - Hours Extension incomes
- Method 4 - Base Hours Extension incomes
- Method 6 - Custom Calculation incomes

Accrual Code

Specify the accrual code value that represents the Infinium PY accrual type to which to map the employees' paid time off.

Infinium HR transfers the income code for the selected accrual code to the payroll time entry file, PYPWK, to update the Infinium PY accrual balances during payroll cycle processing.

Apply PTO Hours Limit

Specify yes to use the maximum PTO hours limit per day. Otherwise, specify no.

Maximum PTO Hours Per Day

Type the maximum number of paid time-off hours an employee can request for a given day when the employee uses the Infor Self Service for Infinium (SHCM) application.

5 Press Enter.

Reviewing Calendar Data

You can use five options within the *Personnel Calendar Operations* function to display and print employee absence data.

Displaying Employee Absence Data

You can use three options within the *Personnel Calendar Operations* function to display employee absence data:

- *Display Employee Calendar Data*
- *Display Absences – Absence Code*
- *Display Absences – Date*

Displaying Employee Calendar Data

The *Display Employee Calendar Data* option combines the holiday/non-workday data entered for an employer and calendar code, if applicable, with the actual absence data you entered for a specified employee. If you did not type a value in the *Calendar Code* field in the employee's personnel data record, the system displays the global holidays you set up for the employee's employer.

If you assigned the employee to a calendar in the employee's personnel data record, the system adds the additional holidays and non-workdays you defined for that calendar to the generic holidays and non-workdays for the employer.

The *Display Employee Calendar Data* option shows the employee's attendance history for a selected date range in a graphic calendar display. The system displays up to a twelve month period on a single screen; you can scroll to view the additional months you selected.

In addition to the graphic calendar display, you can use function keys on the Display Employee Calendars screen to view the following information:

- Details associated with the employee's absence data
- Paid-time-off accrual data from the employee's basic data record
- An absence analysis by day for the specified date range

The absence analysis sorts absences by day of the week for a specified employee and date range using the Infinium HR absence categories. It allows you to quickly recognize absence patterns by date of the week over an extended period of time.

Displaying Absences by Absence Code

The *Display Absences – Absence Code* option allows you to type a specific absence code and date range to display all the corresponding employee absences. You can use this option to identify the types of absences that occur with greatest frequency in your employer.

Displaying Absences by Date

The *Display Absences – Date* option allows you to display all absences that occurred during a specified date range. You can use this option to identify the times of the year when absences occur with greatest frequency in your employer.

Printing Employee Absence Data

You can use two options within the *Personnel Calendar Operations* function to generate reports of employee absence data:

- *List Employee Calendar Data*
- *List Absence Analysis Data*

The *List Employee Calendars* option allows you to print a summary of absences and the details of each occurrence by different selection criteria.

The *List Absence Analysis Report* option prints all employees in a specified set of levels, employer or employer group. It prints the hire date, age and gender of employee and, for a specified date range, lists the absences for each employee by Infinium HR absence type, excluding holidays. It also identifies the number of sick occurrences for each employee and the average number of days per occurrence for each organizational level. A sick occurrence represents an illness that lasts two or more consecutive days.

Updating the PE Calendar with Paid Time Off Information

To update the personnel calendar in Infinium HR with paid time off information in Infinium PY, you must do the following:

- Use the *Update Income Control* function to associate an absence code with the appropriate income control.
- Use the *Update Daily Time Data* function to associate an absence code with an employee's timesheet.
- Use the *Close Absences to PE Calendar* function to update the personnel calendar with vacation, sick, or other paid time off that was entered using the *Update Daily Time Data* function.

Updating the Income Control with an Absence Code

You can associate absence codes for the following types of income:

- Method 2, hours extension
- Method 4, base hours extension
- Method 8, average wage calculation

Complete the steps below to associate an absence code with an income control.

1. From the Infinium PY main menu, select *Master Files.*
2. Select *Update Master Files.*
3. Select *Update Income Controls* [UIC]. The system displays the Update Income Controls prompt screen.
4. Specify the *Employer, Income,* and *Method*.
5. Press Enter. The system displays the Update Income Controls screen similar to Figure 8-8.

```
 7/18/06  13:35:35        Update Income Controls         PYGMIC     PYDMIC
                                                               Page  1 of  4
Employer  . . . :  ZUS    SAMPLE US COMPANY
Income  . . . . :  VACS
Method  . . . . :  2 - Hours Extension
Description . . .  VACATION SALARIED   Starting Date . .  ________
Priority  . . . .  2000                Ending Date . . .  ________
Summ. Code  . . .  05 +                Distribute Labor.  1 (0=No 1=Yes)
Frequency . . . .  8                   Workers Comp. . .  R
Special Tax . . .  _                   Segments Required  _ (0=No 1=Yes)
Income Basis  . .  2                   Tip Credit O.T. .  _
Income Factor . .      1.0000          Limit Segments  .  _
Hourly Rate . . .  _______________     Create T/C *TIPS?  0 (0=No 1=Yes)
Standard Hours  .      .00             PE Absence Code .  V +
Hours Limit . . .      .00             Shift Calc Method  _
Over Limit Code .  _____ +             Residual Hours  .  _
Income Matrix . .  _____ +             Shift Diff Income  ADJS  +
Matrix Column . .  _____ +             1099-R Dist. Code  __
Matrix Row  . . .  _____ +             NQP 457 Plan  . .  _
Labor Expense . .  001-***-***-1200-002                        +
Rev. Hierarchy  .  _ (Blank=No)        Allow Pay Msg?  .  0 (0=No 1=Yes)

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

Figure 8-8: Update Income Controls screen

6. Specify the absence code for this income in the *PE Absence Code* field.
7. Complete the remaining fields as you normally would.
8. Press Enter. The system displays the second Update Income Controls screen.
9. Complete the fields on this screen as you normally would and press Enter. The system displays the third Update Income Controls screen.
10. Complete the fields on this screen as you normally would and press Enter. The system displays the fourth Update Income Controls screen.
11. Complete the fields on this screen as you normally would and press Enter. The system displays the Update Income Controls prompt screen.
12. Enter information for another income control or press F3 to exit to the main menu.

    See the “Setting Up Controls for Incomes” chapter in the *Infinium PY Guide to Controls* for more information about setting up income controls.

Updating Daily Time

Use the *Update Daily Time Data* function to associate a personnel absence code with an employee’s daily hours income information.

Complete the steps below to associate a personnel absence code with an employee’s daily hours income information.

1 From the Infinium PY main menu select *Cycle Operations.*

2 Select *Time & Attendance Functions*.

3 Select *Update Daily Time Data* [UDSD]. The system displays the Enter/Update Daily Hours prompt screen.

4 Specify the employer and appropriate employee information and press Enter. The system displays the Enter/Update Daily Hours - Summary screen.

5 Select the appropriate income to update. The system displays the Enter/Update Daily Hours - Incomes screen similar to Figure 8-9.

```
 7/18/06  13:37:07   Enter/Update Daily Hours - Incomes    PYGWKM     PYDWKM
Employee  . . . :      80005    ACCURATE,ALAN N
                                                                      Chgd   0
Day # . . . . . :  4                                                  CHANGE
Week #  . . . . .  ___                 Date  . . . . . .  6012006
Income Code . . .  VACS  +             Hours . . . . . .  _______
Amount  . . . . .        100.00        Units . . . . . .  _________
Rate Override . .  ______________      Shift Override. .  1    +
Job Code  . . . .  205   +             Position  . . . .  100125 +
Area        . . .  200   +             Division    . . .  ADMIN +
Department  . . .  ACCT  +             Cost Centr  . . .  100   +
Labor Account # .  _____________________________________________ +
Tip Code  . . . .  _                   Absence Code  . .  _____ +
PE Absense Code .  V +
Project . . . . .  _______________ +   Cost Code . . . :
Project W.B.S.  :
User Code . . . .  _____               User Amount . . .  _________.00
User Date . . . .  ________            User Defined  . .  ____________________
State/Province  .  MA  +
Locality-Misc.  .  BMH +               Locality-County .  CAM +
Locality-City . .  AKR +               Locality-School .  JFS +

F4=Prompt  F5=Copy Last  F10=Access  F12=Return to Summary
```

Figure 8-9: Enter/Update Daily Hours - Incomes screen

6 Specify the absence code for this employee in the *PE Absence Code* field.

7 Complete the other fields as you normally would.

8 Press Enter. The system displays the Enter/Update Daily Hours - Summary screen.

9 Press F3 twice to return to the Infinium PY main menu.

See the “Using Alternative Methods of Entering Time” chapter in the *Infinium PY Guide to Processing* for more information.

Closing Payroll Absence Information to the Personnel Calendar

Caution: Before you use this function, you must use the *Close Daily Time to Cycle* function to close the absences you enter to a pay cycle. Specify the same cycle code and period here as in the *Close Daily Time to Cycle* function.

Use the *Close Absences to PE Calendar* function to update the personnel calendar with an employee’s sick, vacation, or other paid time off that was entered using the *Update Daily Time* function. When you use the *Close Absences to PE Calendar* function, the system generates one of the following reports:

- Close Absences To PE Calendar List Only-Files Were Not Updated
- Close Absences To PE Calendar

When you use the *Close Absences to PE Calendar* function, the system places a **3** in the *Processing Status* field on the Display Employee Absence Data screen. The **3** indicates that absence information was sent from Infinium PY to the Infinium HR calendar.

The system ignores the daily time records you create when you use the *Close Absences to Payroll* function because those absences are already stored in Infinium HR. See the “Closing Payroll Absence Information to the Personnel Calendar” section.

Complete the steps below to close absences in payroll.

1 From the Infinium PY main menu select *Cycle Operations.*

2 Select *Cycle Functions.*

3 Select *Close Absences to PE Calendar* [ABS]. The system displays a screen similar to Figure 8-10.

```
 7/18/06  16:49:31      Close Absences to PE Calendar      PYGJC50    PYDJC50

Close Start Date .  5012006

Close End Date . .  5152006

Employer  . . . .  ZUS +

Cycle . . . . . .  BW     +

Period End Date .  05312006

Segment . . . . .  ____

PE Absence Code .  V +

List/Close Opt. .  1 (1=List Only 2=List and Close)



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

Figure 8-10: Close Absences to PE Calendar screen

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

Close Start Date

Specify the earliest absence date to close to the personnel calendar.

Close End Date

Specify the latest absence date to close to the personnel calendar.

Employer

Specify the employer whose records to close to the personnel calendar.

Cycle

Specify the pay cycle of the absence records to close to the personnel calendar. Specify the same cycle code as the one you specified when you used the *Close Daily Time to Cycle* function.

Period End Date

Specify the period end date of the pay cycle you specified in the *Cycle* field. Specify the same period end date as you specified for the cycle you specify.

Segment

Type a segment or leave this field blank to close all segments to the personnel calendar.

PE Absence Code

Specify a personnel absence code. Leave this field blank to close all personnel absence codes to the personnel calendar.

List/Close Opt

Specify whether to generate only a list of records that will be closed to the personnel calendar or to generate the list and close the records. Valid values are:

1	Generate a listing of records to close to the personnel calendar. Do not update any files.
2	Close absences to the personnel calendar and generate a list of the closed records. Records are marked as closed.

5 Press Enter. The system generates the appropriate list depending upon your entry in the *List/Close Opt* field.

Viewing the PE Calendar with Absences

After you use the *Close Absences to PE Calendar* function, you can view absences for a specified employee.

Complete the steps below to view an employee’s absences.

1 From the Infinium HR main menu select *Personnel Calendar Operations*.

2 Select *Display Calendar Data.*

3 Select *Display Employee Calendar Data* [DEC]. The system displays the Display Employee Calendar prompt screen.

4 Specify the employer, employee, and date range.

5 Press Enter. The system displays the Display Employee Calendars screen similar to Figure 8-11.

```
 7/18/06  16:53:47       Display Employee Calendars       PEGHUI     PEDHUI

Employer  . . . :  JCP
Employee  . . . :      17079    ALBERTS,JR,MARY J
Beginning Date  :   8/01/2005          Ending Date . . :   7/31/2006
Age . . . . . . :   41                 Sex . . . . . . :  F

1=Display
                               1 1 1 1 1 1 1 1 1 1 2 2 2 2 2 2 2 2 2 2 3 3
             1 2 3 4 5 6 7 8 9 0 1 2 3 4 5 6 7 8 9 0 1 2 3 4 5 6 7 8 9 0 1
 _   MAR 06
 _   APR 06
 _   MAY 06
 _   JUN 06    S V     V V     V V V V V V V V V V V S S S S S S S S S S
 _   JUL 06  S V S S S S S S S S S S S S S S S S S S S S S S S S S S S S S


CODE DESCRIPTION         NO.    HOURS  CODE DESCRIPTION         NO.    HOURS
 A  ABSENCE               1    20.00
 S  SICK                 44   352.00
 V  VACATION             15   120.00

F3=Exit   F5=Calendar Detail   F6=Analysis   F8=Accrual Data
```

Figure 8-11: Display Employee Calendars screen

6 Type **1** next to the month for which you want to display information. The system displays the Display Employee Calendar detail screen similar to Figure 8-12.

```
_ 7/18/06  16:54:59      Display Employee Calendar Data     PEGHUI     PEDHUI

 Employer  . . . :  JCP
 Employee  . . . :      17079    ALBERTS,JR,MARY J
 Beginning Date  :   8/01/2005          Ending Date . . :   7/31/2006

   Date      Code   Description         Hours     Comments
   6/02/2006  S  SICK                    8.00
   6/03/2006  S  SICK                    8.00
   6/03/2006  V  VACATION                8.00
   6/06/2006  V  VACATION                8.00
   6/07/2006  V  VACATION                8.00
   6/10/2006  V  VACATION                8.00
   6/11/2006  V  VACATION                8.00
   6/12/2006  V  VACATION                8.00
   6/13/2006  V  VACATION                8.00                                  +
    Holidays/Non-workdays                  Holidays/Non-workdays




 F3=Exit
```

Figure 8-12: Display Employee Calendar Data detail screen

7 Press F3 three times to return to the HR main menu.

Updating Infinium Payroll with Absence Information

Use the *Trial Close Absences to Payroll* and *Close Absences to Payroll* functions to close employee absences to payroll.

When you use the *Trial Close Absences to Payroll* function, the system sends the absence information to Infinium PY and generates a report listing the absence information that will close when you run the *Close Absences to Payroll* function. Use the report to review the absence information and make any necessary adjustments for incorrect information.

When you use the *Close Absences to Payroll* function, the system sends the absence information to Infinium PY and generates a report listing the absence information.

After you close absences to payroll, the system sends the information to the Time and Attendance Daily Time file, PYPWK.

When you use the *Close Absences to Payroll* function, the system marks the records that are created during that process as having been sent from HR so that if you create daily time by closing it from Infinium HR, the system ignores the closed daily time records, and those records are not sent back to Infinium HR.

You cannot make changes to an existing PE absence record after you close the absence to payroll. If you need to make changes for an absence that is closed to Payroll, you can

- Use *Update Daily Time Data* to change the Payroll data, and use *Update Employee Absence Data* to create a “memo” entry that explains the adjustment that was needed.
- Use *Update Employee Absence Data* to create an “unprocessed” adjusting entry, and use *Close Absences to Payroll* to send the adjustment to the Daily Time file.

The adjustment method you choose is based on timing issues such as whether the payroll cycle data was processed and your departmental procedures.

Complete the steps below to generate a trial close of employee absences to Infinium PY.

1 From the Infinium HR main menu select *Personnel Calendar Operations*.

2 Select *Update Calendar Data.*

3 Select *Trial Close Absences to Payroll* [TCATP]. The system displays a screen similar to Figure 8-13.

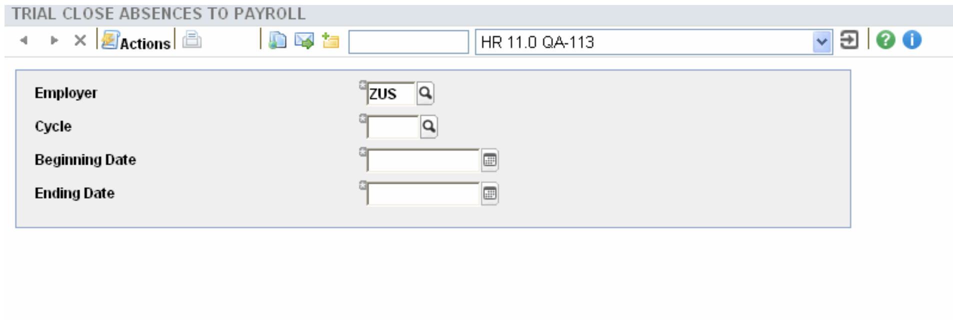


Figure 8-13: Trial Close Absences to Payroll screen

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

Employer

Specify the employer whose records you want to close from the personnel calendar.

Cycle

Specify the pay cycle of the absence records you want to close from the personnel calendar.

Beginning Date

Specify the earliest date for which to include absence information in the records to close from the personnel calendar.

Ending Date

Specify the last date for which to include absence information in the records to close from the personnel calendar.

5 Press Enter. The system generates the Trial Close Absences report.

6 Review the information on the report and make any necessary adjustments.

7 Repeat the above steps using the *Close Absences to Payroll* function to close absences to payroll.

Chapter 9 Family Medical Leave Act Setting Up and Processing

9

The chapter consists of the following topics:

Overview

Infinium HR provides the functionality that supports Federal Family Medical Leave Act (FMLA) tracking. This includes:

- Identifying key information to help to determine eligibility
- Tracking multiple Federal FMLA events for each employee with detail absence tracking
- Tracking multiple certifications, recertifications, and key dates related to each event
- Using leave years based on a fixed year, the date of hire, the adjusted date of hire, the date of the first leave, or a rolling calendar
- Tracking absences through core Infinium HCM, Infor Infinium Self Service, or from time entered manually in the *Daily Time* function in Infinium PY or from time entered into a time clock system
- Concurrently using paid time off (PTO)

Refer to the official US government publications for complete details on the FMLA regulations.

To correctly process FMLA information, you must set up the following:

- Update Employer Controls

  You must specify the FMLA leave year and category for each employer.

- Update Employer Codes

  You must define code values for these code types:

  - Activity Log, ALG

    Use the activity log code values to track certifications, recertifications and other activities related to an event.

  - Leave Type, LVT

    Use the leave type code values to provide reference information for FMLA events such as consecutive leave, intermittent leave, reduced hours, and so on.

  - Reason, RSN

    Use the reason code values to provide the reason for an FMLA event.

  - Personnel Absence Code, PAB

    Type **F** in the *Absence Type* field to identify that FMLA is the type of absence.

  - Accrual Code, ACR

    Use the *FMLA Plan* field to indicate whether to use the accrual for FMLA processing.

- Update FMLA Accrual Controls

  Use the FMLA accrual controls to specify eligibility requirements for hours and months by associating an income group with the FMLA control.

- Map PTO to incomes

  Use the *Update Absence Mapping* function to associate paid time off with incomes to transfer absences to Infinium PY.

Reviewing and tracking FMLA activities include:

- Updating FMLA events

  You create an FMLA event for each type of FMLA leave, for example, surgery, family medical.

  Events include:

  - Verifying FMLA eligibility
  - Defining PTO accruals
  - Creating FMLA events
  - Updating personnel actions
  - Updating absences
- Using the activity log

  Specify a date and activity type.

- Specifying that a status change is an FMLA leave

  Specify that the status change action is for FMLA leave and update the employee's basic data record to indicate that FMLA leave is in effect.

- Updating absence information

Working with SHCM

Infor Self Service for Infinium (SHCM) transfers employee-generated paid-time-off information to the employee absence file in Infinium HCM. These employee absence records are then processed along with other absence records using standard absence related functionality.

Setup Requirements

The diagram below illustrates the setup requirements for FMLA processing.

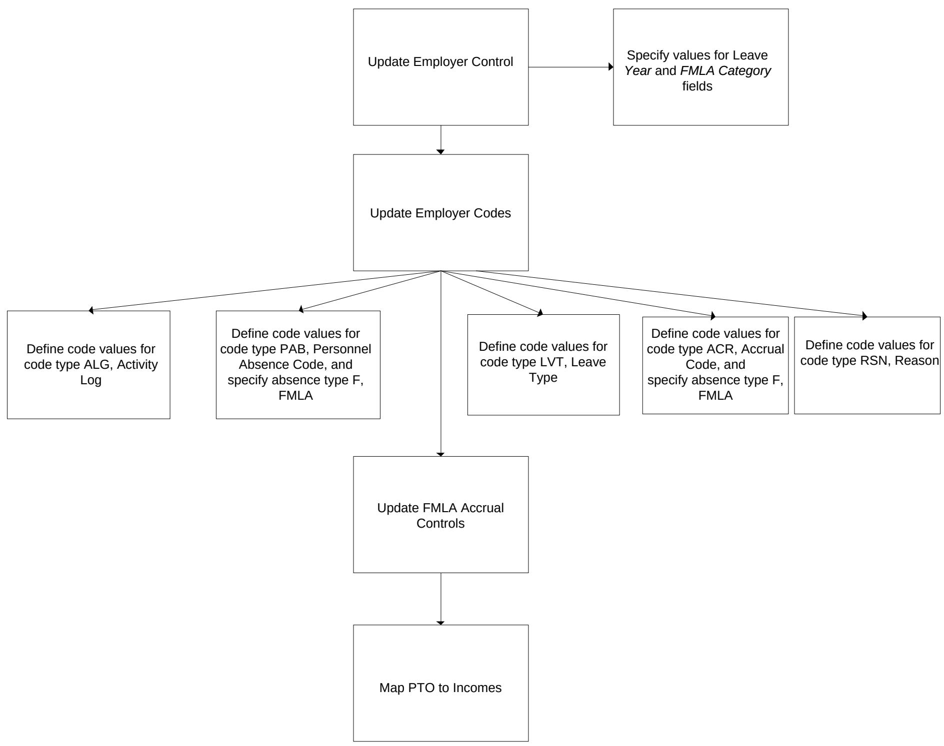


Figure 9-1: Setup requirements for FMLA processing

Updating Employer Controls

To update the Employer Control for FMLA processing, complete the steps below.

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

2 Select *Update Master Files.*

3 Select *Update Employer Controls* [UC].

4 Specify the employer and press Enter.

5 Complete the first Update Employer Controls screen as you normally would and press Enter. The system displays the second Employer Update screen similar to Figure 9-2.

```
 6/27/12  19:41:21            Employer Update            PEGMCO     PEDMCO
                                                               Page  2 of  3
Employer  . . . :  ZUS    SAMPLE US COMPANY
Employer Details
Affirm.Act. Goal    0                  Affirm.Act.Model   0  (0->3)
Tax ID for EE#? .  0  (0=No 1=Yes)     Posit. File Used?  1  (0=No 1=Yes)
Check for Dup ID?  2  (0->2)           Date Format . . .  MDY
                                       EEO Unit Control   0  (0->2)
Accrual Category Names
Category 1  . . .  Vacation            Category 2  . . .  Sick
Category 3  . . .  Personal            Category 4  . . .  FMLA
Category 5  . . .  Category 5          Category 6  . . .  Category 6
FMLA Category . .  4 (0->6)            FMLA Leave Year .  1 (1->5)
Additional Employer Flags
Ed EE only in ER?  1 (0->1)           Act Self Service .  1 (0=No, 1=Yes)
Del. Future Trans  1 (0->2)           Act Self Srv Rout   1 (0=No, 1=Yes)
Position Default . 2 (0->2)           Point In Time Rpt   1 (0=No, 1=Yes)
NAICS Code . . . . 713990 +           Act Talent Mgmt. .  1 (0=No, 1=Yes)
Edit Inact Levels  0 (0->2)           Edit Inact Pos . .  0 (0->2)
Inact Lvl Rpt Dft  0 (0, 1)           Edit Wrkfrc Lvl  .  0 (0->2)
Transfer User Def  1 (0=No, 1=Yes)    Reqr Postal Code?   1 (0->2)
Transfer Payroll . 0 (0=No, 1=Yes)
F3=Exit  F10=Access  F12=Previous
```

Figure 9-2: Employer Update screen

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

FMLA Category

Specify the paid time off category that represents FMLA leave. You identify up to six accrual categories on the second Employer Update screen. When you use the *Calculate Benefit Accruals* function, the system excludes the FMLA leave category from standard processing and does not update the accrued and earned amounts. The system updates the FMLA taken amount and earned amounts when you use the *Calculate FMLA Accruals* function.

Valid values are:

0	Not applicable, none of the categories represents the FMLA leave.
1	Accrual category one represents FMLA leave.
2	Accrual category two represents FMLA leave.
3	Accrual category three represents FMLA leave.
4	Accrual category four represents FMLA leave.
5	Accrual category five represents FMLA leave.
6	Accrual category six represents FMLA leave.

FMLA Leave Year

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

Valid values are:

Blank	Not applicable
1	The year is based on a fixed twelve month period such as calendar, fiscal, or other year required by law.
2	The year is based on the employee's date of hire. For exceptions, complete the *FMLA Start Year* field on the employee's basic data record.
3	The year is based on the employee's adjusted date of hire. For employee's with no adjusted date of hire, the system uses the date of hire. For exceptions, complete the *FMLA Start Year* field on the employee's basic data record.

4	The year is based on the first time the employee took FMLA leave. When you specify 4, the system uses the date in the *FMLA Start Year* field on the employee's basic data record.
5	The year is a twelve month period that looks back from the date an employee uses FMLA leave.

7 Complete the remaining fields as you normally would and press Enter.

8 Complete the third Employer Update screen as you normally would and press Enter to return to the Employer Update prompt screen.

9 Press Exit to return to the main menu.

Updating Employer Codes

You must update the following employer codes before you can process FMLA information:

- Activity Log, ALG
- Leave Type, LVT
- Reason, RSN
- Personnel Absence Code, PAB
- Accrual Code, ACR

Creating Code Values for Code Types ALG, LVT, and RSN

You use the same process to create code values for code types ALG, LVT, and RSN. Complete the steps below to create code values for these code types.

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

2 Select *Update Master Files.*

3 Select *Update Employer Codes* [UCC]. The system displays a screen similar to Figure 9-3.

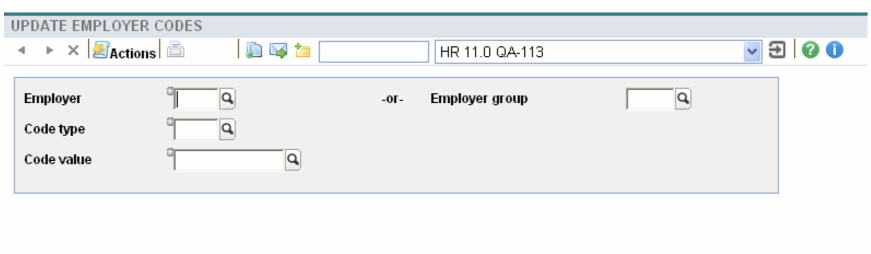


Figure 9-3: Update Employer Codes prompt screen

4 Use the information below to complete this screen.

Employer

Specify the employer for which you are creating code values.

Code type

Specify **ALG**, **LVT**, or **RSN**.

Code value

Specify a value that represents the code.

5 Press Enter. The system displays a screen similar to Figure 9-4.

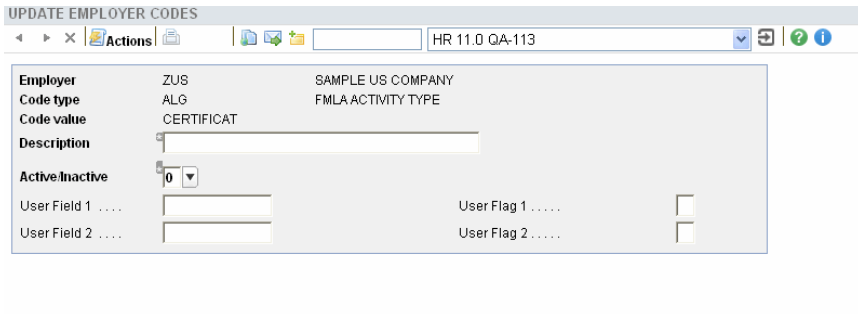


Figure 9-4: Update Employer Codes screen

6 Complete the fields on this screen as you normally would. Provide a meaningful description for the code.

7 Press Enter.

Creating Code Values for Code Type ACR

Complete the steps below to create code values for code type ACR.

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

2 Select *Update Master Files*

3 Select *Update Employer Codes* [UCC]. The system displays a screen similar to Figure 9-5.

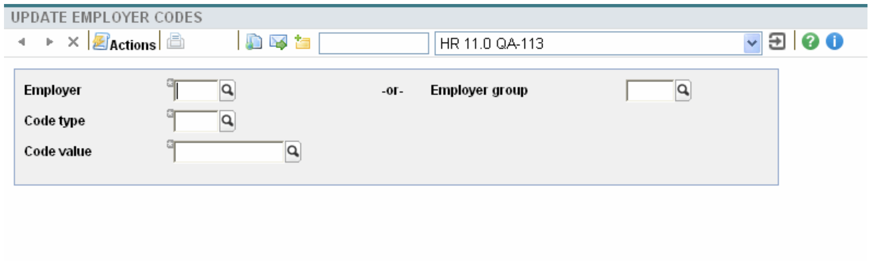


Figure 9-5: Update Employer Codes prompt screen

4 Use the information below to complete this screen.

Employer

Specify the employer for which you are creating code values.

Code type

Specify **ACR**.

Code value

Specify a value that represents the code.

5 Press Enter. The system displays a screen similar to Figure 9-6.

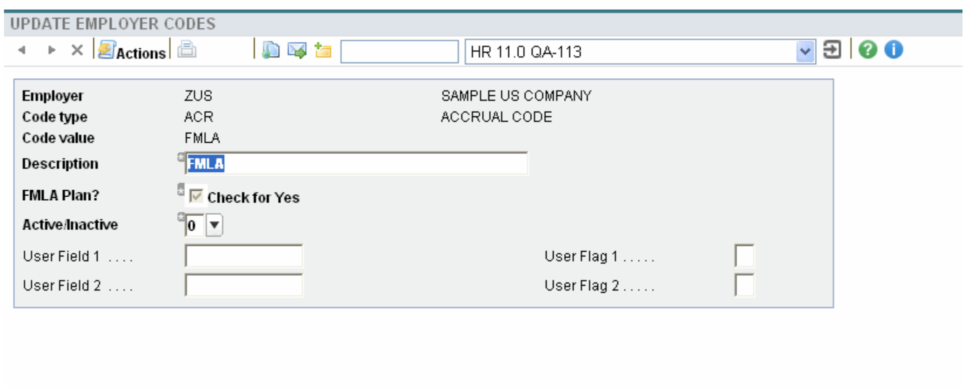


Figure 9-6: Update Employer Codes screen

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

FMLA Plan?

Specify yes to indicate that this code value represents an FMLA plan.

7 Complete the remaining fields as you normally would.

8 Press Enter.

Creating Code Values for Code Type PAB

Complete the steps below to create code values for code type PAB.

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

2 Select *Update Master Files.*

3 Select *Update Employer Codes* [UCC]. The system displays a screen similar to Figure 9-7.

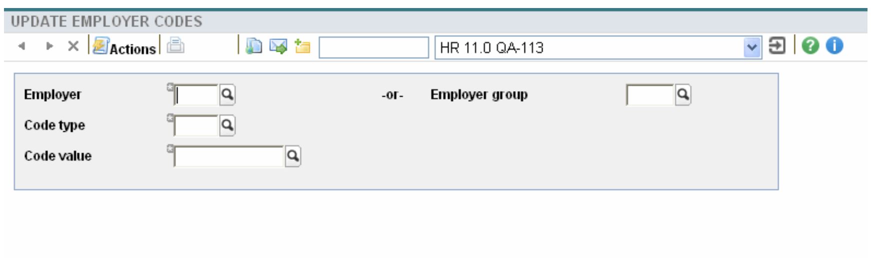


Figure 9-7: Update Employer Codes prompt screen

4 Use the information below to complete this screen.

Employer

Specify the employer for which you are creating code values.

Code type

Specify **PAB**.

Code value

Type the value that represents this absence.

5 Press Enter. The system displays a screen similar to Figure 9-8.

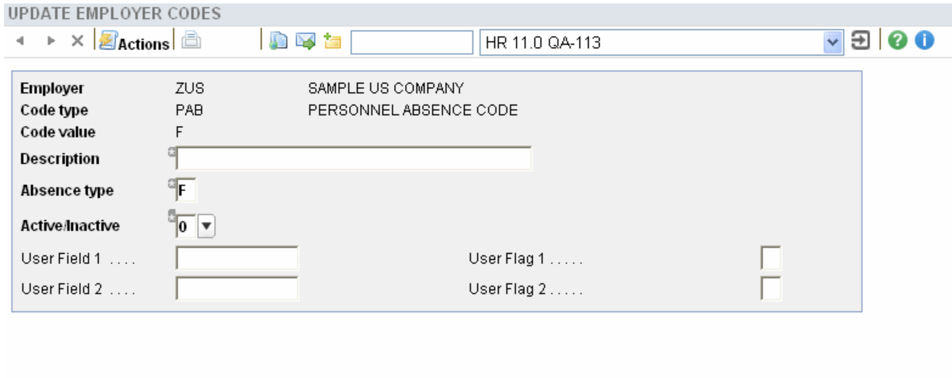


Figure 9-8: Update Employer Codes screen

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

Absence type

Type **F** to indicate that this code value represents an absence associated with FMLA.

7 Complete the remaining fields as you normally would.

8 Press Enter.

Updating FMLA Accrual Controls

Use the information in this section to create and maintain FMLA accrual controls. These values are used to determine an employee's eligibility for FMLA leave.

Complete the steps below to create an FMLA accrual control.

1 From the Infinium HR main menu select *FMLA Operations.*

2 Select *Update Accrual Controls* [UFAC]. The system displays the Update Accrual Controls prompt screen.

3 Specify an employer and an accrual code and press Enter. The accrual code is associated with code type ACR. When you create the accrual code value for code type ACR, you must specify yes in the *FMLA Plan?* field. The system displays the Update FMLA Accrual Controls screen similar to Figure 9-9.

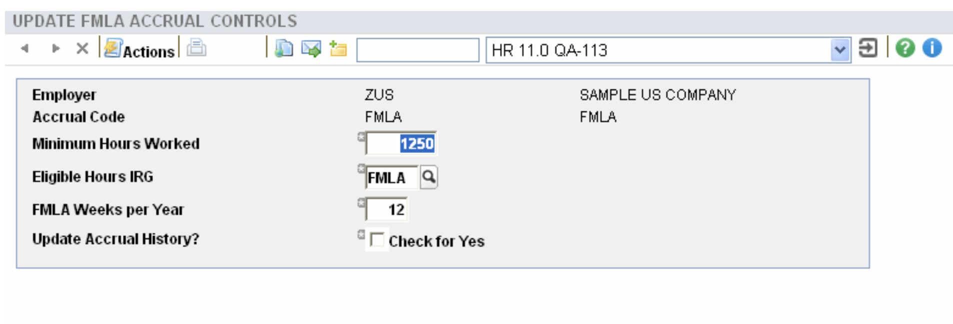


Figure 9-9: Update FMLA Accrual Controls screen

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

Minimum Hours Worked

Type the minimum hours that the employee must work in the previous 12 months to be eligible for FMLA leave.

Eligible Hours IRG

Specify the income reporting group that defines the incomes to use to verify that the employee meets the hours worked requirement for FMLA leave.

FMLA Weeks per Year

Type the number of weeks per year to allow for this accrual code for FMLA leave.

Update Accrual History?

Specify yes to generate history records each time paid time off accrual information changes for an employee. Otherwise, specify no.

5 Press Enter.

Displaying FMLA Accrual Controls

You can use the *Display FMLA Accrual Controls* function to display FMLA accrual control information.

Complete the steps below to display FMLA accrual controls.

1. From the Infinium HR main menu select *FMLA Operations.*
2. Select *Display FMLA Accrual Controls* [DFAC]. The system displays the Display FMLA Accrual Controls prompt screen.
3. Specify an employer and an accrual code and press Enter. The system displays the Display FMLA Accrual Controls screen showing the accrual control information for the specified employer and accrual code.

Mapping Absences to Incomes

You use the *Update Absence Mapping* function to map absence codes to Infinium Payroll income and accrual codes. This is used to interface absences from the Personnel Calendar to the Infinium Payroll time entry file, PYPWK.

If you are mapping absences to income codes only, you can map the paid time off only to the following Infinium PY income methods:

- Method 2 - Hours Extension incomes
- Method 4 - Base Hours Extension incomes
- Method 6 - Custom Calculation incomes

If you are mapping absences to income codes and accrual codes, you can map the paid time off to any Infinium PY income method.

An employee must be authorized to the income in Infinium PY. Otherwise, the employee’s paid time-off requests cannot be closed to PYPWK.

Complete the steps below to map absences to incomes.

See the “Mapping Absences to Incomes” section of the “Working with the Personnel Calendar” chapter for more information.

Processing FMLA Employee Information

The diagram below illustrates the process for updating FMLA employee information.

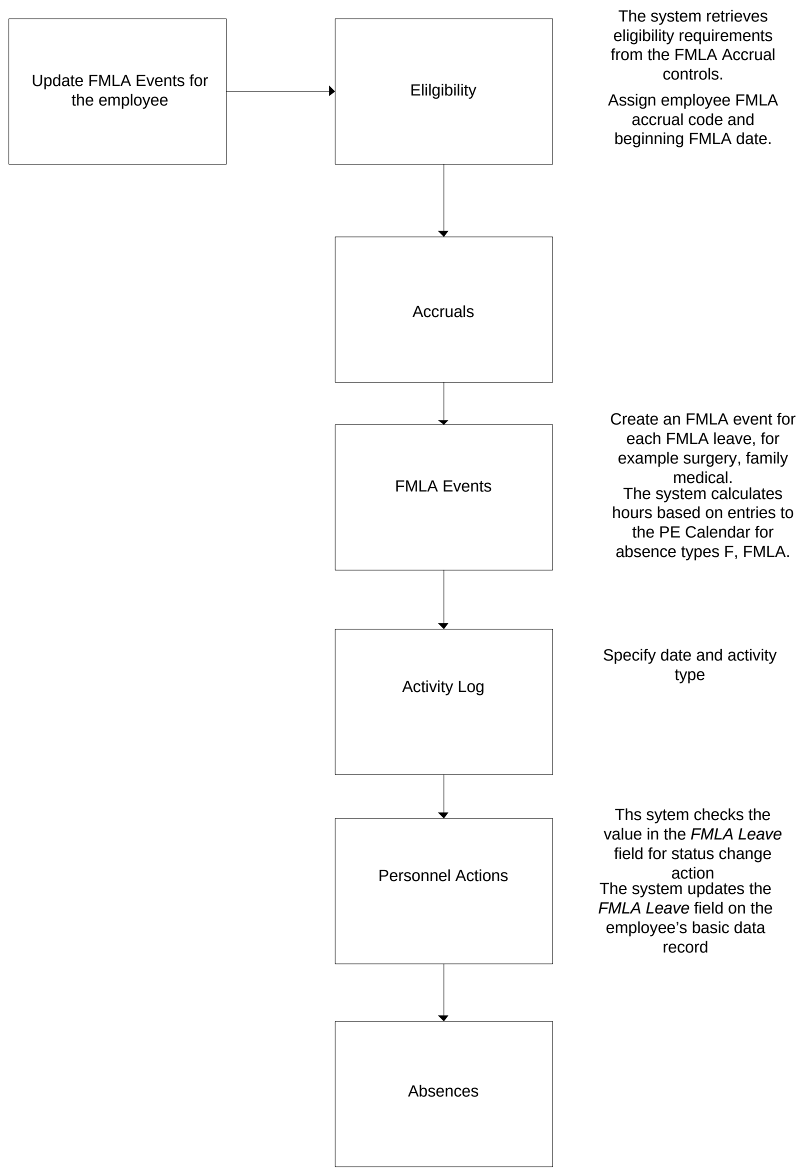


Figure 9-10: Processing employee FMLA information

Updating FMLA Events

Use the *Update FMLA Employee Events* function to record and track FMLA events. Complete the steps below to update FMLA events.

1 From the Infinium HR main menu select *FMLA Operations.*

2 Select *Update FMLA Employee Events* [UFEE]. The system displays the Update FMLA Employee Events prompt screen.

3 Specify the employer and employee and press Enter. The system displays the Update FMLA Events selection screen similar to Figure 9-11.

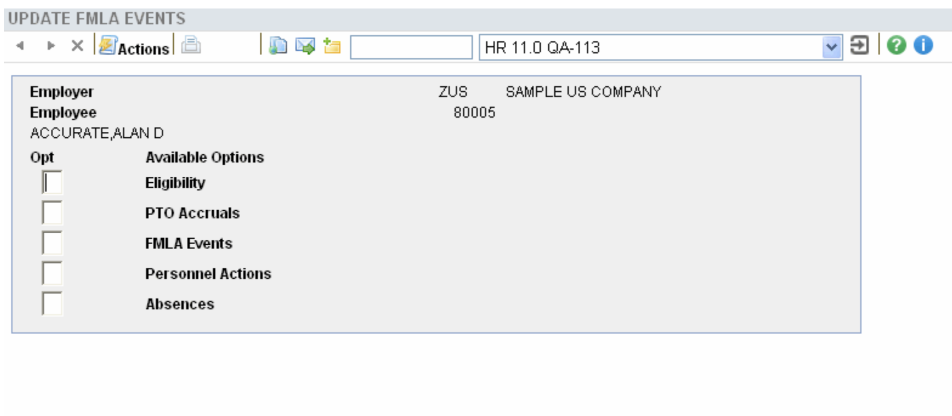


Figure 9-11: Update FMLA Events selection screen

4 Select the option to use. You can select more than one option. If you select more than one option, the system displays each selected option in the order the options are listed.

Verifying FMLA Eligibility

Select Eligibility on the Update FMLA Events selection screen to confirm whether minimum eligibility requirements were met for the employee. The system shows the length of service, hours worked in the past year, and how many FMLA hours for which the employee is eligible. This screen is informational only. The calculated values can assist you in determining eligibility; the values are not used in processing.

Complete the steps below to verify FMLA eligibility.

1 To verify FMLA eligibility, select **Eligibility** on the Update FMLA Events selection screen. The system displays the Verify FMLA Eligibility selection screen similar to Figure 9-12.

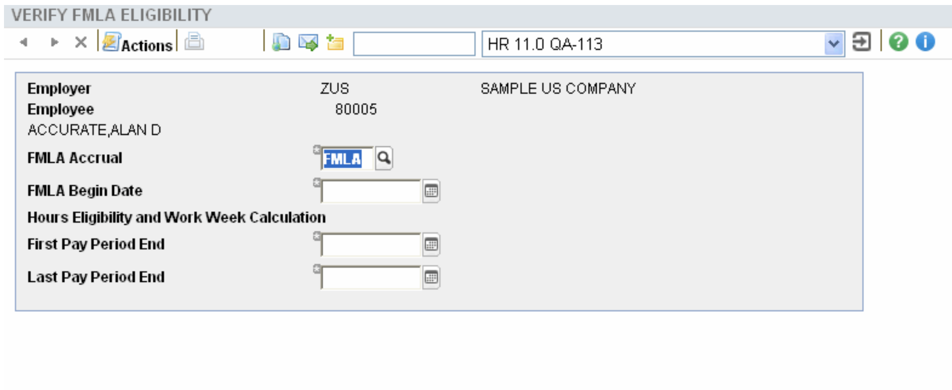


Figure 9-12: Verify FMLA Eligibility screen

FMLA Accrual

Specify the FMLA accrual code where the FMLA rules are defined for this eligibility record.

FMLA Begin Date

Specify the beginning date for the FMLA event. The system uses the date in the *First Pay Period End* and the *Last Pay Period End* to determine the actual hours worked in the previous year. When you select the action that calculates the applicable pay period dates, the system searches for an employee check history pay period ending date that is on or before the date in this field and uses that pay period ending date for the value in the *Last Pay Period End* field.

First Pay Period End

If you calculate the pay periods, the first pay period is normally one year before the last pay period.

You can specify the first pay period ending date to include when the system determines actual hours worked for the employee if the date is different from the calculated date.

Last Pay Period End

If you calculate the pay periods, the last pay period is normally the pay period that closed right before the beginning of the FMLA leave.

You can specify the last pay period ending date to include when the system determines actual hours worked for the employee if the date is different from the calculated date.

2 Press Enter. The system displays the second Verify FMLA Eligibility screen similar to Figure 9-13.

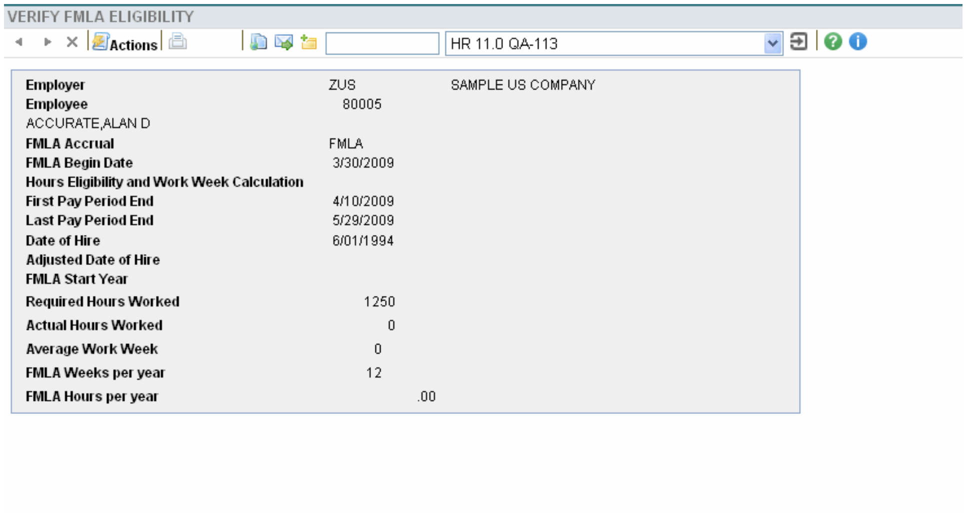


Figure 9-13: Verify FMLA Eligibility information screen

3 Use the information below to understand this screen and review the information.

FMLA Accrual

Specify the FMLA accrual code where the FMLA rules are defined for this eligibility record.

FMLA Begin Date

This is the beginning date for the FMLA event.

First Pay Period End

This is the first pay period ending date when the system determines actual hours worked for the employee.

Last Pay Period End

This is the last pay period ending date when the system determines actual hours worked for the employee.

Date of Hire

This is the employee's date of hire.

Adjusted Date of Hire

This is the employee's adjusted date of hire.

FMLA Start Year

This is the value in the *FMLA Start Year* field in the Break in Service section of the Update Employee Basic Data screen. This field is usually blank; however, if **4** is the value in the *FMLA Leave Year* field, the system completes the *FMLA Start Year* at the time you create the first FMLA event for an employee. You can also use the *Update Employee Data* function to update the value in the *FMLA Start Year* field manually.

Required Hours Worked

This is the minimum required hours worked specified for this accrual control.

Actual Hours Worked

This is the sum of the hours that were worked between the first pay period and the last pay period for any income that is included in the Eligible Hours IRG (Income Reporting Group) on this FMLA accrual control.

Average Work Week

This is the actual hours worked divided by 52.

FMLA Weeks per year

This is the number of FMLA weeks per year specified for the FMLA accrual control.

FMLA Hours per year

This is the average work week hours times the FMLA weeks per year. You can enter this information on the Update PTO Accruals screen when you enter the applicable FMLA accrual code for the employee.

4 Press Enter.

Update PTO Accruals

1 To work with Update PTO Accruals, select **PTO Accruals** on the Update FMLA Events selection screen. The system displays the Update PTO Accruals screen similar to Figure 9-14.

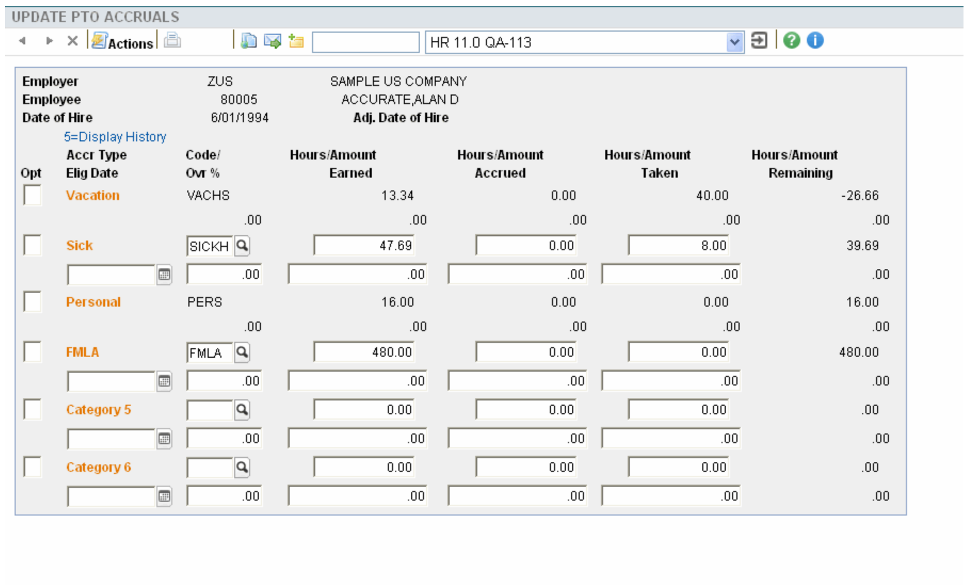


Figure 9-14: Update PTO Accruals screen

2 Use this screen to enter the FMLA accrual code and the earned hours. You can enter the FMLA hours per year that are calculated when you use the *Verify FMLA Eligibility* function or you can enter another value to handle exceptions.

3 See the “Processing the Employee’s PTO Accruals” section of the “Hiring New Employees into US Employers” chapter in the *Infinium HR Guide to Processing* for more information about this screen

Creating and Updating FMLA Events

1 To work with FMLA Events, select **FMLA Events** on the Update FMLA Events selection screen. The system displays the Update FMLA Events Summary screen similar to Figure 9-15.

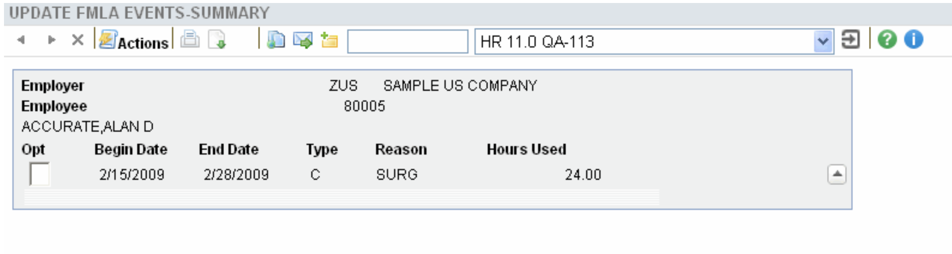


Figure 9-15: Update FMLA Events Summary screen

On this screen you can:

- Create an FMLA event by selecting **Create**
- Update an existing FMLA event by selecting it from the list
- Delete an FMLA event by selecting **Delete**
- Change an FMLA event by selecting **Change**
- Generate an activity log by selecting **Activity Log**

2 Press F6 to create. The system displays the Update FMLA Event Detail screen similar to Figure 9-16.

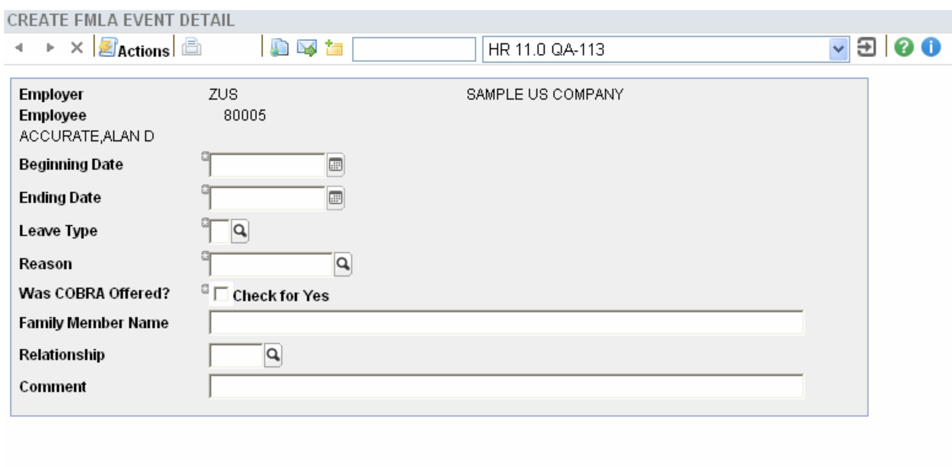


Figure 9-16: Create FMLA Event Detail screen

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

Beginning Date

Specify the beginning date of the FMLA event.

Ending Date

Specify the ending date of the FMLA event.

Leave Type

Specify the code value that represents the leave type for this event. This code value is associated with the Leave Type code type, LVT.

Reason

Specify the value that represents the reason for this event. This code value is associated with the FMLA Reason Code type, RSN.

Was COBRA Offered?

Specify yes if COBRA was offered to the employee for this FMLA event.

Family Member Name

Type the name of the family member for whom the employee will care during this FMLA leave.

Relationship

Specify the relationship between the employee and the family member.

Comment

Type additional information about this FMLA event.

4 Press Enter.

Generating the Activity Log

Use the activity log to track medical certifications, recertifications, letters sent, and other activities related to an event.

Complete the steps below to generate the activity log.

1 On the Update FMLA Events Summary screen select **Activity Log** next to the record. The system displays the Update Event FMLA Activity Log selection screen similar to Figure 9-17.

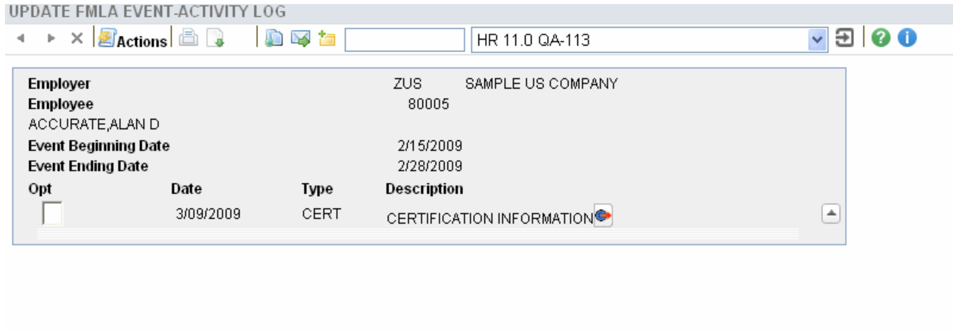


Figure 9-17: Update FMLA Event Activity Log selection screen

On this screen you can:

- Create an activity log
- Update an activity log
- Display an activity log
- Delete an activity log

2 Press F6 to create an activity log. The system displays the Create Activity Log screen similar to Figure 9-18.

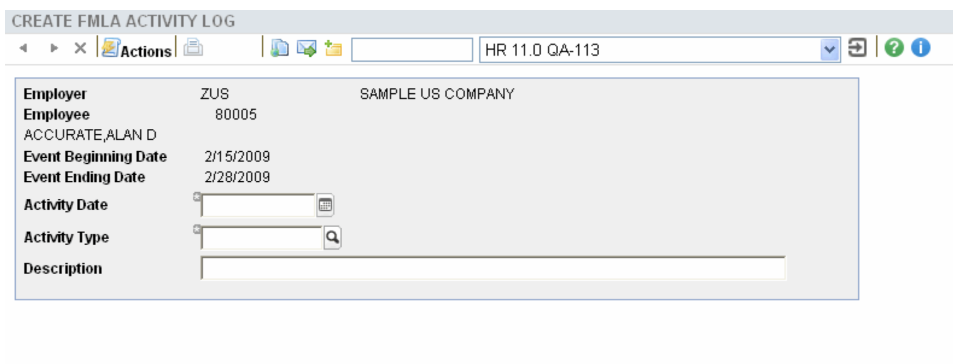


Figure 9-18: Create FMLA Activity Log screen

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

Activity Date

Specify the date on which the activity was performed.

Activity Type

Specify the code value that represents this activity type. This code is associated with the FMLA Activity code type, ALG.

Description

Type a description for this activity.

4 Press Enter. The system generates the activity log for the specified criteria.

Updating Personnel Actions

1 To work with Personnel Actions, select **Personnel Actions** on the Update FMLA Events selection screen. The system displays the Personnel Actions selection screen Figure 9-19.

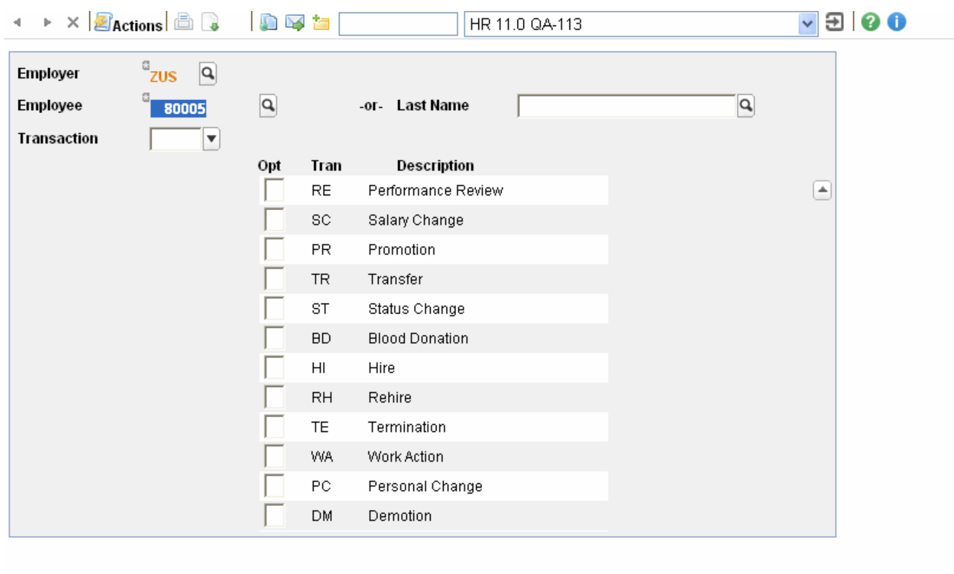


Figure 9-19: Personnel Actions selection screen

2 Select the status change action. The system displays a screen similar to Figure 9-20.

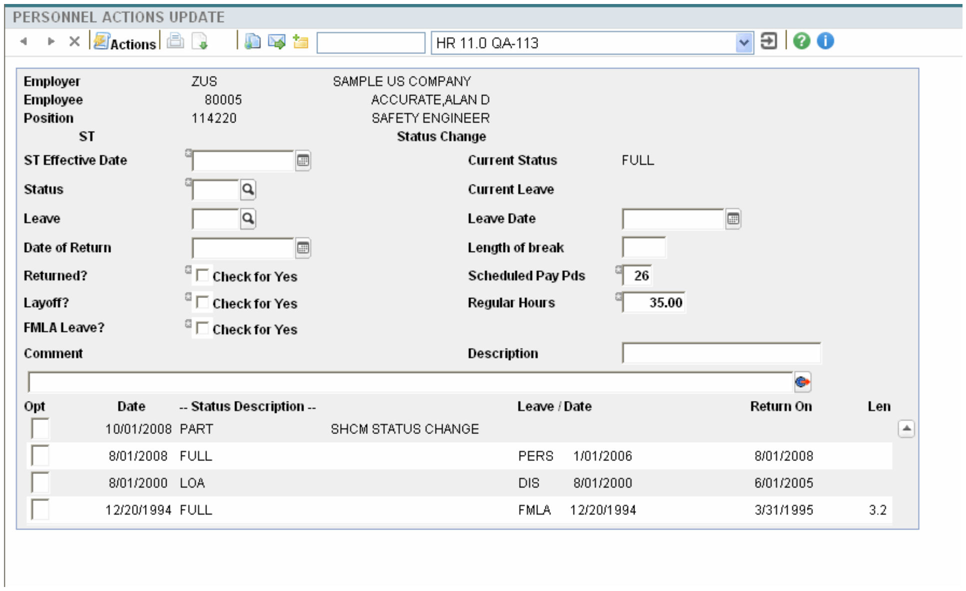


Figure 9-20: Personnel Actions Update status change screen

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

FMLA Leave?

Specify yes to indicate that this status change is for an FMLA leave. After you enter a value here, the system updates the *FMLA Leave* field on the employee's basic data record.

4 Complete the other fields as you normally would and press Enter.

Updating Absences

1 To work with employee absences, select **Absences** on the Update FMLA Events selection screen. The system displays the Update Employee Absence Data selection screen.

On this screen you can:

- Create a new absence record by specifying **Create**
- Update an absence record by selecting the record from the list

2 Press F6 to create a new record. The system displays a screen similar to Figure 9-21.

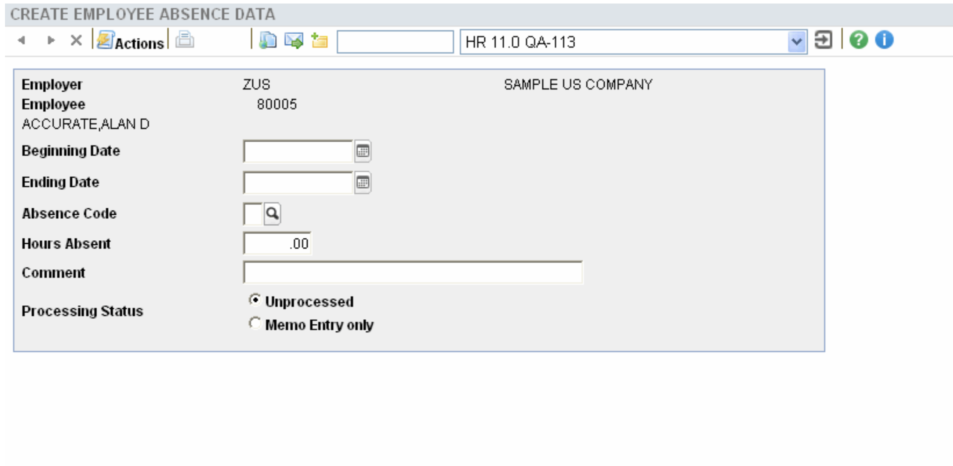


Figure 9-21: Create Employee Absence Data screen

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

Beginning Date

Specify the date when the employee's absence from work started.

If this absence is longer than one day, indicate the duration of the absence by specifying the ending date. If the absence is one day or less, leave the *Ending Date* field blank.

Ending Date

If the duration of the employee's absence from work was greater than one day, specify the last day the employee was absent. If the duration of the absence was one day or less, leave this field blank.

Absence Code

Specify the code value that represents the reason the employee was absent. To enter an FMLA related absence code, you must create an FMLA event before you can enter the absence days. This code is associated with the Personnel Absence Code type, PAB, and the absence type must be **F**.

Hours Absent

Type the number of hours the employee was absent. To make a correction for a previously processed absence, enter a negative value (xx.xx-). If you are entering an absence that does not require hours, such as a comment to document an absence-related action, you can leave this field blank.

Comment

Type a comment for this absence event.

Processing Status

Specify whether this transaction is **Unprocessed** or **memo only**.

4 Press Enter.

Processing Leave Information

After you complete setting up your employees for FMLA, use the steps below to process the leave information with Infinium PY.

1 Use the *Update Employee Absence Data* function to update employee absence information. See the “Maintaining Employee Absence Data” section in the “Working with the Personnel Calendar” chapter.

2 Use the *Trial Close Absences to Payroll* function to simulate closing absences to payroll. See the “Updating Infinium Payroll with Absence Information” section of the “Working with the Personnel Calendar” chapter.

3 Review the Close Absences to Payroll Trial Listing report. Make any necessary corrections.

4 Use the *Close Absences to Payroll* function to close absences to payroll. See the “Updating Infinium Payroll with Absence Information” section of the “Working with the Personnel Calendar” chapter.

5 Run your payroll cycles as you normally would including the *Post Cycles and Print Checks* function. See these chapters in the *Infinium PY Guide to Processing:*

- “Processing Cycles”
- “Beginning a Cycle”
- “Working with Timesheet Data”
- “Completing Cycle Operations”
- “Using Alternative Methods of Entering Time”

6 Periodically, use the *Trial Calculate FMLA Accruals* function and the *Calculate FMLA Accruals* function to calculate FMLA accruals. We recommend that you calculate FMLA accruals as often as you run payroll unless you specify **1**, twelve month, in the *FMLA Leave Year* field on the employer control. If you specify a twelve-month leave year, you can calculate accruals yearly. See the “*Calculating FMLA Accruals*” section below.

7 Use the *Trial Calculate FMLA Accruals* function to simulate calculation of FMLA accruals.

8 Review the FMLA Accrual Processing Trial Listing report. Make any necessary corrections.

9 Use the *Calculate FMLA Accruals* function to calculate FMLA accruals.

Calculating FMLA Accruals

Use the *Trial Calculate FMLA Accruals* function to simulate the calculation of changes in the "taken" amount for employees who use FMLA leave. The calculation is based on the value in the *FMLA Leave Year* field on the employer control.

The system modifies the taken hours only when the employee qualifies for changes based on the value in the *FMLA Leave Year* field on the Employer Control. The system generates the FMLA Accrual Processing Trial Listing, which you can review to determine whether to make adjustments to employee accrual information.

Use the *Calculate FMLA Accruals* to calculate the changes in the “taken” amount for employees who use FMLA leave. The calculation is based on the value in the *FMLA Leave Year* field on the employer control. The system generates a list of changes and changes employee data.

The system processes only employees for whom the accrual code is in the accrual category that you specify in the *FMLA Category* field on the employer control.

The system modifies the taken hours only when the employee qualifies for changes based on the value in the *FMLA Leave Year* field on the employer control. Use the table below to understand the processing that occurs depending upon the values in the *FMLA Leave Year* field.

FMLA Leave Year	Action taken
1 Fixed year	The taken hours are zero for all employees with an FMLA accrual.
2 Date of hire	The taken hours are zero for all employees for whom the FMLA start year for the FMLA accrual is **if present** or whose date of hire is within the specified date range.
3 Adjusted date of hire	The taken hours are zero for all employees for whom the FMLA start year, the adjusted date of hire for the FMLA accrual is **if present,** or whose date of hire is within the specified date range.

FMLA Leave Year	Action taken
4	The taken hours for all employees for whom the starting year for the FMLA accrual is within a specified date range is **0**.
5 Rolling calendar	Reduce the number of taken hours by the number of hours taken more than a year prior to the end date of the specified date range.

Complete the steps below to calculate FMLA accruals. Before you calculate accruals, use the *Trial Calculate FMLA Accruals* function to generate a simulated calculation of accruals on the FMLA Accrual Processing Trial Listing report.

1 From the Infinium HR main menu select *FMLA Operations.*

2 Select *Trial Calculate FMLA Accruals* [TCFA]. The system displays a screen similar to Figure 9-22.

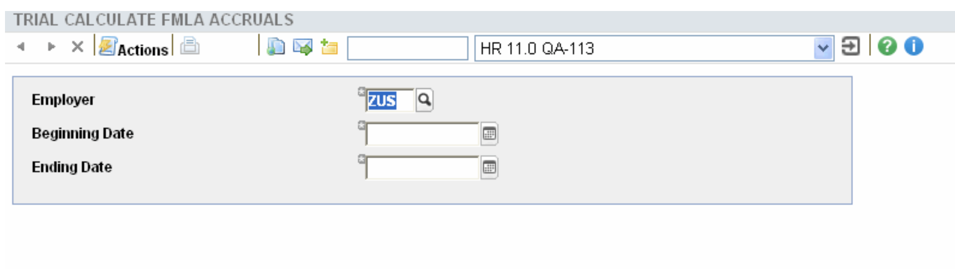


Figure 9-22: Trial Calculate FMLA Accruals screen

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

Employer

Specify the employer for whom you are calculating FMLA accruals.

Beginning Date

Specify the earliest date for calculation of FMLA accruals.

The system calculates FMLA accrual values only for dates that are the same as or after the beginning date and same as or earlier than the ending date.

Ending Date

Specify the last date for calculation of FMLA accruals.

The system calculates FMLA accrual values only for dates that are the same as or after the beginning date and same as or earlier than the ending date.

4. Press Enter. The system simulates the calculation of accruals and generates the FMLA Accrual Processing Trial Listing report.

5. Review the information on the report and make any necessary adjustments.

6. Use the *Calculate FMLA Accruals* function to calculate the accrual information for the specified employer and date range.

Chapter 10 Establishing Employee Career Paths

10

You use the *Employee Development* function to chart and maintain activities related to the development of your organization's employees using career development paths that you define for your employer.

The *Employee Development* module provides a quantitative measurement of an employee's readiness to progress from one job to another based on completion of the following criteria:

- Training courses, both internal and external
- On-the-job training, based on hours worked performing specific tasks

This function is particularly suited to supporting apprenticeship programs. This function is self-contained and has no effect on any other files in the system.

The chapter consists of the following topics:

Objectives

At the conclusion of this chapter you should be able to perform the following activities to set up and maintain the *Employee Development* function:

- Establish career development paths for your employer
- Assign courses and work process hours requirements to the paths
- Assign employees to career development paths
- Track employees' completion of courses and work process hours
- Use displays and reports to analyze employee career development activities

Overview of the Employee Development Function

Through the *Employee Development* function you can define and establish career development paths to which you can assign employees to track and enhance their individual occupational growth.

Each development path can contain a number of training courses and/or work process steps. The courses or work process steps must be successfully completed before the employee can progress to the next step in his or her assigned path.

You type completed hours for courses and/or work process steps for each employee. You can monitor the progress of employees in the development path(s) by using displays and generating reports.

To implement the *Employee Development* function, you must complete each of the following topics in the order shown below:

1. Set up code values used in the *Employee Development* function.
2. Establish development paths.
3. Assign employees to paths.
4. Set up courses.
5. Assign courses to development paths.
6. Update employee courses taken.
7. Set up work process path steps.
8. Update employee work process hours.
9. Use displays and reports to analyze employee progress.

Updating Employee Development Codes

You use the *Update Development Codes* function to create all code values for the *Employee Development* function. You can add, change or delete code values using this option. The chart below shows all the required code types and sample code values for the *Employee Development* function.

Code Types	Sample Code Values and Descriptions
SCL – School	**NYU** – New York University **INT** - Internal/Employer
SKL – Skill	**PROG** - Programming
TSK – Task	**RPG** - RPG language **C++** - C++ language
DRA – Development Rating	**A** – Above average **C** - Average
COM – Course Completion	**COMPL** - Course completed **WD** - Withdrew
GRA – Course Grade	**A** - Highest achievement
PED – Period	**1** – Period 1
STE – Step	**1** - Step One
YER – Year	**1997** - 1997 calendar year

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development Data.*

3 Select *Update Development Codes* [EDC]. The system displays the screen shown in Figure 10-1.

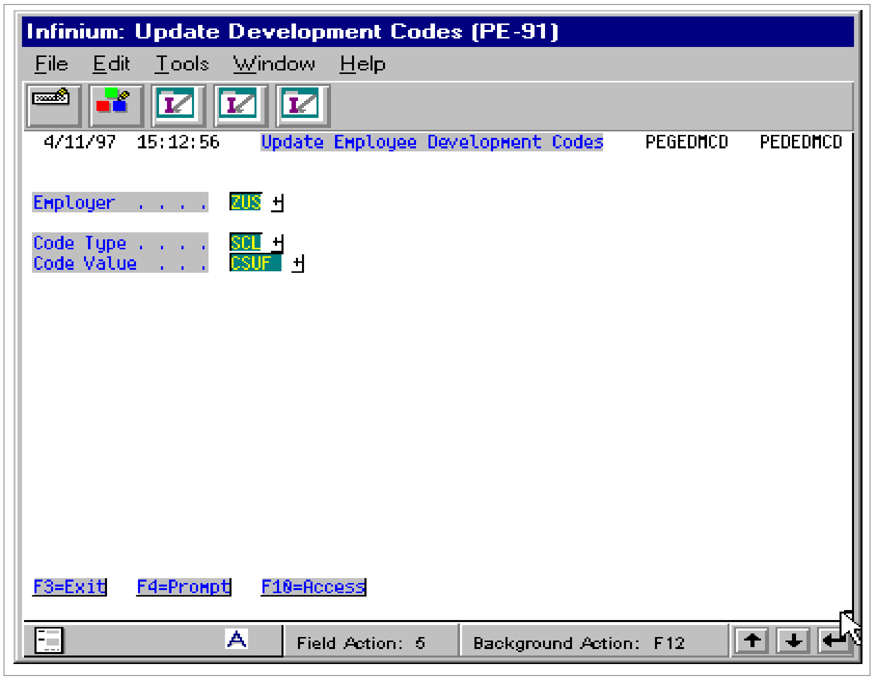


Figure 10-1: Update Employee Development Codes screen

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 creating code values.

Code Type

Type the value that represents the code type to which you are assigning values.

Code Value

Type the value you are assigning to this code type.

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

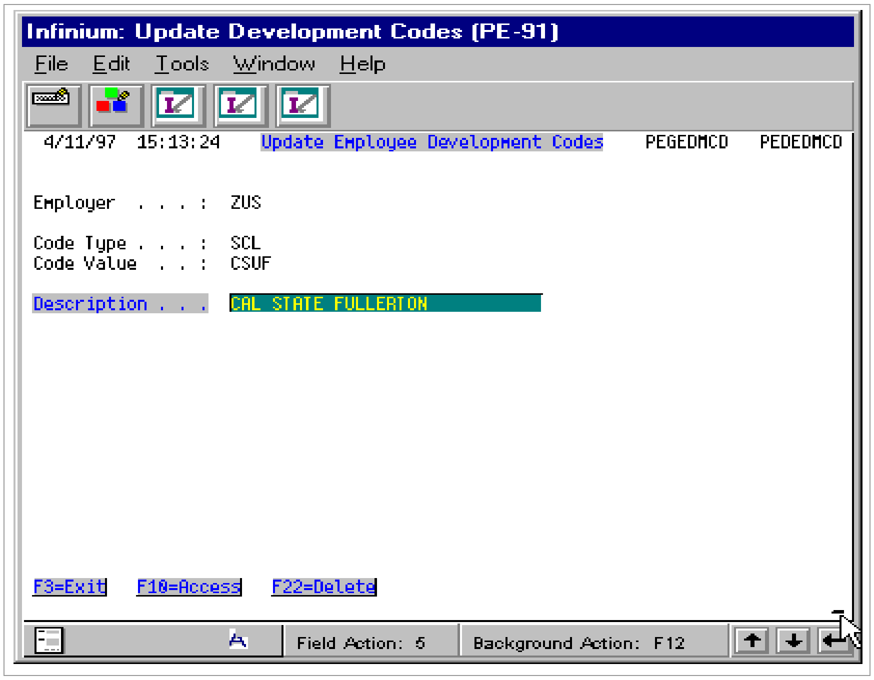


Figure 10-2: Update Employee Development Paths screen

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

Description

Type a description for the code value.

7 Press Enter.

8 Repeat steps 4 through 7 for each code type you are creating.

9 Press F3 to return to the Infinium HR main menu.

Setting Up Development Paths

A development path is a series of courses and/or work experiences that an employee must successfully complete to achieve a specific position within the company.

You use *Update Development Paths* to define all development path codes you plan to use. You also use this function to add or delete path codes.

The chart below shows an example of codes and descriptions for a development path.

Sample Codes	Description
OFFMGT	Office Management
FSUPER	Factory Supervisor
ACCOJT	Accounting-On-the-Job Training

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development Data.*

3 Select *Update Development Paths* [UDP]. The system displays the screen shown in Figure 10-3.

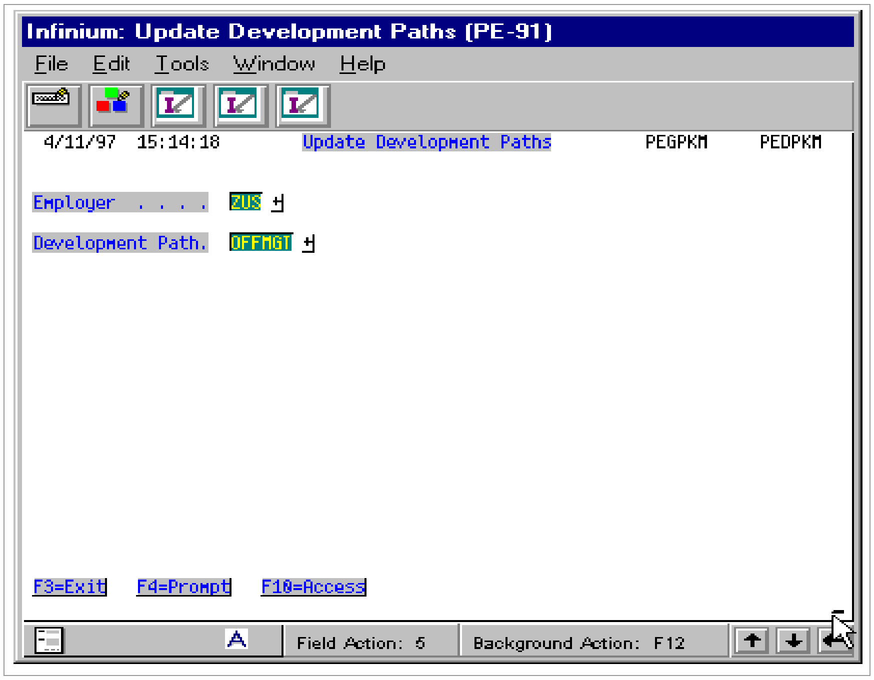


Figure 10-3: Update Development Paths screen

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

Employer

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

Development Path

Type the name you are assigning to this development path.

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

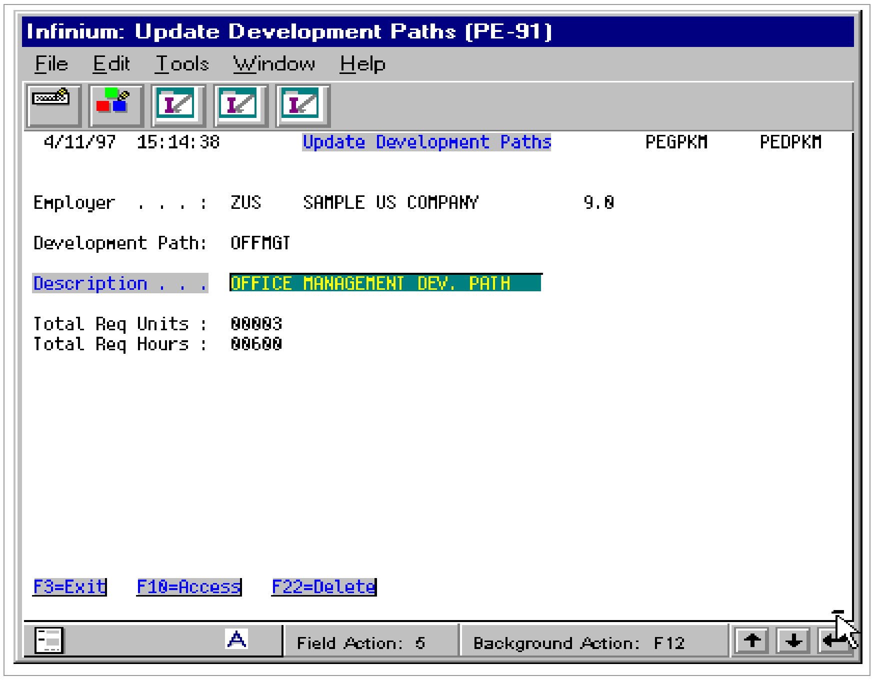


Figure 10-4: Update Development Paths screen

The system defaults values into the *Total Req Units* and the *Total Req Hours* fields after you have assigned courses and work process hours to the development path.

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

Description

Type a description of the development path.

7 Press Enter.

8 Repeat steps 4 through 6 to set up additional development paths or press F3 to return to the Infinium HR main menu.

Assigning Employees to Development Paths

You use the *Update Employee Development Data* function to assign an employee to one or more development paths.

For example, on May 1, 1997, you assign Edward Eager to two development paths: Office Management (OFFMGT) which has first priority, and Accounting On-the-Job Training (ACCOJT), which has second priority.

Development Path	Path Priority	Start Date
OFFMGT	1	05011991
ACCOJT	2	05011991

1. From the Infinium HR main menu select *Employee Development*.
2. Select *Update Development Data*.
3. Select *Update Employee Development Data* [UEDD].
4. Type the values that represent the employer and employee for whom you are updating development data.
5. Press Enter. The system displays the screen shown in Figure 10-5.

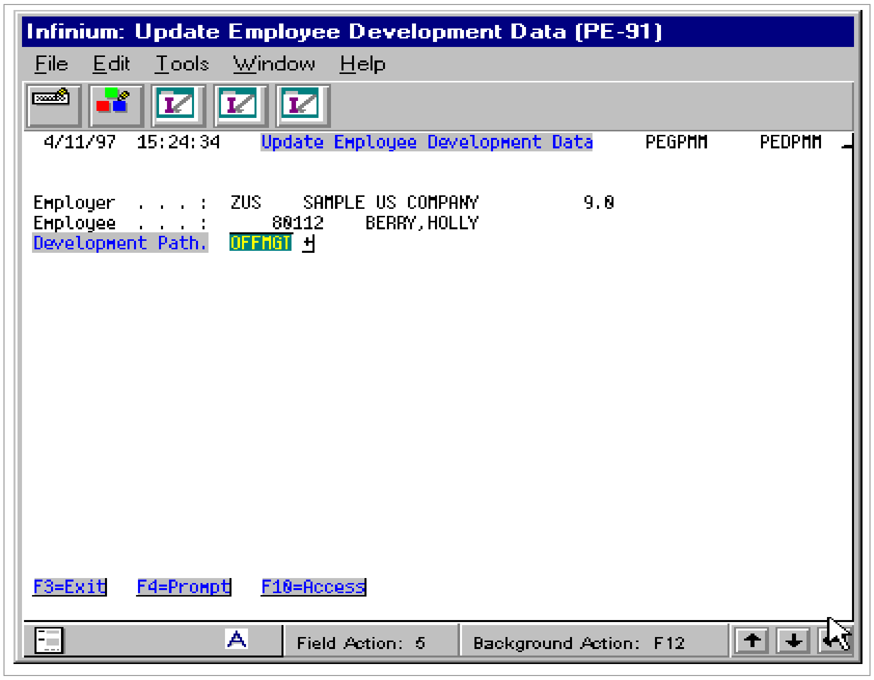


Figure 10-5: Update Employee Development screen

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

Development Path

Type the development path code.

7 Press Enter. The system displays the screen shown in Figure 10-6.

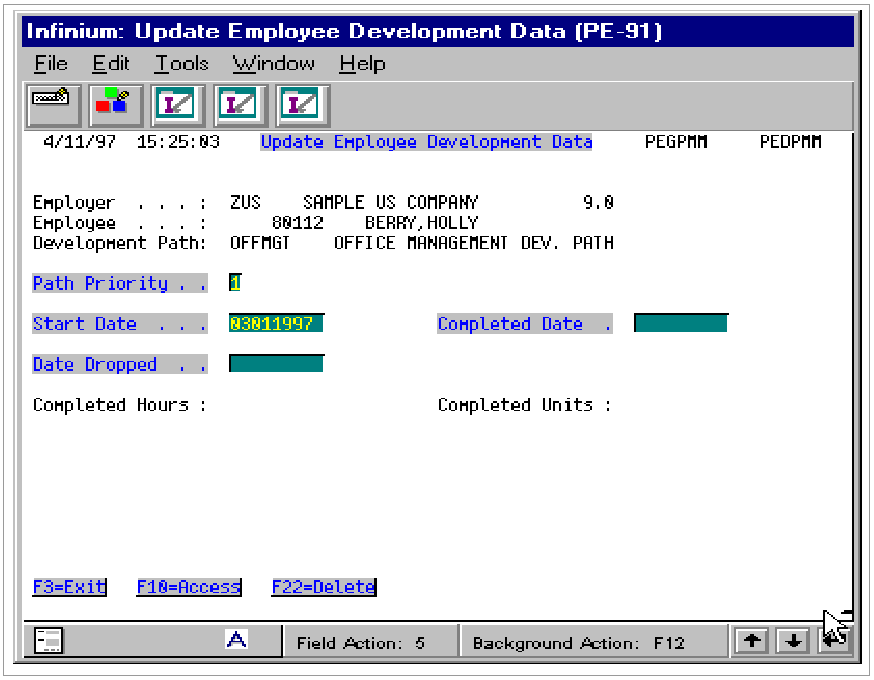


Figure 10-6: Update Employee Development Data screen

The system tracks the amounts in the *Completed Hours* and *Completed Units* fields when you use other options in the *Employee Development* function.

8 Use the following information to complete the fields on this screen:

Path Priority

Type the priority level for this development path for this employee. Use **1** as the highest priority.

Start Date

Type the date when the employee is first assigned to in the specified development path.

Completed Date

Type the date on which the employee completes all path requirements. Leave this field blank until the employee completes all requirements.

Date Dropped

Type the date when this employee stopped participating in this development path.

9 Press Enter.

10 Repeat steps 6t through 9 to assign the employee to additional paths or press F3 to return to the Infinium HR main menu.

Working with Courses

This section provides you with information on how to set up courses, assign them to development paths and track information for employees who have completed the courses.

Updating Courses

Use the *Update Courses* function to establish the courses that you will assign to one or more development paths.

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development Data.*

3 Select *Update Courses* [UCR]. The system displays the screen shown in Figure 10-7.

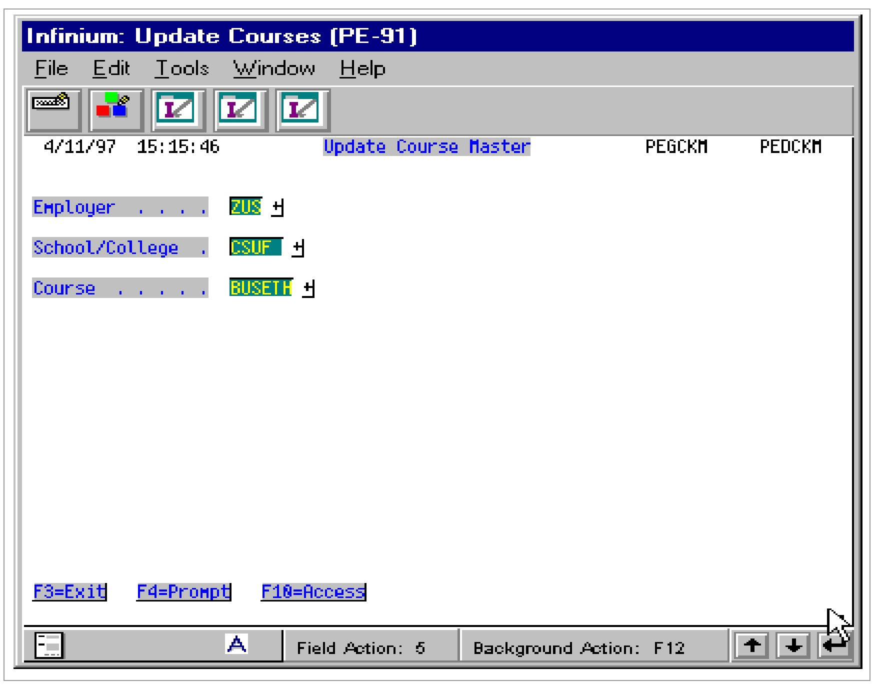


Figure 10-7: Update Course Master screen

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 processing.

School/College

Type the value that represents the school, college or other provider that offers a course to be assigned to one or more of your development paths.

Course

Type the value that represents the course for one or more development paths.

5 Press Enter. The system displays the screen shown in Figure 10-8.

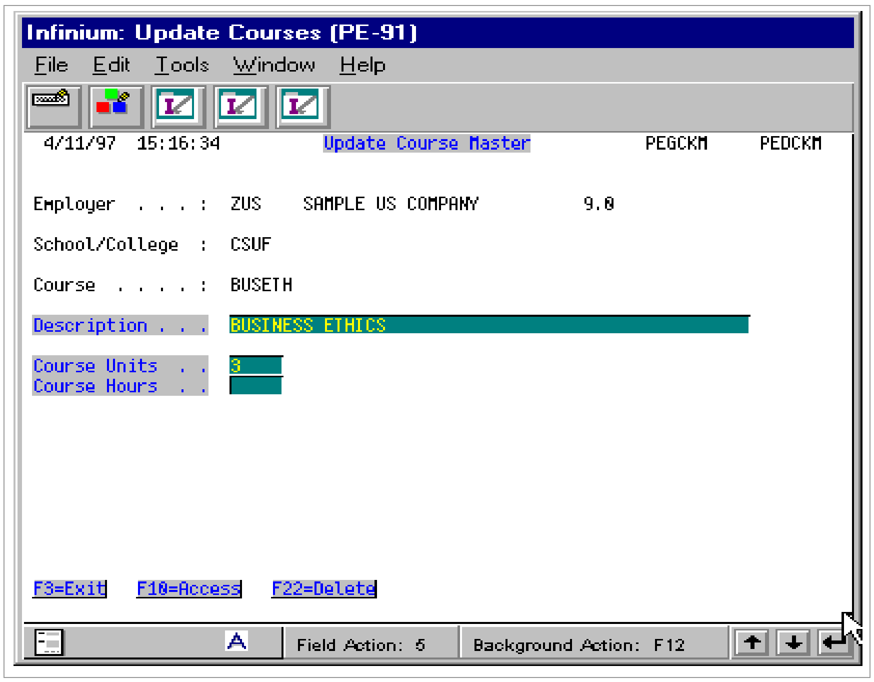


Figure 10-8: Update Course Master screen

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

Description

Type a description for this course.

Course Units

Type the total number of units allowed for credit for this course. You complete this field or the *Course Hours* field.

Course Hours

Type the total number of hours credited for this course.

You complete this field or the *Course Units* field.

7 Press Enter.

8 Repeat steps 4 through 7 to set up additional courses or press F3 to return to the Infinium HR main menu.

Updating Courses in a Development Path

You use the *Update Courses Development Paths* option to associate specific courses with a development path. You can change or delete courses through this option.

The chart below shows an example of the specific courses in the office management development path.

Description	Units	School	Course	Sec	Sequence
Intro. To Bus. Mgmt.	3	UCLA	306	1	1
Advanced Mgmt. Concepts	3	UCLA	310	4	2

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development Data.*

3 Select *Update Course Development Paths* [UCDP]. The system displays the screen shown in Figure 10-9.

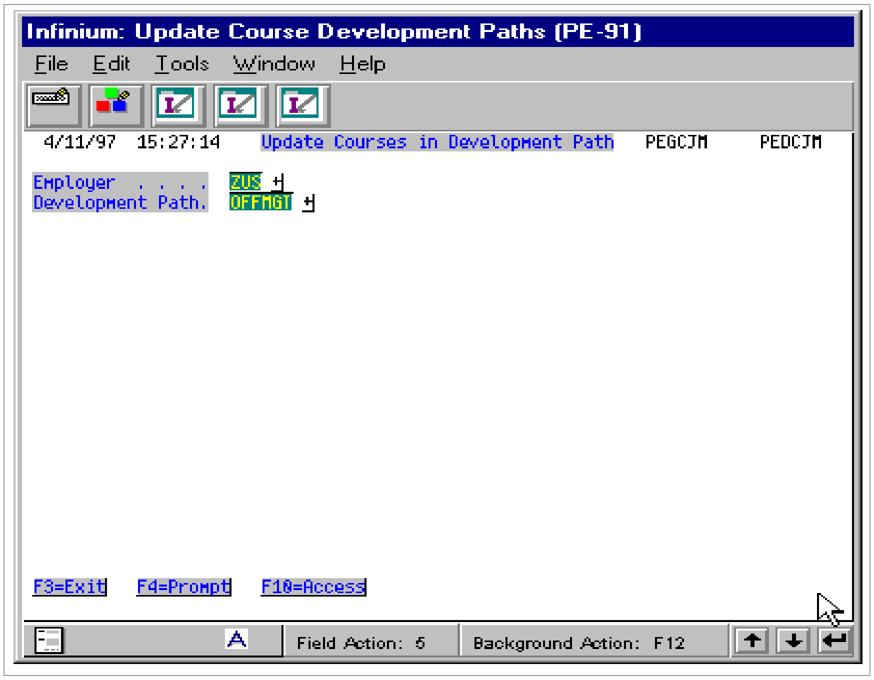


Figure 10-9: Update Courses in Development Path prompt screen

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.

Development Path

Type the value that identifies the development path you are associating with a course.

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

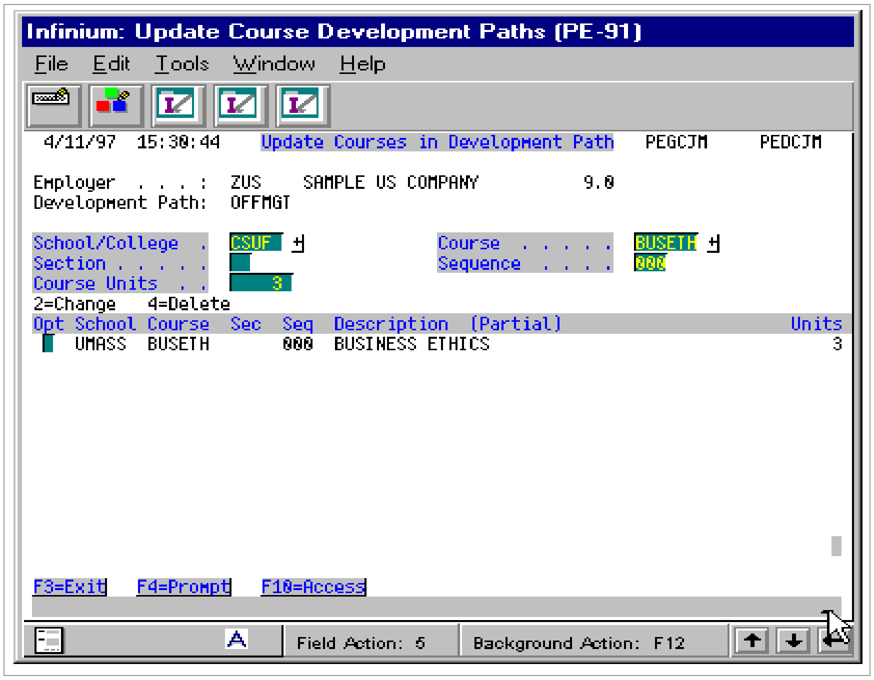


Figure 10-10: Update Courses in Development Paths screen

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

School/College

Type the value that represents the school or college where courses are offered for this development path. If you press F4 and select a course from the list, the system automatically completes the *Course* field. It fills a value in the *Units* field when you press Enter to store your course information in the sub-file of the screen.

Course

Type the value that represents the course associated with this development path.

Section

Type the section code, if any, for this course and development path.

Sequence

Type a number that represents the place in the development path order where this course is taken.

Course Units

Type the number of units associated with this course.

7 Press Enter. The system stores the course information in the sub-file at the bottom of the screen.

8 Repeat steps 6 and 7 to assign additional courses to the path or press F3 to exit from this screen.

9 Press F3 to return to the Infinium HR main menu.

Updating Employee Courses Taken

Use the *Update Employee Courses Taken* option to record the courses that an employee completes. This option also allows you to change course data for the employee.

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development Data.*

3 Select *Update Employee Courses Taken* [UECT]. The system displays the screen shown in Figure 10-11.

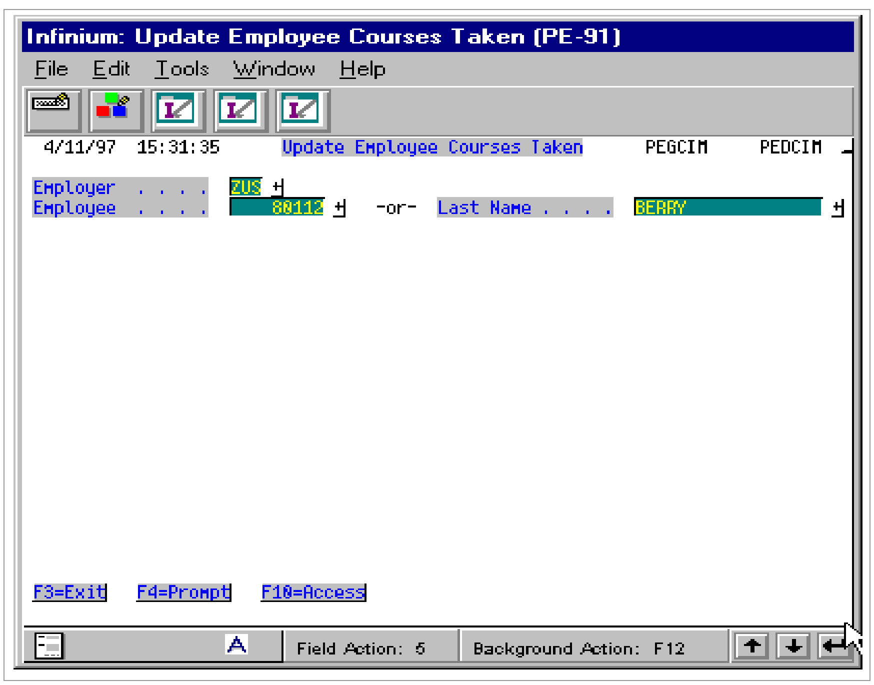


Figure 10-11: Update Employee Courses Taken screen

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.

Employee

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

5 Press Enter. The system displays the screen shown in Figure 10-12.

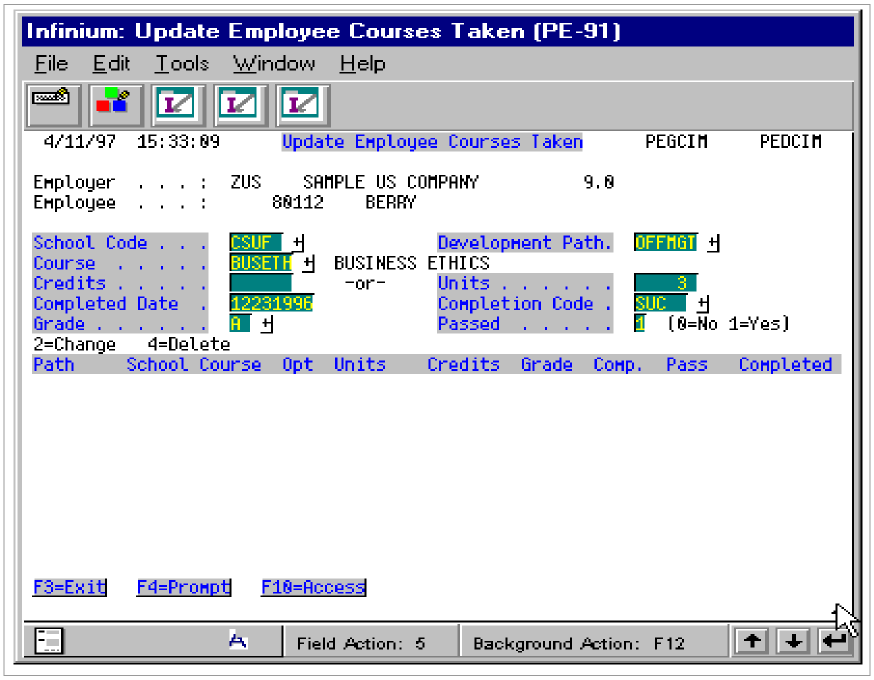


Figure 10-12: Update Employee Courses Taken screen

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

School Code

Type the value that represents the school where the courses will be taken.

Development Path

Type the value that represents the development path associated with this employee.

Course

Type the value that represents the course associated with this employee's development path.

Credits

Type the number of credits allowed for this course.

or

Units

Type the number of units associated with this course.

Completed Date

Type the date when the employee completed the course.

Completion Code

Type the value that represents how the employee completed the course.

Grade

Type the value that represents the employee's grade for this course.

Passed

Type the value that represents whether this employee passed this course. Valid values are:

1	Passed
2	Did not pass

7. Press Enter. The system stores the course completed information in the subfile at the bottom of the screen.
8. Repeat steps 6 and 7 to enter additional course information for the specified employee or press F3 to exit from this screen.
9. Press F3 to return to the Infinium HR main menu.

Working with Work Process Steps

Work process steps consist of specific work experiences you require in a development path. You specify the number of hours of each experience the employee must complete to advance on the development path. You can use the *Update Work Process Path Steps* to create, update or delete a step.

The chart below shows an example of the work process steps for the factory supervisor position.

Description	Sequence	Step Code	Req'd Hrs.
Basic Factory Procedures	1	10	200
Assembly Line Procedures	2	20	200
Order/Inventory Procedures	3	30	200
Shipping Room Procedures	4	40	200
Report Writing	5	50	200
Advanced Factory Procedures	6	60	200

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development Data.*

3 Select *Update Work Process Path Steps* [UWPS]. The system displays the screen shown in Figure 10-13.

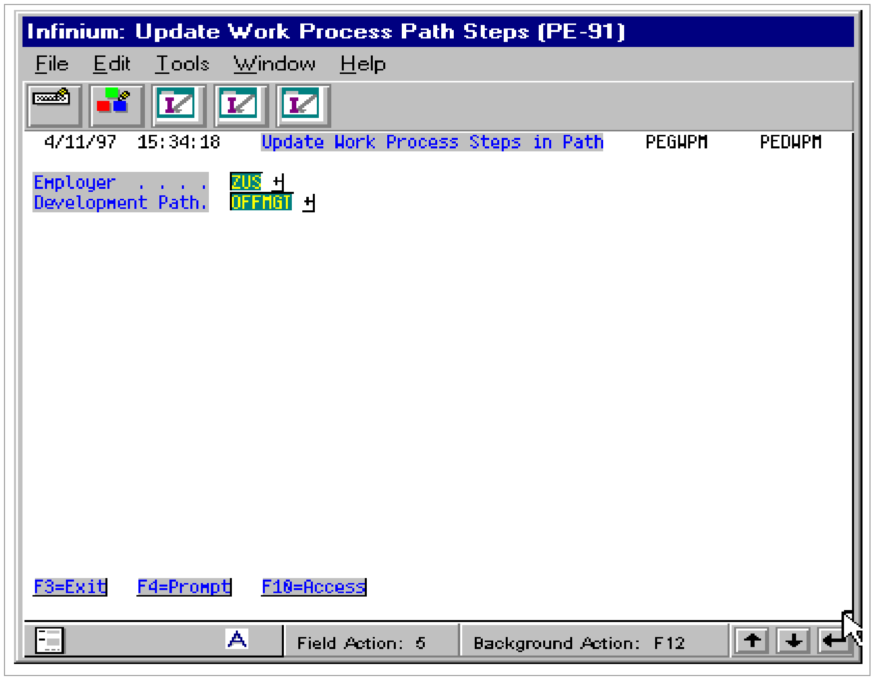


Figure 10-13: Update Work Process Steps in Path prompt screen

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

Employer

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

Development Path

Type the value that represents the development path for which you are entering information.

5 Press Enter. The system displays the screen shown in Figure 10-14.

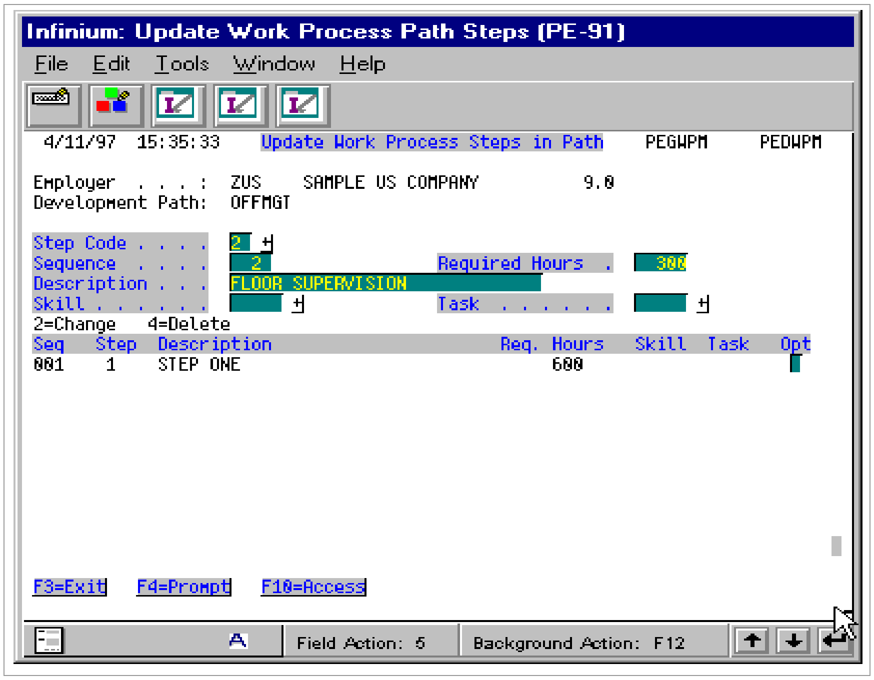


Figure 10-14: Update Work Process Steps in Path screen

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

Step Code

Type the code value that represents the step code for this development path.

Sequence

Type the number that represents the position in the sequence of steps when this step should be completed.

Required Hours

Type the number of hours required for this step.

Description

Type a description of this step.

Skill

Type the value that represents the skill required for this step.

Task

Type the value that identifies the task associated with this step.

7 Press Enter. The system stores the work process step information in the sub-file at the bottom of the screen.

8 Repeat steps 6 and 7 to enter additional work process steps for the specified path or press F3 to exit from this screen.

9 Press F3 to return to the Infinium HR main menu.

Updating Employee Work Process Hours

You use the *Update Employee Work Process Hours* option to type the hours an employee completes for a work process step. You can type an appropriate rating code to rate the performance of the employee for the completed tasks and hours.

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development Data.*

3 Select *Update Work Process Hours* [EWPH]. The system displays the screen shown in Figure 10-15.

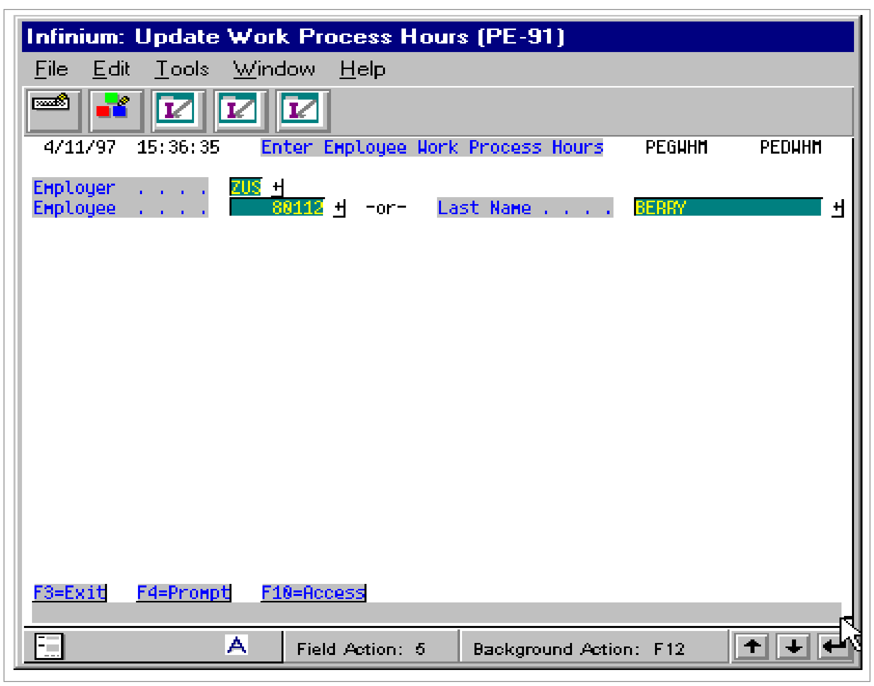


Figure 10-15: Enter Employee Work Process Hours prompt screen

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.

Employee

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

5 Press Enter. The system displays the screen shown in Figure 10-16.

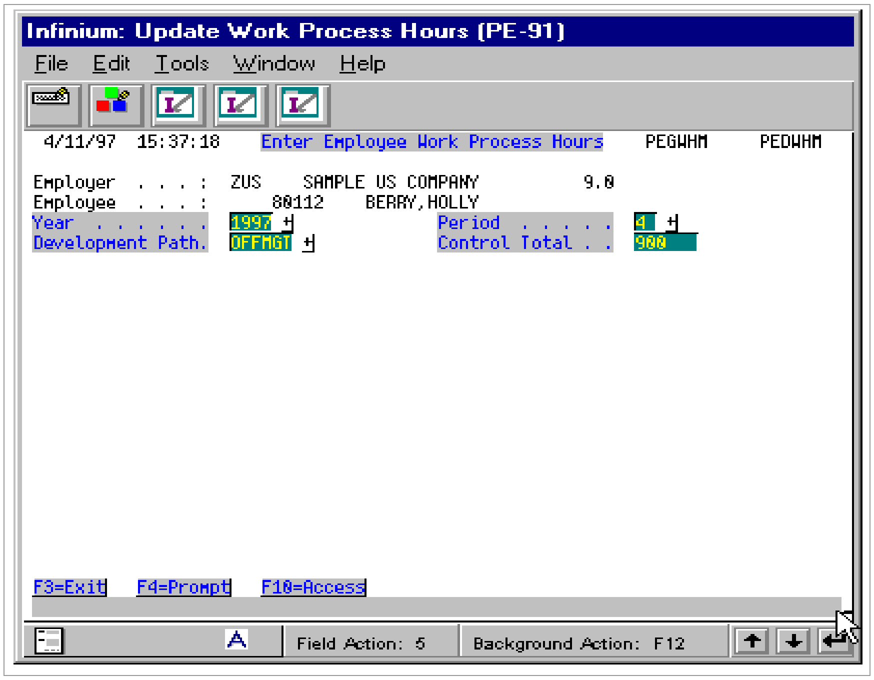


Figure 10-16: Enter Employee Work Process Hours prompt screen

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

Year

Type the value that represents the year when this employee completed work process hours for a development path.

Period

Type the value that represents the portion of the year when this employee completed work process hours for a development path.

Development Path

The system defaults the employee’s first priority development path into this field. If that is not the path for which you are entering completed work process hours, type the value that represents an alternate development path for the specified employee.

Control Total

Type the total number of hours this employee spent on work process steps associated with this development path during the specified time period.

7 Press Enter. The system displays the screen shown in Figure 10-17.

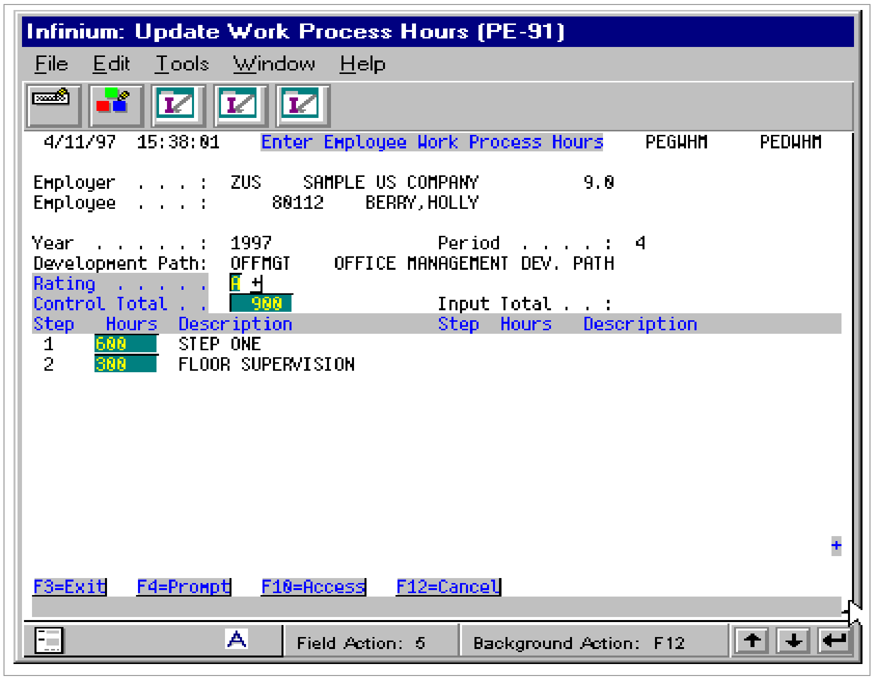


Figure 10-17: Enter Employee Work Process Hours screen

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

Rating

Type the value that represents the current status of this employee for this development path.

Control Total

Type the total number of hours the employee has completed for this development path during the specified time period. This value defaults from the *Control Total* field on the Enter Employee Work Process Hours prompt screen.

Hours

Type the number of hours completed by this employee for each step on the specified path.

9 Press Enter. The system computes the total hours you enter and displays it in the *Input Total* field. Verify that this value matches the value in the *Control Total* field.

10 Press F3 to exit from this screen.

11 Repeat steps 6 through 10 to enter additional completed work process hours or press F3 to return to the Infinium HR main menu.

Copying Development Path Data

You use the *Copy Development Path Data* option to copy the following information to a new development path from an existing one:

- Development path master record
- Courses in development paths
- Work process steps in development paths

Follow these steps to copy development data to a new path:

1 From the Infinium HR main menu select *Employee Development.*

2 Select *Update Development.*

3 Select *Copy Development Path Data* [CDPD]. The system displays the screen shown in Figure 10-18.

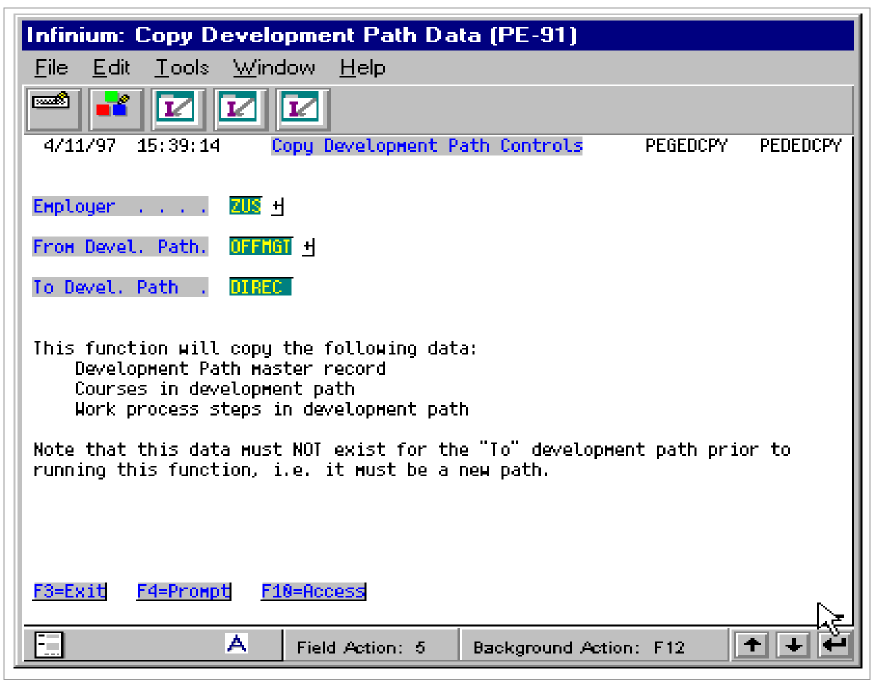


Figure 10-18: Copy Development Path Controls

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

Employer

Type the value that represents the employer whose development path data you are copying.

From Devel. Path

Type the value that represents the development path you are copying.

To Devel. Path

Type the value that represents the new development path to which are copying data. The system establishes the new path on the system for your employer and copies the specified data.

5 Press Enter. The system instantly sets up the new development path and assigns courses and work process steps to it based on the path from which you copied information.

6 Use the Update Development Paths, Update Course Development Paths and Update Work Process Path Steps to update the copied information in the new path.

Reviewing Employee Development Data

You can use the display and list options described below to review and print reports of employee development data for your organization.

Displaying Employee Development Data

You can use the following displays to review employee development information on-line:

- *Display Development Paths* - allows you to review the number of course units and work process hours associated with the paths within a specified employer
- *Display Development Profile* - for a specified employee and path, allows you to review the completed courses and work process hours
- *Display Courses* - allows you to display schools, course names and course codes within a specified employer
- *Display Employees in Paths* - for a specified employer and path, allows you to review the starting and ending dates for all employees assigned to the path along with completed course units and work process hours
- *Display Employee Courses Taken* - for a specified employee and path, allows you to display details about completed courses
- *Display Work Process Hours* - for a specified employee and path, allows you to display details about completed work process steps

Printing Employee Development Data

You can use the following reports to review employee development information:

- *List Progress Review* - for a specified employer or levels, includes the work process hours completed by employees
- *List Development Paths* - for a specified employer or for all employers, lists the courses and work process hours associated with each development path
- *List Courses* - for a specified employer, school or for all employers, lists course information including description, units and hours

- *List Courses Completed* - for a specified employer, levels or path, lists the names of employees and the courses they have completed
- *List Courses Within Paths* - for a specified employer or path, lists the associated courses
- *List Work Process Charts* - for a specified employer, year and period, lists completed work process hours along with a cover letter and audit form to comply with U.S. Department of Labor apprenticeship training program requirements

Chapter 11 Implementing Workforce Development

11

This chapter introduces you to the *Workforce Development* function and explains how to use various options within the *Workforce Development* function to track employee skills and competencies, enter the results of various types of reviews, record career development plans and prepare succession plans.

The chapter consists of the following topics:

Introducing Workforce Development

This section contains the following information:

- Overview of Workforce Development
- Objectives
- Controls that impact Workforce Development
- Employer codes used in Workforce Development
- Glossary of terms used in Workforce Development
- Diagram of the processing flow in Workforce Development

Overview of Workforce Development

You use options within the *Workforce Development* functions to track various kinds of skill and employee performance appraisal information. You can use this information to administer career development and performance improvement programs in your organization.

You can use the *Workforce Development* function to accomplish the following:

- Define skills and competencies, associate them with positions and assign them to employees.
- Using skill and competency data, locate employees qualified to fill a position or locate positions appropriate for an employee.
- Define views to identify various types of employee performance reviewers, such as manager, peer, subordinate, customer, vendor, and so on.
- Record appraisal information from multiple reviewers. This supplements the summary employee performance review data you enter using the Performance Review transaction in the *Enter Personnel Actions* function. For each reviewer, you can enter ratings of the employee's competencies, identify development needs and record free-format comments.
- Record information for two auxiliary types of reviews:
  - Personal development reviews, which are typically frequent informal meetings between a manager and an employee

    - Management reviews, which are typically annual confidential assessments of employees' current value, mobility and potential future role(s) in your organization

- Access the Infinium Training Administration course catalog to identify training courses and set up training requests for employees
- Generate numerous reports to aid in administering employee career development and succession planning activities, including:

  Overall Rating
  Competency Analysis
  Overdue Development Reviews
  Management Review Details
  Management Review Summary
  Development Needs
  Career Plans

Objectives

When you complete this chapter you should be familiar with the following:

- How to define skills and competencies
- How to associate skills and competencies with positions and employees
- How to enter summary and detailed performance review information
- How to enter personal development review information
- How to enter management review information
- How to maintain employee development needs
- How to set up and maintain career plans for employees

Controls That Affect Workforce Development

You must set up certain control information in Infinium Human Resources before you can complete the tasks presented in this chapter.

The following table lists the tasks that you must complete before using the *Workforce Development* function. This table includes the functions used to complete the tasks and the menus on which the functions are located. Refer to the *Infinium Human Resources Guide to Controls* for information on setting up code values and positions. Refer to the *Infinium Human Resources Guide to Processing* for information on setting up review controls and hiring employees.

Task	Function(s)	Menu
Define code values for the employer code types used in the *Workforce Development* function	*Update Employer Codes*	*Update Master Files*
Establish positions	*Update Position Data*	*Update Master Files*
Set up performance review controls (optional)	*Update Review Controls*	*Update Master Files*
Create employee records	*Enter New Hires*	*Update Employee Data*

The following section entitled "Employer Codes Used in Workforce Development" provides you with a table that lists all of the code types used in the *Workforce Development* function.

Employer Codes Used in Workforce Development

The following table lists the employer code types used in the *Workforce Development* function, gives sample code values and indicates whether the code types are required:

Description	Code Type	Explanation and Sample Code Values	Required?
Assessment Code	**ASM**	Use to identify the method for assessing an employee's skill and competency levels **TEST** - Formal test administered **DEMO** - On-the-job demonstration	Yes
Category Code	**CAT**	Use to group skills and competencies **COMM** - Communication skills **PLANNING** - Planning skills	No
Competency View	**CVW**	Use to identify different types of performance appraisers **SUPV** - Supervisor **PEER** - Peer	Yes

Description	Code Type	Explanation and Sample Code Values	Required?
Delivery Method	**STY**	Use to identify how an employee can satisfy a development need **OJT** - On-the-job training **CBT** - Computer-based training	No
EEO Category	**EEO**	Use to group employees for statutory reporting in the US and Canada **1** - Officials and Managers **5** - Office and Clerical	Yes
Mobility Code	**MOB**	Use to categorize an employee's relocation preference **OPEN** - Open, no restrictions **USA** - Limited to US locations	No
Potential Code	**PNL**	Use to classify employee's future career potential in the organization **HIPO** - High potential **LTD** - Limited options	Yes
Priority	**PTY**	Use to rank the importance of an employee's developmental needs **001** - Top priority **LOW** - Low priority	Yes
Rating	**RAT**	Use to appraise overall employee performance level and to rate each assigned competency according to each reviewer **GOOD** - Good **SAT** - Satisfactory	Yes
Review Type	**RTP**	Use to identify the kind of performance review given to an employee **PROB** - Probation **MERIT** - Annual merit	Yes

Description	Code Type	Explanation and Sample Code Values	Required?
Role Code	**RLE**	Use to identify future types of position assignments for an employee **MGR** - Managerial position **CS** - Customer service position	No
Summary Code	**SUM**	Use to represent the employee's current career status or value to the organization **PN** - Promotable now **PF** - Promotable future	No
Reason Code	**TRS**	Use to indicate the source of or reason for a development need recommendation **PD** - Performance deficiency **FO** - Qualify for future opportunities	No

You set up these codes by using the *Update Employer Codes* function on the *Update Master Files* menu. For information about setting up employer codes, refer to the *Infinium Human Resources Guide to Controls*.

Understanding the Processing Flow in Workforce Development

The following diagram illustrates the typical sequence in which you would utilize the various options within the *Workforce Development* function.

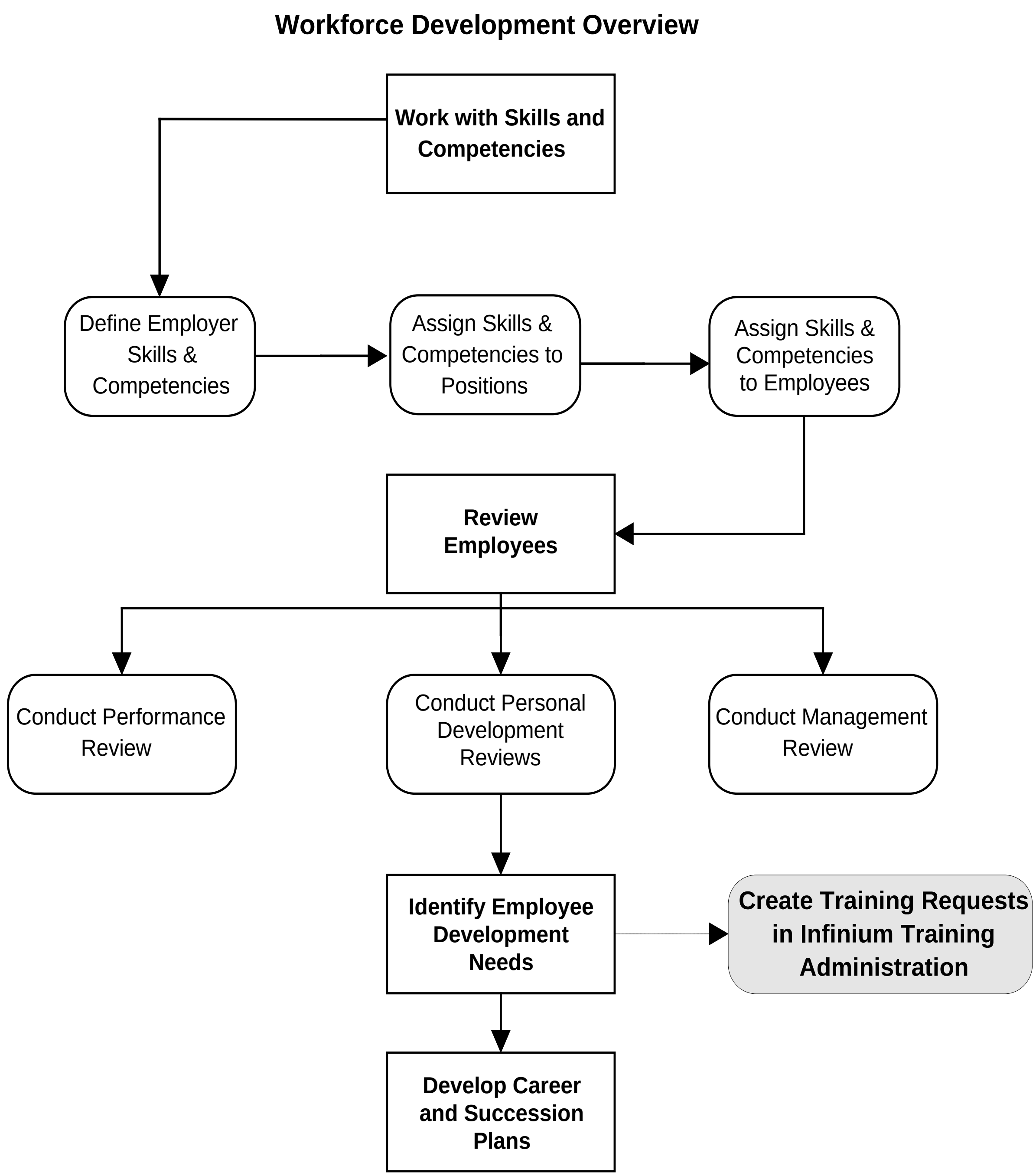


Figure 11-1: Workforce Development Overview

Setting Up Skills and Competencies

This section explains how to establish or change skills and competencies for your employer and how to assign them to positions and employees.

When you establish skills and competencies for your employer, you can indicate whether the skill or competency is required for all employees in your employer and the maximum level achievable.

After you establish skills and competencies for your employer, you can selectively assign them to one or more positions and indicate if the skills and/or competencies are required for employees who occupy the positions.

After you assign skills and competencies to a position, you can copy them to the records of employees who are assigned to the position. You can track each employee's individual achievement level for each assigned skill or competency.

Prerequisites

Before completing the tasks listed above, you must:

- Set up positions using the *Update Position Data* function on the *Update Master Files* menu
- Define code values for the following code types using the *Update Employer Codes* function on the *Update Master Files* menu:
  - Competence category (**CAT**), which you use to group skills and competencies
  - Assessment code (**ASM**), which you use to identify how performance appraisers assess an employee's skill and competency levels
  - Role code (**RLE**), which you use to identify future positions or developmental assignments for an employee

For setup information, refer to the *Infinium Human Resources Guide to Controls*.

Defining Skills and Competencies

Complete the following steps to establish all of the skills and competencies that are relevant to each of your employers:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Skills and Competencies*.

3 Select *Update Skills and Competencies* [USANDC]. Type the value that represents your employer in the *Employer* field and press Enter.

4 The system displays the Select Skills/Competencies screen shown in Figure 11-2.

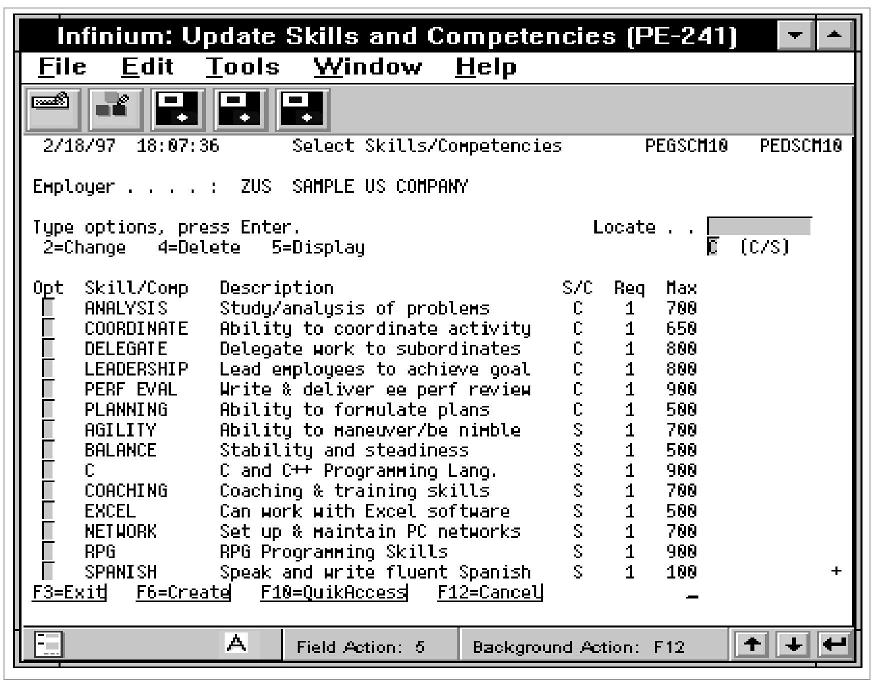


Figure 11-2: Select Skills/Competencies screen

From this screen you can do the following:

- Locate an existing skill or competency displayed in the list on the screen by taking the following actions:
  - Type some or all of the value that represents the skill or competency in the *Locate* field at the top of the Select Skills/Competencies screen
  - Type **S** or **C** in the *(C/S)* field to identify whether you are searching for a skill or competency

  - Press Enter. The system locates the skill or competency, displays it at the top of the list and positions your cursor in the *Opt* field adjacent to it.

- Create a new skill or competency by pressing F6. The system displays the Create Skills/Competencies screen shown in Figure 11-3.
- Update an existing skill or competency by typing **2** in the *Opt* field to select the skill or competency and pressing Enter. The system displays the Update Skills/Competencies screen, which is similar to the Create screen shown in Figure 11-3.
- Delete a skill or competency by typing **4** in the *Opt* field to select the skill or competency and pressing Enter. If you have not assigned the skill or competency to a position or employee, the system displays the Confirm Deletion window; type **1** in the space provided and press Enter to delete the selected skill or competency. You cannot delete skills or competencies if they are associated with a position or employee.
- Display the information for an existing skill or competency by typing **5** in the *Opt* field adjacent to the skill or competency and pressing Enter. The system displays the Display Skills/ Competencies screen, which is similar to the Create screen shown in Figure 11-3.

Creating a New Skill or Competency

5 Press F6 on the Select Skills/Competencies screen to create a new skill or competency for your employer. The system displays the screen shown in Figure 11-3.

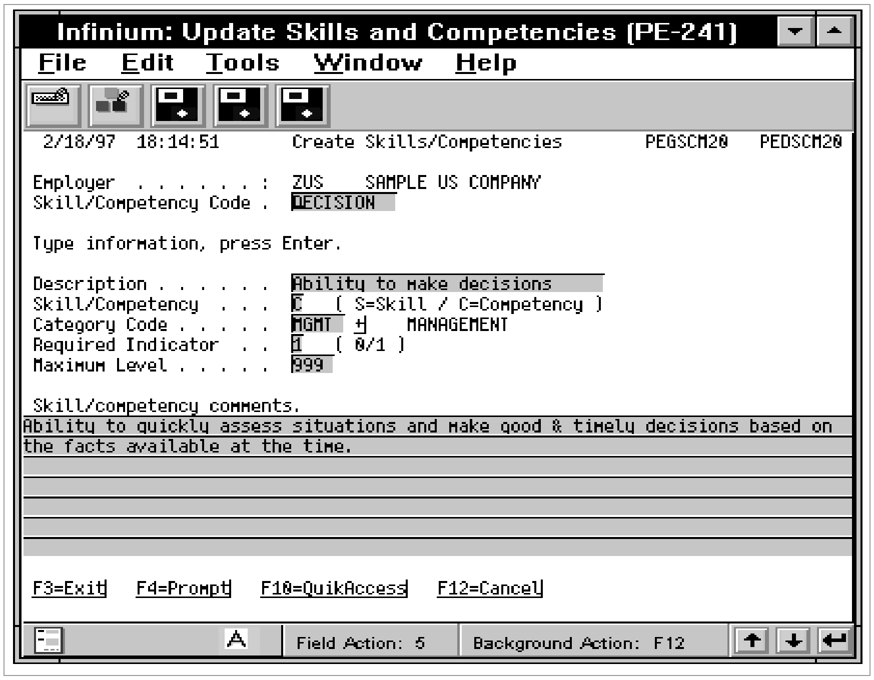


Figure 11-3: Create Skills/Competencies screen

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

Skill/Competency Code

Type a code value of up to ten characters to represent a skill or competency.

Description

Type a description of the skill or competency you are assigning.

Skill/Competency

Indicate whether the code value you are defining represents a skill or a competency. Refer to the Glossary of Terms in the “Overview” chapter of this guide for definitions of the terms Skill and Competency.

Valid values are:

S	Skill
C	Competency

Category Code

Type a valid category code value or press F4 to select a value from a list of valid entries. You set up categories for skills and competencies using code type **CAT**.

Required Indicator

Type **1** (Yes) or **0** (No) to indicate whether the skill or competency is required for all employees in the specified employer. If the skill or competency is required for only some employees, you can assign the skill to selected positions and indicate that it is required for employees assigned to that position rather than for all employees in the employer.

When you perform a search function to locate employees qualified to fill a position, you can include only required skills in your search.

Maximum Level

Specify any value between 1 and 999 to define the maximum level attainable for this skill or competency within the specified employer. You use skill and competency levels to identify the degree to which an employee has mastered a skill or competency.

Skill/competency comments

Use this field to enter additional information pertaining to this skill or competency.

7 Press F3 to display the Exit Options window. Accept the default value of **1** in the Exit Options window to exit from this screen and save your information.

8 Follow the instructions in steps 5 through 7 to enter or update additional skills and competencies or press F3 to return to the Infinium HR main menu.

Associating Skills and Competencies with Positions

After you establish skills and competencies for your employer, you can associate them with positions. You can associate an unlimited number of skills and competencies with each position.

When you associate skills and competencies with a position, you can use the *Ranking of Importance* field to indicate whether one skill is more important than another or whether one skill must be acquired before another. If a skill is required, you can specify the level or degree of proficiency required.

Complete the following steps to associate a skill or competency with a position:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Skills and Competencies*.

3 Select *Upd Position Skills/Competencies* [UPDPOSSKL]. The system displays the Update Position Skills/Competencies prompt screen shown in Figure 11-4.

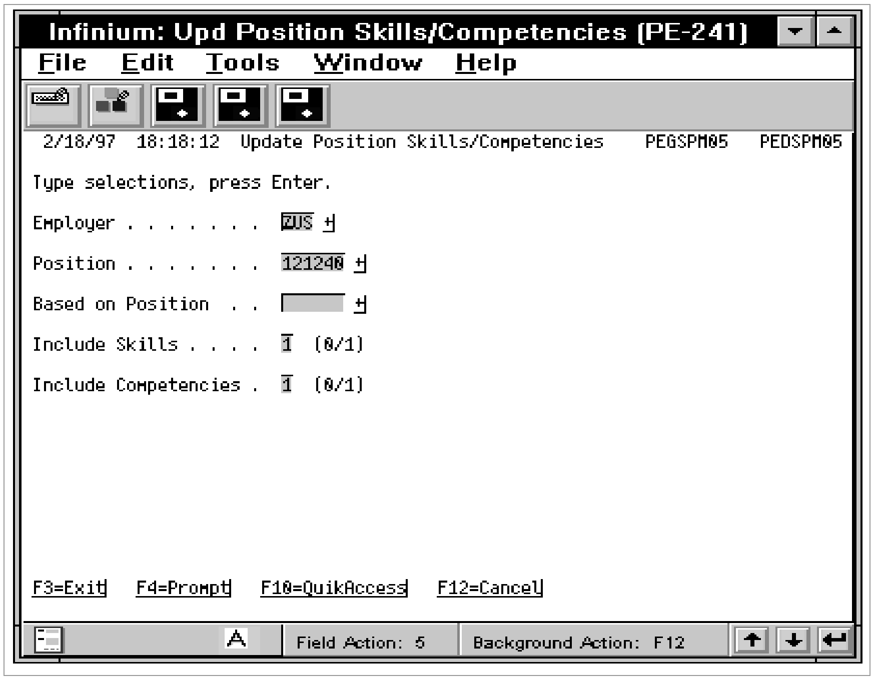


Figure 11-4: Update Position Skills/Competencies prompt screen

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

Employer

Type the value that represents your employer.

Position

Type the value that identifies a position to which you want to assign skills and/or competencies.

Based on Position

If the skills or competencies you want to assign to the specified position are similar to or the same as those already assigned to another position, type the value that represents the position with established skills and competencies. The system will copy the skills and/or competencies associated with the established position to the position you are updating. You can modify the copied skills and competencies for the position you are updating.

You can copy skills and competencies only once to a position. After you copy skills and competencies to a position, you cannot copy additional skills and competencies to it again at a later time.

Include Skills

When copying information from one position to another, type **1** (Yes) or **0** (No) to indicate whether you want to copy skills to the selected position.

You must type **1** in this field and/or the *Include Competencies* field.

Include Competencies

When copying information from one position to another, type **1** (Yes) or **0** (No) to indicate whether you want to copy competencies to the selected position.

You must type **1** in this field and/or the *Include Skills* field.

5 Press Enter to advance to the second Update Position Skills/ Competencies screen shown in Figure 11-5.

```
 2/07/00  16:58:05   Update Position Skills/Competencies   PEGSPM10   PEDSPM10

Employer . . . . :  ZUS  SAMPLE US COMPANY
Position . . . . :  121240   PROJECT MANAGER

Type options, press Enter.
 2=Change   4=Delete   5=Display

Opt  Prty  Req  Level  S/C Skill/Comp Description                       Date
 =      3    1    600    S  ANALYSIS   Ability to analyze problems     4/01/1995
 _      4    1    500    S  COMMVERBAL Verbal Communication Skills     5/01/1995
 _      5    1    400    S  COMMWRITE  Written Communication Skills    5/01/1995
 _      1    1    800    C  LEADERSHIP Ability to lead others          3/15/1995
 _      2    1    700    S  PLANNING   Ability to formulate plans      3/01/1997






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

Figure 11-5: Update Position Skills/Competencies screen

From this screen you can do the following:

- Assign a skill or competency to the selected position by pressing F6. The system displays the Create Position Skill/Competency screen shown in Figure 11-6.
- Update the information for a skill or competency already assigned to the selected position by typing **2** in the *Opt* field adjacent to the skill or competency and pressing Enter. The system displays the Update

Position Skills/Competencies screen, which is similar to the Create screen shown in Figure 11-6.

- Delete a skill or competency from the selected position by typing **4** in the *Opt* field adjacent to the skill or competency and pressing Enter. The system displays the Confirm Deletion window. Type **1** in the space provided and press Enter to delete the selected skill or competency from the position.
- Display the information for a skill or competency already assigned to the selected position by typing **5** in the *Opt* field adjacent to the skill or competency and pressing Enter. The system displays the Display Position Skills screen, which is similar to the Create screen shown in Figure 11-6.

Assigning a Skill or Competency to a Position

6 Press F6 on the Update Position Skills/Competencies screen to assign a skill or competency to the selected position. The system displays the screen shown in Figure 11-6.

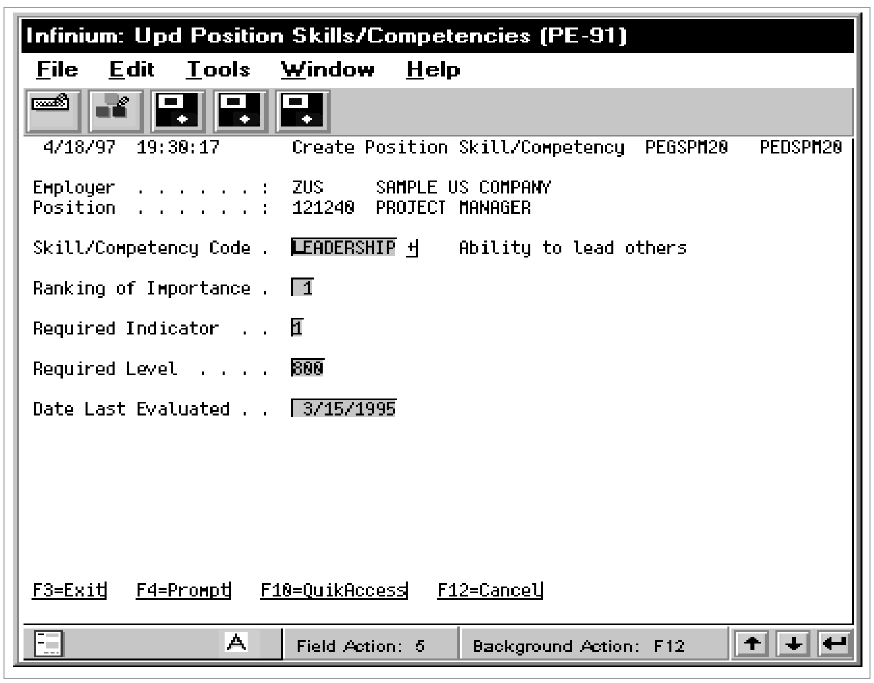


Figure 11-6: Create Position Skill/Competency screen

7 Use the following information to complete the fields on this screen:

Skill/Competency Code

Type the skill or competency code value that you want to associate with the selected position.

If the skill or competency you want to assign does not exist for your employer, you must establish it using the *Update Skills and Competencies* function.

Ranking of Importance

Type a number from 1 - 99 to indicate the priority level of this skill or competency for this position.

Required Indicator

Type **1** (Yes) or **0** (No) to indicate whether this skill or competency is required for this position.

When you perform a search function to locate employees qualified to fill this position, you can include only required skills in your search.

Required Level

Type a number from 1 - 999 to indicate the required rating for this skill or competency. This number cannot exceed the maximum level you established for the skill or competency for the specified employer.

Date Last Evaluated

Type the date on which you evaluated the skill or competency for this position.

If you later re-evaluate the position's skill or competency, you can override this date when you update the position skill information.

8. Press F3 to display the Exit Options window. Accept the default value of **1** in the Exit Options window to exit from this screen and save your information. The system displays the Update Position Skills/Competencies screen.

9. Repeat the instructions in steps 6 through 8 to enter additional skills and competencies for the selected position, or press F3 to return to the Infinium HR main menu.

Associating Skills and Competencies with Employees

This section explains how to associate employees with skills and competencies. You can use a copy function to expedite the process of assigning skills and competencies to employees based on the employees' position assignment.

When you associate an employee with a skill or competency, you can specify the following:

- the skill or competency level attained by the employee
- the method used to measure the employee's skill or competency level
- the date on which the employee attained the skill or competency
- whether the competency is evaluated during reviews
- the employee who approved assigning the skill or competency to the employee

Complete the following steps to associate skills and/or competencies with an employee:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Skills and Competencies*.

3 Select *Upd Employee Skills/Competencies* [UPDEMPSKL]. The system displays the Update Employee Skills/Competencies prompt screen.

4 Complete the screen and press Enter. The system displays the Update Employee Skills/Competencies screen shown in Figure 11-7.

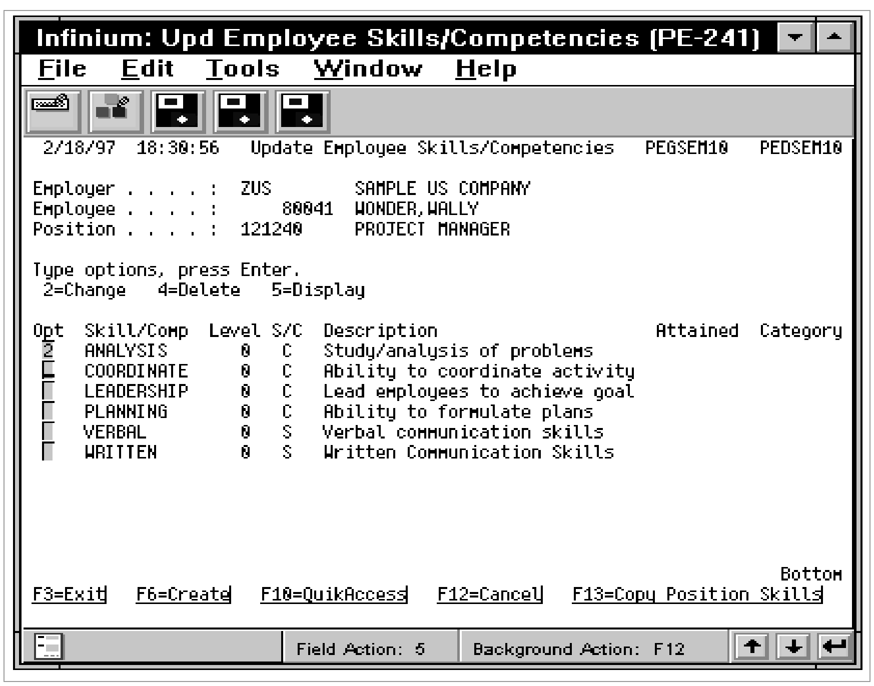


Figure 11-7: Update Employee Skills/Competencies screen

From this screen you can do the following:

- Manually assign a skill or competency to an employee by pressing F6. The system displays the Create Employee Skill/Competency screen shown in Figure 11-8.
- Copy the set of skills and competencies associated with the employee's position to his or her own personal record by pressing F13. The system re-displays the Update Employee Skills/Competencies prompt screen with the copied records.

WARNING! After you copy skills and competencies to an employee, you must update the competency information for the employee before you can enter ratings of the employee's competencies using the *Update Performance Review Detail* function.

- Update the information for a skill or competency already assigned to the selected employee by typing **2** in the *Opt* field adjacent to the skill or competency and pressing Enter. The system displays the Update Employee Skill/Competency screen sequentially for each selected skill or competency; the screen is similar to the Create screen shown in Figure 11-8.
- Delete a skill or competency from the selected employee by typing **4** in the *Opt* field adjacent to the skill or competency and pressing Enter. The system displays the Confirm Deletion window. Type **1** in the space provided and press Enter to delete the selected skill or competency from the employee.
- Display the information for a skill or competency already assigned to the selected employee by typing **5** in the *Opt* field adjacent to the skill or competency and pressing Enter. The system displays the Display Employee Skills screen, which is similar to the Create screen shown in Figure 11-6.

5 Press F6 to assign a skill or competency to an employee. The system displays the screen shown in Figure 11-8.

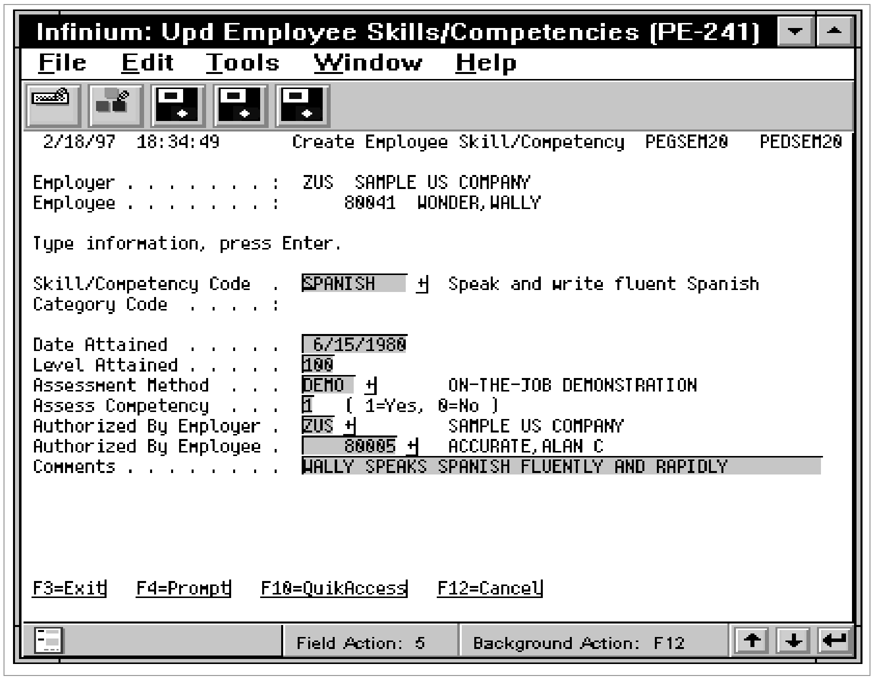


Figure 11-8: Create Employee Skill/Competency screen

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

Skill/Competency Code

Type the value that represents the skill or competency that the employee has attained.

Category Code

The system defaults a code value into this field that identifies the category to which the selected skill or competency belongs. You assign skills and competencies to categories using the *Update Skills and Competencies* function.

Date Attained

Type the date on which the employee attained the skill or competency.

Level Attained

Type a number from 1 - 999 to indicate the level that the employee has attained for this particular skill or competency. This number cannot exceed the maximum level you established for the skill or competency for the specified employer. You use the level value to specify the degree to which an employee has mastered a skill or competency.

For example, you specify that in your organization 500 is the maximum skill level attainable for speaking and writing Spanish. You assign a level of 475 to an employee who has almost flawless Spanish language skills and 50 to an employee who has only rudimentary Spanish speaking or writing abilities.

Assessment Method

Type the code value that identifies the method you use to assess the employee's skill or competency level. You establish code values for this field using code type **ASM**.

Assess Competency

For competencies only, type **1** (Yes) or **0** (No) to indicate whether to assess the competency during performance reviews. If you type **0** (No), you cannot enter ratings of the competency by the employee's appraisers when you use the *Update Performance Review Detail* function.

You cannot assess skills during performance reviews. For this reason, when you prompt on the *Skill/Competency* field and select a skill, the system automatically hides this field when you return to the Create Employee Skill/Competency screen and when you later update or display the skill information.

Authorized By Employer

Specify the employer who authorized the employee assessment or confirmed attainment of the skill or competency.

Authorized By Employee

Identify the employee who authorized the employee assessment or confirmed the attainment of the skill or competency.

To complete this field, you must first complete the *Authorized by Employer* field.

Comments

Use this field to type additional information about the employee's assigned skill or competency.

When you copy skills and competencies into the employee's record from his or her position, the system automatically defaults the employee's position title into this field. You can delete the title and/or add any remarks.

7 Press F3 to display the Exit Options window. Accept the default value of **1** in the Exit Options window to exit from this screen and save your information.

8 Repeat steps 5 through 7 to assign additional skills and competencies to the selected employee or press F3 twice to return to the Infinium HR main menu.

Performing Skill and Competency Searches

You can use two options in the *Workforce Development* function to match employee skills and competencies to positions as described below:

- You use the *Locate Empl. w/Pos Skill/Comp* function to locate employees whose skills and competencies match those associated with a particular position.
- You use the *Locate Pos. w/Empl. Skill/Comp* function to locate positions whose associated skills and competencies match those assigned to a particular employee.

Locating Employees for a Position

Complete the following steps to locate employees whose skills and/or competencies match those associated with a position:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Skills and Competencies*.

3 Select *Locate Empl. w/Pos Skill/Comp* [POSSKLSRC]. The system displays the Locate Empl. w/Pos Skill/Comp screen shown in Figure 11-9.

```
 6/30/05  10:47:04      Locate Empl. w/ Pos Skill/Comp     PEGPSS     PEDPSS

This function lists employees whose skills match up with the selected position.

Employer . . . . . . . .  ZUS +
Position . . . . . . . .  101540 +

Selection Requirements.

Area. . . . . . . . . . . ____ +
Division. . . . . . . . . ____ +
Department. . . . . . . . ____ +
Cost Centr. . . . . . . . ____ +


Maximum No. to Report . . ___
Select Only Req Skills  . 0    (0/1)
Detail Report . . . . . . 0    (0/1)
Format  . . . . . . . . . 0    ( 1=Print, 0=Interactive )



F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Figure 11-9: Locate Empl. w/Pos Skill/Comp screen 1

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

Employer

Type the value that represents your employer.

Position

Type the value that identifies a position for which you want to locate qualified employees.

Levels

Type one or more values to limit the search to employees within specified areas of your organization. Leave this field blank to include all levels in your search.

Maximum No. to Report

Type a value that indicates the maximum number of employees you want to include in your search results.

Select Only Req Skills

Indicate if you want to search using only the skills and competencies designated as required for the position. You use the *Upd Position*

Skills/Competencies function to identify which skills and competencies are required for a position.

Valid values are:

0	No, include all of the skills and competencies associated with the specified position in the search.
1	Yes, include only the required skills and competencies for the specified position in the search.

Detail Report

If you type **1** in the *Format* field to generate a report, use this field to indicate if you want the system to generate a summary or detail report.

The summary report lists the names of employees who satisfy your position skill and competency search specifications along with their employee number, tax identification number and assigned levels.

The detail report lists the information on the summary report along with the employees' skills, competencies and mobility code. It also compares the employees' skill and competency ratings to those you specified for the search.

Valid values are:

0	Generate a summary report.
1	Generate a detail report.

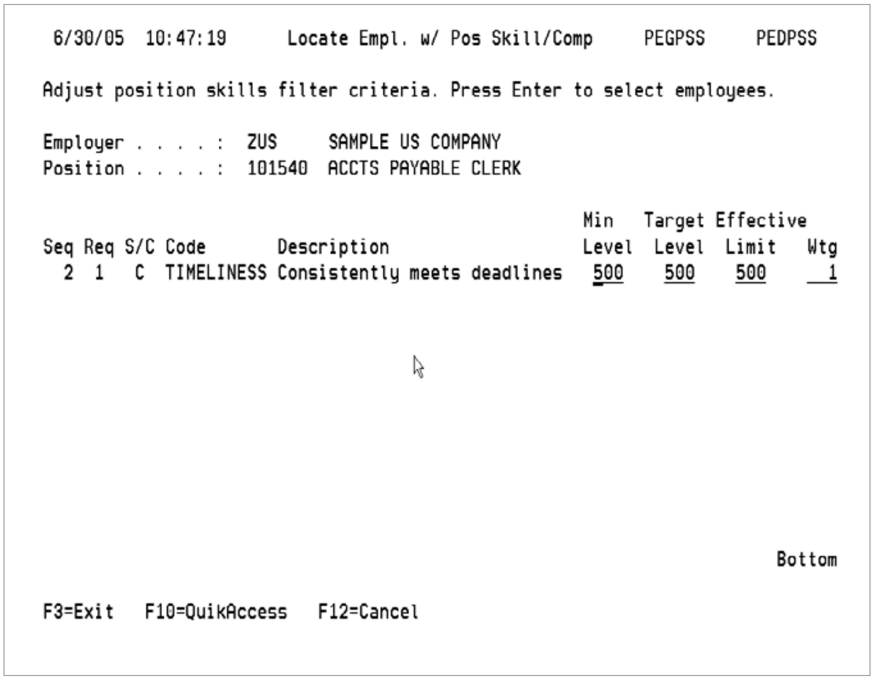
Format

Use this field to indicate if you want the system to use interactive processing to display the search results on-line or batch processing to print the search results in a report.

Valid values are:

1	Use batch processing to generate a report that contains the search results.
0	Use interactive processing to generate a display screen that contains the search results.

5 Press Enter. The system displays the screen shown in Figure 11-10.



```
 6/30/05  10:47:19      Locate Empl. w/ Pos Skill/Comp     PEGPSS     PEDPSS

Adjust position skills filter criteria. Press Enter to select employees.

Employer . . . . :  ZUS     SAMPLE US COMPANY
Position . . . . :  101540  ACCTS PAYABLE CLERK

                                                     Min   Target Effective
Seq Req S/C Code       Description                   Level  Level  Limit   Wtg
  2  1   C  TIMELINESS Consistently meets deadlines   500    500    500     1

                                                                        Bottom

F3=Exit   F10=QuikAccess   F12=Cancel
```

Figure 11-10: Locate Empl. w/Pos Skill/Comp screen 2

Depending on your specifications on the preceding screen, the system displays either all of the skills and competencies associated with the specified position or only the required skills and competencies.

The system defaults the level value you specified for each of the position’s skills and competencies into the *Min Level, Target Level* and *Effective Limit* fields. You can delete or modify these values to expand or restrict your search for qualified candidates for the specified position.

6 Use the following information to work with this screen.

Min Level

For the adjacent skill or competency, type the minimum level the employee must possess to be included in the search results. Leave this field blank to exclude this skill or competency from the search.

Target Level

Type the ideal level for the adjacent skill level or competency. The system uses this field to compute a variance for the Position Skill Search report. It compares the target level you specify to each employee’s individual level for the skill or competency and indicates the difference between the two levels.

The target level value you specify for a skill or competency must be greater than the minimum level you entered. You can leave this field blank to exclude this skill or competency from the search.

Effective Limit

For the adjacent skill or competency, type the highest level that is appropriate for the specified position. The system does not use this value to exclude employees from the skill search.

Leave this field blank to exclude this skill or competency from the search.

Wtg

Specify the relative importance of the skills and competencies for your search. The system uses this field to prioritize the order in which employees who satisfy your search criteria are presented on the following screen.

7 Press Enter. The system does one of the following depending on the value you entered in the Format field on the first Locate Empl. w/Pos Skill/Comp screen:

- If you selected batch processing, the system generates the following message and returns you to the Infinium HR main menu:

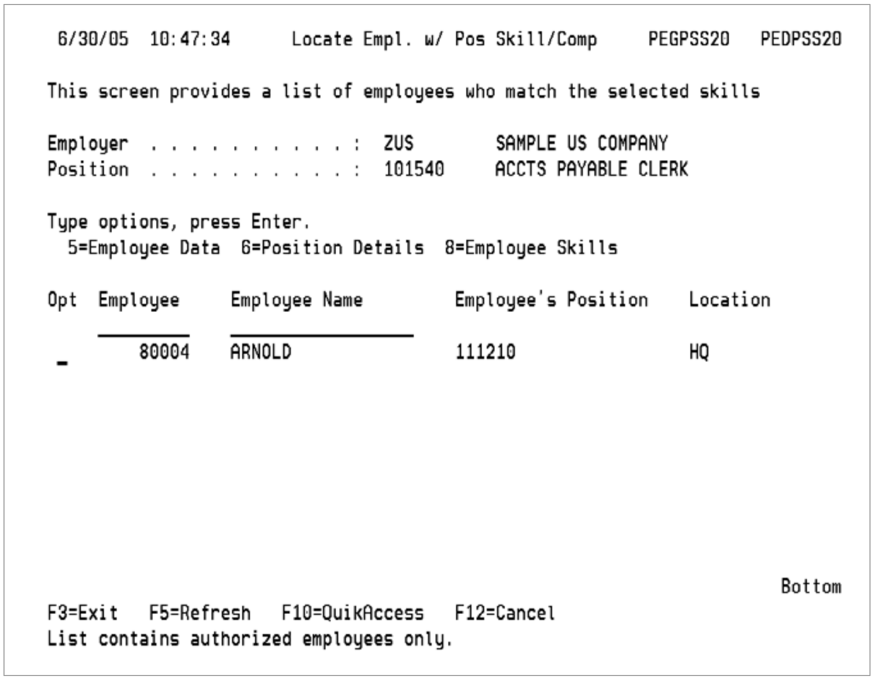
  Building submission request . . .

  The system uses batch processing to generate the Locate Empl. w/Pos Skill/Comp report. Skip to step 10.

- If you selected interactive processing, the system generates the following message while it searches for qualified employees:

  Interactive search in progress. Please wait . . .

  When the search is complete, the system displays the Locate Empl. w/Pos Skills/Comp screen as shown in Figure 11-11.



```
 6/30/05  10:47:34      Locate Empl. w/ Pos Skill/Comp     PEGPSS20   PEDPSS20

This screen provides a list of employees who match the selected skills

Employer . . . . . . . . . . . :  ZUS       SAMPLE US COMPANY
Position . . . . . . . . . . . :  101540    ACCTS PAYABLE CLERK

Type options, press Enter.
  5=Employee Data  6=Position Details  8=Employee Skills

Opt  Employee     Employee Name          Employee's Position    Location

 _       80004    ARNOLD                 111210                 HQ

                                                                          Bottom
F3=Exit   F5=Refresh   F10=QuikAccess   F12=Cancel
List contains authorized employees only.
```

Figure 11-11: Locate Empl. w/Pos Skill/Comp screen 3

The system displays the employees that satisfy your search criteria on this screen. You can use options on this screen to view employee basic data, skills assigned to the employee and position controls.

8 Press F12 or F3 to exit from this screen. The system displays the second Locate Empl. w/Pos Skill/Comp screen.

9 You can enter additional search criteria or press [F3] to return to the Infinium HR main menu.

10 If you generated a report, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen. You can view or print the report using options on these screens.

Locating Positions for an Employee

Complete the following steps to locate positions whose skills and/or competencies match those possessed by a specified employee.

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Skills and Competencies*.

3 Select *Locate Pos. w/Empl. Skill/Comp* [EMPSKLSRC]. The system displays the screen shown in Figure 11-12.

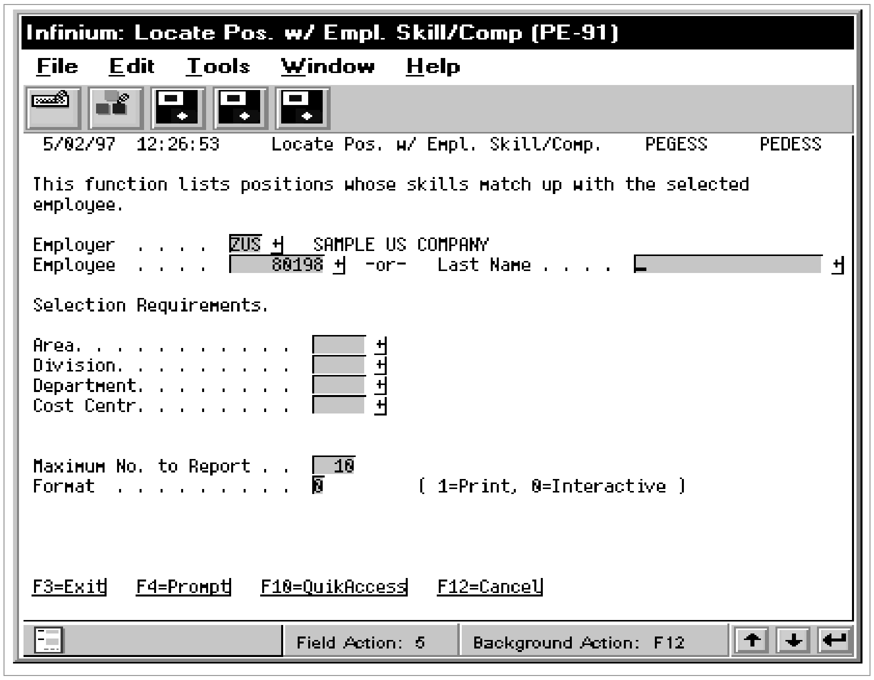


Figure 11-12: Locate Pos. w/Empl. Skill/Comp screen 1

4 Use the information in the “Locating Employees for a Position” section to complete the fields on this screen.

5 Press Enter. The system displays the screen shown in Figure 11-13.

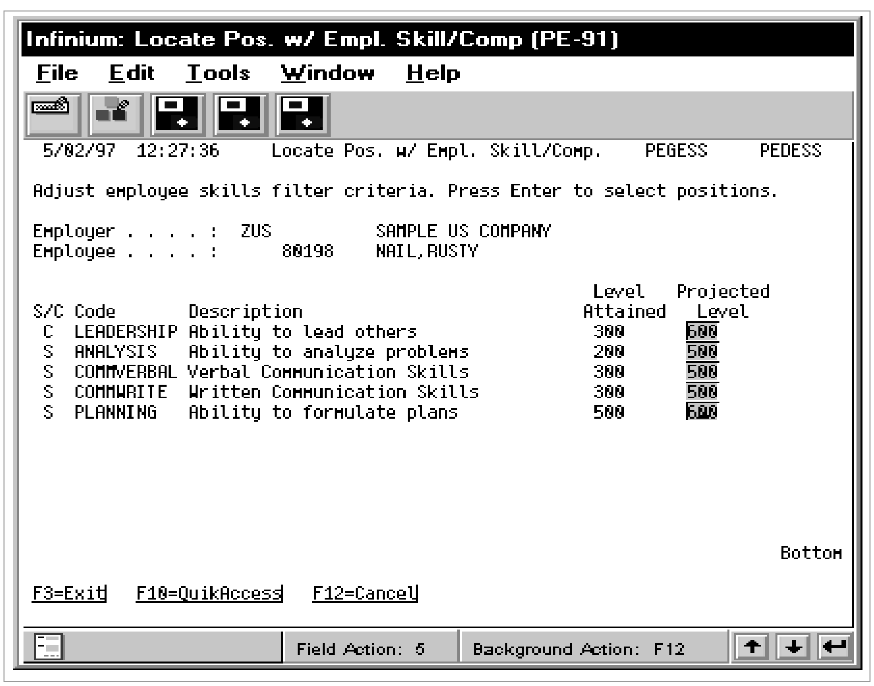


Figure 11-13: Locate Pos. w/Empl. Skill/Comp screen 2

The system displays the specified employee's skills and competencies on this screen. It defaults the employee's current skill or competency levels in the *Level Attained* and *Projected Level* fields.

6 Use the following information to work with this screen:

Projected Level

You can delete or modify the values in the *Projected Level* fields to more closely identify appropriate positions for the specified employee based on his or her anticipated skill and competency levels when he or she is ready for a new position assignment.

7 Press Enter. The system does one of the following depending on the value you entered in the *Format* field on the first selection screen:

- If you selected batch processing, the system generates the following message and returns you to the Infinium HR main menu:

  Building submission request . . .

  The system uses batch processing to generate the Locate Pos. w/Empl. Skill/Comp report. Skip to Step 10.

- If you selected interactive processing, the system generates the following message while it searches for qualified employees:

  Interactive search in progress. Please wait . . .

  When the search is complete, the system displays the Locate Pos. w/Empl. Skill/Comp screen as shown in Figure 11-14.

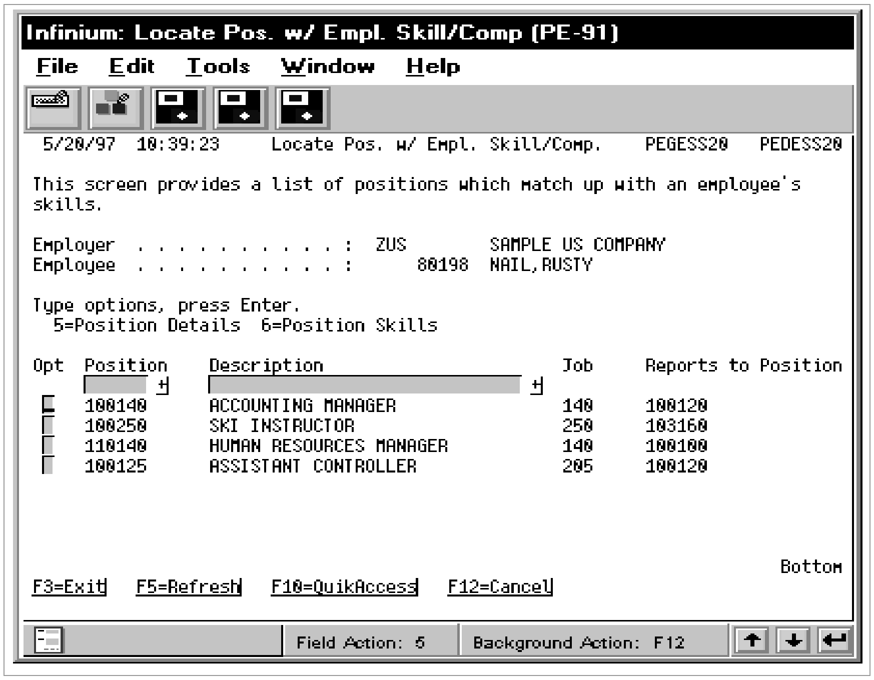


Figure 11-14: Locate Pos w/Empl Skill/Comp screen 3

The system displays the positions that satisfy your search criteria on this screen. You can use options on this screen to view the position control and position skills records for each selected position.

8 Press F12 or F3 to exit from this screen. The system displays the screen shown in Figure 11-12.

9 You can enter additional search criteria or press F3 to return to the Infinium HR main menu.

10 If you generated a report, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen. You can view or print this report using options on these screens.

Printing Skill and Competency Reports

You can use the following three functions to print reports that list skills and competencies:

- Use the *Print Skills and Competencies* function to generate a report of the skills and competencies defined for a specified employer or for all employers on your system.

- Use the *Print Empl. Skill/Competencies* function to generate a report of the skills and competencies assigned to one or all employees within a specified employer or all employees in all employers in your database.
- Use the *Print Pos. Skill/Competencies* function to generate a report of all or selected skills and competencies defined for a specified position, all positions within an employer or all positions in all employers on your database.

Entering Performance Reviews

This section provides you with information on how to create both summary and detailed performance review records for an employee.

You use the *Enter Personnel Actions* function to record a summary performance review record for an employee. You can then use either the *Enter Personnel Actions* function or the *Update Performance Review Detail* function to record additional free-form review commentary and competence levels from different view types that you establish such as employee, manager, peer or subordinate.

You must enter the summary performance review information before you can enter additional details. The performance review summary record provides an overall assessment of the employee's job performance. The system automatically displays key information from the summary performance review when you enter additional performance review details using the view types that you establish.

Prerequisites

Before completing this task, you must:

- Set up positions by using the *Update Position Data* function on the *Update Master Files* menu.
- Establish code values for the following code types using the *Update Employer Codes* function on the *Update Master Files* menu:
  - Competency View (**CVW**), which you use to record performance review details for each type of appraiser
  - Review Type (**RTP**), which you use to record performance review summary information
  - Rating (**RAT**), which you use to record performance review summary information
- Set up skills and competencies by using the *Update Skills and Competencies* function on the *Skills and Competencies* menu.
- Associate skills and competencies with positions by using the *Upd Position Skills/Competencies* function on the *Skills and Competencies* menu.

- Associate skills and competency records with employees by using the *Upd Employee Skills/Competencies* function on the *Skills and Competencies* menu.

For setup information, refer to the *Infinium Human Resources Guide to Controls*.

Entering Summary Performance Review Information

The following section provides you with a brief synopsis of how to enter summary performance review information for an employee using the *Enter Personnel Actions* function. Refer to the chapter entitled “Entering Personnel Actions” in the *Infinium Human Resources Guide to Processing* for complete information about how to enter performance review summary records.

You can access the *Enter Personnel Actions* function using either the *Workforce Development* or the *Employee Data* menu options. Complete the following steps to enter a performance review summary record for an employee using the *Workforce Development* option.

1. From the Infinium HR main menu select *Workforce Development.*

2. Select *Performance Reviews*.

3. Select *Enter Personnel Actions* [EPA]. The system displays the first Personnel Actions Update screen.

4. Complete the *Employer* and *Employee* fields.

5. Select the performance review transaction by typing **RE** in the *Transaction* field or typing a character in the *Opt* field adjacent to the performance review choice listed in the middle part of the screen.

6. Press Enter. The system displays the Personnel Actions Update prompt screen shown in Figure 11-15.

```
 6/12/14 12:36:27        Personnel Actions Update          PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80041 WONDER,WALLY
  RE                             Performance Review
RE Effective Date  _________            Current Review  :  MERIT
Rating  . . . . .  _____ +              Rating Score  . .  ___.00
Next Review . . .  _____ +              Promotion . . . .  _____
Next Review Date.  _________            Sup. Employer . .  ZUS
RE Employer . . .  ZUS +                Sup. Name: CANDLE,ROMAN J
RE Employee . . .  _________ +
Comment . . . . .                       Description . . .  __________________

 2=Change  4=Delete  8=Additional Information
Opt    Date     Rating    - Next Review --   - Reviewer --     Description
 _   1/01/1997  SAT      MERIT  1/01/1998   ZUS     80005  ANNUAL REVIEW







F3=Exit/Update  F4=Prompt  F8=Calc  F10=Access  F12=Cancel  F13=Training Nomin
```

Figure 11-15: Personnel Actions Update screen

From this screen you can do the following:

- Change the information for an existing performance review record in the sub-file by typing **2** in the *Opt* field to select the record.
- Delete an existing performance review record from the sub-file by typing **4** in the *Opt* field to delete the record.
- Advance to the Competency View Selection screen for an existing performance review record in the sub-file by typing **8** in the *Opt* field to select the record. Refer to the instructions in the following section entitled “Entering Performance Review Details” for further information.
- Review or create training requests for the employee in Infinium Training Administration by pressing F13. Refer to the *Infinium Training Administration Guide to Setup and Processing* for details on how to create training requests.

7 Use the following information to complete the fields on this screen:

RE Effective Date

Type the effective date of the performance review.

Current Review

The system displays the employee's current review type in this field. The value in this field defaults from the *Next Review* field in the employee's basic data record. You cannot enter a value in this field.

Rating

Type the code value that signifies the employee's overall performance rating. You establish code values for this field using code type **RAT**.

Rating Score

Type the performance review rating score for this employee. You can enter up to five characters with two decimal places. The largest number you can type in this field is 999.99.

You can associate rating scores with review controls that you establish using the *Update Review Controls* function. The system can use these controls to update the *Next Review* and *Next Review Date* fields when you enter a performance review. Refer to the *Infinium Human Resources Guide to Processing* for details on how to set up review controls.

Next Review

Type the code value that indicates the next type of performance review for this employee. You establish code values for this field using code type **RTP**.

If you have set up performance review controls, press F8 for the system to automatically complete this field using the values in the *RE Effective Date, Rating* and *Rating Score* fields.

Next Review Date

Type the date of the employee's next scheduled performance review.

If you have set up performance review controls, press F8 for the system to automatically complete this field using the values in the *RE Effective Date, Rating* and *Rating Score* fields.

Promotion

Use this field to indicate whether an employee's job performance warrants a promotion. This is a 5-character free-form field that does not require pre-defined values.

RE Employer

Type the reviewer' employer number.

If you leave this field blank, the system defaults to the value that represents the employer of the employee being reviewed.

RE Employee

Type the reviewer' employee number.

Description

Use this field to record additional information related to this employee' job performance evaluation.

Comment

Use this field to record additional information related to this employee' job performance evaluation. Type your comments on the long line below the *Comment* and *Description* fields.

8 Press Enter to store the review information in the sub-file shown on the screen.

9 Press F3 to exit from this screen. The system displays the first Personnel Actions Update screen.

10 You can enter additional transactions for the selected employee or press F3 to return to the Infinium HR main menu.

Entering Performance Review Details

You can use the *Update Performance Review Details* function to enter additional information about an employee's performance review from one or more reviewers. Before you can enter performance review details, you must do the following:

- Enter the summary performance review using the *Enter Personnel Actions* function.
- Set up code values to represent competency views using code type **CVW**.

You use competency views to identify the different types of reviewers and perspectives associated with an employee's performance review. You can define an unlimited number of competency views to support 360 degree performance appraisals that incorporate feedback from a variety of sources including the employee, his or her supervisor, manager, subordinates, peers, customers, vendors and so on.

You can access the Performance Review Details screens from the Personnel Actions Update screen described in the preceding section or from the Infinium HR main menu as described below.

Complete the following steps to update performance review details:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Performance Reviews*.

3 Select *Update Performance Review Detail* [UPDPERF]. The system displays the Update Employee Performance Reviews prompt screen.

4 Complete the Update Employee Performance Reviews prompt screen and press Enter. The system displays the Update Performance Review Detail screen shown in Figure 11-16.

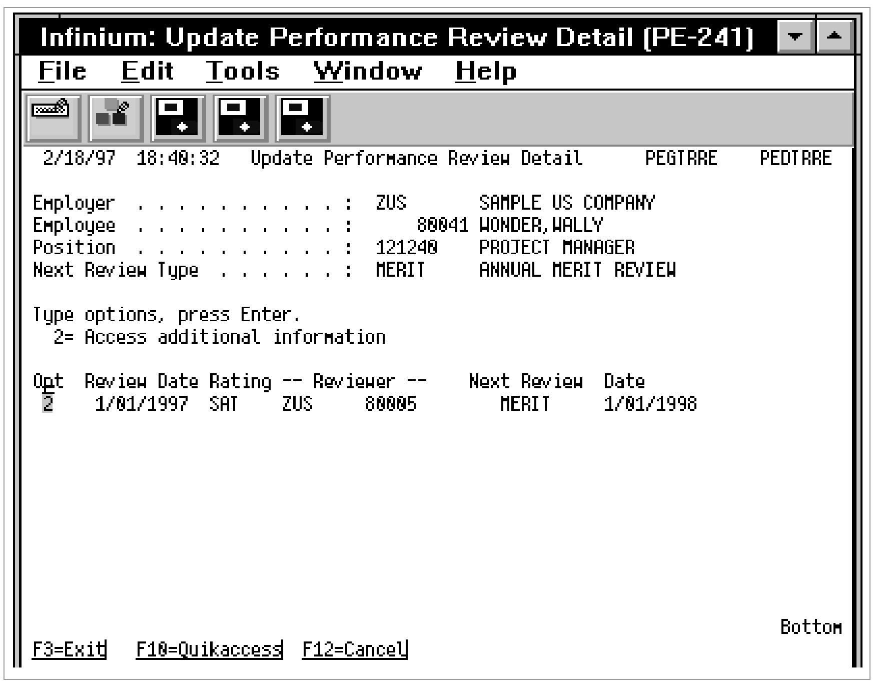


Figure 11-16: Update Performance Review Detail screen

The system displays the performance review summary records that have been entered for the selected employee.

5 Type **2** in the *Opt* field next to the performance review summary record for which you want to enter additional information and press Enter. The system displays the Competency View Selection screen shown in Figure 11-17.

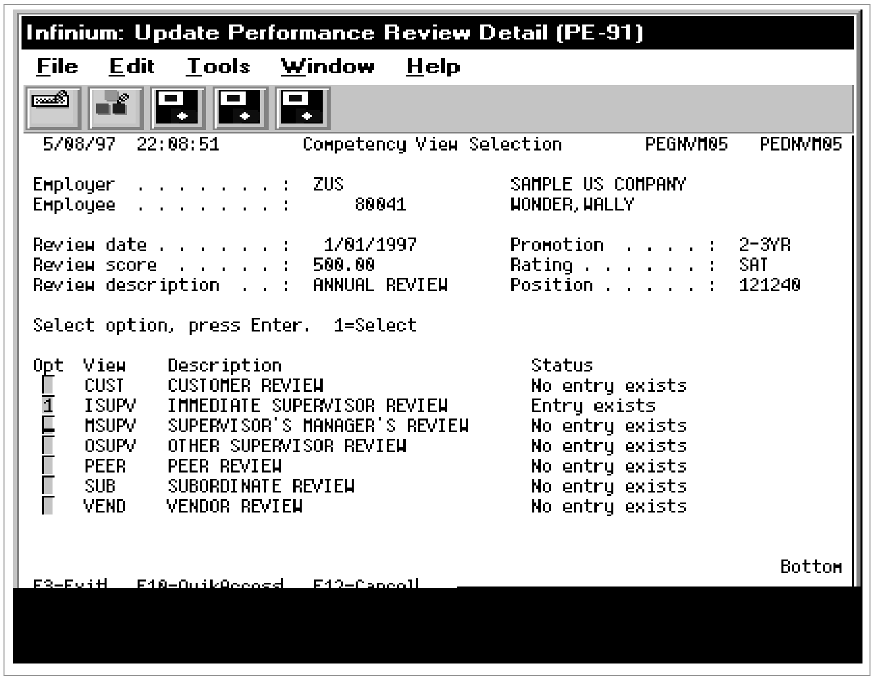


Figure 11-17: Competency View Selection screen

This screen displays the competency views you have established using code type **CVW**. Each competency view represents the role or perspective of individuals who contribute to an employee's performance appraisal. Many different competency views can be associated with one performance review. The *Status* column indicates whether information for a competency view has already been entered for the selected performance review.

6 Type **1** in the *Opt* field next to the competency view you want to update or review and press Enter. The system displays the Additional Review Details screen shown in Figure 11-18.

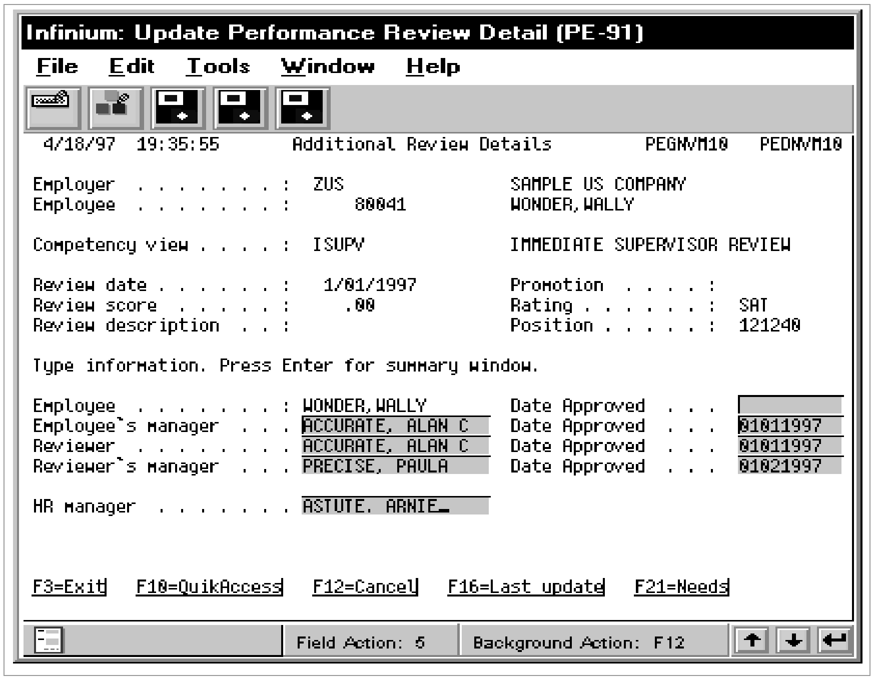


Figure 11-18: Additional Review Details screen

Use this screen to enter or update additional information for the specified competency view. The system displays the selected competency view in the top portion of the screen.

You can record the dates when the employee, the employee’s manager, the reviewer, the reviewer’s manager and the HR manager sign or approve information associated with the selected competency view. None of the fields on this screen are required.

On this screen you can do the following:

- Press F21 to display the Update Development Needs screen from which you can create or change a development need for the selected employee
- Press F16 to view the time, date, user and workstation last used to update information for the selected competency view
- Press Enter to advance to the Performance Review Summary screen

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

Employee

The system defaults the employee’s name in this field.

Date Approved

Type the date that the employee approved the selected competency view.

Employee's manager

Type the name of the employee's manager. This field is free format.

Date Approved

Type the date that the employee's manager approved the selected competency view.

Reviewer

Type the name of the reviewer associated with the selected competency view.

Date Approved

Type the date that the reviewer approved the selected competency view.

Reviewer's manager

Type the name of the reviewer's manager. This field is free format.

Date Approved

Type the date that the reviewer's manager approved the selected competency view.

HR manager

Type the name of the human resources manager. This field is free format.

8 Press Enter to display the Performance Review Summary window for this competency view as shown in Figure 11-19.

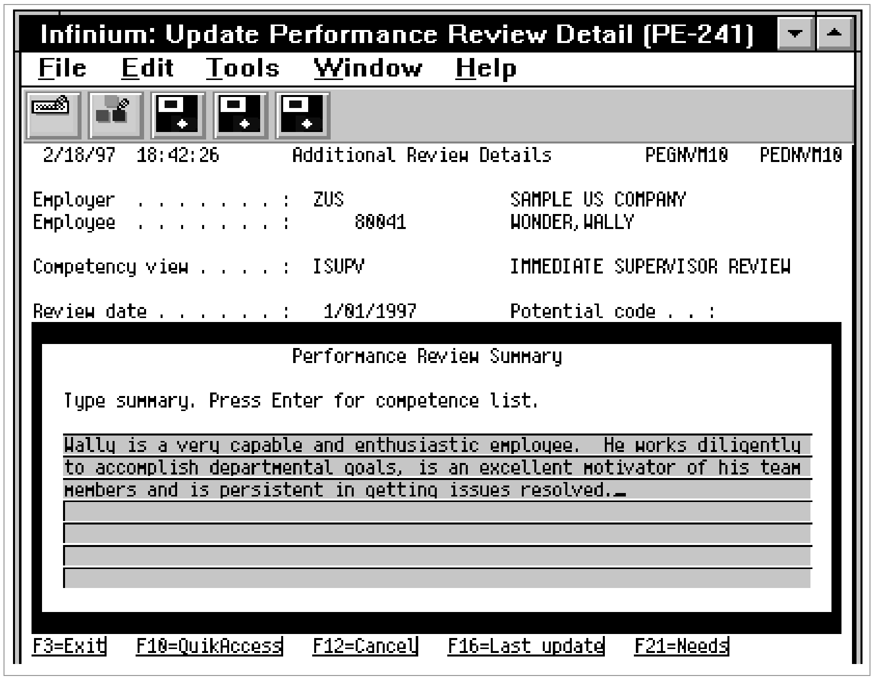


Figure 11-19: Additional Review Details screen with Performance Review Summary window

9 Type up to 7 lines of free-format information that pertains to the selected competency view.

10 Press F3 to re-display the Additional Review Details screen without the Performance Review Summary window, or press Enter to display the Performance Review Competency List screen shown in Figure 11-20.

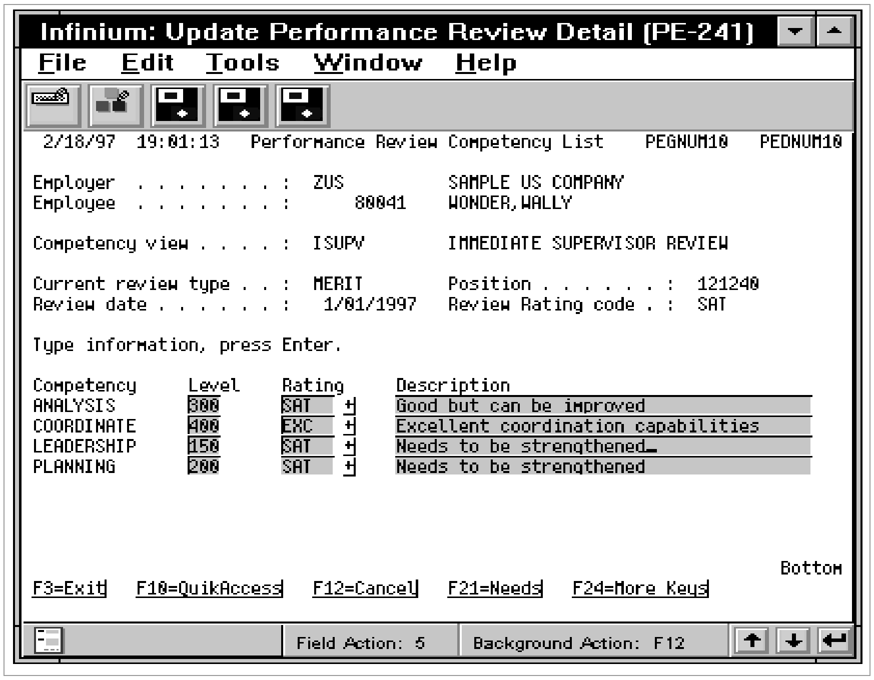


Figure 11-20: Performance Review Competency List screen

The system displays the competencies that are currently assigned to the selected employee and available for assessment. You use the *Update Employee Skills/Competencies* function to assign competencies to the employee and to indicate which competencies are to be assessed during performance reviews. The system automatically excludes employee skills from this screen.

Assigning Additional Competencies

When you first access this screen for a selected employee and competency view, and before you make any entries on this screen, you can assign additional competencies to the employee's record. Press F23 to display the Update Employee Skills/Competencies screen. Refer to the information in the "Associating Skills and Competencies with Employees" section for instructions on how to assign new competencies to an employee.

After you have once accessed this screen for a particular competency view and employee, you cannot later add competencies to that competency view for the specified employee.

After you update the employee's assigned competencies, press F3 to exit from the Update Employee Skills/Competencies screen and return to the Performance Review Competency List screen. The system adds the new competencies for the competency view you are currently updating and for other competency views you will update later. However, it does not add the new competencies to competency views you have already completed.

11 Use the following information to work with this screen:

Level

The system defaults values into this field based on the values in the *Level Attained* field in the employee's skill/competency record. You can override the default values with the values indicated by the reviewer up to the maximum level defined for the skill or competency.

The skill and competency levels you enter in this competency view do not affect any other competency views nor do they update the employee's skill/competency record.

Rating

Type the code value that identifies the rating the appraiser assigned to the employee's competency. You define code values for this field using code type **RAT**.

Description

Type a brief description of the appraiser's comments about the employee's competency.

12 Press Enter to refresh the screen. If you exit without pressing Enter, the system does not save your entries.

13 Press F3. The system displays the Exit Options window. Verify that **1** is entered in the Exit Options window and then press Enter to exit from the screen and save your entries.

Printing the Overall Rating Report

The Overall Rating report lists the overall performance ratings for one or more employees, including their position, grade, date of review and reviewer. The employees' performance review ratings are updated when you create the review by using the *Update Performance Reviews* or *Enter Personnel Actions* functions.

Complete the following steps to run the Overall Rating report:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Performance Reviews*.

3 Select *Print Overall Rating* [POR]. The system displays the Print Overall Rating screen shown in Figure 11-21.

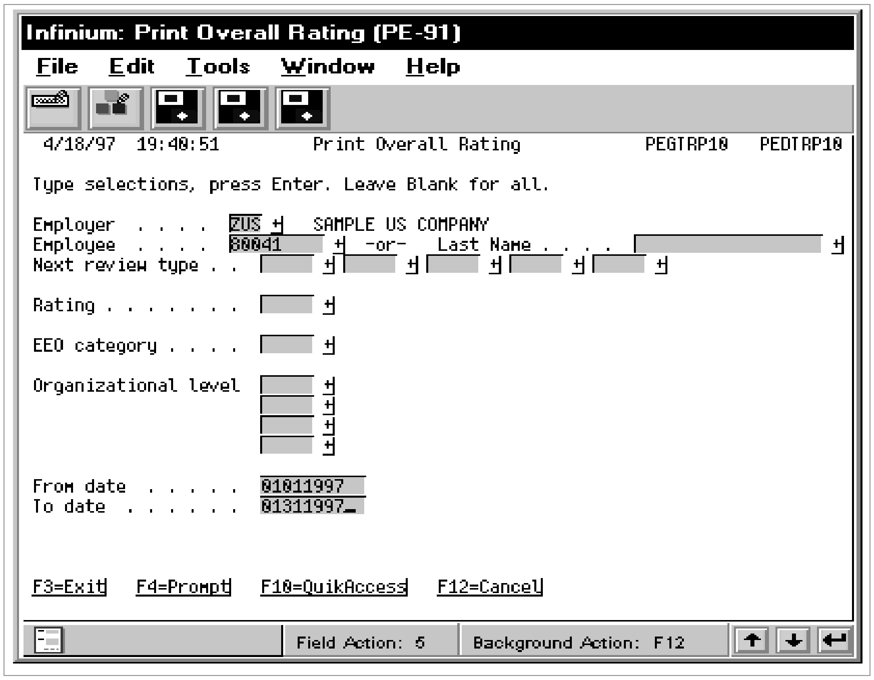


Figure 11-21: Print Overall Rating screen

Use this screen to list performance review rating results by employee, next review type, EEO category or organizational levels. You can run this report for performance reviews that have taken place within a particular date range by specifying a from and to date.

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

Employer

Type the value that identifies your employer, or leave this field blank to include all employers on the report.

Employee

Type a valid employee number, or leave this field blank to include all employees in the report.

Next review type

Specify the code value that represents the next performance review for the selected employees, or leave this field blank to select all next review types for the report.

Rating

Type the code value that represents the employees' overall performance rating, or leave this field blank to select all ratings for the report.

EEO Category

Type the code value that represents a specific EEO category, or leave this field blank to select employees in all EEO categories for the report.

Organizational level

Specify one or more valid organizational levels, or leave this field blank to select employees in all levels for the report.

From date

Type the earliest performance review date that should be included in the report. The report will list all performance reviews with effective dates that are the same as or follow this date. Leave this field blank to include performance reviews on the report regardless of their effective date.

To date

Type the latest performance review date that should be included in the report. The report will list all performance reviews with effective dates that are the same as or precede this date. Leave this field blank to include performance reviews on the report regardless of their effective date.

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

   Building submission request . . .

   The system uses batch processing to generate the Overall Rating report.

6. 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.

Printing the Competency Analysis Report

The Competency Analysis report lists the performance review competency results for the selected employee(s). The employee's performance review competency ratings are updated when you use the *Update Performance Review Details* or option 8 within the *Enter Personnel Actions* function.

Complete the following steps to generate the Competency Analysis report:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Performance Reviews*.

3 Select *Print Competency Analysis* [PCA]. The system displays the Print Competency Analysis screen shown in Figure 11-22.

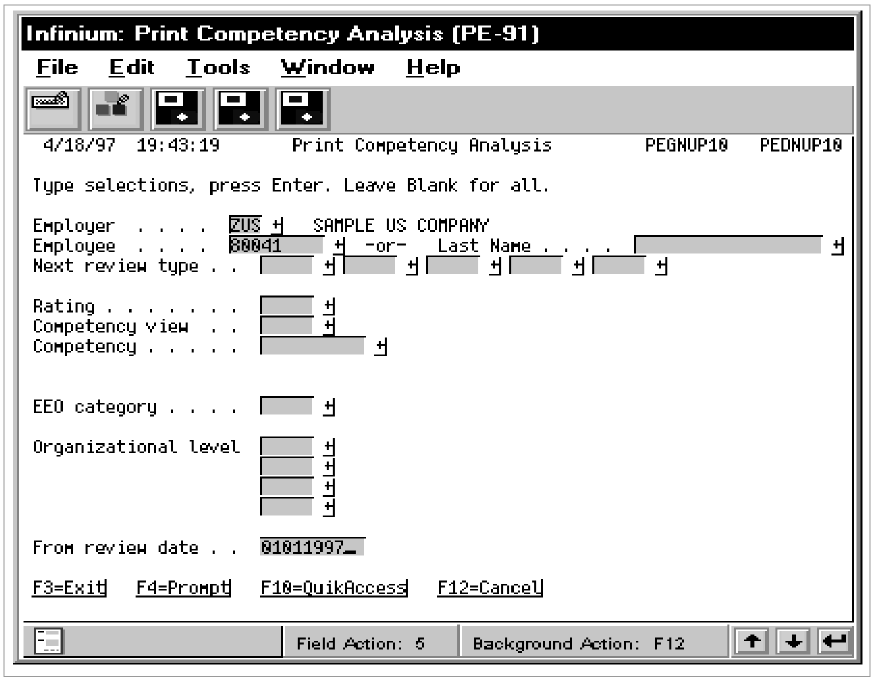


Figure 11-22: Print Competency Analysis screen

Use this screen to list the competencies and the competence level ratings of one or all of the employees within your organization, or to print a selection of employees by level, EEO category or review type. You can also generate the report for a particular date range.

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

Employer

Type the value that represents your employer number, or leave this field blank for all employers.

Employee

Type a valid employee number, or leave this field blank to include all employees in the report.

Next review type

Specify the code value that represents the selected employee's next performance review type, or leave this field blank to include all next review types in the report.

Rating

Type the value that identifies the employee's overall performance rating, or leave this field blank to include all ratings in the report.

Competency view

Specify a valid competency view, or leave this field blank to include information from all competency views on the report.

Competency

Specify a valid competency, or leave this field blank to include all competencies on the report.

EEO category

Specify a valid EEO category, or leave this field blank to include employees in all EEO categories in the report.

Organizational level

Specify a valid organization level or leave this field blank to include employees in all organizational levels in the report.

From review date

Type the earliest performance review date the system should include in the report. The report will list all performances reviews with effective dates that are on or after this date. Leave this field blank to include performance reviews regardless of their effective date on the report.

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

Building submission request . . .

The system uses batch processing to generate the Competency Analysis report.

6 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.

Entering Personal Development Reviews

You use personal development reviews to record commentary regarding an employee's achievements and abilities, career plan and developmental needs. The personal development review is generally an informal meeting between the employee and his or her supervisor that occurs on a regular basis, such as quarterly. It supplements the formal performance review and often is used to follow up on the employee's progress in meeting goals and objectives established in the formal performance review.

Prerequisites

Before completing this task, you must:

- Set up positions by using the *Update Position Data* function on the *Update Master Files* menu.
- Establish code values for the Role code type (**RLE**) using the *Update Employer Codes* function on the *Update Master Files* menu.

For setup information, refer to the *Infinium Human Resources Guide to Controls*.

Entering Personal Development Review Information

Complete the following steps to create a personal development review record:

1. From the Infinium HR main menu select *Workforce Development*.
2. Select *Personal Development Reviews*.
3. Select *Update Personal Devt. Reviews* [M_PDR]. The system displays the Personal Development Reviews screen.
4. Complete the *Employer* and *Employee* fields and press Enter. The system displays the Update Personal Development Reviews screen shown in Figure 11-23.

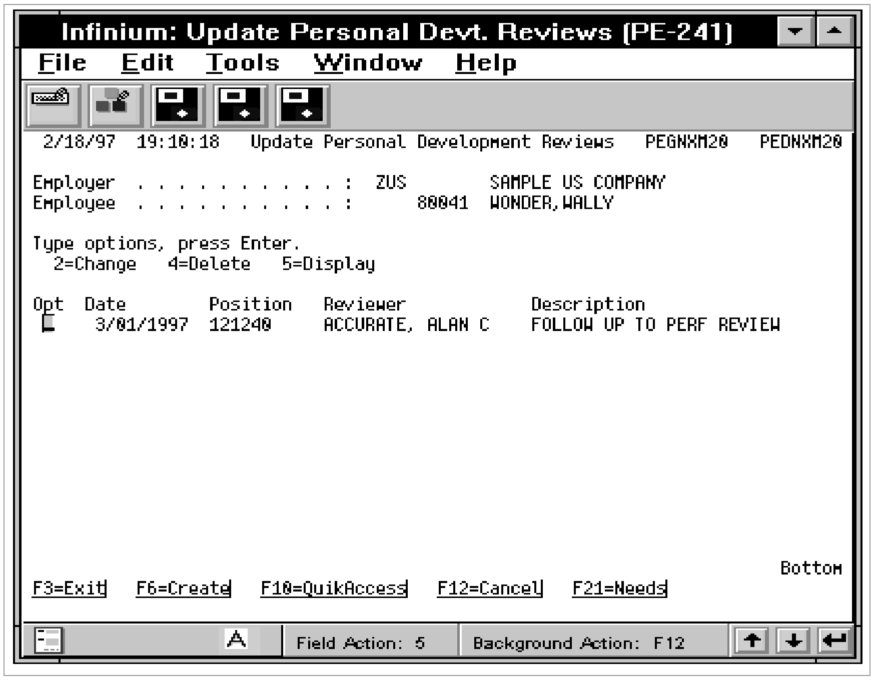


Figure 11-23: Update Personal Development Reviews screen 1

This screen lists the personal development reviews previously entered for the selected employee, with the most current review shown at the top of the list.

On this screen you can do the following:

- Create a personal development review by pressing F6. The system displays the Update Personal Development Reviews screen shown in Figure 11-24.
- Update an existing personal development review by typing **2** in the *Opt* field next to the review record you want to update and pressing Enter. The system displays the Update Personal Development Reviews Skills/Competencies screen shown in Figure 11-24.
- Delete a personal development review by typing **4** in the *Opt* field next to the review you want to delete and pressing Enter. The system displays the Confirm Deletion window; type **1** in the space provided and press Enter to delete the selected review.
- Display an existing personal development review by typing **5** in the *Opt* field next to the appropriate review and pressing Enter. The system displays the review. You cannot update review information using this option.
- Press F21 to display the Update Development Needs screen from which you can create or change a development need for the selected employee

5 Press F6 to create a new record. The system displays the second Update Personal Development Reviews screen shown in Figure 11-24.

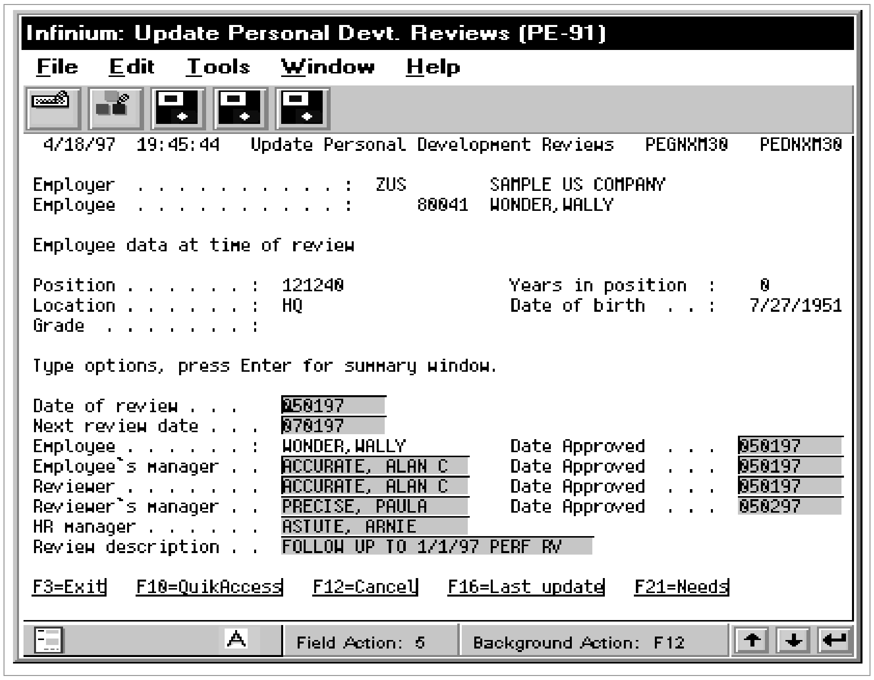


Figure 11-24: Update Personal Development Reviews screen 2

On this screen specify details of the personal development review. In the top portion of the screen, the system uses information in the employee's basic data record to default the following data:

- the value that represents the employee's current position assignment
- the value that represents the employee's current location
- the value that represents the employee's current pay grade
- the number of years the employee has been assigned to his or her current position, based on the length of time that has elapsed between the employee's effective date in the position and today's date, the system date
- the employee's date of birth

The system automatically associates the employee's current position assignment with the personal development review.

On this screen you can do the following:

- Press F3 to exit and save your entries
- Press Enter to advance to the Personal Development Review Summary screen shown in Figure 11-25

- Press F16 to view the time, date, user and workstation last used to update personal development review information for the selected employee
- Press F21 to access the Update Development Needs screen. See the “Identifying Development Needs” section for details about completing this screen.

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

Date of review

When you enter a new personal development review record, you must type a date in this field.

Next review date

Type the date on which the employee’s next personal development review is scheduled.

Employee

The system defaults the employee’s name in this field.

Date Approved

Type the date that the employee approved the review.

Employee’s manager

Type the name of the employee’s manager. This field is free format.

Date Approved

Type the date that the employee’s manager approved the review.

Reviewer

Type the name of the reviewer. This field is free format.

Date Approved

Type the date that the reviewer approved the review.

Reviewer’s manager

Type the name of the reviewer’s manager. This field is free format.

Date Approved

Type the date that the reviewer’s manager approved the review.

HR manager

Type the name of the HR manager who reviewed or approved the personal development review. This field is free format.

Review description

Type a brief review description. This field is free format.

7 Press Enter. The system displays the screen shown in Figure 11-25.

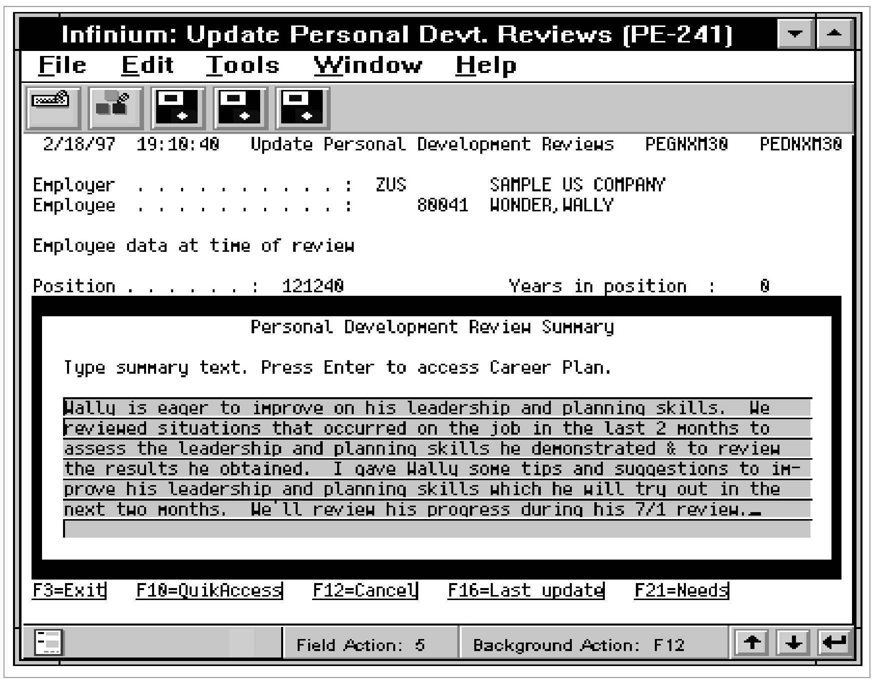


Figure 11-25: Update Personal Development Reviews screen with Personal Development Review Summary window

8 Type up to seven lines of commentary that summarizes the content and outcome of the personal development review.

You can press Enter to display the Update Career Plan screen for the selected employee. Refer to the information in the “Developing Career and Succession Plans” section for more details.

9 Press F3 to return to the Update Personal Development Reviews screen 2.

10 Press F3 to return to the Update Personal Development reviews screen 1.

11 You can enter additional personal development review information or press F3 twice to return to the Infinium HR main menu.

Displaying Development Review Information

You can use the *Display Personal Devt Reviews* function to view personal development review and development needs information previously entered for a specified employee.

Printing the Overdue Development Reviews Report

The Overdue Development Reviews Report lists personal development reviews that have not been conducted by their scheduled next review date.

Complete the following steps to print this report:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Personal Development Reviews*.

3 Select *Print Overdue Devt Reviews* [P_PDR1]. The system displays the Print Overdue Development Reviews screen shown in Figure 11-26.

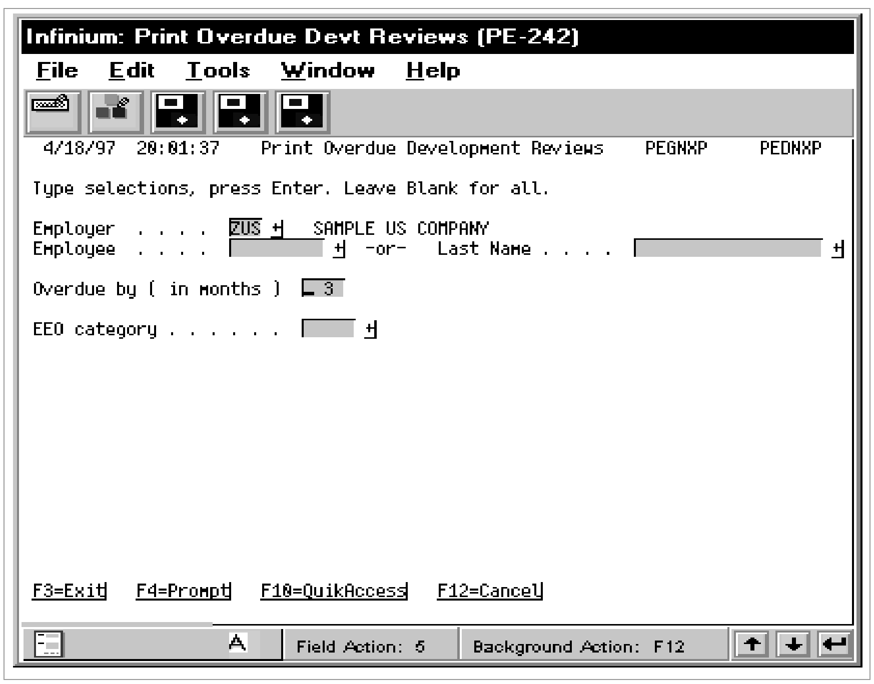


Figure 11-26: Print Overdue Development Reviews screen

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

Employer

Type the value that represents your employer, or leave this field blank to include information for all employers in your report.

Employee

Type a valid employee number, or leave this field blank to include all employees in your report.

Overdue by (in months)

Type a value that indicates the number of months by which personal development reviews are overdue. The system uses the value you specify to compare the next review date entered in the most recent personal development review to the date on which you generate the report, the system date. A performance review is overdue when the next review date precedes the system date by the specified number of months.

For example, you use the *Overdue Devt Reviews* function on March 1, 1997 and enter **3** in the *Overdue by (in months)* field. The system includes all personal development reviews that were scheduled for January 1, 1997 and earlier.

Leave this field blank to list all scheduled personal development reviews.

EEO category

Specify a valid EEO category, or leave this field blank to include employees assigned to all EEO categories in your report.

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

Building submission request . . .

The system uses batch processing to generate the Overdue Development Reviews report.

6 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.

Entering Management Reviews

You use management reviews to record ratings of an employee's current value to your organization, future potential and willingness to relocate. The management review is generally a confidential assessment conducted by managers responsible for career and succession planning in your organization. It is an extension of the formal performance review and is used to record decisions regarding an employee's career path and potential for advancement.

Prerequisites

Before completing this task, you must:

- Set up positions by using the *Update Position Data* function on the *Update Master Files* menu.
- Establish code values for the following code types using the *Update Employer Codes* function on the *Update Master Files* menu:
  - Mobility (**MOB**), which you use to indicate an employee's willingness to relocate
  - Potential Rating (**PNL**), which you use to characterize an employee's future career potential
  - Role Code (**RLE**), which you use to record future developmental assignments for an employee
  - Summary Code (**SUM**), which you use to characterize an employee's current career status or value to the organization

For setup information, refer to the *Infinium Human Resources Guide to Controls*.

Entering Management Review Information

Complete the following steps to create a management review record:

1. From the Infinium HR main menu select *Workforce Development*.
2. Select *Management Reviews*.

3 Select *Update Management Reviews* [M_ANALYSIS]. The system displays the Management Reviews screen.

4 Complete the *Employer* and *Employee* fields.

5 Press Enter to advance to the Update Management Reviews screen shown in Figure 11-27.

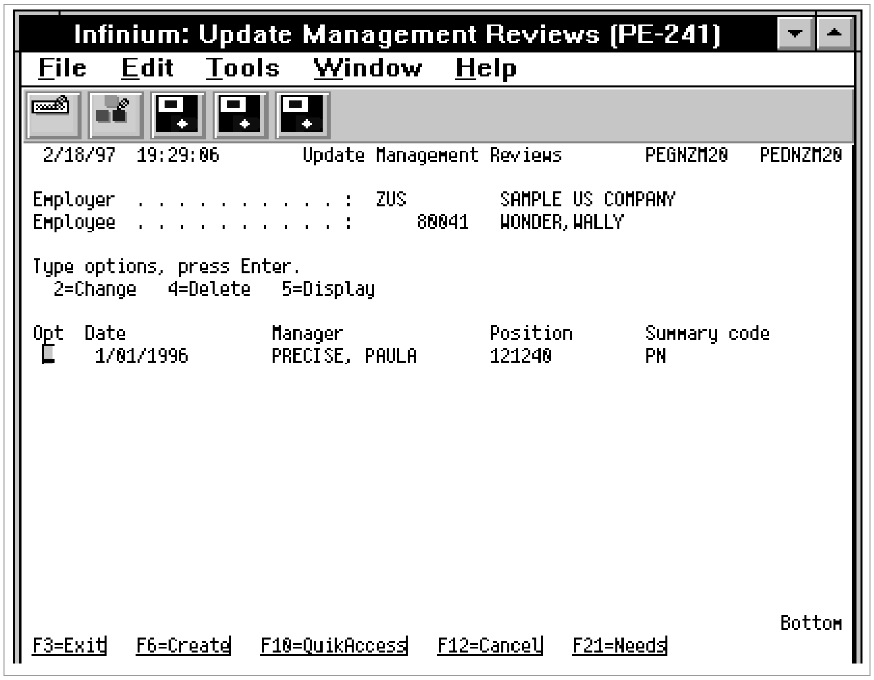


Figure 11-27: Update Management Reviews screen

The system displays a list of management reviews for the selected employee in descending date order. Only one entry can exist for an employee for any given date.

On this screen you can do the following:

- Create a management review by pressing F6. The system displays the Update Management Review screen shown in Figure 11-29.
- Update an existing management review by typing **2** in the *Opt* field to select the review and pressing Enter. The system displays the Update Management Review screen shown in Figure 11-29.
- Delete a management review by typing **4** in the *Opt* field to select the review and pressing Enter. The system displays the Confirm Deletion window; type **1** in the space provided and press Enter to delete the selected review.

- Display an existing management review by typing **5** in the *Opt* field to select the review and pressing Enter. The system displays the review. You cannot update review information using this option.

6 Press F6 to create a new review record and then press Enter. The system displays the second Update Management Reviews screen shown in Figure 11-28.

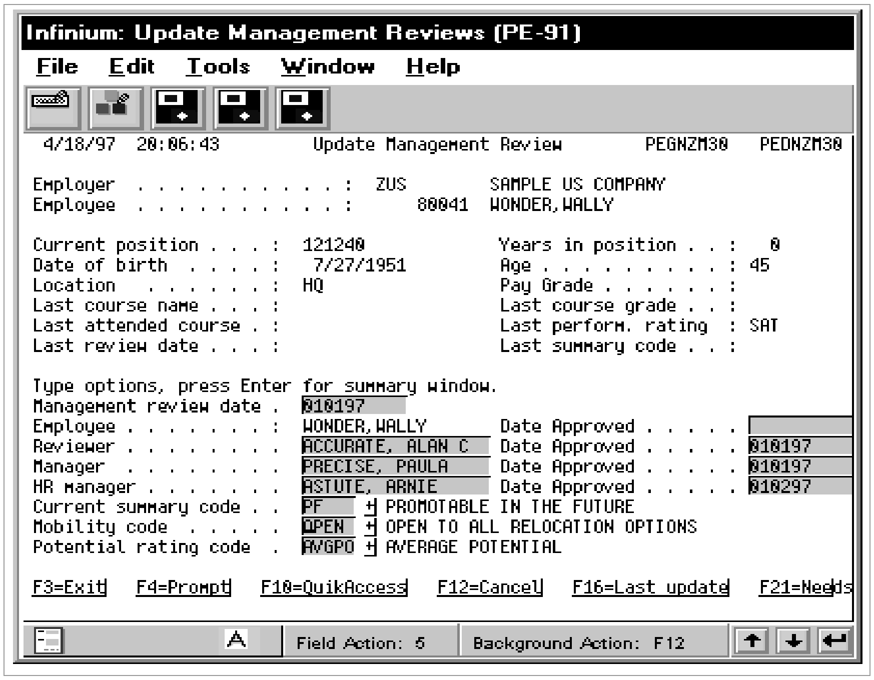


Figure 11-28: Update Management Review screen 2

The system displays default information in the top portion of this screen based on data in the employee's basic data record, most recent training course information in Infinium Training Administration, most recent performance review information, and most recent previous management review.

On this screen you can do the following:

- Press Enter to display the Management Review Summary window shown in Figure 11-29.
- Press F3 to return to the screen shown in Figure 11-28.
- Press F16 to display a window that tells you when the record was last updated. This information includes the time, date, user and workstation used.
- Press F21 to access the Update Development Needs screen. See "Identifying Development Needs" for details about completing this screen.

7 Use the following information to complete the fields on this screen:

Management review date

When you enter a new management review record, you must type a date in this field. You cannot change this date after you complete this screen.

Employee

The system defaults the employee’s name in this field.

Date Approved

Type the date that the employee approved the review.

Reviewer

Type the name of the reviewer. This field is free format.

Date Approved

Type the date that the reviewer approved the review.

Manager

Type the name of the employee’s manager. This field is free format.

Date Approved

Type the date that the reviewer’s manager approved the review.

HR manager

Type the name of the HR manager who reviewed or approved the personal development review. This field is free format.

Date Approved

Type the date that the HR manager approved the review.

Current summary code

Type the code value that signifies the employee’s current career status or value to the organization. You establish code values for this field using code type **SUM**.

Mobility code

Type the code value that indicates the employee’s willingness to relocate. You establish code values for this field using code type **MOB**.

Potential rating code

Type the code value that represents the employee's future career potential in your organization. You establish code values for this field using code type **PNL**.

8 Press Enter. The system displays the screen shown in Figure 11-29.

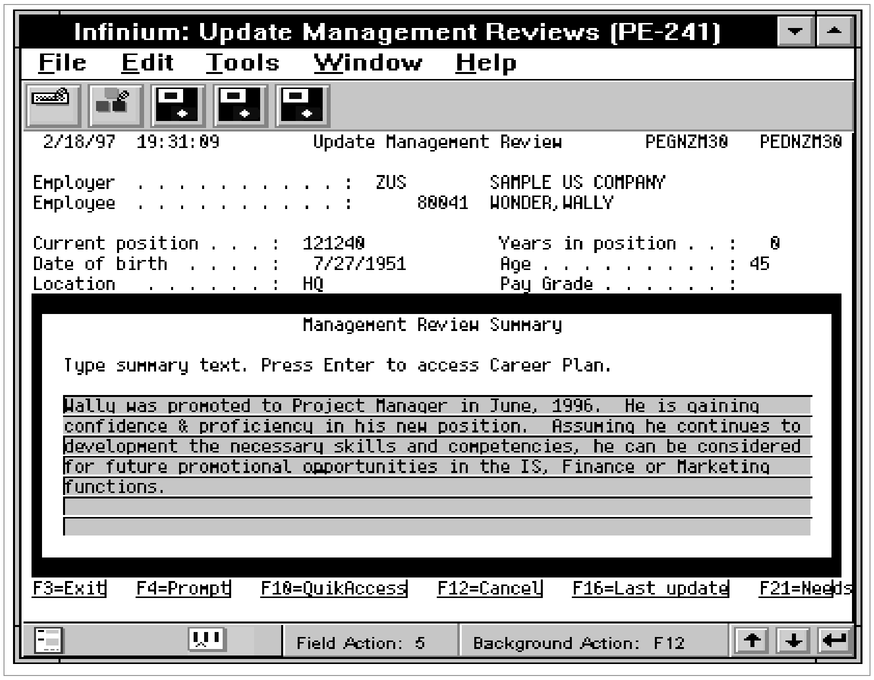


Figure 11-29: Update Management Reviews screen with Management Review Summary window

9 Type up to seven lines of commentary that summarizes the content and outcome of the management review.

You can press Enter to display the Update Career Plan screen for the selected employee. Refer to the information in the "Developing Career and Succession Plans" section for more details.

10 Press F3 to return to the screen shown in Figure 11-28.

11 Press F3 to return to the Update Management Reviews screen 1 of 2. You can enter additional management review information or press F3 twice to return to the Infinium HR main menu.

Displaying Management Review Information

You can use the *Display Management Reviews* function to view management review and development needs information for a specified employee.

Printing the Management Review Detail Report

Complete the following steps to print a report that includes employee position assignment details along with management review information.

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Management Reviews*.

3 Select *Print Management Review Detail* [PPDS]. The system displays the screen shown in Figure 11-30.

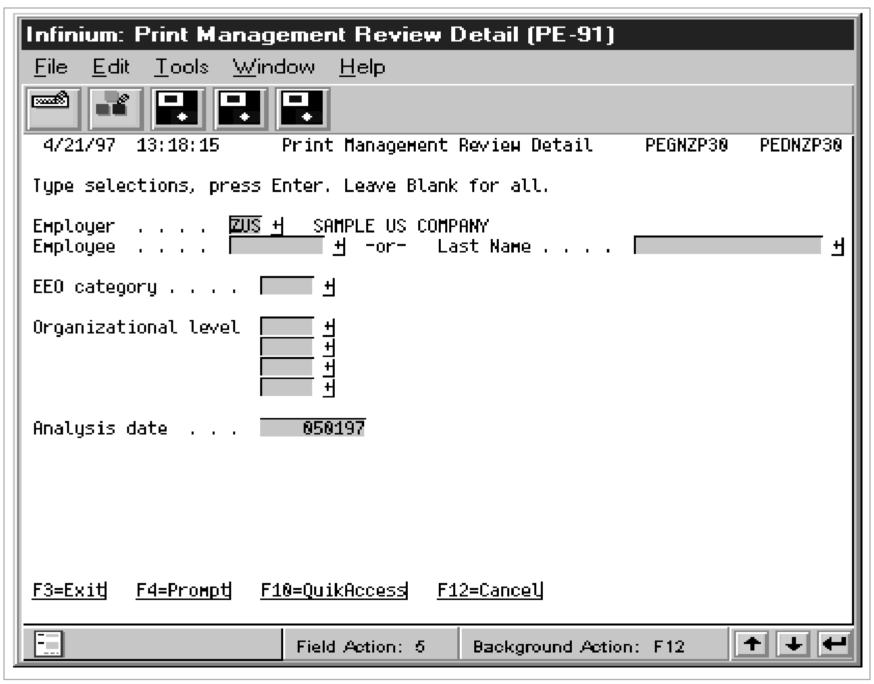


Figure 11-30: Print Management Review Detail screen

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

Employer

Type the value that represents your employer number or leave this field blank to include all employers in the report.

Employee

Type a valid employee number or leave this field blank for all employees.

EEO category

Specify a valid EEO category or leave this field blank to include employees in all EEO categories.

Organizational level

Specify a valid organizational level or leave this field blank for all levels.

Analysis date

Type the date of the management review that you want to print on the report. The system compares the date you specify to the value in the *Management review date* field for each employee and prints the information associated with the selected reviews on the report.

Leave this field blank to print the latest management review information for the selected employee(s).

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

Building submission request . . .

The system uses batch processing to generate the Management Review Detail report.

6 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. Note that the system lists the employee career plan details in portrait format.

Printing the Management Review Summary Report

The Management Review Summary report lists the names of reviewers, dates of management reviews and the summary code for a specific employee or groups of employees.

Complete the following steps to print a management review summary for a specified employee:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Management Reviews*.

3 Select *Print Management Review Summary* [L_ANALYSIS]. The system displays the Print Management Review Summary screen shown in Figure 11-31.

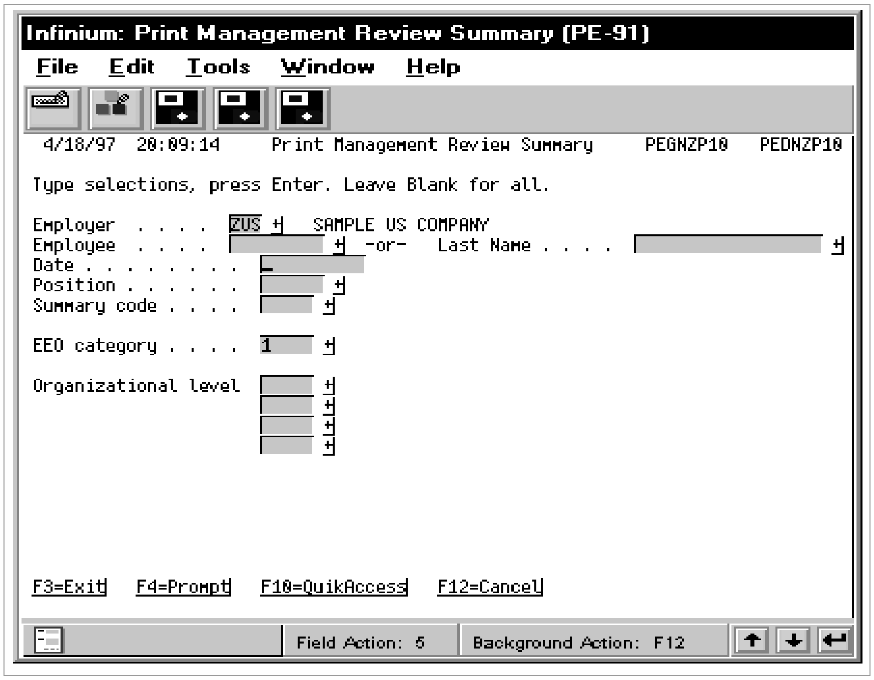


Figure 11-31: Print Management Review Summary screen

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

Employer

Type the value that represents your employer or leave this field blank to include all employers on the report.

Employee

Type a valid employee number or leave this field blank for all employees.

Date

Type the date of the management review or leave this field blank to include all management review dates in the report.

Position

Specify a valid position or leave this field blank for all positions.

Summary code

Type a valid summary code or leave this field blank to include all codes in the report.

EEO category

Specify a valid EEO category or leave this field blank to include employees in all categories.

Organizational level

Specify a valid organization level or leave this field blank to include employees in all levels in the report.

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

Building submission request . . .

The system uses batch processing to generate the Management Review Summary report.

6 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.

Identifying Development Needs

This section explains how to record an employee's job performance and career development needs. As part of the review process, the employee's supervisor and/or other performance appraisers can identify actions the employee should take to improve his or her current job performance and to enhance his or her opportunities to progress within the organization.

You can use the *Update Development Needs* function to track the employee's development needs and the ways in which the employee fulfills his or her needs including formal or on-the-job training, temporary job assignments, special projects, coaching and counseling by a mentor and so on.

The employee's supervisor and other reviewers may identify development needs when they conduct performance reviews, personal development reviews or management reviews. For this reason you can access the Update Development Needs screen using a function key from within all of the review functions.

Prerequisites

Before completing this task, you must:

- Define code values for the following code types using the *Update Employer Codes* function on the *Update Master Files* menu:
  - Delivery Method (**STY**), which you use to identify the way development needs will be satisfied or remedied
  - Priority Code (**PTY**), which you use to rank an employee's development needs
  - Source Code (**TRS**), which you use to identify the source of an employee's development need
- Set up skills and competencies by using the *Update Skills and Competencies* function on the *Skills and Competencies* menu.

Refer to the *Infinium Human Resources Guide to Controls* for information on how to define code values. Refer to the "Setting Up Skills and Competencies" section of this chapter for information on how to set up skills and competencies.

Entering an Employee’s Development Needs

When you enter an employee’s development needs, you can classify them as either training or non-training needs and assign priority levels. If you classify a need as a training requirement, you can assign a course code and access the functions on the *Training Requests* menu within Infinium Training Administration.

Complete the following steps to identify an employee’s development needs:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Development Needs*.

3 Select *Update Development Needs* [M_NEEDS]. The system displays the Development Needs screen as shown in Figure 11-32.

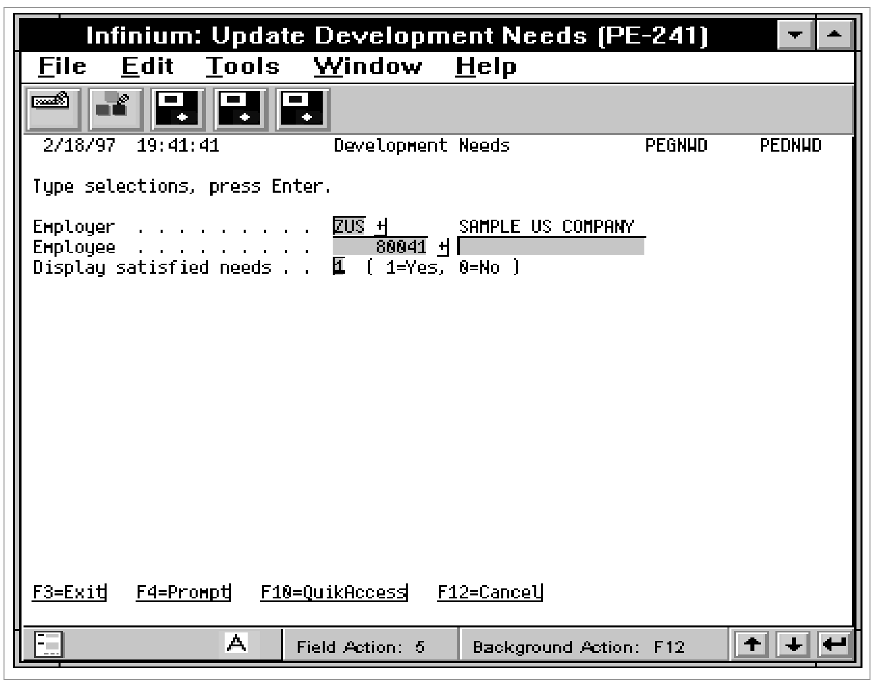


Figure 11-32 : Development Needs prompt screen

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

Display satisfied needs

Use this field to indicate whether you want to work with all of the development needs previously entered for your employee. When you specify a completed date for a development need, the system classifies it as a satisfied need.

Valid values are:

0 Do not include satisfied development needs on the following screen.

1 Include all development needs, including satisfied needs, on the following screen.

5 Press Enter. The system displays the Update Development Needs screen shown in Figure 11-33.

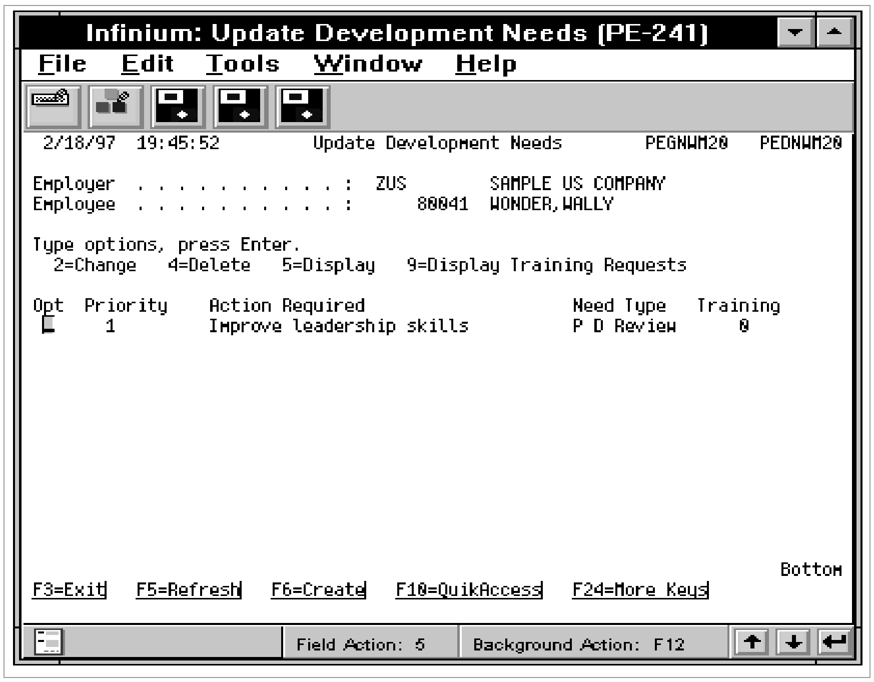


Figure 11-33 : Update Development Needs screen

You can access this screen when creating or updating performance reviews, personal development reviews or management reviews by using the F21 key as indicated on screens within each of these functions.

On this screen you can do the following:

- Create a development need by pressing F6. The system displays the screen shown in Figure 11-34.
- Change a development need by typing **2** in the *Opt* field to select that need and press Enter. The system displays the screen shown in Figure 11-34.
- Delete an existing development need by typing **4** in the *Opt* field to select that record and press Enter. The system displays the Confirm Deletion window; type **1** in the space provided and press Enter to delete the selected need from the employee.

- Display a development need by typing **5** in the *Opt* field to select that need and press Enter.
- Display the training requests already submitted for an existing development need by typing **9** in the *Opt* field to select that need and press Enter.

6 Press F6 to create a development need. The system displays the screen shown in Figure 11-34.

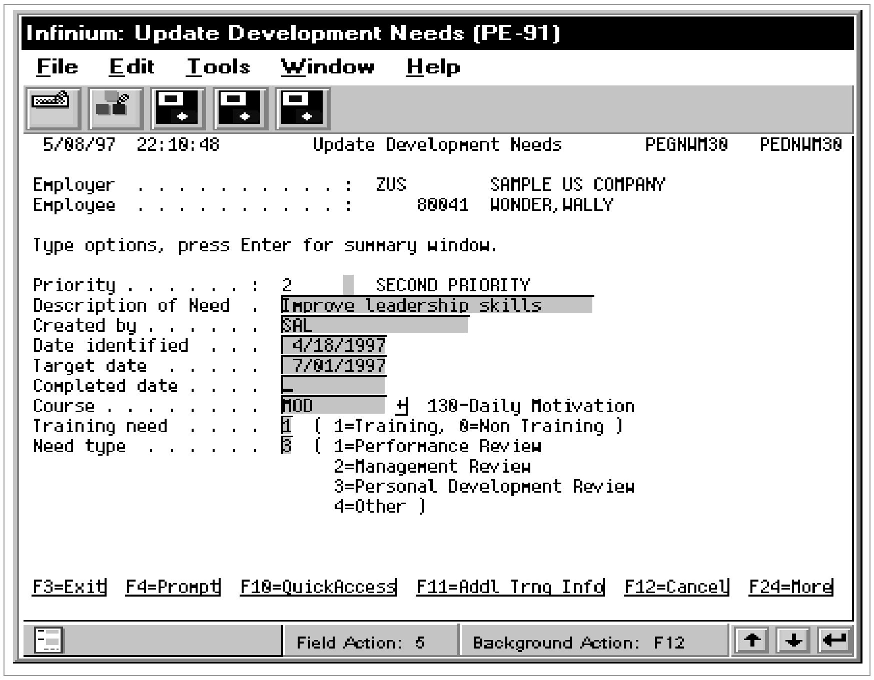


Figure 11-34: Update Development Needs screen 2

You can do the following from this screen:

- Press Enter to access the Needs Summary window into which you can type free-form text to augment the development need information entered on the screen shown above.
- Press F23 to create a training request for the specified employee on Infinium Training Administration.
- Press F21 to review existing training requests for the specified employee on Infinium Training Administration.

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

Priority

Type the code value that represents the importance of the development need to the employee. You must complete this field to create a development need. You cannot assign the same priority value to more than one development need for the same employee and you cannot update the value in this field at a later time for the specified employee.

You establish priority code values using code type **PTY**.

Description of Need

Type a description of the development need or action recommended for the employee.

Created by

The system defaults the User ID you used to sign onto your system. You can change the default value.

Date identified

Type the date on which the development need was identified.

Target date

Type the date on which the development need must be satisfied.

Completed date

Type the date on which the development need was satisfied.

Course

The system displays this field only if Infinium Training Administration is installed on your system and the appropriate libraries are in your library list.

If the development need can be satisfied by a training course, specify the course code value. You set up training courses using Infinium Training Administration.

Training need

Type one of the following values to indicate whether the need can be satisfied by a training course:

0	Non-training need
1	Training need

Need type

Type one of the following values that identifies how the need was identified or how the need will be assessed the future:

1	Performance review
2	Management review
3	Personal development review
4	Other

The system displays an abbreviated reference to the need type value you select when it displays the list of employee development needs as shown in Figure 11-33.

7 Press Enter to display the Needs Summary window shown in Figure 11-35.

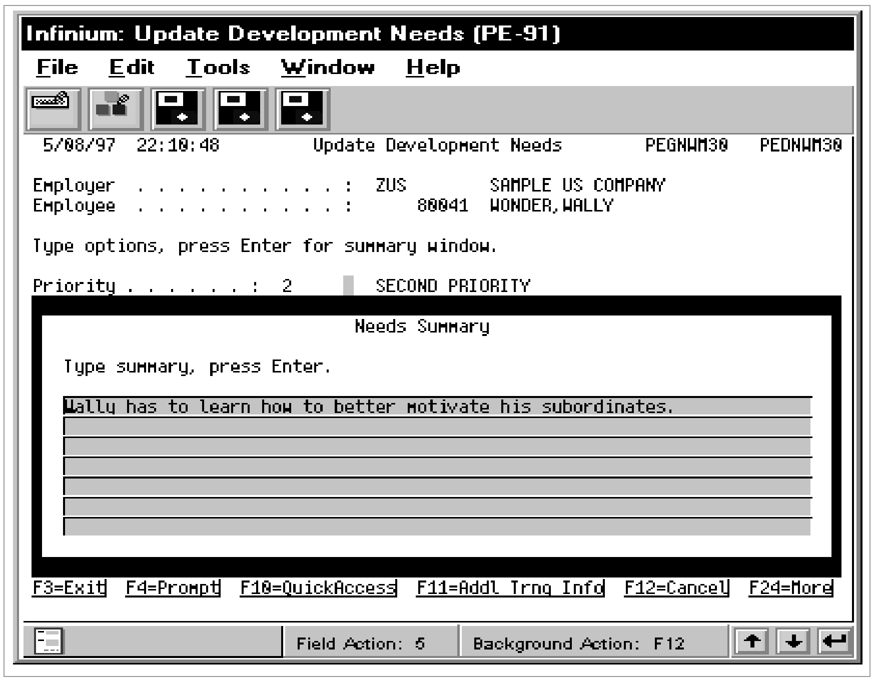


Figure 11-35: Update Development Needs screen with Needs Summary window

8 Type up to seven lines of commentary regarding the employee's development need.

9 Press Enter to return to the Update Development Needs screen.

10 If you want to enter additional details about training related to the development need, press F11 to advance to the Additional Training Information screen shown in Figure 11-36.

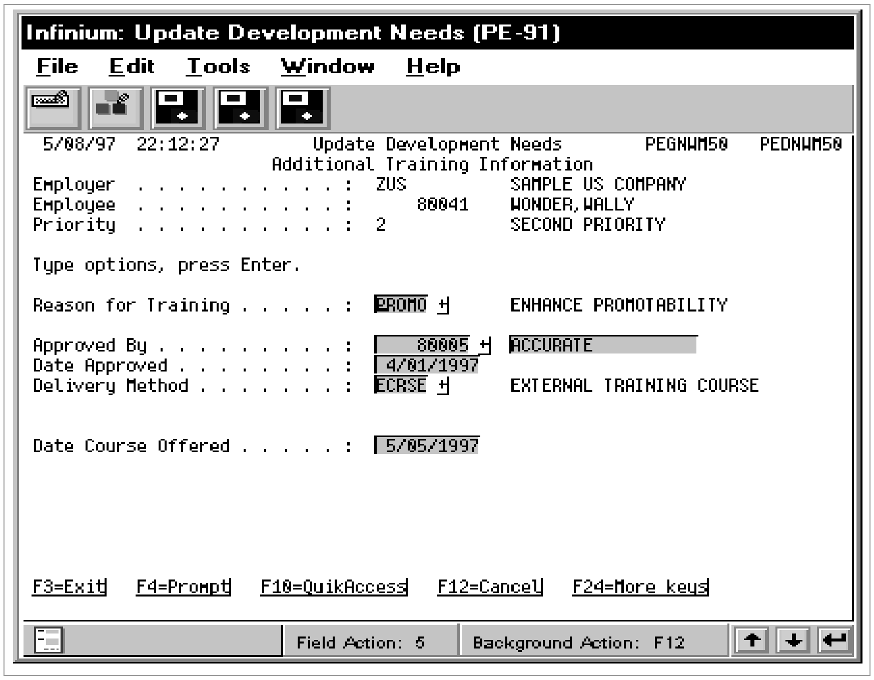


Figure 11-36: Update Development Needs Additional Training Information screen

On this screen record additional information pertaining to the development need, such as the skill or competency required by the employee.

From this screen you can do the following:

- Press F3 to exit and save your information.
- Press F21 to display all training requests currently available for the employee within Infinium Training Administration.
- Press F23 to record a new training request for the employee within Infinium Training Administration.
- Press F16 to display a window that identifies when the employee’s development needs record was last updated, including the time, date, user and workstation involved.
- Press F12 to cancel and exit from the update function. You return to the first Update Development Needs screen from which you can create, change, delete or display other development needs.

11 Use the following information to complete the fields on this screen:

Reason for Training

Type the code value that identifies the source of or reason for the development need. You set up code codes using code type **TRS**.

Approved By

Type the number of the employee who approved this need.

Date Approved

Type the date on which the development need was approved.

Delivery Method

Type the delivery method code value that indicates how the development need will be resolved for the employee. You set up delivery method code values using code type **STY**.

For example, you can indicate that the employee will take a formal training course, participate in a self-paced study program, or will receive one-on-one mentoring to address the identified development need.

Date Course Offered

Type the date on which the course the employee should attend is presented.

12 Press F3. The system displays the first Update Development Needs screen.

13 You can enter additional development needs information or press F3 to return to the Infinium HR main menu.

Displaying Development Needs Information

You can use the *Display Development Needs* function to display a list of development needs and recommended resolutions previously entered for a specified employee.

Printing the Development Needs Report

The Development Needs report lists the development needs you have entered for a specific employee or for groups of employees.

Complete the following steps to generate the Development Needs report:

1 From the Infinium HR main menu select *Workforce Development*.

2 Select *Development Needs.*

3 Select *Print Development Needs* [P_NEEDS]. The system displays the Print Employee Needs selection shown in Figure 11-37.

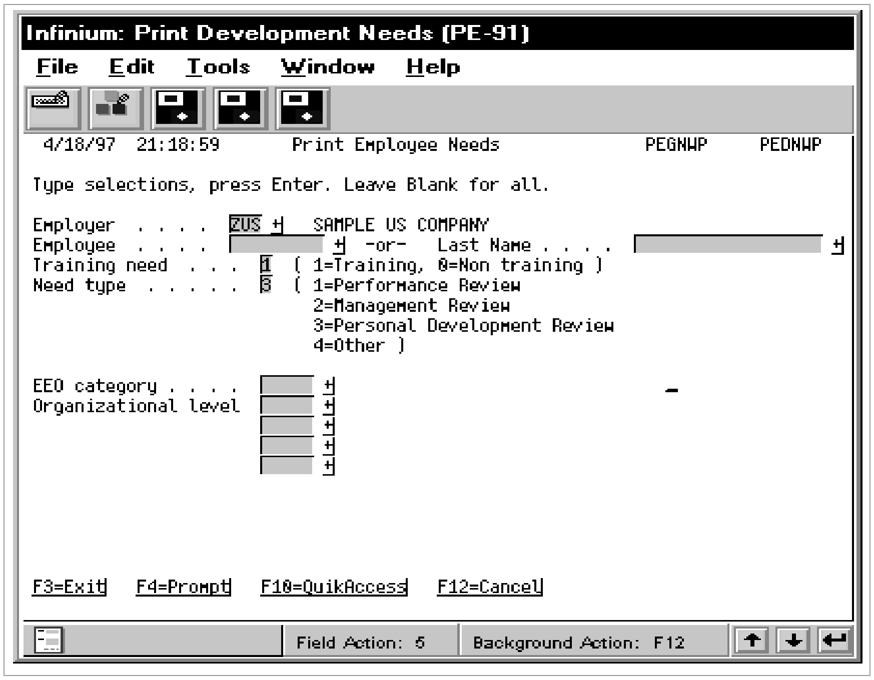


Figure 11-37: Print Employee Needs screen

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

Employer

Type the value that represents your employer or leave this field blank to include all employers on the report.

Employee

Type a valid employee number or leave this field blank for all employees.

Training Need

Specify the type of information that appears on the report. Valid values are:

0	Include only non-training needs on the report.
1	Include only training needs on the report.

Leave this field blank to include both types of needs on the report.

Need Type

Specify the type of training needs that appear on the report. Valid values are:

1	Include only needs associated with performance reviews on the report.
2	Include only needs associated with management reviews on the report.
3	Include only needs associated with personal development reviews on the report.
4	Include only needs associated with other assessment types on the report.

Leave this field blank to include all types of needs on the report.

EEO category

Specify a valid EEO category or leave this field blank to include employees in all categories on the report.

Organizational level

Specify one or more valid organization levels or leave this field blank to include employees in all levels in the report.

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

Building submission request . . .

The system uses batch processing to generate the Print Development Needs report.

6 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.

Working with Career and Succession Plans

This section explains how to:

- Enter a career plan for an employee.
- Conduct succession planning by matching vacant positions with potential candidates.

In career planning, you develop individualized career paths for employees who want to assume new responsibilities in your organization in the future. You can use the *Update Career Plans* function to identify either specific positions or general roles that an employee can perform in the future. You can specify a date by which you expect the employee to be ready to assume the new position or role.

You can enter career plans using the following functions:

- *Update Personal Devt. Reviews*
- Update Management Reviews
- Update Career Plans

When you enter a career plan using the first two options listed above, the system automatically identifies the source of the career plan as being either a personal development review or a management review. Once you establish career plans, you can display them, print them and use them to locate candidates who are qualified to fill open positions.

In succession planning, managers identify expected openings and identify the potential candidates that are or will be qualified to fill the openings.

Prerequisites

Before completing this task, you must:

- Set up positions by using the *Update Position Data* function on the *Update Master Files* menu
- Set up code values for the Role code (**RLE**) using the *Update Employer Codes* function on the *Update Master Files* menu

For setup information, refer to the *Infinium Human Resources Guide to Controls*.

Steps to Develop a Career Plan for an Employee

Complete the following steps to develop a career plan for an employee:

1 From the Infinium HR main menu select *Professional Development*.

2 Select *Career and Succession Planning*.

3 Select *Update Career Plans* [M_POSITION]. The system displays the Career Plans prompt screen.

4 Complete the screen and press Enter. The system displays the Update Career Plan screen shown in Figure 11-38.

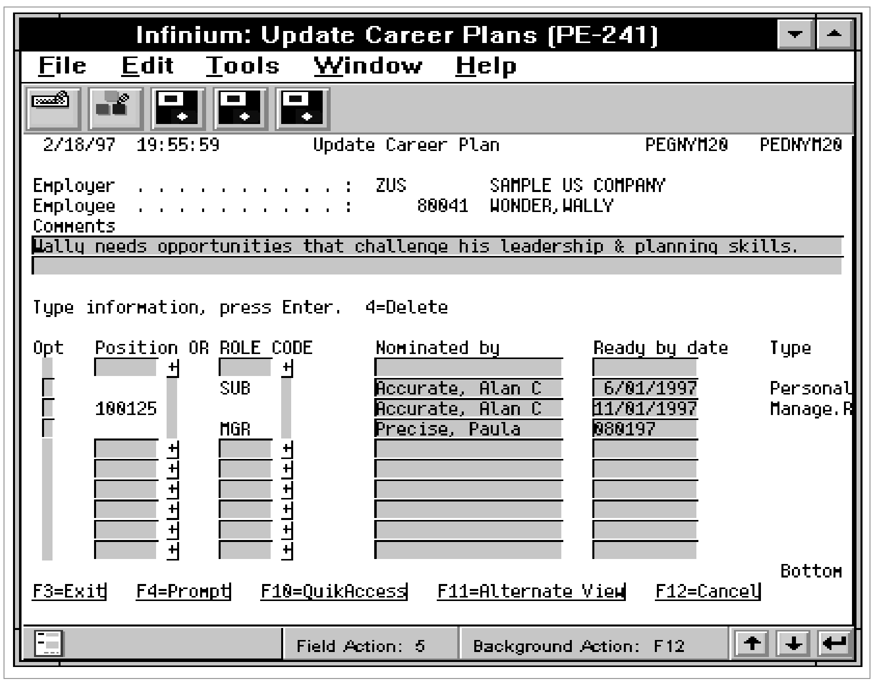


Figure 11-38: Update Career Plan screen

This screen enables you to specify up to ten potential positions or roles for the employee. You can also record comments at the top of the screen. If you entered career plan information for the employee using the *Update Personal Devt. Reviews* or *Update Management Reviews* functions, the system displays the information and identifies the related review in the Type column on the right-hand side of the screen.

On this screen you can do the following:

- Delete an existing position or role code assigned to the employee by typing **4** in the *Opt* field adjacent to the position or role record and pressing Enter. The system displays a message asking you to confirm the deletion.

- Press F11 to display an alternate view of the Update Career Plan screen, which includes the position and role codes with their descriptions. You cannot make any changes to the position and role codes using the alternate view. Press F11 again to return to the previous screen.

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

Position

Type the value that represents a potential position for the employee. You must complete this field or the *Role Code* field.

Role Code

Type the value that represents a potential role for the employee. You must complete this field or the *Position* field.

You define code values for this field using code type **RLE**.

Nominated by

Type the name of the person nominating the employee for a future position or role.

Ready by date

Type the date by which the employee will be ready to assume the specified position or role.

Type

The system defaults a value into this field based on the function you use to enter the career plan data as described below:

- If you use the *Update Management Reviews* function to enter career plan data, the system automatically defaults **Manage.R** in this field.
- If you use the *Update Personal Devt. Reviews* function to enter career plan data, the system automatically defaults **Personal** in this field.
- If you use the *Update Career Plan* function to enter career plan data, the system automatically defaults **Other** in this field.

6 Press F3 to exit and type **1** in the Exit Options window. The system displays the Infinium HR main menu.

Matching Open Positions to Candidates

You can use employee career plan information to develop a succession plan for a specified position opening. Complete the following steps to match open positions to potential candidates:

1. From the Infinium HR main menu select *Workforce Development*.
2. Select *Career and Succession Planning*.
3. Select *Succession Inquiry* [PPSEARCH]. The system displays the Succession Inquiry screen shown in Figure 11-39.

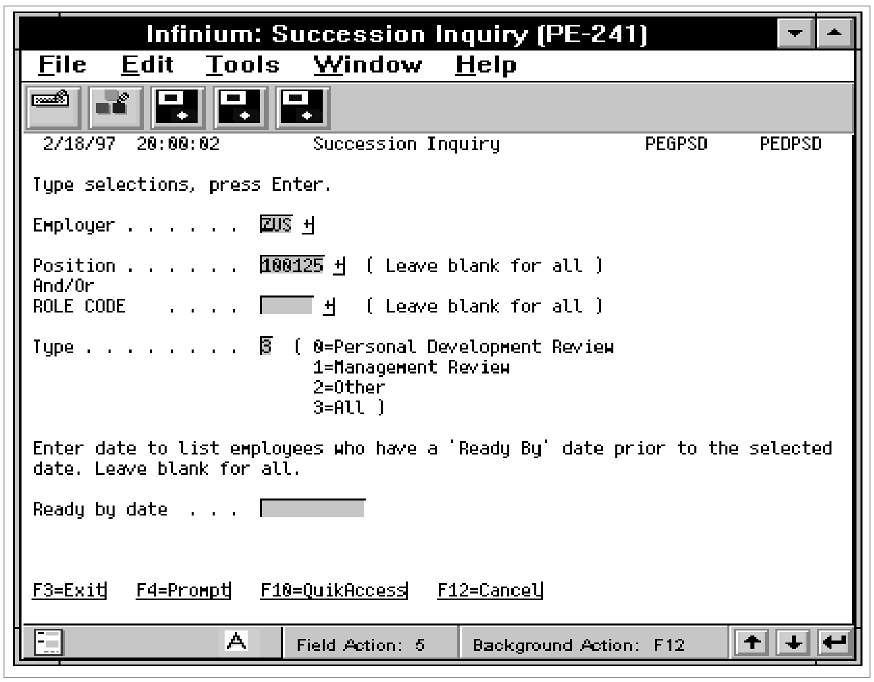


Figure 11-39: Succession Inquiry screen

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

Employer

Type the value that represents your employer.

Position and/or Role Code

Type either a position code or a role code. Leave both fields blank to include all position and role codes in your search.

Type

Specify the review type you want to include in the search. The system selects only those employees whose career plans are associated with the specified type of review.

Valid values are:

0	Personal Development Review
1	Management Review
2	Other
3	All

Ready by date

Type the date by which employees must be ready for their new assignment. The system includes employees whose *Ready by date* is the same as or precedes the specified date.

Leave this field blank to select employees regardless of their *Ready by date*.

5 Press Enter to display the Potential Successors screen shown in Figure 11-40.

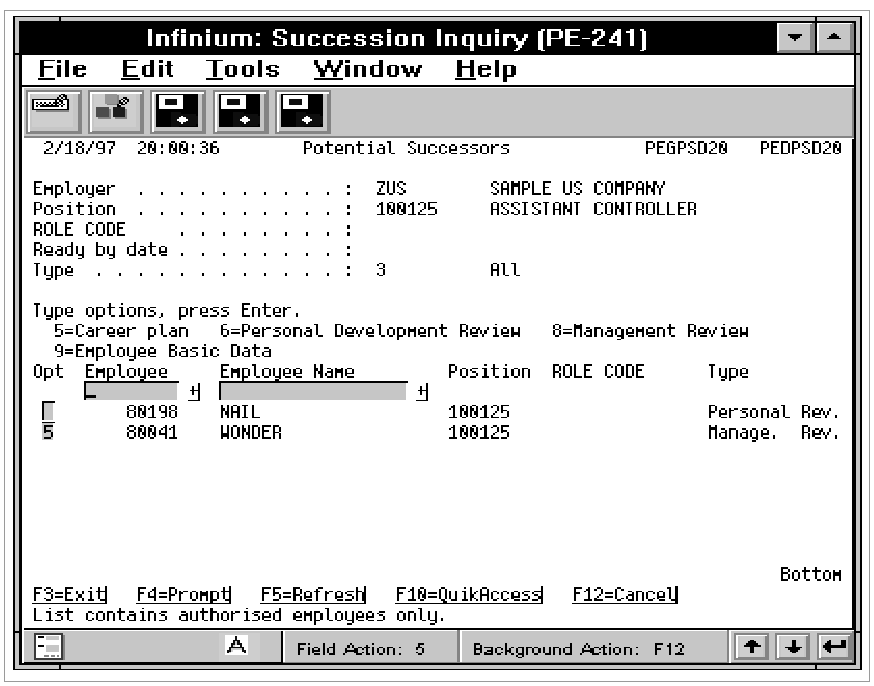


Figure 11-40: Potential Successors screen

This screen includes a list of all employees who meet the selection criteria you specified.

You can review additional information for an employee by typing one of the following values in the *Opt* field:

5	Career Plan
6	Personal Development Review
8	Management Review
9	Employee Basic Data

6 Press F3 or F12 to exit from this screen. The system displays the Succession Inquiry screen.

7 You can specify additional selection criteria or press F3 to return to the Infinium HR main menu.

Displaying Career Plan Information

You can use the *Display Career Plans* function to view previously entered career plan data for a specified employee, including future roles and position assignments.

Printing the Career Plans Report

You can use the *Print Career Plans* function to generate a report of career plan information for a specified employee or groups of employees.

Chapter 12 Using System Operations Functions

12

In this chapter you should learn how to use various options contained in the following functions within the *System Operations* menu of Infinium Human Resources including:

- *Supervisor's Functions* - including the user security options and the *Reorganize HR/400 Files* option
- *Personnel Purge Functions* - including options for purging employers and the report selection file

The chapter consists of the following topics:

Objectives

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

- Set up or modify user security controls for Infinium HR users
- Set up or modify user restrictions using security groups
- Set up or modify employee topic list controls and groups
- Set up or modify user restrictions using organizational levels
- Set up field level security

- Reorganize Infinium HR files
- Purge employers from your Infinium HR database
- Purge data in the report selections file from your Infinium HR database

Working with User Security Options

You can use the following *User Security Operations* options to restrict Infinium HR and Infinium PY users' access to certain types of employee information or transactions.

Use…	**To restrict users to…**
Update User Security Controls	▪ Specified employers ▪ Pay cycles ▪ Compensation data ▪ *Enter New Hire* screens ▪ *Employee Topic List* topics ▪ Additional position information for multiple position processing ▪ Authorized employees when using prompting on the *Employee* fields ▪ Personal health information in certain *Health Administration* functions and certain functions in Infinium Flexible Benefits ▪ Personnel section transactions ▪ On-demand check methods ▪ Sensitive employee information
Update User Security Groups	From the records of employee included in specified security groups.
Update User Security Levels	To the records of employees in specified organizational levels.

You can use the *User Security Operations* options listed below to set up controls and user restrictions for accessing the wide range of employee information available through the *Employee Topic List* function.

Use . . .	To . . .
Update Topic List Controls	Define default topic descriptions and the default sequence in which topics are to be presented. You can override these defaults through *Update Topic List Group* or *Update User Security Controls*.
Update Topic List Group	Define which topics a specified group of users can access. You can also override the default topic descriptions and sequence.
Reset Topic List Overrides	Reset the topic descriptions, the topic sequence, or both to the default settings for a specified topic list group or user.

In addition to the security functions listed above, you can set up security on any field in the Infinium HR/PY database. You can restrict selected users from viewing and/or updating data in a particular field.

To assign security to another user, you must have a higher authority level than the user whose security you want to update. Your system administrator assigns user security levels using Infinium AM.

Establishing User Security Controls

You must set up a security record for each user of Infinium HR and Infinium PY using the *Update User Security Controls* function before the user can utilize Infinium HR and Infinium PY menu options. You must first authorize the user to the Infinium HR and Infinium PY systems using Infinium AM before you can set up the user's Infinium HR and Infinium PY security.

Follow the steps below to define the Infinium HR security for a user:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Supervisor's Functions.*

3 Select *User Security Operations.*

4 Select *Update User Security Controls* [UUSC]. The system displays the User Security Update prompt screen.

User Security Update Prompt Screen

5 Specify the user whose security controls you are defining or updating.

6 Press Enter. The system displays the User Security Update selection screen.

User Security Update Selection Screen

Use this screen to select the user security attribute to update for the specified user:

- Restrictions
- Defaults
- New Hire Screen Selections
- Personnel Flags
- Payroll Flags
- Sensitive Data Access

7 Select the security attribute to create or update and press Enter.

Update User Security Restrictions Screen

On the Update User Security Restrictions screen, the system displays **Current User** if you are updating the record of a user with an existing security record. The system displays **New User** if you are setting up a user security record for the first time.

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

Employer Group

Type an employer group code value if you want to restrict the user to working with only the employers contained in a specified group. Leave this field blank if you do not want to restrict the user to specific employers.

Cycle Group

Type a valid code value for a cycle group if you want to restrict the user to processing only certain payroll cycles on Infinium PY. Leave this field blank for no restrictions or if it does not apply to the user.

Topic List Group

Specify the controls that apply when this user accesses the *Employee Topic List* as indicated in the following table.

Value	Controls for This User
***CTL**	The default controls defined in *Update Topic List Controls*.
A topic list group name	The controls defined for this group in *Update Topic List Group*.
Blank	The controls defined specifically for this user later in this *Update User Security Controls* procedure. If these user security controls already include topic list controls for this user, the system displays ***USER** to the right of this field.

Compensation Info

Type a value that indicates if the user can view and/or update the compensation information in the employee basic data record.

Valid values for this field are:

1	The user can view and update employee compensation data.
2	The user can see employee compensation data but cannot change it.
3	The user cannot view or update employee compensation data.

HIPAA PHI Access

Specify whether this user has access to the *Health Administration* functions in Infinium HR and/or Infinium Flexible Benefits functions. Valid values are:

0	No access to certain menu options in either *Health Administration* or Infinium Flexible Benefits
1	Access to all menu options in the *Health Administration* functions only
2	Access to all menu options Infinium Flexible Benefits only
3	Access to all menu options in both *Health Administration* and Infinium Flexible Benefits

When you specify that a user is restricted from Infinium HR *Health Administration* menu options, the user cannot access the menu options listed below.

Health Administration

Update Health Data	Display Health Data	List Health Data
Update Physicians Data	*Display Accident/OSHA Data*	*List Incident Data*
Update Accident/OSHA Data	*Display OSHA 200 Data*	*List OSHA 200 Log*
Enter Cost Transactions	*Display Physicians' Data*	*List OSHA 300 Log*
Update Employee Medical Exams	*Display Cost Transactions*	*List OSHA 300A Summary*
Update Employee Medical Claims	*Display Employee Medical Exams*	*List OSHA 301 Incident by Est*
	Display Employee Medical Claim	*List OSHA 301 Incident Level/EE*
		List OSHA Privacy Cases
		List Cost Transactions
		List Cost Analysis
		List Cost Summary by Supervisor
		List Medical Exams by Level
		List Medical Exams by Date
		List Employee Medical Claims

When you specify that a user is restricted from Infinium FB, the user will not be able to access the menu options listed below.

Spending Acct / Cash Operations

Update Spending Account Data	List FSA/ Cash Data	Display FSA/ Cash Data	Mass Update FSA/ Cash Data
Update Spending Account Claims	*List Spending Account Claims*	*Display Spending Account Claims*	*Trial Unused Credits- Spend Acct*
Update Spending Acct Claim Hist	*List Spending Acct Claim Trans*	*Display Spending Account Credits*	*Update Unused Credits-Spend Acct*
Enter Spending Account Credits	*List Spending Account Credits*	*Display Employee Cash Election*	*Extract Spending Acct Controls*
	List Employee Cash Election	*Display Spending Acct Activity*	*Trial Update Cash Back Paid*
	Statement of Spending Account		*Update Cash Back Paid*
			Trial Register Reimbursement Checks
			Post/Print Reimbursement Checks
			Trial Prior Year Reimbursements
			Post/Print Prior Year Reimb Cks

Additional Position

This value determines access to update and view additional position information.

0	No access
1	Access through Infinium PY
2	Access through Infinium HR

3 Access through both Infinium PY and Infinium HR

Employee Display

Specify whether this user can view all employees or only those to whom the user is authorized when the user prompts on the *Employee, Employer* and *Supervisor Employee* fields or when the user uses the *Employee Locate* function.

Valid values are:

0 Display only authorized employees.

1 Display all employees, including restricted employees.

9 Press F3 to save your updates and exit to the selection screen.

User Security Update Screen

10 If you did not specify a *Topic List Group* value for this user, you can press F9 (Topic List) at the User Security Update screen to display the Update Topic List Group screen.

Update Topic List Group Screen

At the Update Topic List Group screen, the system displays a list of the employee information topics that are potentially available to this user in the *Employee Topic List* function, such as Basic Data – Personal Info, Job Authorization, User Defined Data, and so forth.

Topics available to update in the topic list control file through *Update Topic List Controls* are highlighted on this page.

You can do the following to modify this user's topic list controls:

- To include a topic to update and display in this user's *Employee Topic List* selection list, type **2** in the *Opt* column next to that topic. To include a topic to display only in this user's *Employee Topic List* selection list, type **5** in the *Opt* column next to that topic. To remove a topic from this user's *Employee Topic List* selection list, blank out the value in the *Opt* column next to that topic.
- To modify the sequence of the user's topics, type new numbers in the *Seq* column for the affected topics. Press F5 (Resequence) to redisplay the list in this user's order.
- To modify the topic description this user is to see in *Employee Topic List*, edit the text in the *Employee Topic* column.

11 Press F3 to return to the main User Security Update screen.

User Security Update Screen

12 Press F3, specify **1** in the Exit Options window and press Enter to exit from this screen.

Update User Security Defaults Screen

On the Update User Security Defaults screen, the system displays **Current User** if you are updating the record of a user with an existing security record. The system displays **New User** if you are setting up a user security record for the first time.

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

Employer

To use a default value for a specific employer in the *Employer* field for this user each time the user accesses a screen that includes the *Employer* field, type the value that represents that employer. The user can override the specified default value if he or she is not restricted from other employers on your system.

Level 1, 2, 3, 4

If you want the system to default the value for levels 1, 2, 3 and 4 into the *Level* fields for this user each time the user accesses a screen that includes *Level* fields, type the value that represents one or more of the levels within the specified employer that you want to default. The user can override the specified default value if he or she is not restricted from other levels within the specified employer.

Include Inactive Employees

Type **1** to define the user’s Employee Locate screen default employee list to include inactive (terminated) as well as active employees. Type **0** to define the user’s Employee Locate screen default employee list to include only active employees.

This default applies both in the *Employee Locate* function and in most other functions where the user can prompt in an *Employee* or *Last Name* field to find the desired employee.

The user can change this default setting by changing the value in the *Include Inactive?* field on the Employee Locate screen. The system stores the new value in the user security controls.

User Preference

Specify this user's default display in the *Assignment* column on the Employee Locate screen. Valid values are:

1	Organizational level codes, as defined for your system
2	Lowest level description, such as **Accounts Payable**
3	Location description, such as **Headquarters**
4	Position description, such as **Accounts Payable Supervisor**

If the user presses F23 for User Preferences at the Employee Locate screen and changes this default, the system stores the new default in the user profile controls.

Include Inactive Levels

Type a value to indicate which levels are displayed when you prompt on employee or when you use *Employee Locate*.

Valid values are:

blank	
0	Include employees in active levels only.
1	Include employees in active and inactive levels.

14 Press F3 to exit and save your updates and return to the Update User Security selection screen.

Update User Security New Hire Screen Selections Screen

On the Update User Security Defaults screen, the system displays **Current User** if you are updating the record of a user with an existing security record. The system displays **New User** if you are setting up a user security record for the first time.

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

Payroll Data, Paid Time Off Accruals, User Defined, Benefits, Incomes, Deductions, Foreign National Data, Miscellaneous Data, *Employee Topic List*

Type **1** for each screen that you allow this user to access when he or she uses the *Enter New Hires* function on Infinium HR or Infinium PY.

New Hire Topic List Group

Specify the new hire topic list group for this user.

16 Press F3 to exit and save your updates and display the Update User Security selection screen.

Update User Security Personnel Flags Screen

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

Type **1** for each transaction that this user is allowed to access in the *Enter Personnel Actions* and *Mass Update PE Actions* functions, such as salary changes or transfers.

The system removes transactions from which the user is restricted from the Personnel Actions Update screen. The system displays an error message if the user tries to enter or select a transaction to which he or she is not authorized in either function.

18 Press F3 to exit and save your updates and return to the User Security Update selection screen.

Update User Security Payroll Flags screen

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

Calculate Only, Manual Checks, Print Checks

Specify yes for each on-demand transaction that this user is allowed to access.

Default

Specify the default transaction for this user profile. This indicates the normal operations that the user profile will perform:

Valid values:

1	The user can only calculate on-demand checks.
2	The user can calculate and provide manual on-demand checks.
3	The user can calculate and print on-line on-demand checks.

The value you enter here is in the upper left corner of the *On Demand Checks* function where you can also enter it.

20 Press F3 to exit and save your updates and return to the Update User Security selection screen.

Update User Security Sensitive Data Access Screen

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

Tax ID Access, Tax ID Print Default, Bank Account Access, Bank Account Print Default

To use the value you define on the Entity Controls record as the default value, leave the field blank.

Specify the code that identifies the amount of detail this user can access for the specified employee information. This is an Infinium AM code. The codes are:

- **SHOWALL** to show all characters
- **MASKALL** to mask all characters
- **LASTFOUR** to show the last four characters only
- **FIRSTFOUR** to show the first four characters only
- **FANDLFOUR** to show the first and last four characters and show asterisks for all characters in between

22 Press F3 to exit and save your updates and return to the Update User Security Selection screen.

23 Press F3 to return to the main menu.

Copying a User Security Control

You can copy the security values from an existing user to create the security definition for a new user.

Follow the steps below to copy Infinium HR security values from an existing user.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Supervisor's Functions.*

3 Select *User Security Operations.*

4 Select *Update User Security Controls* [UUSC]. The system displays the User Security Update prompt screen.

5 Specify the user whose security controls you are adding.

6 Specify the user whose security controls you are copying.

Caution: If this user profile has a value in the *Topic List Group* field, the topic list group is not copied to the new user profile and the *Topic List Group* field must be maintained in the Restrictions section of the new user profile security controls.

7 Press Enter. The system copies the values from the referenced user then displays the User Security Update selection screen, with **New User** in the upper right corner.

8 Use the selection screen to select a user security topic and view or to update the copied values for the new user.

If you change one of the security topics and you exit and save your changes, the system saves all of the copied security values and displays **Current User** in the upper right corner instead of **New User**.

Setting Up User Security Groups

You can restrict a user profile from updating, displaying and reporting the data of employees who are assigned to a security group.

For example, you set up the **EXEC** security group for executives of your organization and enter the **EXEC** security group code value in the basic data records of five top-level employees in your organization. You then assign a user to the **EXEC** security group. The system automatically restricts the user from accessing, displaying or printing the information of the five employees in the **EXEC** security group.

You must take the following steps to implement security groups:

1 Define code values for code type **SEC** (security group) using the option *Update Employer Codes.* You set up security group code values without specifying an employer. Therefore, when you set up a security group, you can use it in all employers on your system.

2 Assign employees to the security group by either defaulting it from their assigned job or by typing it directly into the *Security Group* field on each

employee's basic data record. To default the security group code value into employee records, specify it on job control records before you assign the employees to their jobs; you can use either the *Enter New Hires* or the *Enter Personnel Actions* functions to assign employees to jobs and positions.

3 Restrict users from employees in the security group by typing the security group code value in the *Security Group* field on the Update User Security Groups screen for each of the users to be restricted. This step restricts the user from viewing, updating and reporting on the employees in the security group.

Follow the steps below to restrict users from employees in one or more security groups:

4 From the Infinium HR main menu select *System Operations.*

5 Select *Supervisor's Functions.*

6 Select *User Security Operations.*

7 Select *Update User Security Groups* [UUS]. The system displays the screen shown in Figure 12-1.

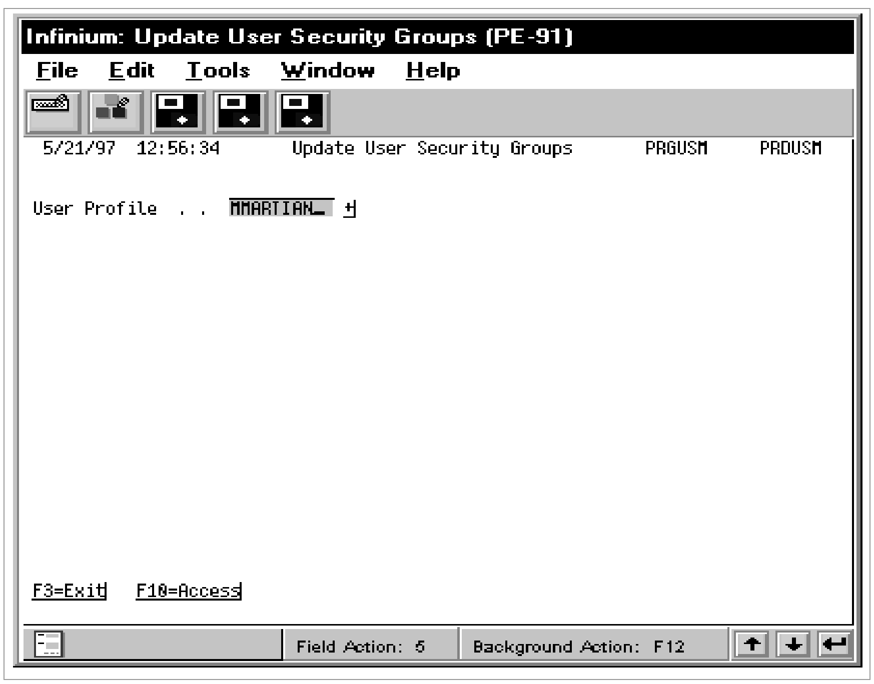


Figure 12-1: Update User Security Groups prompt screen

8 Type a valid user profile.

9 Press Enter. The system displays the screen shown in Figure 12-2.

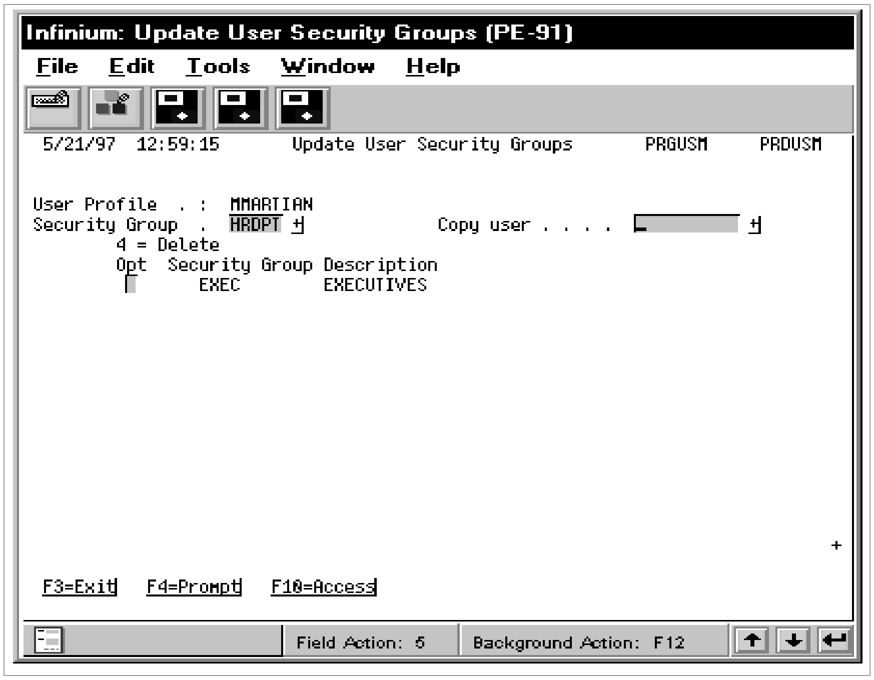


Figure 12-2: Update User Security Groups screen

You can use this screen to add or delete security groups from the specified user profile. To delete an existing security group, type **4** in the *Opt* field adjacent to a security group in the sub-file in the middle portion of the screen and press Enter.

10 Use the information below to fill in the fields on this screen and to assign a security group restriction to a user profile.

Security Group

Type a valid security group code value. The system restricts the specified user from employees who are included in the security group that you enter on this screen. You type or default the security group code value into the basic data records of employees whose information you want to restrict.

Copy user

You can use this field to copy the security group assignments of another user profile to the specified user profile.

11 Press Enter. The system stores the specified security group in the sub-file in the middle portion of the screen.

12 Repeat steps 7 and 8 to assign the specified user to additional security groups.

13 Press F3 to exit from this screen and return to the Update User Security Groups prompt screen.

14 You can update security groups for another user profile or press F3 to return to the Infinium HR main menu.

Implementing Security by Levels

You use the *Update User Security Levels* option to restrict a user to the records of employees who are assigned to specific organizational level combinations within a specified employer. Until you use this option, the system allows Infinium HR and Infinium PY users to work with employee records in all levels of the employers they are allowed to access.

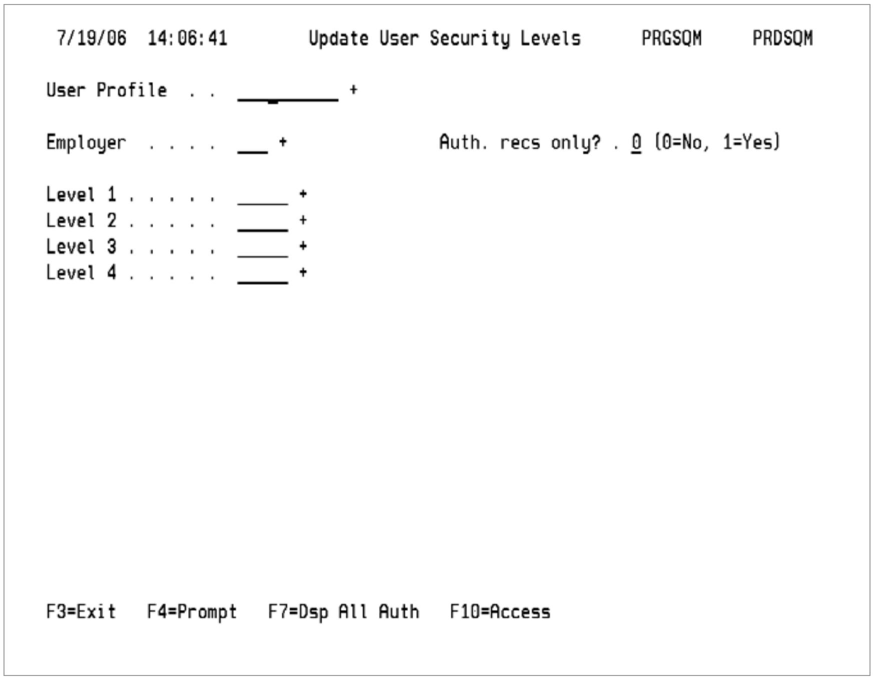
The system uses the levels assignments in each employee's basic data record to apply level security.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Supervisor's Functions.*

3 Select *User Security Operations.*

4 Select *Update User Security Levels* [UUL]. The system displays the screen similar to Figure 12-3.



```
 7/19/06  14:06:41       Update User Security Levels      PRGSQM     PRDSQM

User Profile  . .  __________ +

Employer  . . . .  ___ +               Auth. recs only? . 0 (0=No, 1=Yes)

Level 1 . . . . .  _____ +
Level 2 . . . . .  _____ +
Level 3 . . . . .  _____ +
Level 4 . . . . .  _____ +




F3=Exit   F4=Prompt   F7=Dsp All Auth   F10=Access
```

Figure 12-3: Update User Security Levels prompt screen

On this screen, you can do the following:

- Specify the user profile, employer, and levels to which to assign restrictions.
- Display all authorized security levels for the specified user profile and employer by pressing F7.

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

User Profile

Specify the user profile to which you are assigning level security.

Employer

Specify the employer to which you are assigning level security.

Auth recs only?

Specify whether to restrict the display of level records.

Valid values are:

0	No, do not restrict the level display. Include all level records that meet the selection criteria, including levels not yet authorized to the user profile.

1 Yes, restrict the level display. Include only level records that are already authorized to the user profile.

Levels 1 through 4

Specify the appropriate level for this employer.

6 Press Enter. The system displays the screen similar to Figure 12-4.

```
 7/19/06  14:09:21       Update User Security Levels      PRGSQM     PRDSQM

User Profile  . :  JTH
Employer  . . . :  ZUS    SAMPLE US COMPANY
Selected levels :
Indicate with an X the highest levels accessible to the user.

    Opt     Area          Division      Department     Cost Centr
            100
     _      100           ADMIN
     _      100           ADMIN         ACCT
     _      100           ADMIN         ACCT           100
     _      100           ADMIN         ACCT           101
     _      100           ADMIN         ACCT           102
     _      100           ADMIN         ACCT           103
     _      100           ADMIN         ACCT           104
     _      100           ADMIN         HR
     _      100           ADMIN         HR             110
     _      100           ADMIN         HR             111
     _      100           ADMIN         HR             112
     _      100           ADMIN         HR             113                   +

F3=Exit   F10=Access  F12=Cancel
```

Figure 12-4: Update User Security Levels screen

7 Use this screen to add or delete level security restrictions for the specified user profile. To delete an existing level so that the user can no longer access employees assigned to it, place your cursor in the *Opt* field adjacent to that level and press Spacebar or Delete to remove the **X**.

8 Type **X** in the *Opt* field to identify the organizational levels within which the user is allowed to access employee records.

When you type **X** next to a level, you restrict the user profile to employees assigned to only that level. You are automatically excluding the user profile from accessing employees assigned to all other levels.

You can restrict the user to one or more levels in your organization. Type **X** adjacent to the highest appropriate level or levels. For example, if a user can access all level 3 departments within a particular level 2, only type **X** adjacent to the level 2 record; you do not need to designate each level 3 within that level 2.

Similarly, if you type **X** adjacent to a particular level 1, the system assumes that the user can access the records of employees assigned to any of the levels 2, 3 and 4 within the selected level 1. You cannot select specific levels 2, 3 and 4 within the level 1 that you have already designated.

9 Press Enter. The system displays the Update Employee Security Levels prompt screen.

10 You can enter level restrictions for additional employees or press F3 to return to the Infinium HR main menu.

Defining Topic List Controls

Overview

Use *Update Topic List Controls* to define default topic list descriptions and the default sequence of topics for *Employee Topic List*. These default settings are stored in the topic list control file.

This procedure is not necessary since you can easily override the defaults for individual users and groups of users. The override settings are stored in the topic list override file. In addition, Infinium refreshes the topic list control file but does not refresh the override file during the installation of each new release. You can therefore save yourself rework by using overrides rather than changing the control file itself.

You can also use *Update Topic List Controls* to look up the program that is called when a user selects a particular topic in *Employee Topic List* along with related information such as the system designator (PE for Infinium HR, PY for Infinium PY, or PR for both).

What Is a Topic List?

A topic list identifies employee information pages available to the user through the *Employee Topic List* function. The user selects the pages to be displayed and/or updated, such as specific basic data or personnel pages, automobile information, user-defined information, and so forth.

Topic Description and Sequence Defaults

The topic descriptions and sequence specified in the control file are the default descriptions and sequence for employee topic list information in *Update User Security Controls* and *Update Topic List Group*.

You can override the defaults in *Update Topic List Group* for a group of users or in *Update User Security Controls* for the specified user.

Topic Controls Shipped by Infinium

Infinium ships the following topics in the topic list controls file. The sequence numbers have gaps to facilitate inserting numbers. When displayed in other functions, this sequence is 1, 2, 3 and so forth.

Sequence	Default Text Description	Display Program Called	Update Program Called	Update and Display (U) or Display (D)
005	PR - Basic Data - Personal Info	PRGMSD	PRGMMS	U
010	PR - Basic Data - Job/Perform	PRGMSD	PRGMMS	U
015	PR - Basic Data – Contact/Misc	PRGMSD	PRGMMS	U
020	PR - Basic Data - Compensation	PRGMSD	PRGMMS	U
025	PR - Basic Data - Break in Srv	PRGMSD	PRGMMS	U
030	PR - Basic Data - PTO Accruals	PRGMACC1	PRGMACC1	U
035	PR - User Defined Data	PRGUDD	PRGUDM	U
040	PY - General Info	PYGED10	PYGMMS	U
042	PY - General Info 2	PYGED10	PYGMMS	U
045	PY - Fed/State/Provincial	PYGED10	PYGMMS	U
060	PY - Income Authorization	PYGED10	PYGMIE	U
065	PY - Deduction Authorization	PYGED10	PYGMDE	U
070	PY - Direct Deposit	PYGED10	PYGMDD	U
075	PY - Multiple Distribution	PYGED10	PYGMMD	U
080	PY - Job Authorization	PYGED10	PYGMJO	U
085	PY - Display Check History	PYGPI10		D
090	PY - Annual Pay History	PYGPQI		D
095	PY - Income Data	PYGCIE	PYGCIE	U
100	PY - Income Data Multitax	PYGMDIX	PYGMDIX	U
105	PY - Deduction Data	PYGCDE	PYGCDE	U
110	PY - Deduction Data Multitax	PYGMDDX	PYGMDDX	U
115	PY - YTD Totals	PYGCPY	PYGCPY	U

Sequence	Default Text Description	Display Program Called	Update Program Called	Update and Display (U) or Display (D)
120	PY - Misc. Data (PYPST)	PYGCST	PYGCST	U
125	PY - Misc. Data (CANADA)	PYGCST2	PYGCST2	U
130	PY - Additional Data - MP	PYGMMP	PYGMMP	U
135	PY - Daily Time & Attendance	PYGWKI	PYGWKM	U
140	PY - ROE History	PYGROD		D
145	PY - Employee Add’l Positions	PYGMOP	PYGMOP	U
150	PE -General Data	PEGMSD	PEGMMS	U
155	PE -Physician/Military	PEGMSD	PEGMMS	U
160	PE -Previous Information	PEGMSD	PEGMMS	U
165	PE -Education/Tuition Reimbur	PEGD20	PEGMED	U
170	PE - Education Data-O.J.T	PEGD25	PEGMOJ	U
175	PE - Prev. Employment History	PEGZED20	PEGZEM20	U
180	PE - Property Data	PEGD45	PEGMPP	U
185	PE - Dependent Data	PEGD50	PEGMDP	U
190	PE - Automobile Data	PEGAWM	PEGAWM	U
195	PE - Benefit Enrollments	PRGBEI	PRGBE05	U
200	PE - Professional Licensing	PEGLID	PEGLIM	U
205	PE - Accident/OSHA Data	PEGOSI	PEGOSE	U
210	PE - Benefit Respondents	PEGBR10	PEGBR10	U
215	PE - Calendar/Absence Data	PEGHUI	PEGATM	U
220	PE - PE Action History	PEGD90		D
230	PE - Emergency Data	PEGDEC		D
235	PE - Medical Claims	PEGMCM	PEGMCM	U
240	PE - Medical Exams	PEGMVM	PEGMVM	U
245	PE - EE Skills/Competencies	PEGSEM10	PEGSEM10	U
250	TR - Training History	TRGOJD20	TRGOJM30	U
260	PR - Macau Name & Address	PRGMND10	PRGMND10	U

Sequence	Default Text Description	Display Program Called	Update Program Called	Update and Display (U) or Display (D)
265	PY - Payroll Master (MO)	PYGDMO20	PYGDMO20	D
270	PY - Employee Internat'l Tax	PYGDGE20	PYGDGE20	D
280	PR - International ID Data	PRGDQI20	PRGDQI20	D
285	PR - Macau Attendance	PRGWMM10	PRGWMM10	U
290	PE - Relatives Employed	PEGDRF10	PEGDRF10	D
295	PE – FMLA Events	PEGFML40	PEGFML30	U
300	PE – FMLA Eligibility	PEGFML20		D

Adding Your Own Topic Program

For information on adding your own topic in the control file and the parameters necessary, refer to the *Infinium HR/PY Technical Guide*.

Use the menu path below.

- Infinium HR or Infinium PY
- *System Operations*
- *Supervisor's Functions*
- *User Security Operations*
  - *Update Topic List Controls* [UTLC]

Choosing a Topic at the Topic List Controls Selection Page

About This Page

On the Update Topic List Controls selection page, you can select a topic to change its controls, to delete the topic or to specify creation of controls for a new topic. Infinium recommends using this function only to look up information about topic defaults, and making changes only as overrides in *Update Topic List Group* and *Update User Security Controls*.

The selection page summarizes the default order in which topics are listed in *Employee Topic List*, the text description displayed, the program called if the user selects that topic, whether the topic is active, the type of topic (display or update), the owner (the user that created the topic, such as *SYSTEM for Infinium), and the system designator (PR, PE, or PY).

PR refers to both Infinium HR and Infinium PY, PE refers to Infinium HR, and PY refers to Infinium PY.

A highlighted topic indicates you can both display and update the topic.

How Do I…

Select a topic for update	Type **2** in *Opt* next to the topic and press Enter. The system displays the Update Topic List Controls details page for update.
Create a new topic	Press F6. The system displays the Update Topic List Controls details page for definition of the new topic.
Delete a listed topic	Type **4** in *Opt* next to the topic and press Enter. Confirm the deletion.
Exit to the menu	Press F3.

Specifying a Topic’s Details

About This Page

On the Update Topic List Controls details page, you can modify the controls for a topic you selected or specify controls for a new topic.

The topic name and display sequence you specify here are the defaults for the topic list entries in *Update User Security Controls* and *Update Topic List Group*. You can override these defaults for specific groups of users or an individual user in these other functions.

This page identifies when these controls were last changed and by whom. **`*SYSTEM`** means shipped by Infinium and not yet updated. If you create a new topic, the initial *Last Change User* value is your user profile name.

Field Information

Topic Name

Specify the default text description to be used for this topic in *Update User Security Controls* and *Update Topic List Group*.

Display Program

This is the program that is called if a user selects this topic in display mode in *Employee Topic List*.

Update Program

This is the program that is called if a user selects this topic in update mode in *Employee Topic List*.

Display Format

Each topic represents a single page of information, which may be only one of several pages within the called function. This format indicates the appropriate page to be displayed.

For example, if this topic calls basic data PTO information as shipped by Infinium, the program is **PRGMACC1** and the display format is **TWO**.

Update Format

Each topic represents a single page of information, which may be only one of several pages within the called function. This format indicates the appropriate page to be updated.

For example, if this topic calls basic data personnel information as shipped by Infinium, the program is **PRGMMS** and the display format is **ONE.**

Option Sequence

Specify where in the sequence of topics this topic is to appear relative to other topics. We ship the topics numbered 5, 10, 15, 20, and so forth for your convenience in inserting a topic between other topics.

If you are creating a new topic, the system supplies the next available sequence number.

The number specified here is not the number displayed in *Update User Security Controls* or *Update Topic List Group*. In these functions, the system dynamically refreshes the numbers as 1, 2, 3, and so forth based on their sequence or any overrides to their sequence in these functions.

Active

1 indicates an active topic (to be included in *Update User Security Controls* and *Update Topic List Group*). **0** means an inactive topic.

If you flag a topic as inactive, the topic appears highlighted in the selection lists within *Update Topic List Group* and *Update User Security Controls*. If a highlighted topic is selected for the group or user, the user does not see the topic in *Employee Topic List* until you change the topic's status to active in this topic list control field.

Display/Update

D indicates that this topic is currently display only. The user cannot update the data through *Employee Topic List*. **U** indicates a topic that allows both updates and displays.

System Designator

Indicates whether the topic is for a page in an Infinium HR function (**PE**), an Infinium PY function (**PY**), or a function used in both (**PR**).

If the value is **PR**, the system uses the controls defined in Infinium PY for both systems.

How Do I…

Return to the selection page saving your changes	Press F3 and specify saving.
Return to the selection page canceling your changes	Press F12.

Updating a Topic List Group

Overview

Use *Update Topic List Group* to define a selection list of employee information topics for a group of users. Assign the users to this group in *Update User Security Controls*. The users assigned to this group then see these topics in the order and with the descriptions you specify here when they use *Employee Topic List*.

The default topic descriptions and sequence for *Update Topic List Group* are from the definitions in *Update Topic List Controls*. You can override these defaults for this group in *Update Topic List Group*.

You must first have defined the topic list group's code in *Update Employer Codes* using code type TLG.

Path

- Infinium HR or Infinium PY
- *System Operations*

- *Supervisor's Functions*
- *User Security Operations*
  - *Update Topic List Group* [UTLG]

Specifying a Group at the Update Topic List Group Prompt Page

About This Page

On the Update Topic List Group prompt page, you can specify a new group for definition or select an existing group for update.

Field Information

Topic List Group

Type a five-character name for a new group, or to update information for an existing group specify the group's name. The system provides a selection list of existing topic list groups.

The code must already be defined for employer code type TLG.

How Do I…

Access the Update Topic List Group details screen	Specify a five-character group name and press Enter.
Exit to the menu	Press F3.

Defining the Group's Topic Selection List at the Details Page

About This Page

On the Update Topic List Group details page, you can specify which topics appear on the *Employee Topic List* topic selection list for this group of users, the topic text descriptions, and the order in which the topics appear on the *Employee Topic List* selection list for these users.

Topics available for update are highlighted.

If an inactive topic is selected for this group, the users do not see the topic in *Employee Topic List* until the topic's controls are changed to specify active status.

The changes you make here to the default definitions from the employee topic list control file are stored in the employee topic list override file.

Field Information

Opt

Type **2** in *Opt* next to each topic to be included on this group of users' topic selection list that can be updated and displayed within *Employee Topic List*. For security purposes, the default for each group and user is no access.

Type **5** in *Opt* next to each topic to be included on this group of users' topic selection list that can only be displayed within *Employee Topic List*. For security purposes, the default for each group and user is no access.

Seq

You can edit the default sequence number of a topic for these users by typing a new number in this field and then performing the resequence action. *Employee Topic*

You can edit a topic's description to modify how the topic appears on this group of users' *Employee Topic List* topic selection list.

How Do I…

Include a topic in this group of users' *Employee Topic List* selection list to update and display	Type **2** in *Opt* next to that topic.
Include a topic in this group of users' *Employee Topic List* selection list to display only	Type **5** in *Opt* next to that topic.
Change the sequence of topics on this group of users' *Employee Topic List* selection list	Type numbers in the *Seq* column to specify the new order of topics and then press F5 to redisplay the topics in the new sequence.
Change a topic's description for this group of users' *Employee Topic List* selection list	Type the new description in the *Employee Topic* column.
Return to the prompt screen saving your changes	Press F3.

Resetting Topic List Overrides

Overview

Use *Reset Topic List Overrides* to reset definitions in the topic list override file to the corresponding definitions in the topic list control file for a specified topic list group or a specified individual user.

You can specify resetting either or both of the following:

- The topic descriptions
- The topic sequence

The definitions in the control file are specified in *Update Topic List Controls*. The definitions in the override file are specified for topic list groups of users through *Update Topic List Group* and for individual users through *Update User Security Controls*.

Path

- Infinium HR or Infinium PY
- *System Operations*
- *Supervisor's Functions*
- *User Security Operations*
  - *Reset Topic List Overrides* [RTLO]

Specifying a User or Group on the Prompt Page

About This Page

On the Reset Employee Topic List prompt page you can specify the user profile or topic list group for which you need to reset topic list overrides. Resetting the overrides replaces the information in the topic list override file with the default information from the topic list control file.

Field Information

User Profile

If you are resetting the override settings for a single user, specify the user's profile. Otherwise leave blank.

Topic List Group

If you are resetting the override settings for a topic list group of users, specify the group. Otherwise leave blank.

How Do I…

Continue to the next page	Press Enter.
Exit to the menu	Press F3.

Specifying What To Reset

About This Page

On the Reset Employee Topic List selection page you can specify whether to reset the topic text descriptions, reset the topic sequence, or reset both for the specified user or topic list group of users.

Resetting the overrides replaces the information in the topic list override file with the default information from the topic list control file.

Field Information

Reset Text Description

Specify **Yes** if the topic text descriptions for this user or group as defined in the topic list override file are to be reset to the descriptions in the topic list control file. Otherwise specify **No**.

Reset Option Sequence #s

Specify **Yes** if the topic sequence for this user or topic list group of users as defined in the topic list override file is to be reset to the sequence in the topic list control file. Otherwise specify **No**.

How Do I…

Initiate the reset process and return to the menu.	Press F3.

Establishing Field Level Security

If you have the authority, you can restrict a user profile from viewing and/or updating the information in specific fields in Infinium HR. You need to define security for a field only once. Each time the system encounters this field, it recognizes the user security restrictions you have set up for it.

You can set up security on any field in the system by first accessing that field, then pressing Help. If you are securing an employee data field from a particular user, you can access the record of any employee to set up security for the field. The system then applies the security restrictions to all employee records that the user accesses.

You can update field level security only if the user profile you are restricting has a lower authority level than your own user profile. Normally, only the system supervisor applies field level security.

The following example shows you how to set up field level security for the *Base Rate* field in the employee basic data record. Follow a similar procedure to restrict access to other fields in the system.

1 From the Infinium HR main menu select *Employee Data*.

2 Select *Update Employee Data*.

3 Select *Update Basic Data* [UEB]. The system displays screen shown in Figure 12-5.

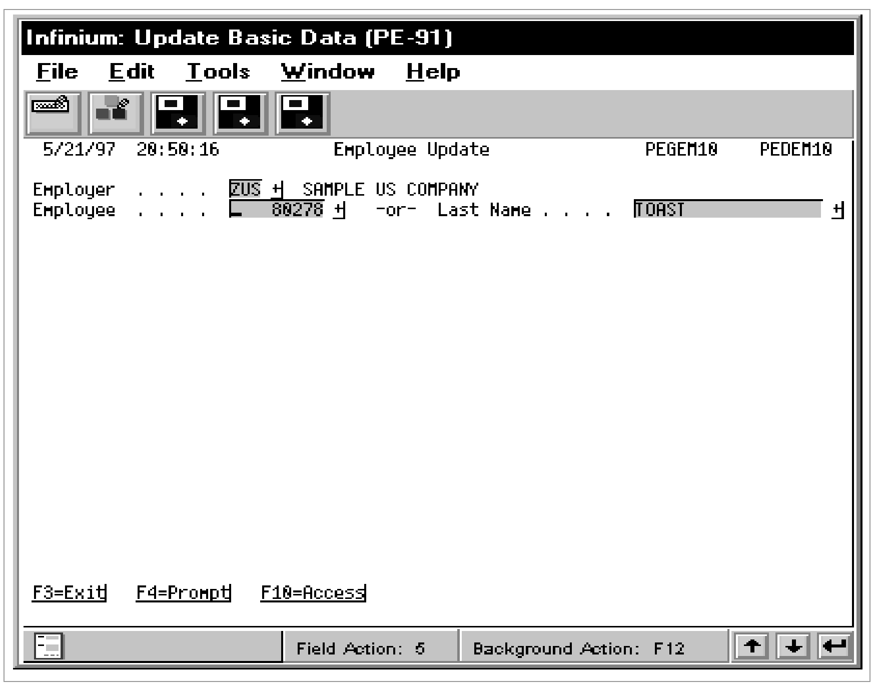
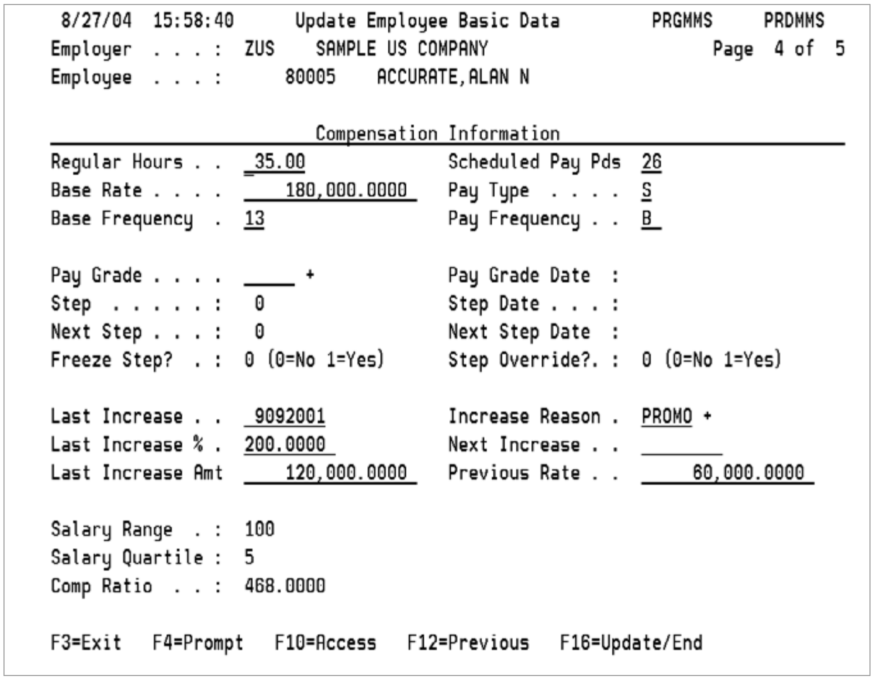


Figure 12-5: Employee Update prompt screen

4 Type the values of any employer and employee and press Enter four times to advance to the Compensation Information screen. The system displays the screen shown in Figure 12-6.



```
 8/27/04  15:58:40      Update Employee Basic Data        PRGMMS     PRDMMS
Employer  . . . :  ZUS    SAMPLE US COMPANY                     Page  4 of  5
Employee  . . . :      80005    ACCURATE,ALAN N

                          Compensation Information
Regular Hours . .  35.00               Scheduled Pay Pds  26
Base Rate . . . .      180,000.0000    Pay Type  . . . .  S
Base Frequency  .  13                  Pay Frequency . .  B

Pay Grade . . . .  _____ +             Pay Grade Date  :
Step  . . . . . :   0                  Step Date . . . :
Next Step . . . :   0                  Next Step Date  :
Freeze Step?  . :  0 (0=No 1=Yes)      Step Override?. :  0 (0=No 1=Yes)

Last Increase . .   9092001            Increase Reason .  PROMO +
Last Increase % .  200.0000            Next Increase . .  ________
Last Increase Amt      120,000.0000    Previous Rate . .       60,000.0000

Salary Range  . :  100
Salary Quartile :  5
Comp Ratio  . . :  468.0000

F3=Exit   F4=Prompt   F10=Access   F12=Previous   F16=Update/End
```

Figure 12-6: Update Employee Basic Data screen 4

5 Place your cursor on the field that you need to protect. In this example you are setting up security for the *Base Rate* field, therefore you place your cursor on the *Base Rate* field.

6 Press Help. The system displays the system help text or the user-defined help text for the selected field as shown in Figure 12-7.

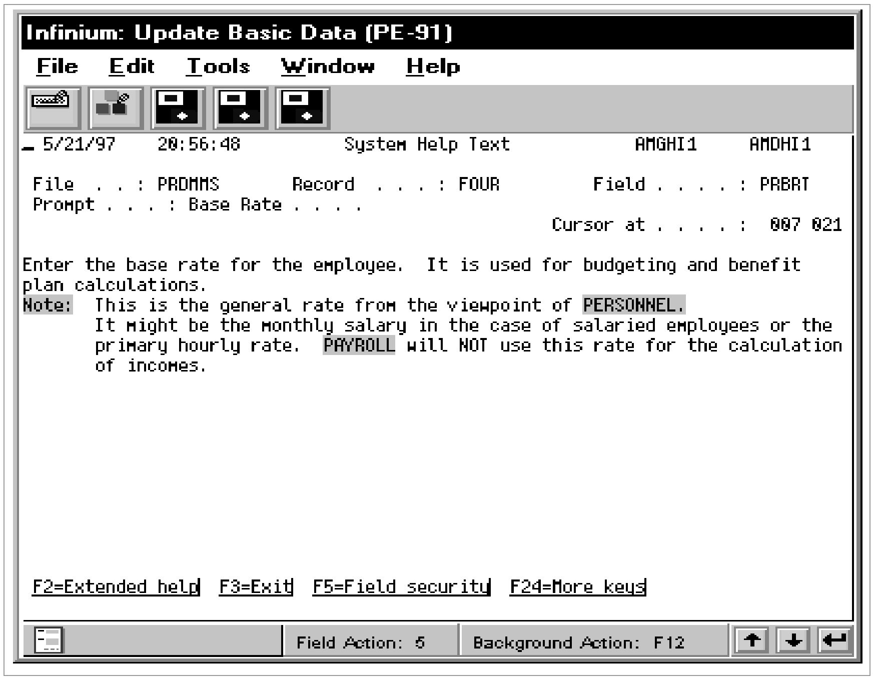


Figure 12-7: System Help Text screen (Field Level Help)

7 If you are allowed to work with field level help, the system displays F5 at the bottom of the Field Level Help or User-Defined Help Text screen. Press F5 to apply security to this field. The system displays the screen shown in Figure 12-8.

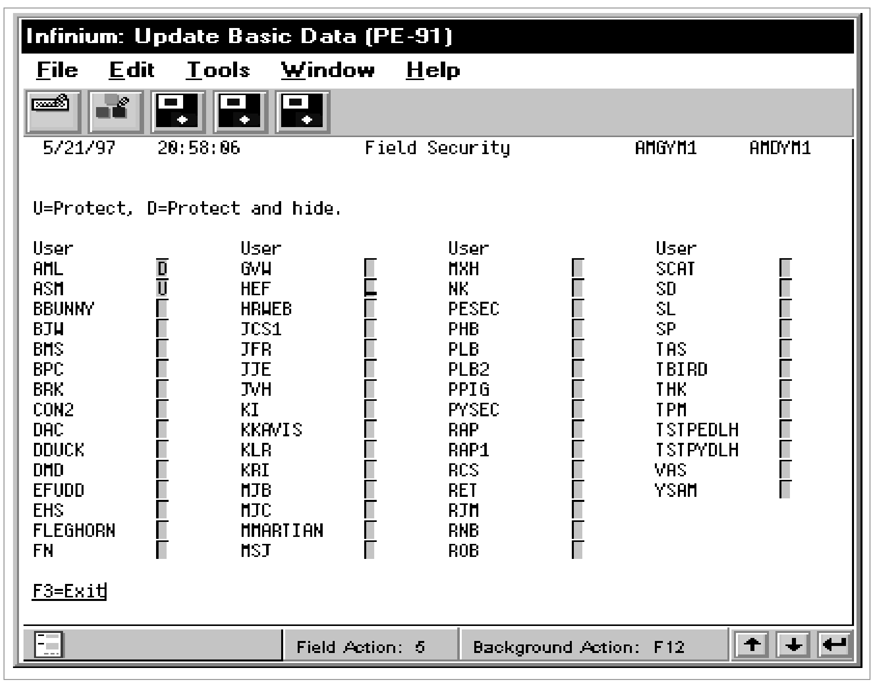


Figure 12-8: Field Security screen

8 Next to each field, type the appropriate value for users whom you want to restrict from viewing or updating data in the selected field.

D	Protect and hide the field from the user profile.
U	Allow the user to view information in the field but not update it.

9 Press F3 twice to return to the field from which you accessed the Field Security screen.

10 Exit from the screen in the usual manner.

Listing User Security

Use the *List User Security* function to print a report of user security restrictions for a specified user or for all users on your system. The report includes information on the following types of security restrictions:

- Employer groups, cycle groups and topic list groups
- Organizational level security
- Security groups
- Personnel Action transactions
- On-Demand Checks options

1 From the Infinium HR main menu select *System Operations*.

2 Select *Supervisor's Functions*.

3 Select *User Security Operations*.

4 Select *List User Security* [LUS]. The system displays the screen shown in Figure 12-9.

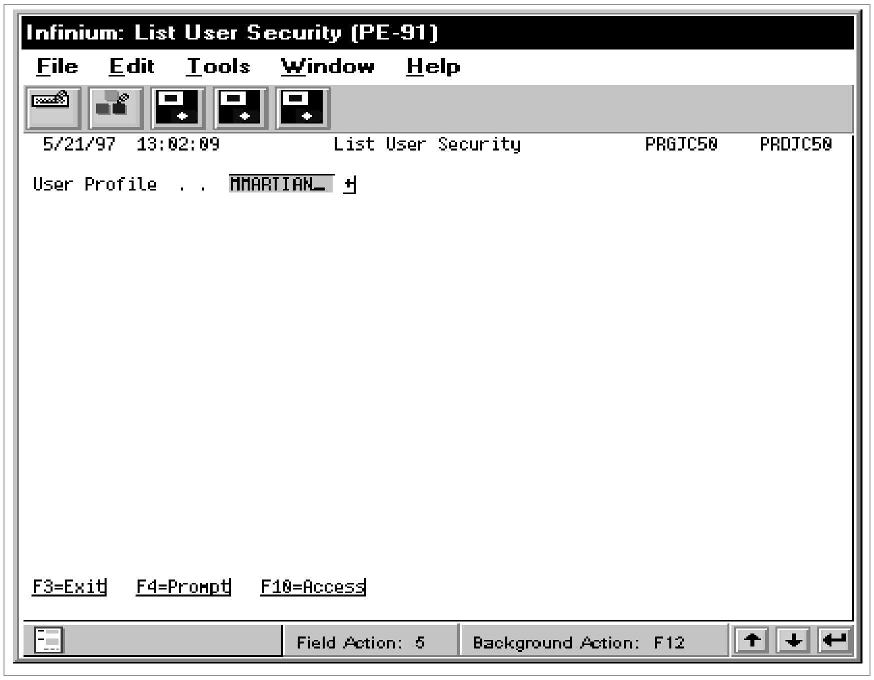


Figure 12-9: List User Security screen

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

User Profile

Type a user profile name if you want the report to list a specific user only.

Leave this field blank if you want the report to list security information for all user profiles and versions of Infinium HR and Infinium PY on your system.

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

Building submission request . . .

Reorganizing Files

In this section you learn how to reorganize the Infinium HR files. This maintenance feature allows you to make the best use of available space on your system by compressing the space formerly taken up by deleted records. Compressing the deleted records improves the overall performance of Infinium HR. If you reorganize Infinium HR files, you should also reorganize Infinium PY files to maximum system performance.

It is especially helpful to run this option as you complete your initial system implementation immediately prior to going live on Infinium HR.

Refer to the *Infinium HR/PY Technical Guide* for additional technical details concerning the *Reorganize HR/400 Files* and *Reorganize PY/400 Files* functions.

Reorganizing Infinium HR Files

The *Reorganize HR/400 Files* option is a long-running job that requires all Infinium HR and Infinium PY users to be signed off the system. You must plan carefully to allow adequate time for the job to complete before users sign back onto Infinium HR and Infinium PY.

WARNING! Ensure that all users are signed off of Infinium HR and Infinium PY before you run this option.

Follow the steps below to reorganize Infinium HR files:

1. From the Infinium HR main menu select *System Operations.*
2. Select *Supervisor's Functions.*
3. Select *Miscellaneous Operations.*
4. Select *Reorganize HR/400 Files* [RPEF]. The system displays the screen shown in Figure 12-10.

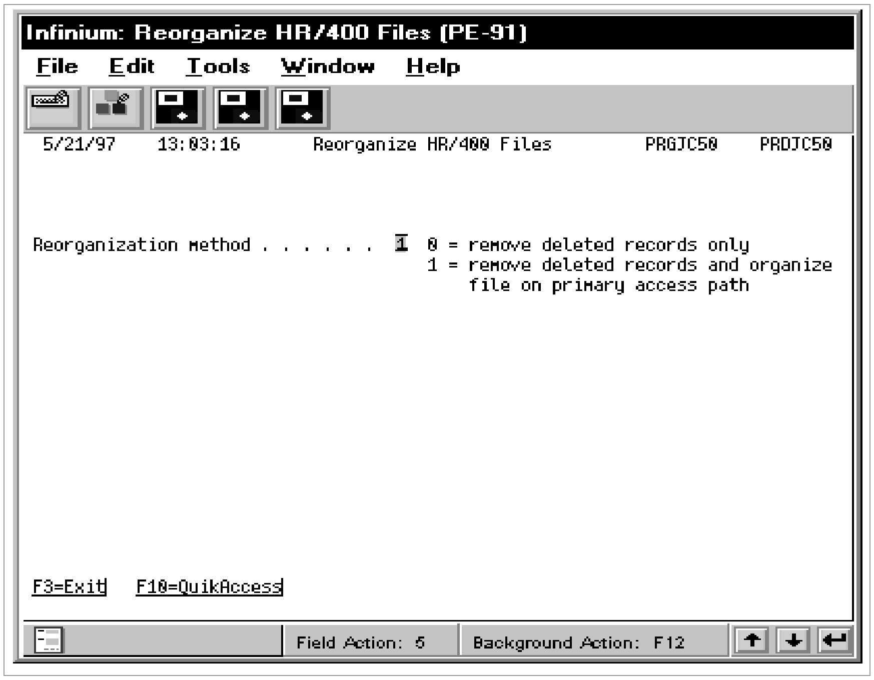


Figure 12-10: Reorganize HR/400 Files screen

5 Use the following information to complete the field on this screen.

Reorganization method

Specify how the system should reorganize Infinium HR files. Valid values are:

0	Remove deleted records only.
1	Remove deleted records and organize the files by their primary access paths; if a file lacks a primary access path, the system reorganizes the physical file.

6 Press Enter to reorganize and compress your Infinium HR files.

7 The system generates the following message and returns to the Infinium HR main menu:

Building submission request . . .

Using Purge Functions

In this section you should learn how to purge an employer and the report selections file.

When you purge an employer, you remove all control file and employee information for that employer from your system.

When you purge the report selections file, the system deletes system audit records that are automatically generated every time a user runs a report. You can increase disk space by occasionally purging this file.

Refer to the *Infinium HR/PY Technical Guide* for additional technical details concerning these and other purges. Refer to the following application guides for non-technical information about other purge functions in Infinium HR:

For Information on this option . . .	Refer to this guide:
Purge Applicant Data	*Infinium HR Guide to Processing*
Purge Terminated Employees	
Purge Benefit Enrollment History	*Infinium HR Guide to Setup and Processing for Benefits Administration*
Purge Benefit Plan & Enrollments	
Purge ACA Transmission History	

Purging an Employer

You must perform four steps to purge an employer:

1. Run the option *Purge Selected Employers (PE***)**. This option deletes information from Infinium HR files such as position controls, employee personnel data and so on.

2. Run the option *Purge Selected Employers (PY)* if you are using Infinium PY. This option deletes information from all Infinium PY files such as income and deduction controls, employee payroll data and so on.

3. Run the option *Purge Selected Employers (PR).* This option deletes the files that are shared between Infinium HR and Infinium PY, such as the employer control, employee basic data, and so on. You can perform this step using either Infinium HR or Infinium PY only after you complete Steps 1 and 2.

4 Select the option *Update Employer Controls* and press F22 on Screen 1 of 2. This deletes the employer control record from your system. After you complete this step, you can no longer access controls or employees assigned to the purged employer.

Purging Selected Employers (PE)

Follow the steps below to remove information from Infinium HR files for a specified employer:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Personnel Purge Functions.*

3 Select *Employers.*

4 Select *Purge Selected Employers (PE)* [PSEPE]. The system displays the screen shown in Figure 12-11.

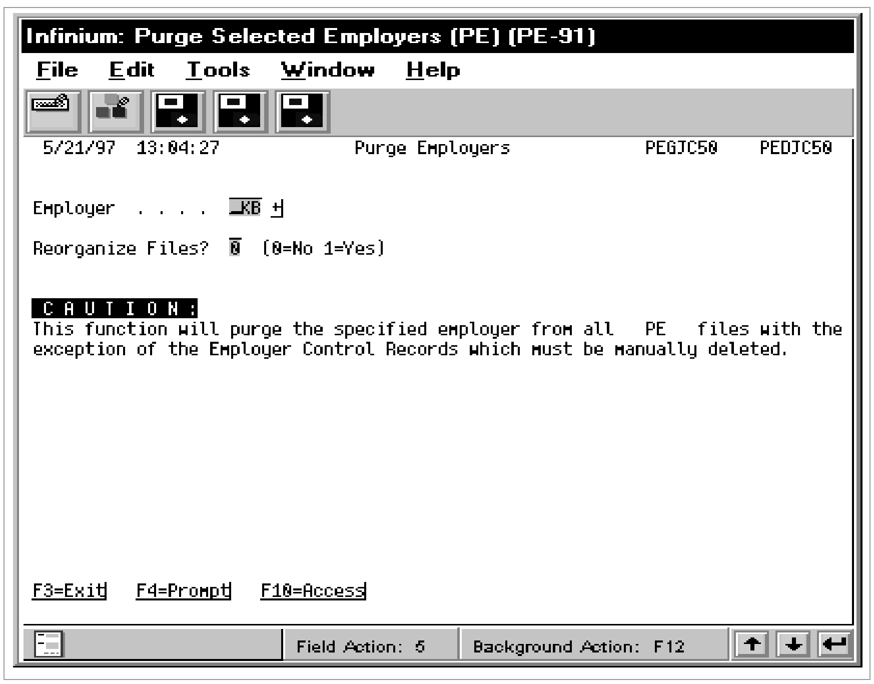


Figure 12-11: Purge Employers screen

5 Use the information below to fill in the field on this screen.

Employer

Type the value that represents the employer whose information you want to remove from your system.

Reorganize Files?

Type **1** in this field to reorganize your Infinium HR files after the system purges information for the specified employer. Otherwise type **0**.

Caution: Do not type **1** in the *Reorganize Files?* field unless all users are signed off of Infinium HR and Infinium PY.

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

Building submission request . . .

Purging Selected Employers (PR)

Follow the steps below to remove information from files that are shared between Infinium HR and Infinium PY:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Personnel Purge Functions.*

3 Select *Employers.*

4 Select *Purge Selected Employers (PR)* [PSEPR]. The system displays the screen shown in Figure 12-12.

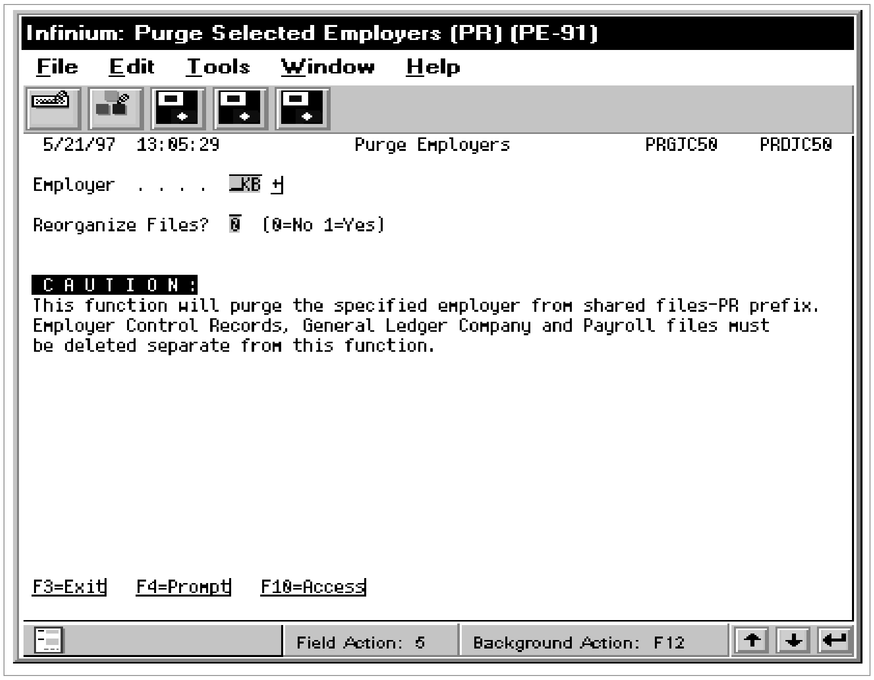


Figure 12-12: Purge Employers screen

5 Use the information below to fill in the field on this screen.

Employer

Type the value that represents the employer whose information you want to remove from your system.

Reorganize Files?

Type **1** in this field to reorganize your files. Otherwise type **0**.

Caution: Do not type **1** in the *Reorganize File* field unless all users are signed off of Infinium HR and Infinium PY.

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

Building submission request . . .

Purging the Report Selections File

Each time you run a standard report, the system generates a 28 character reference key to identify this report by date and time. This reference key also contains the job number the iSeries operating system assigns.

The system stores the reference key and the report parameters specified by the user in the reports selections file (PRPLD). This file is also known as the task coupling file. You can use records in this file as an audit trail of jobs that were run during a specified time frame.

You can increase disk space on your system by purging this file on a regular basis, such as every six months.

1 From the Infinium HR main menu select *Systems Operations.*

2 Select *Personnel Purge Functions.*

3 Select *Miscellaneous Data.*

4 Select *Purge Report Selections File* [PESF]. The system displays the screen shown in Figure 12-13.

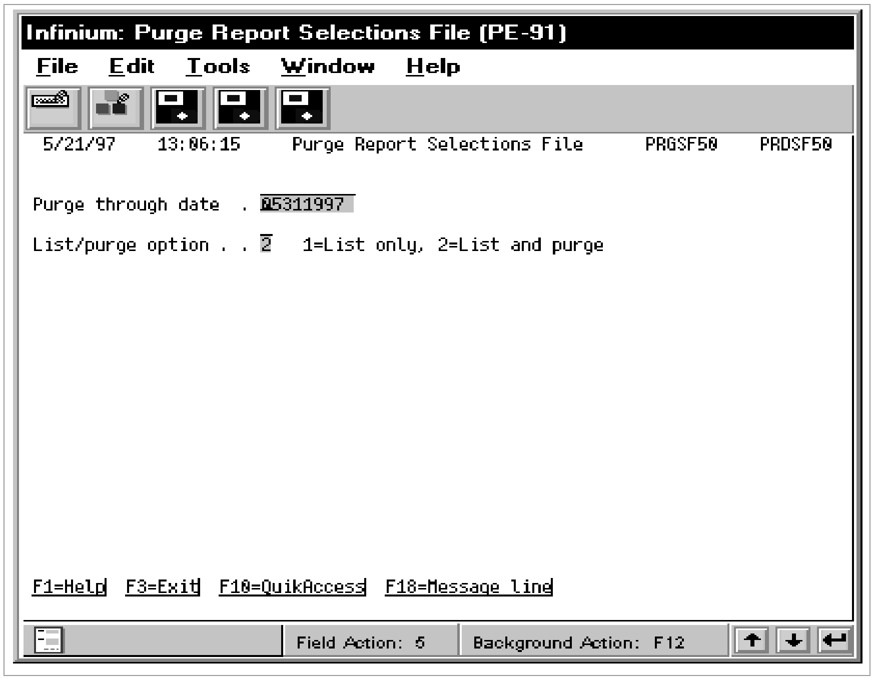


Figure 12-13: Purge Report Selections File screen

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

Purge through date

Type the latest date for which you want to purge report selection file records.

List/purge option

Type **1** if you want the system to give you just a listing of the records in the file. Type **2** if you want the system to purge the reports selection file and give you a listing of the purged records.

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

Building submission request . . .

Chapter 13 Using the Projectix Interface with Infinium HR Applicant Tracking

13

The chapter consists of the following topics:

Overview

Infinium uses staging files and a trigger program to support the Projectix interface with the applicant administration and employee transfer processes in Infinium HR.

Projectix is an e-recruitment application from Recruiternet, Inc. The Projectix interface with Infinium HR transfers applicant information via an ODBC (Open Database Connectivity) interface to the staging files. The trigger program identifies inserted records and validates the data before entering the data.

For transfer transacitons if the transaction date is the current date or earlier, the system processes the transaction immediately. If the transaction date is a future date, the system processes the transaction when you use the *Mass Update PE Actions* function.

When you first use Projectix with Infinium HR, you must activate the trigger programs that are used to transfer information from Projectix to Infinium HR. Each time you receive an upgrade release of Infinium HR, you must deactivate these trigger programs. After the upgrade installation is complete, you must then reactivate the trigger programs.

When you use Projectix with applicant administration, the system creates an audit trail that shows errors that may have occurred in the Projectix files that were transferred to applicant administration. From time to time, you may need to purge the audit files.

Activating and Deactivating Projectix Trigger Programs

Before you can use Infinium HR with Projectix, you must activate trigger programs. Each time you install an upgrade release of Infinium HR/PY, you must deactivate these trigger programs before you begin the installation and then reactivate these trigger programs when you complete the upgrade installation.

The system uses the trigger programs to transfer applicant and employee transfer information to Infinium HR.

Activating the Trigger Program

Follow the steps below to activate the trigger program.

1. From the Infinium HR main menu select *System Operations.*

2. Select *Trigger Functions.*

3. Select *Activate Projectix Trigger* [ACTAPPI]. The system displays the Activate Projectix Trigger screen shown in Figure 13-1.

Figure 13-1: Activate Projectix Trigger screen

4 Press Enter to activate the trigger program.

Deactivating the Trigger Program

Follow the steps below to deactivate the trigger program.

1 From the Infinium HR main menu select *System Operations*.

2 Select *Trigger Functions*.

3 Select *Deactivate Projectix Trigger* [DEAAPPI]. The system displays the Deactivate Trigger screen shown in Figure 13-2.

```
_ 9/27/04  14:56:22       Deactivate Projectix Trigger      PRGTRGM    PRDTRGM



                     Press or Click Enter To Continue

             Projectix interface trigger programs are currently active.


Projectix interface trigger programs are currently active. If you deactivate
these trigger programs, you cannot use the Projectix interface to
Infinium HR/PY.



 F3=Exit   F10=Access
```

Figure 13-2: Deactivate Projectix Trigger screen

4 Press Enter to deactivate the Projectix trigger program.

Listing the Projectix Audit Trail

The Projectix audit trail list provides you with the following listings of applicant information that was transferred from Projectix to Infinium HR:

- Projectix Audit Trail - Applicants
- Projectix Audit Trail - Jobs
- Projectix Audit Trail - Interview
- Projectix Audit Trail - Transfers

You can generate the lists for one employer or all employers. You specify a date through which to include information on the list and whether to include only processed records or both processed records and those that are in error.

Follow the steps below to generate the audit trail list.

1 From the Infinium HR main menu select *System Operations*.

2 Select *Projectix Operations*.

3 Select *List Projectix Audit Trail* [LPAT]. The system displays the List Projectix Audit Trail screen shown in Figure 13-3.

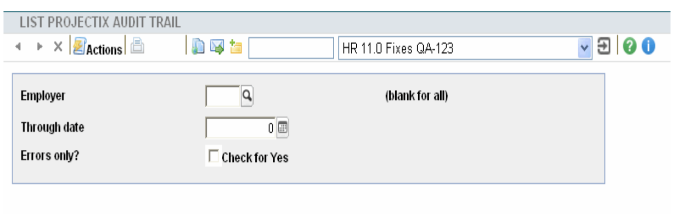


Figure 13-3: List Projectix Audit Trail screen

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

Employer

Specify the employer for which you are generating a Projectix audit trail. Leave blank for all employers.

Through date

Specify the date through which information is included on the list. This is the date when the information is sent to Infinium HR. Leave blank to include all of the records on the list.

Errors only?

Specify whether to include only errors on the report. Valid values are:

0	No. Include only errors on the report.
1	Yes. Include all audit information on the report.

5 Press Enter. The system generates the audit trail and returns to the main menu.

Purging Projectix Audit Information

You can purge Projectix audit information. Follow the steps below to purge the Projectix audit information.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Projectix Operations.*

3 Select *Purge Projectix Audit Trail* [PPAT]. The system displays the Purge Projectix Audit Trail screen shown in Figure 13-4.

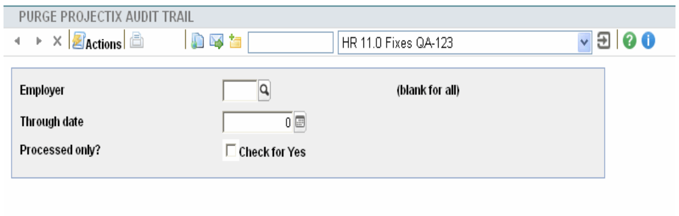


Figure 13-4: Purge Projectix Audit Trail screen

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

Employer

Specify the employer for which you are purging Projectix audit trail information. Leave blank for all employers.

Through date

Specify the date through which information is purged. This is the date when the information is sent to Infinium HR. Leave blank to include all of the records on the list.

Errors only?

Specify whether to purge both processed records and those in error. Valid values are:

0	No. Purge only processed records.
1	Yes. Purge both processed and records in error.

5 Press Enter. The system purges the specified records and returns to the main menu.

Notes

Chapter 14 Working with Infor HCM Talent Management

14

This part discusses the setup requirements and the processing options for using Infinium HCM with Talent Management.

The chapter consists of the following topics:

Overview

Use the functions under *Talent Management Operations* to export Infinium HR employee data to Talent Management. You can export the information in the following two ways:

- Export data for all employees associated with a specific employer code to a file that can you can later import into the Talent Management system. Use this method to initially send employee data to the Talent Management system.
- Export only changed employee information.

We store the interface file in a standard location on the Integrated File System (IFS) of the iSeries machine. The interface is in the tab delimited format.

Setting up Infinium HR information for use with Talent Management

Before you work with Infinium Human Resources data to use it with Talent Management, you must do the following. An asterisk (*) precedes the required steps.

1 *****Update Entity Control*

Use this function and specify yes in the *TM Interface Active?* to activate the Talent Management interface. The trigger programs for this interface only run if you activate Talent Management on the Entity Control.

2 *Display Entity Control*

Use this function to view the value of the new flag.

3 *Update Employer Control*

Use this function to specify yes in the *Act Talent Mgmt* field to activate the Talent Management interface for the specified employer. The system only tracks employee information for Talent Management for employers for whom you activate this interface.

4 *Display Employer Control*

Use this function to view the value in the *Act Talent Mgmt* field for the specified employer.

5 *List Employer Controls*

Use this function to print an employer list that includes the value in the *Act Talent Mgmt* field for the specified employer.

6 **Update TM Default Data*

Use this function to enter the name for the default interface file to use when you generate Talent Management on the IFS. You can override this value at the time you generate the file.

7 *Display TM Default Data*

Use this function to display the default file name to use when generating the Talent Management interface file on the IFS.

8 **Update TM Mapping Rules*

Use this function to enter configuration information related to building employee data during the interface process. This process includes entering information about the creation of an employee ID, password, email address, Talent Management department number, required and optional fields.

9 *Display TM Mapping Rules*

Use this function to display configuration information related to building employee data during the interface process. This process includes entering information about the creation of an employee ID, password, email address, Talent Management department number, required and optional fields.

10 *List TM Mapping Rules*

Use this function to generate a listing of configuration information related to building employee data during the interface process. This process includes entering information about the creation of an employee ID, password, email address, Talent Management department number, required and optional fields.

Extracting and capturing Infinium HR information for Talent Management

Use the following functions to work with Infinium HR and Talent Management: An asterisk (*) precedes the required steps.

1. *Extract Data for TM - Changes

   Use this function to create an interface file that contains changes that occurred since the last time the function was run. Run this function regularly, daily, weekly, and so on. The system marks the records as being processed so that they are not included the next time you run the function. You specify the employer, file name, format of the data, and the type of record.

2. **Activate Talent Mgmt Trigger*

   Use this function after your initial load of Infinium HR information into the Talent Management system to activate a trigger process that tracks changes in the Infinium HR database for fields that need to change in the Talent Management system.

3. **Extract Data for TM - All*

   Use this function to initially populate the interface file with all applicable employee information for Talent Management to a specified file that you can later import into Talent Management. You specify the employer, file name, format of the data, type of record and whether to include terminated employees.

4. *Update EE Web/Interface Data*

   Use this function to enter or modify the user ID that interfaces with Talent Management. This provides you with the ability to modify an employee's ID if you need to change it when you do not want to continue using the value you previously entered in the *TM User ID* field. The system updates this file when you run the *Extract Data for TM - All* or the *Extract Data for TM - Changes* function and the system does not find an employee record or the system finds an employee record and the *TM User ID* field is blank. Otherwise, the system continues to use the existing value.

5. *Display EE Web/Interface Data*

   Use this function to display the information in the interface file.

6. *List EE Web/Interface Data*

   Use this function to generate a list of interface data.

7 *Reset TM Audit Data*

Use this function if you previously ran the *Extract Data for TM-Changes* function and an unrecoverable error occurred while generating the interface file. This function resets the processed records for the specified date range to an unprocessed status. The records are then available for processing again.

8 *Deactivate Talent Mgmt Trigger*

Use this function if you need to temporarily remove the Talent Management triggers from the employee Basic Data file. For example, when you install a new release of HCM, you may need to deactivate the trigger while the installation is run. You reactivate the trigger program after the installation is complete.

9 *Purge TM Audit Data*

Use this function to delete records from the audit file that tracks employee changes for the Talent Management interface. If you use this function outside of normal business hours when no changes are being made to the employee basic data records, you can reorganize the file to reclaim the disk space the deleted records occupy after delete processing is complete, For performance and disk space reasons, run this function on a regular basis, such as weekly or monthly.

Setting up Infinium HR to use with Talent Management

This section provides information about setting up Infinium HR to use with Talent Management.

Updating the Entity Control

Follow the steps below to specify that you are using Talent Management.

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

2 Select *Update Master Files.*

3 Select *Update Entity Controls* [UN].

4 Type **2** in the *Opt* field for Installed Systems and press Enter. The system displays a screen similar to Figure 14-1.

```
 6/27/12  19:33:47     Update Entity Controls             PRGMEN     PRDMEN
                       Installed Systems

Self Service Installed?  . . 1 (0=No 1=Yes)

FB/400 Installed?  . . . . . 1 (0=No 1=Yes)

TR/400 Installed?  . . . . . 1 (0=No 1=Yes)

TM Interface Active? . . . . 1 (0=No 1=Yes)

PA Interface Active? . . . . 2 (0=No, 1=PA 11.2, 2=PA 12.0 and later)

PL/400 Installed?  . . . . . 1 (0=No 1=Yes)

GL Interface Option  . . . . 1 (0=Unspecified, 1=Infinium GL
                                2=ERP LX CEA, 3=FMS Masterpiece)




F3=Exit  F10=QuikAccess  F12=Cancel
```

Figure 14-1: Update Entity Controls screen

5 Type **1** in the *TM Interface Active?* field.

6 Complete the other fields as you normally would. See the “Setting up the Entity and Employer Controls” chapter in the *Infinium HR Guide to Controls* for more information.

7 Press Enter to save you changes and return to the main menu.

Displaying Entity Control Information

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

2 Select *Display Master Files.*

3 Select *Display Entity Controls* [DEN].

4 Type **2** in the *Opt* field for Installed Systems and press Enter. The system displays a screen similar to Figure 14-2.

```
 6/27/12  19:36:48      Display Entity Controls            PRGDEN2    PRDDEN2
                        Installed Systems

Self Service Installed?  . : 1 (0=No 1=Yes)

FB/400 Installed?  . . . . : 1 (0=No 1=Yes)

TR/400 Installed?  . . . . : 1 (0=No 1=Yes)

TM Interface Active? . . . : 1 (0=No 1=Yes)

PA Interface Active? . . . : 2 (0=No, 1=PA 11.2, 2=PA 12.0 and later)

PL/400 Installed?  . . . . : 1 (0=No 1=Yes)

GL Interface Option  . . . : 1 (0=Unspecified, 1=Infinium GL
                                2=ERP LX CEA, 3=FMS Masterpiece)




F3=Exit  F10=QuikAccess  F12=Cancel
```

Figure 14-2: Display Entity Controls screen

5 After you view the information on this screen, press Enter to return to the main menu.

Updating the Employer Control

Follow the steps below to activate Talent Management for a specific employer.

1. From the Infinium HR main menu select *Master Files.*
2. Select *Update Master Files.*
3. Select *Update Employer Controls* [UC]. The system displays the Update Employer Update prompt screen.
4. Specify the employer and press Enter. The system displays the first Employer Update screen.
5. Complete the fields on this screen as you normally would and press Enter. The system displays the second Employer Update screen similar to Figure 14-3.

```
 6/27/12  19:29:38            Employer Update            PEGMCO     PEDMCO
                                                               Page  2 of  3
Employer  . . . :  ZUS    SAMPLE US COMPANY
Employer Details
Affirm.Act. Goal    0                   Affirm.Act.Model   0  (0->3)
Tax ID for EE#? .  0  (0=No 1=Yes)      Posit. File Used?  1  (0=No 1=Yes)
Check for Dup ID?  2  (0->2)            Date Format . . .  MDY
                                        EEO Unit Control   0  (0->2)
Accrual Category Names
Category 1  . . .  Vacation             Category 2  . . .  Sick
Category 3  . . .  Personal             Category 4  . . .  FMLA
Category 5  . . .  Category 5           Category 6  . . .  Category 6
FMLA Category . .  4 (0->6)             FMLA Leave Year .  1 (1->5)
Additional Employer Flags
Ed EE only in ER?  1 (0->1)            Act Self Service .  1 (0=No, 1=Yes)
Del. Future Trans  1 (0->2)            Act Self Srv Rout   1 (0=No, 1=Yes)
Position Default . 2 (0->2)            Point In Time Rpt   1 (0=No, 1=Yes)
NAICS Code . . . . 713990 +            Act Talent Mgmt. .  1 (0=No, 1=Yes)
Edit Inact Levels  0 (0->2)            Edit Inact Pos . .  0 (0->2)
Inact Lvl Rpt Dft  0 (0, 1)            Edit Wrkfrc Lvl  .  0 (0->2)
Transfer User Def  1 (0=No, 1=Yes)     Reqr Postal Code?   1 (0->2)
Transfer Payroll . 0 (0=No, 1=Yes)
F3=Exit  F10=Access  F12=Previous
```

Figure 14-3: Employer Update screen

6. Type **1** in the *Act Talent Mgmt* field.
7. Complete the remaining fields as you normally would.
8. Press Enter. The system displays the third Employer Update screen.

9 Complete the fields on this screen as you normally would and press Enter. The system displays the Employer Update prompt screen.

10 Enter information for another employer or press F3 to exit. See the “Setting up the Entity and Employer Controls” part in the *Infinium HR Guide to Controls* for more information.

Displaying Employer Control Information

Follow the steps below to display employer control information.

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

2 Select *Display Master Files.*

3 Select *Display Employer Controls* [DC]. The system displays the Employer Controls Display prompt screen.

4 Specify the employer and press Enter. The system displays the first Employer Controls Display screen.

5 Press Enter until you advance to the fourth Employer Update screen similar to Figure 14-4.

```
 6/27/12  19:22:52       Employer Controls Display        PRGMCOD    PRDMCOD
                                                                Page  4 of  5
Employer  . . . :  ZUS    SAMPLE US COMPANY

Additional Employer Flags
Activate Self Service  . . . : 1      Position Default . . . . . . : 2
Chg Wks Wrk to 0?  . . . . . : 1      NAICS Code . . . . . . . . . : 713990
Ed EE only in ER?  . . . . . : 1      Crt Shop Floor IE? . . . . . : 0
PE Upd PY Auth Gp? . . . . . : 1      Act Talent Mgmt . .  . . . . : 1
Activate Self Service Routing: 1      Audit Update Checks? . . . . : 0
Prt $0 Vouchers  . . . . . . :        Print Voucher Default  . . . : 1
Pay Message Code . . . . . . :        Edit Inactive Levels . . . . : 0
Delete Future Trans. . . . . : 1      Inactive Levels Report Def . : 0
Prt All YTD on Reg.? . . . . : 1      Edit Inactive Position . . . : 0
Point In Time Rpting . . . . : 1      Edit Workforce Levels  . . . : 0
Use Tip Comp/TRDA? . . . . . : 1      Require Postal Code  . . . . : 1
Use Multi. Pos?  . . . . . . : 1      Number Unprinted Vouchers  . : 1
Position Prompt  . . . . . . : 0      Transfer User Defined  . . . : 1
Close to PA. . . . . . . . . :        Transfer Payroll . . . . . . : 0
Dir. Dep. ID Code Desig. . . : A
Chk. Record Lcks?  . . . . . : 1

F10=Access  F12=Previous  F3=Exit
```

Figure 14-4: Employer Controls Display screen

6 Press Enter until the Employer Display prompt screen is displayed.

7 Specify another employer to display or press F3 to exit to the main menu.

Listing Employer Control Information

Complete the steps below to generate and Employer Control list.

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

2 Select *List Master Files.*

3 Select *List Employer Controls* [LC]. The system displays the Employer Controls List prompt screen.

4 Specify the employer and press Enter. The system generates the Employer Controls List.

Updating Talent Management Default Data

Complete the steps below to update the Talent Management default data.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations.*

3 Select *Update TM Default Data* [UTMDD]. The system displays the Update TM Default Data screen similar to Figure 14-5.

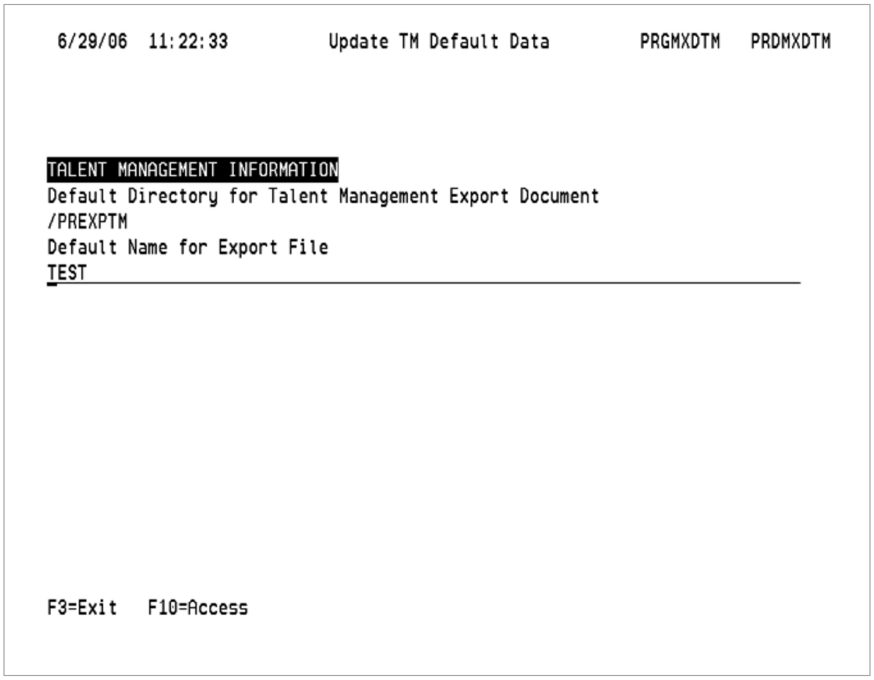


Figure 14-5: Update TM Default Data screen

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

Default Directory for Talent Management Export Document

This is the name of the directory where Talent Management extract files are stored.

Default Name for Export File

Type the name of the default file for the interface file created for Talent Management. When you type a value here, the system enters the default value in the appropriate place on the screens for the *Extract Data for TM-All* and *Extract Data for TM-Changes* functions.

Note: You can type the name with or without a leading forward slash (/). The system needs a leading **/** to build the system command properly and adds the / if it is missing from the value you type.

Displaying Talent Management Default Data

Complete the steps below to display default information.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations.*

3 Select *Display TM Default Data* [DTMDD]. The system displays the Display TM Default Data screen similar to Figure 14-6.

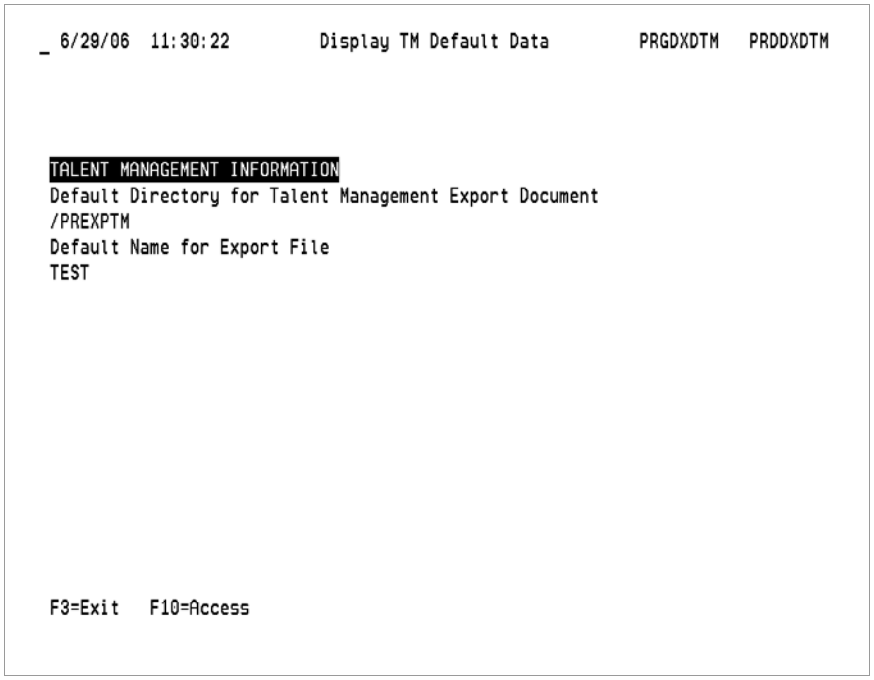


Figure 14-6: Display TM Default Data screen

4 After you view the information, press Enter to return to the main menu.

Updating Talent Management Mapping Rules

Use this function to enter configuration information related to building employee data during the interface process. This process includes entering information about the creation of an employee ID, password, email address, Talent Management department number, required and optional fields..

You can also call a custom program instead of using the standard mapping rules.

Complete the steps below to select the category of data for which to update the mapping rules.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations.*

3 Select *Update* [UTMMR]. The system displays the Update Mapping Rules prompt screen.

4 Specify the employer and press Enter. The system displays the screen similar to Figure 14-7.

```
 3/13/07  13:02:15    Update TM Mapping Rules-Options    PRGMTM    PRDMTM

Employer . . . . :    SAMPLE US COMPANY

Opt Mapped Rule
 _  User ID
 _  Password
 _  Email Address
 _  Dept. No.
 _  Required Fields
 _  Optional Fields
 _  Alternate ID









F3=Exit   F10=Access  F12=Cancel
```

Figure 14-7: Update TM Mapping Rules - Options screen

5 Type any character in the *Opt* field to select each category to update.

6 After you select a category and press Enter, the system displays the mapping rule screen for first category you selected.

User ID Mapping

Use this screen to specify a sequence number, the range within the sequence number to use, and the separation character to build a user ID from the following information that you can export to Talent Management:

- Employer
- Employee
- Clock
- Tax ID
- Levels 1 through 4
- First Name

- Last Name
- Middle Init

For example, the system uses the sequence number, the associated *From* and *To* values and the value in the associated *Sep. Char* field to build the user ID. If you specify the values in the table below for each specified item of data, the system builds the user ID in the format of firstname.lastname.last4ssn.

Field	Sequence value	From value	To value	Separator character value
First Name	**1**	**1**	**18**	**.**
Last Name	**2**	**1**	**18**	**.**
Tax ID	**3**	**6**	**9**	blank

The user ID for an employee named Jane Smith with a tax ID of 123456789 is **JANE.SMITH.6789**.

Complete the steps below to update the mapping rules for the user ID.

1 Type any character in the *Opt* field next to User ID on the Update TM Mapping Rules Options screen. The system displays the Update TM Rules - Build User ID screen similar to Figure 14-8.

```
 3/15/07  15:29:57     Update TM Rules-Build User ID       PRGMTM    PRDMTM
Employer . . . . : ZUS SAMPLE US COMPANY                   Type: USERS
                                        Sep.               Rule: USERID
Field              Seq  From  To  Max Char
Employer . . . . . ___  __1  __3   3  _
Employee . . . . . ___  __1  __9   9  _
Clock  . . . . . . ___  __1  __8   8  _
Tax ID . . . . . . __3  __6  __9   9  _
Level 1  . . . . . ___  __1  __5   5  _
Level 2  . . . . . ___  __1  __5   5  _
Level 3  . . . . . ___  __1  __5   5  _
Level 4  . . . . . ___  __1  __5   5  _
First Name . . . . __1  __1  _18  18  .
Last Name  . . . . __2  __1  _18  18  .
Middle Init  . . . ___  __1  __1   1  _

Replace User ID? . _  (0=No 1=Yes)

Constant Before  . __________________________________________________
Constant After . . __________________________________________________
Custom program . . __________

F3=Exit   F10=Access  F12=Cancel  F22=Delete
```

Figure 14-8: Update TM Rules - Build User ID screen

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

Seq

Type a valid sequence number to include the field when the system builds the user ID value to send to Talent Management.

From

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Sep Char

If you type a value in the *Seq* field and you want to add a separator character after the characters in a field, type a separator character. Leave this field blank if you do not want to separate this value from the next one.

Replace User ID?

Specify whether to replace the value in the Talent Management *User ID* field each time you generate an interface record for an employee.

If you do not replace the user ID each time you generate an employee interface record, the system generates a new user ID value based on the mapping rules when a record is not found in the Web Interface file, PRPWA, or when a record is found and the Talent Management *User ID* field is blank.

Valid values are:

0	Do not replace the Talent Management user ID if you already generated it.
1	Always replace the Talent Management user ID value.

Constant Before

If applicable, type a value that the system will insert at the start of the *User ID* field for every employee. Leave this field blank if you do not need to use standard beginning characters.

Constant After

If applicable, type a value that the system will add at the end of the *User ID* field for every employee. Leave this field blank if you do not need to use standard ending characters.

Custom Program

Type the name of a custom program to use if the system mapping rules do not produce the necessary *User ID* value. The system calls the custom program and uses the returned value as the user ID.

We provide a sample custom program named PRGTMCU1 as a model for your custom program(s).

3 Press Enter.

Password Mapping

Use this screen to specify a sequence number and the range within the sequence number to use to build passwords from the following information to export to Talent Management:

- Employer
- Employee

- Clock
- Tax ID
- Levels 1 through 4
- First Name
- Last Name
- Middle Init
- Birth Date - Year
- Birth Date - Mon
- Birth Date - Day

For example, the system uses the sequence number and the associated *From* and *To* values to build the password. If you specify the values in the table below for each specified item of data, the system builds the password in the format of DOBYY.DOBMM.DOBDD.

Data	Sequence value	From value	To value
Birth Date - Year	**1**	**3**	**4**
Birth Date - Mon	**2**	**1**	**2**
Birth Date - Day	**3**	**1**	**2**

The password for an employee with a birth date of 05051955 is **550505**. If the value in the *From* field is **1**, the password is **19550505**.

You can also call a custom program instead of using the standard mapping rules.

Complete the steps below to update the mapping rules for the password.

1 Type any character in the *Opt* field next to Password on the Update TM Mapping Rules Options screen. The system displays the Update TM Rules - Build Password screen similar to Figure 14-9.

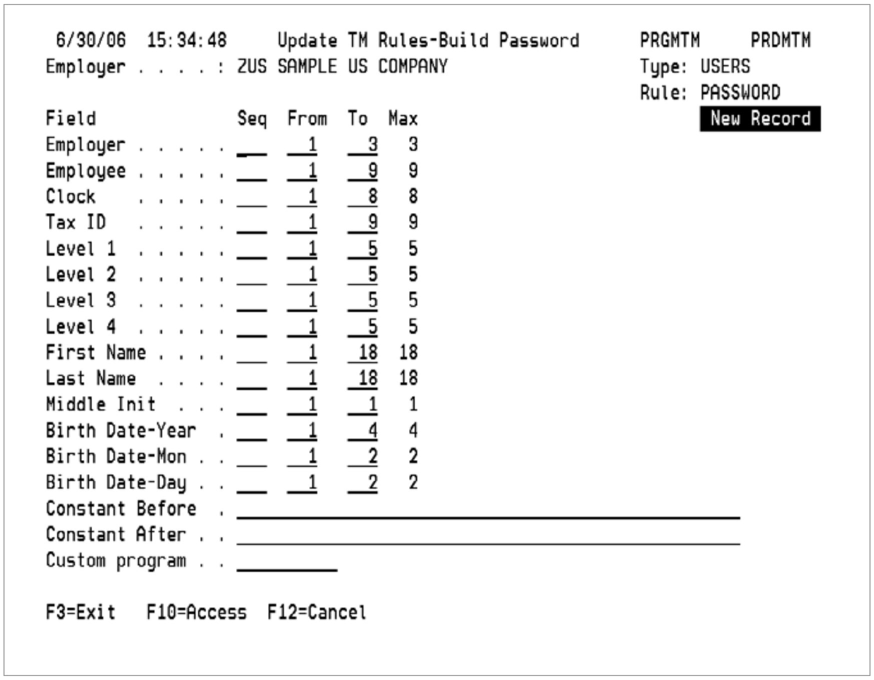


Figure 14-9: Update TM Rules - Build Password screen

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

Seq

Type a valid sequence number to include this field when the system builds the password value to send to Talent Management.

From

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Constant Before

If applicable, type a value that the system will insert at the start of the *Password* field for every employee. Leave this field blank if you do not need standard beginning characters.

Constant After

If applicable, type a value that the system will add at the end of the *Password*

field for every employee. Leave this field blank if you do not need to use standard ending characters.

Custom program

Type the name of a custom program if the system mapping rules will not produce the necessary password value. The system will call the custom program and use the value returned as the password. We provide a sample custom program, PRGTMCU1, to use as a model for your custom program(s).

3 Press Enter.

Email Address Mapping

Use this screen to specify a sequence number, the range within the sequence number to use, the maximum number of characters and the separation character for the following information that you can export to Talent Management:

- First Name
- Last Name
- Middle Init

The system uses the sequence number, the value in the associated *From* and *To* fields and the value in the associated *Sep. Char* field to build the email address. You can add standard text. If you specify the values in the table below, the system builds the email address in the format of "firstname.lastnameCONSTANTAFTER".

Data	Sequence value	Separator character value	Value
First Name	**1**	**.**	
Last Name	**2**		
Constant After			**@TESTMAIL.COM**

The email address for an employee named Jane Smith is **JANE.SMITH@TESTMAIL.COM**.

You can also call a custom program instead of using the standard mapping rules.

Complete the steps below to update the mapping rules for the email address.

1 Type any character in the *Opt* field next to Email Address on the Update TM Mapping Rules Options screen. The system displays the Update TM Rules - Email Address screen similar to Figure 14-10.

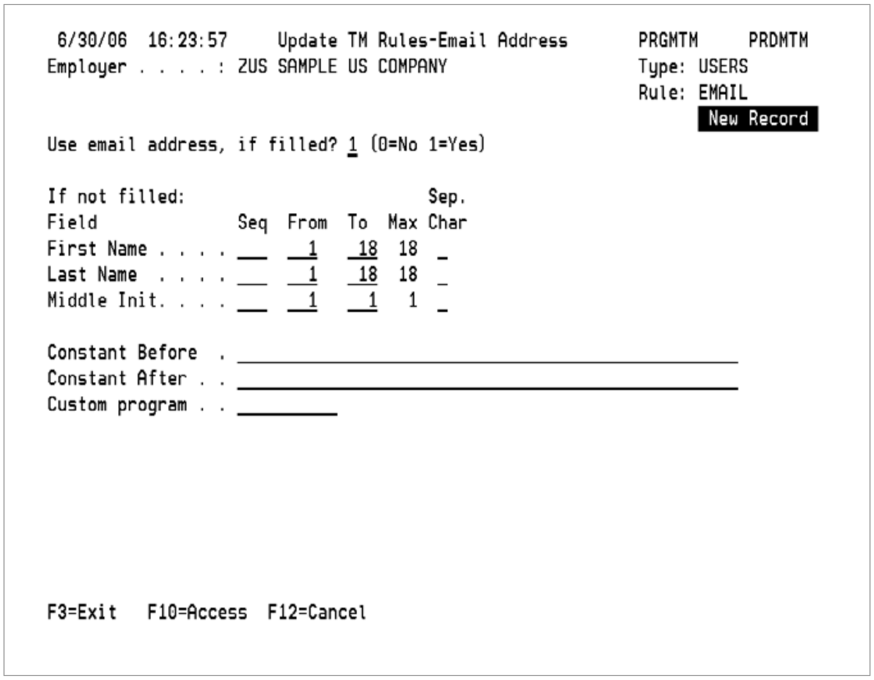


Figure 14-10: Update TM Rules-Email Address screen

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

Use email address, if filled?

Specify whether to use the e-mail address from the Infinium system. Valid values are:

0	No, do not use the Infinium email address value. Always apply mapping rules and build the address.
1	Yes, use the value in the *Email address #1* field on the Enter New Hire Contact and Miscellaneous Data screen if a value exists. If the field is blank, apply the mapping rules and build an address.

Seq

Type a valid sequence number to include this field when the system builds the email address value to send to Talent Management.

From

If you type value in the *Seq* field and you do not want to include all of the characters in field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Sep Char

If you type a value in the *Seq* field and you want to add a separator character after the characters in a field, type a separator character. Leave this field blank if you do not want to separate this value from the next one.

Constant Before

If applicable, type a value that the system will insert at the start of the *Email address* field for every employee. Leave this field blank if you do not need to use standard beginning characters.

Constant After

If applicable, type a value that the system adds at the end of the *Email address* field for every employee. Leave this field blank if you do not need to use standard ending characters.

Custom program

Type the name of a custom program if the system mapping rules will not produce the necessary *Email address* value. The system calls the custom program and uses the returned value as the email address.

We provide a sample custom program, PRGTMCU1, to use as a model for your custom program(s).

3 Press Enter.

Department Number Mapping

Use this screen to specify a sequence number and the range within the sequence number to use to build the department number from the following information that you can export to Talent Management:

- Level 1
- Level 2
- Level 3
- Level 4
- Location

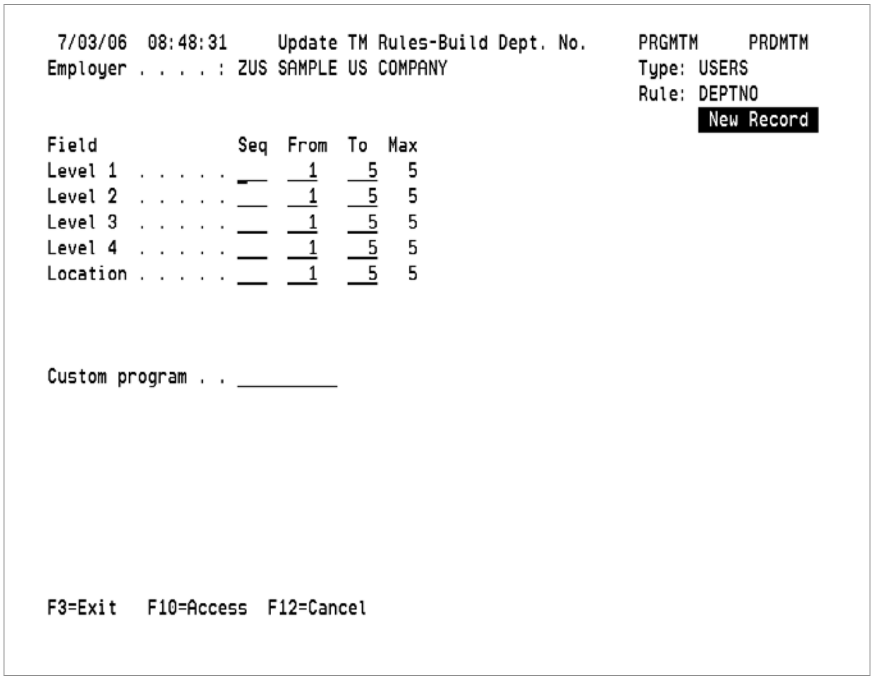
The system uses the sequence number and the associated *From* and *To* values to build the department number. If you specify the values in the table below for each specified item of data, the system builds the department number in the format of 1st3ofLEVEL1LEVEL4. The department number for an employee level one value is ADMIN and level four value is 123 is ADM123.

Data	Sequence value	From value	To value
(Level 1) ADMIN	**1**	**1**	**3**
(Level 4) 123	**2**	**1**	**5**

You can also call a custom program instead of using the standard mapping rules.

Complete the steps below to update the mapping rules for the department number.

1 Type any character in the *Opt* field next to Dept. No. on the Update TM Mapping Rules Options screen. The system displays the Update TM Rules - Build Dept. No. screen similar to Figure 14-11.



```
 7/03/06  08:48:31     Update TM Rules-Build Dept. No.      PRGMTM     PRDMTM
Employer . . . . : ZUS SAMPLE US COMPANY                   Type:  USERS
                                                           Rule:  DEPTNO
                                                                  New Record

Field             Seq  From  To  Max
Level 1  . . . . . ___  __1  __5   5
Level 2  . . . . . ___  __1  __5   5
Level 3  . . . . . ___  __1  __5   5
Level 4  . . . . . ___  __1  __5   5
Location . . . . . ___  __1  __5   5


Custom program . . __________


F3=Exit   F10=Access  F12=Cancel
```

Figure 14-11: Update TM Rules - Build Dept. No. screen

2 Complete the steps below to update the mapping rules for the user ID.

Seq

Type a valid sequence number to include this field when the system builds the department number value to send to Talent Management.

From

If you type a value in the *Seq* field and you do not want to include all of the characters in field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Custom Program

Type the name of a custom program if the system mapping rules will not produce the necessary department number value. The system will call the custom program and use the returned value as the department number value.

We provide a sample custom program, PRGTMCU1, to use as a model for your custom program(s).

3 Press Enter.

Required Fields Mapping

Use this screen to specify the source of the default value in the required fields. Infinium supplies the field that provides the default value for the *First Name, Last Name* and *Country* fields.

- First Name
- Last Name
- Country
- TM Company No
- Language ID
- Time Zone

You can also call a custom program instead of using the standard mapping rules.

Complete the steps below to update the mapping rules for required fields.

1 Type any character in the *Opt* field next to Required Fields. on the Update TM Mapping Rules Options screen. The system displays the Update TM Rules - Required Fields screen similar to Figure 14-12.

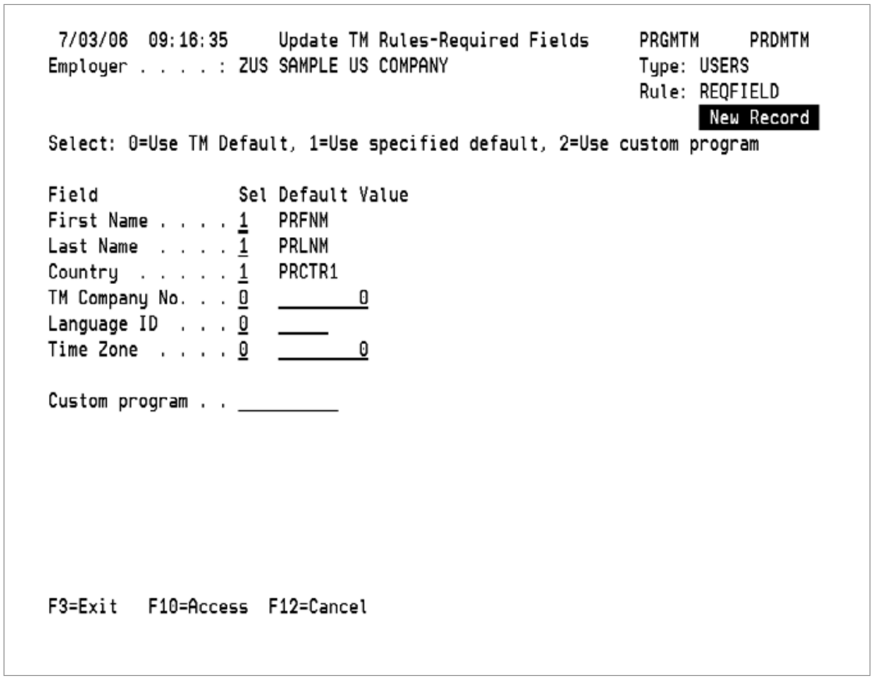


Figure 14-12: Update TM Rules - Required Fields screen

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

Sel

Specify how to complete the associated required field.

Valid values are:

0	Use the default provided by the Talent Management system, if available.
1	Use the values specified on this screen as the default.
2	Use a custom program to provide the appropriate value.

Default Value

Specify the default value for the associated field.

Custom program

Type the name of a custom program if the system mapping rules will not produce the necessary value for one or more of the required fields. The system calls the custom program and uses the value returned as the required field value.

We provide a sample custom program, PRGTMCU1, to use as a model for your custom program(s).

3 Press Enter.

Optional Fields Mapping

Use this screen to specify the source of the default value in that field. Infinium supplies the field that provides the default value for the *Address Line 1, Address Line 2, City, State/Province, Postal Code, Phone, Job Title, Active Flag, and Middle Initial* fields.

- Address Line 1
- Address Line 2
- City
- State/Province
- Postal Code
- Phone
- Fax
- Education
- Background
- Web Address
- Job Title
- Region ID
- County ID
- Notify by Email
- Currency
- Active Flag
- Middle Initial

You can also call a custom program instead of using the standard mapping rules.

Complete the steps below to update the mapping rules for the optional fields.

1 Type any character in the *Opt* field next to Optional Fields. on the Update TM Mapping Rules Options screen. The system displays the Update TM Rules - Optional Fields screen similar to Figure 14-13.

```
 7/03/06  09:41:42     Update TM Rules-Optional Fields     PRGMTM     PRDMTM
Employer . . . . : ZUS SAMPLE US COMPANY                  Type: USERS
                                                          Rule: OPTFIELD
Select: 0=Omit, 1=Include from default, 2=Use custom program   New Record
Field              Sel Default Value    Field            Sel Default Value
Address Line 1 . . 1   PRADR1           Middle Initial . 1   PRMNM
Address Line 2 . . 1   PRADR2
City . . . . . . . 1   PRCITY
State/Province . . 1   PRSTA1
Postal Code  . . . 1   PRZIP1
Phone  . . . . . . 1   PRTL1
Fax  . . . . . . . 0   None
Education  . . . . 0   None
Background . . . . 0   None
Web Address  . . . 0   None
Job Title  . . . . 1   PRPOS
Region ID  . . . . 0   None
County ID  . . . . 0   None
Notify by Email  . 0   None
Currency . . . . . 0   None
Active Flag  . . . 1   Based on PRTEC
Custom program . .
F3=Exit   F10=Access  F12=Cancel
```

Figure 14-13: Update TM Rules - Optional Fields screen

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

Sel

Specify how to complete the associated optional field. Valid values are:

0	Omit this field when sending interface data to Talent Management.
1	Use the values specified on this screen as the default.
2	Use a custom program to provide the appropriate value.

Default value

Infinium HR provides the default value for the following fields:

- Address Line 1
- Address Line 2
- City
- State/Province
- Postal Code
- Phone

Infinium does not supply standard values for the following fields, but a custom program can supply values, if needed:

- Fax
- Education
- Background
- Web Address
- Region ID
- County ID
- Notify by Email
- Currency
- Custom program

For *Job Title* specify the default value. Valid values are:

Blank	Do not provide a default value.
PRJOB1	Use the value from the *Job Code 1* field on the employee basic data record.
PRPOS	Use the value in the *Position* field on the employee basic data record.
PRPTITL	Use the value in the *Position Title* field on the employee basic data record.

Custom program

Type the name of a custom program if the system mapping rules will not produce the necessary value for one or more of the optional fields. The system calls the custom program and uses the value returned as the optional field value.

We provide a sample custom program, PRGTMCU1, to use as a model for your custom program(s).

3 Press Enter.

Alternate ID Mapping

Use this screen to specify the fields to use to build an alternate ID:

- Employer
- Employee Number

- TM User ID

The recommended unique key in Infinium HCM is Employer/Employee Number.

You can also call a custom program instead of using the standard mapping rules.

Complete the steps below to update the mapping rules for the alternate ID.

1 Type any character in the *Opt* field next to Alternate ID on the Update TM Mapping Rules Options screen. The system displays the Update TM Rules - Alternate ID screen similar to Figure 14-14.

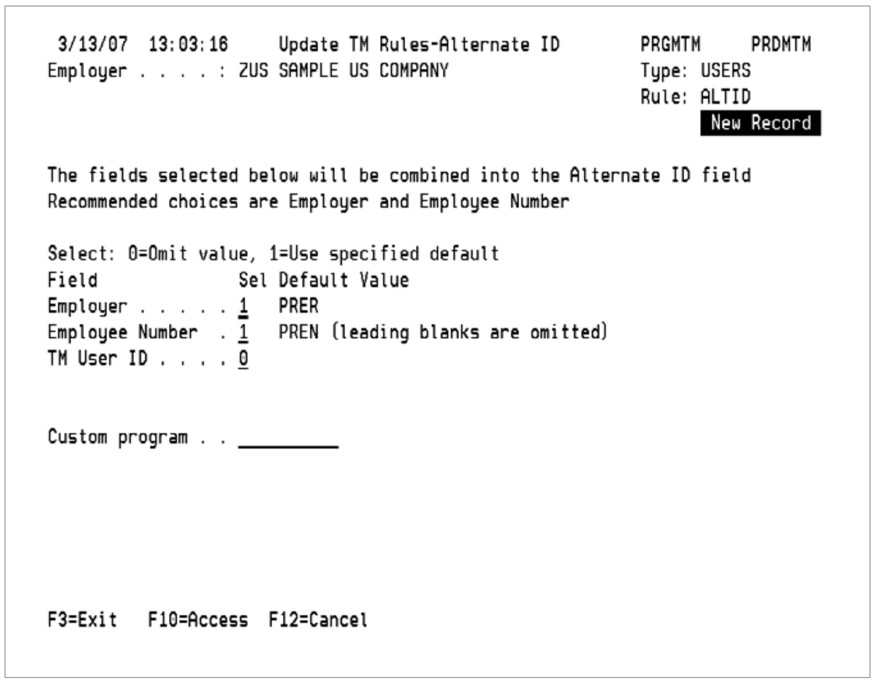


Figure 14-14: Update TM Rules - Alternate ID screen

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

Employer Sel

Specify how to use the *Employer* field.

Valid values are:

0	Do not use this field when you build the alternate ID for Talent Management.

1 Use the value in the *Employer* field as a part of the alternate ID.

Employee Number Sel

Specify how to use the *Employee number* field.

Valid values are:

0 Do not use this field when you build the alternate ID for Talent Management.

1 Use the value in the *Employee Number* field as a part of the alternate ID.

TM User ID Sel

Valid values are:

0 Do not use this field when you build the alternate ID for Talent Management.

1 Use this field when you build the alternate ID for Talent Management.

Custom program

Type the name of a custom program if the system mapping rules do not produce the necessary user ID value. The system calls the custom program and uses the value returned as the user ID. We provide a sample custom program, PRGTMCU1, to use as a model for your custom program(s).

3. Press Enter.

Displaying Talent Management Mapping Rules

Use the *Display Talent Management Mapping Rules* function to view the rules for an employer.

Complete the steps below to view mapping rules.

1. From the Infinium HR main menu select *System Operations.*
2. Select *Talent Management Operations.*

3 Select *Display Talent Management Mapping Rules* [DTMMR]. The system displays the Display TM Mapping Rules prompt screen.

4 Specify the employer whose mapping rules you want to view and press Enter. The system displays the Display TM Mapping Rules-Options screen.

5 Type any character next to the mapping rules you want to display. You can select all of the mapping rules.

6 Press Enter. The system displays the screen for the first mapping rules you selected.

7 Continue to press Enter to display each mapping rules screen you selected. When you complete viewing the mapping rules, press Enter to return to the Display TM Mapping Rules Options screen.

8 Press F3 twice to return to the main menu.

Listing Talent Management Mapping Rules

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations.*

3 Select *List Talent Management Mapping Rules* [LTMMR]. The system displays the List TM Mapping Rules screen similar to Figure 14-15.

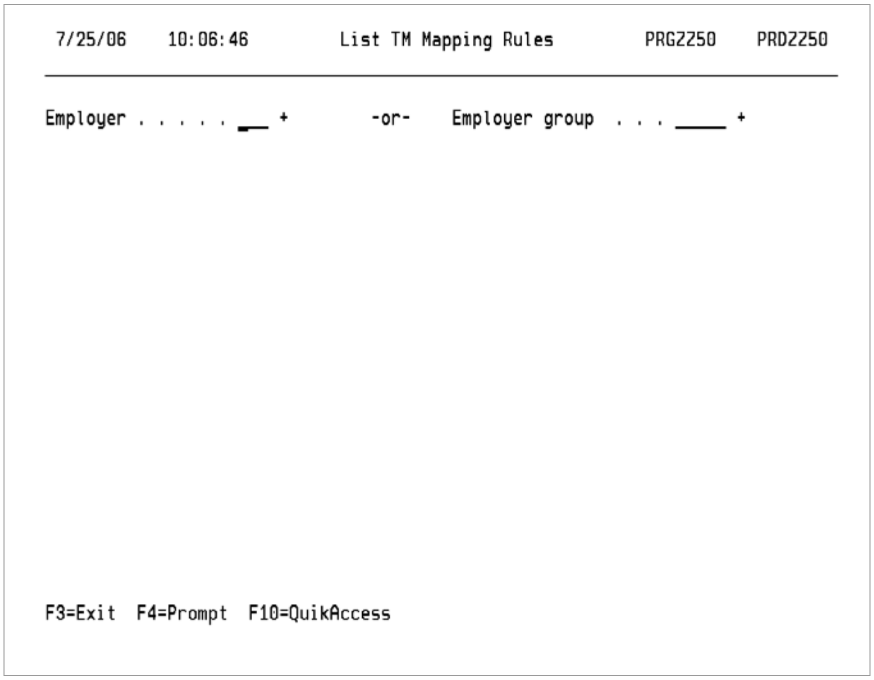


Figure 14-15: List TM Mapping Rules screen

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

Employer

Specify the employer for which you want to print Talent Management mapping rule information. You must specify an employer or an employer group.

Employer group

Specify the employer group for which you want to print Talent Management mapping rule information. You must specify an employer or an employer group.

5 Press Enter. The system prints the Talent Management Interface Mapping Rules list.

Processing Infinium HR with Talent Management

This section discusses extracting Infinium HR information and preparing it for Talent Management.

Extracting all Infinium HR information

Use the *Extract Data for TM - All* function to extract all applicable information for Talent Management to a specified file that you can later import into Talent Management. You specify the employer, file name, format of the data, type of record and whether to include terminated employees.

Follow the steps below to extract all data for Talent Management.

1. From the Infinium HR main menu select *System Operations.*
2. Select *Talent Management Operations*.
3. Select *Extract Data for TM - All* [EDTM1]. The system displays the Extract Data for TM - All screen similar to Figure 14-16.

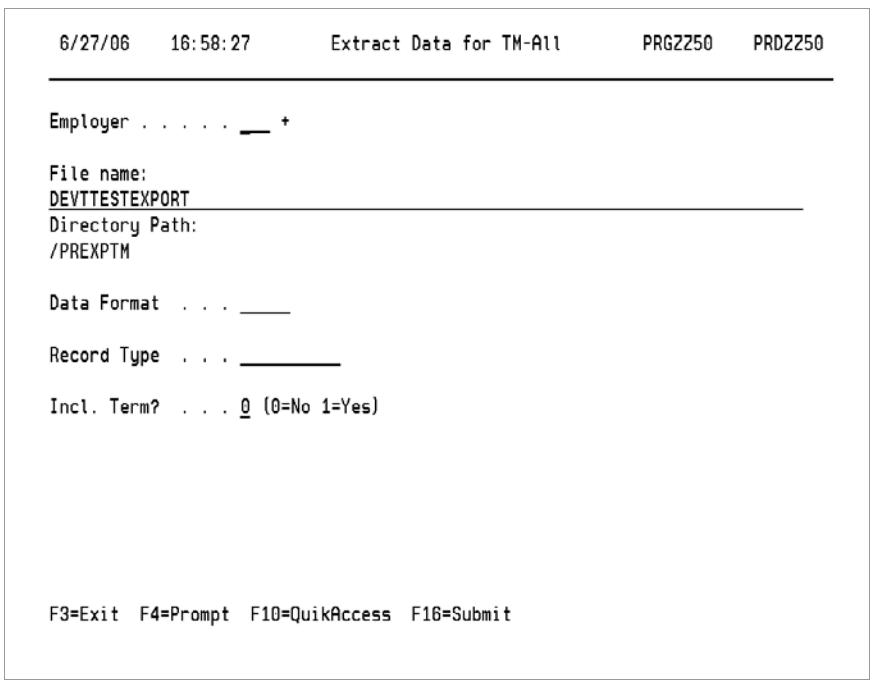


Figure 14-16: Extract Data for TM - All screen

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

Employer

Specify the employer whose data you are extracting.

File name

Type the file name of the interface file for Talent Management. You can use any alphanumeric combination. The system appends the file suffix associated with the value in the *Data Format* field to the file name you enter when it creates the full file name. For example, if you type **MYTEST** as the file name and **TAB** as the data format, the system creates the file name **MYTEST.TXT**.

If the file is not found in the applicable directory, the system creates it. If the file is found, the system replaces it.

Directory Path

This is the path where the file you are creating is stored.

Data Format

Type **TAB** to create a file as a tab delimited text file for the data format of the interface file for Talent Management.

The system appends the file suffix associated with the data format value to the value you enter in the *File name* field when it creates the full file name. For example, if you type **MYTEST** as the file name and **TAB** as the data format, the system creates the full file name as **MYTEST.TXT**.

If the file is not found in the applicable directory, the system creates it. If the file is found, the system replaces it.

Record Type

Type **USERS**, include user (employee) information, to indicate the kind of information to write to the interface file for Talent Management.

Incl. Term?

Specify whether to include terminated employees in the file.

Valid values:

0	No, do not include terminated employees.
1	Yes, include terminated employees.

5 Press F16 to submit the extraction. The system extracts the data and returns to the main menu.

Activating the Talent Management Trigger

Use the *Activate Talent Management Trigger* function to activate the trigger program that records changes to the HR system for use with Talent Management.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations*.

3 Select *Activate Talent Mgmt Trigger* [ATMT]. The system displays the Activate Talent Mgmt Trigger screen similar to Figure 14-17.

Figure 14-17: Activate Talent Mgmt Trigger screen

4 Press Enter to activate the trigger program.

Extracting Changed Infinium HR information

Use this function to create an interface file that contains changes that occurred since the last time the function was run. Run this function regularly, daily, weekly, and so on. Records that are included are marked as processed so that they are not included the next time you run this function. You specify the employer, file name, format of the data, and the type of record.

Follow the steps below to extract changes to data for Talent Management.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations*.

3 Select *Extract Data for TM - Changes* [EDTM2]. The system displays the Extract Data for TM - Changes screen similar to Figure 14-18.

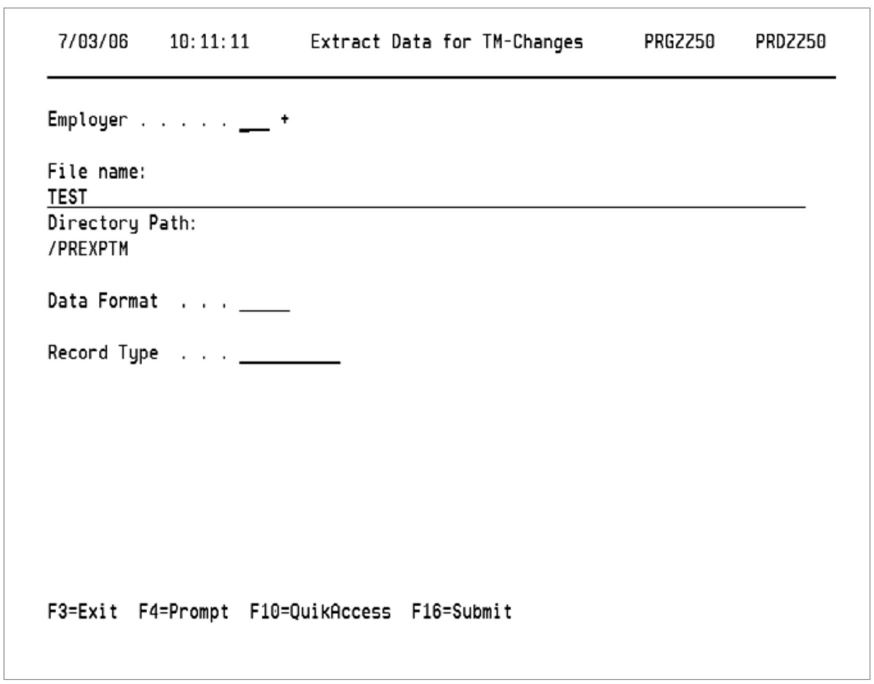


Figure 14-18: Extract Data for TM - Changes screen

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

Employer

Specify the employer whose data you are extracting.

File name

Type the file name of the interface file for Talent Management. You can use any alphanumeric combination. The system appends the file suffix associated with the value in the *Data Format* field to the file name you enter when it creates the full file name. For example, if you type **MYTEST** as the file name and **TAB** as the data format, the system creates the file name **MYTEST.TXT**.

If the file is not found in the applicable directory, the system creates it. If the file is found, the system replaces it.

Directory Path

This is the path where you will store the file you are creating.

Data Format

Type **TAB** to create a file as a tab delimited text file for the data format of the interface file for Talent Management.

The system appends the file suffix associated with the data format value to the value you enter in the *File name* field when it creates the full file name. For example, if you type **MYTEST** as the file name and **TAB** as the data format, the system creates the full file name as **MYTEST.TXT**.

If the file is not found in the applicable directory, the system creates it. If the file is found, the system replaces it.

Record Type

Type **USERS**, include user (employee) information, to indicate the kind of information to write to the interface file for Talent Management.

5 Press F16 to submit the extraction. The system extracts the data and returns to the main menu.

Updating the Employee Web and Interface Data

Use this function to change or delete the user ID value the system stores when you use the *Extract Data for TM* function.

If you delete the user ID or erase the existing value, the next export of changes builds a new user ID based on the mapping rules, sends the new user ID to Talent Management, and stores it in the Infinium HR file.

Follow the steps below to extract changes to data for Talent Management.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations*.

3 Select *Update EE Web/Interface Data* [UWID]. The system displays the Update EE Web/Interface Data - Select screen similar to Figure 14-19.

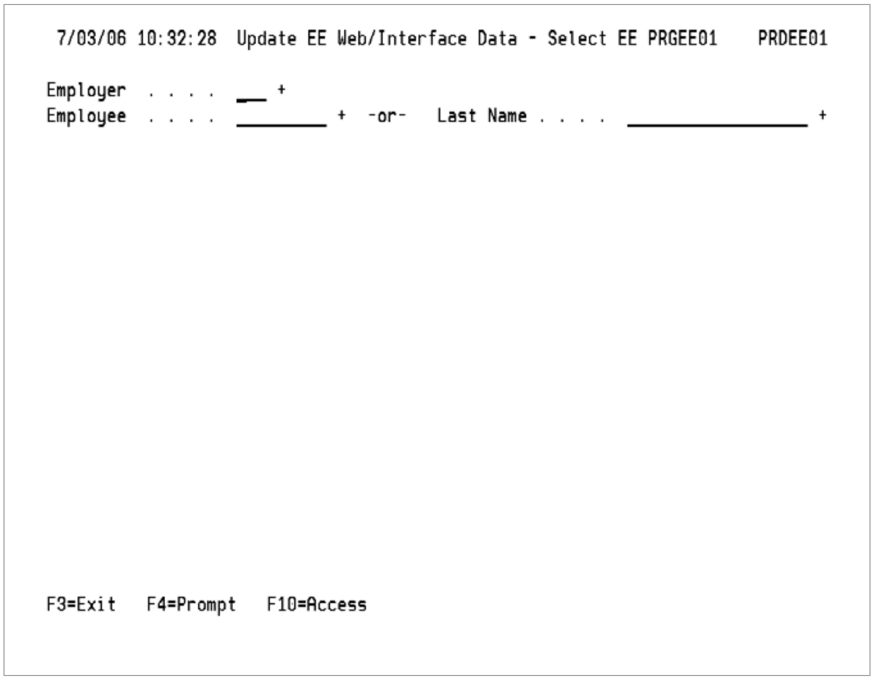


Figure 14-19: Update EE Web/Interface Data - Select EE screen

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

Employer

Specify the employer for whom you are updating information.

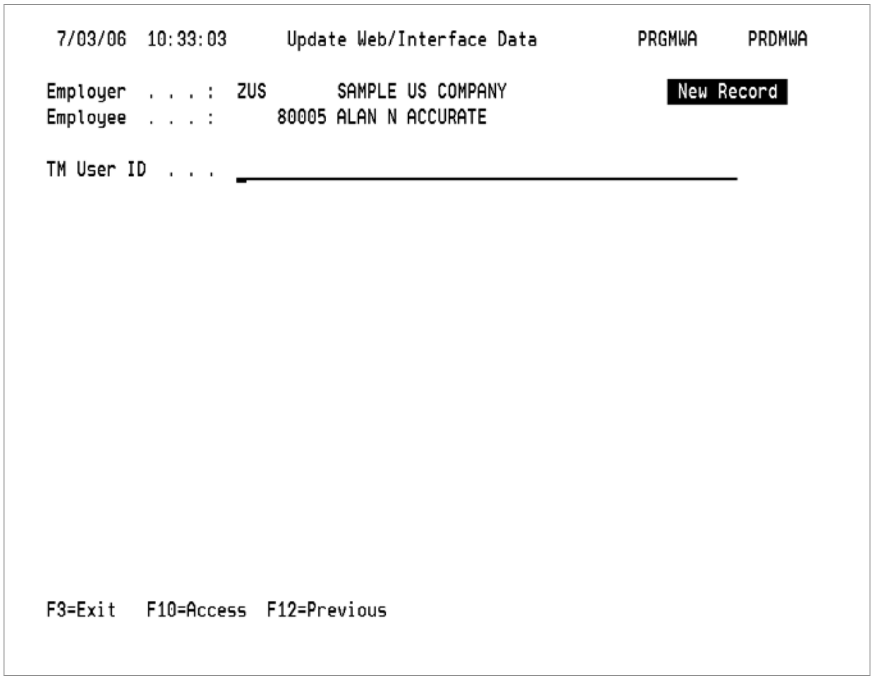
Employee

Specify the employee whose information you are updating. Or, leave this field blank and specify the employee’s last name in the *Last Name* field.

Last Name

Type some or all of the employee's last name and prompt to view a list of all employees by last name. You can select the employee from this list and the system completes the *Employee* field on this screen.

5 Press Enter. The system displays the Update Web/Interface Data screen similar to Figure 14-20.



```
 7/03/06  10:33:03      Update Web/Interface Data          PRGMWA    PRDMWA

Employer  . . . :  ZUS       SAMPLE US COMPANY                New Record
Employee  . . . :      80005 ALAN N ACCURATE

TM User ID  . . .  _____________________________________________









F3=Exit   F10=Access  F12=Previous
```

Figure 14-20: Update Web/Interface Data screen

TM User ID

Specify the user ID value to send to Talent Management for this employee when you send changes to the Talent Management file. If you leave this field blank, if a record does not exist for the employee, or if the mapping rule for the user ID specifies to always replace the value, the system builds a user ID value from the mapping rules and stores that value in the file that contains the employee information you extract to Talent Management.

If the mapping for the user ID does not specify replacement and a value exists in this field, the system uses this value as the user ID for the employee when you send changes to Talent Management.

If you previously sent data to Talent Management for an employee, and you want to force the system to send a new value as the user ID, type the new value here.

6 Press Enter. The system updates the information to send to Talent Management.

Displaying the Employee Web and Interface Data

Use the *Display EE Web/Interface Data* function to display user ID information for a specified employer and employee.

Complete the steps below to display employee interface information.

1. From the Infinium HR main menu select *System Operations.*
2. Select *Talent Management Operations*.
3. Select *Display EE Web/Interface Data* [DWID]. The system displays the Display EE Web/Interface Data - Select screen.
4. Specify the employer and employee and press Enter.
5. The system displays the Display Web/Interface Data screen showing the specified employer and employee's user ID information.
6. Press Enter to return to the Display EE Web/Interface Data - Select screen.
7. Select another employer and employee or press F3 to exit to the main menu.

Listing the Employee and Interface Data

Use the *List EE Web/Interface Data* function to generate a list of user ID information for a specified employer.

Complete the steps below to display employee interface information.

1. From the Infinium HR main menu select *System Operations.*
2. Select *Talent Management Operations*.
3. Select *Display EE Web/Interface Data* [LSTEEWEB]. The system displays the List EE Web/Interface Data screen.
4. Specify the employer for whom you want to generate a list and press Enter. The system generates the List Employee Web/Interface Data report.

Resetting Talent Management Audit Data

Use the *Reset Talent Management Audit Data* function to reset records in the Talent Management audit file so that you can regenerate an interface file for Talent Management. Use this function when you extract changed data and you encounter problems during the import process, which requires that you resubmit the data. The system resets records in the audit file that were created for the interface to TM so that you can extract them again.

Complete the steps below to reset audit data.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations*.

3 Select *Reset TM Audit Data* [RTMAD]*.* The system displays the Reset TM Audit Data screen similar to Figure 14-21.

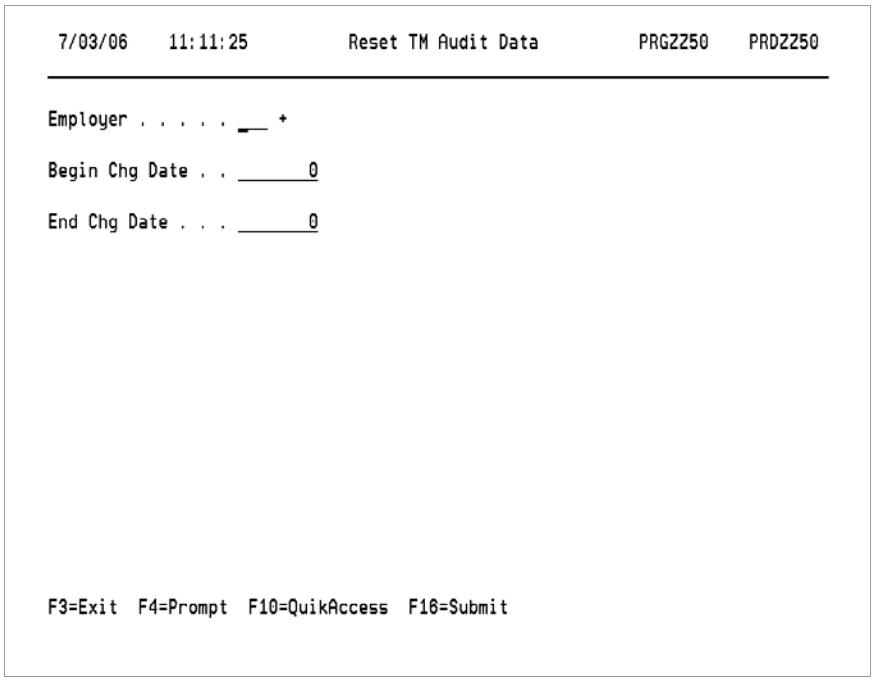


Figure 14-21: Reset TM Audit Data screen

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

Employer

Specify the employer whose Talent Management information you want to reset.

Begin Chg Data

Specify the first date in the range of dates to reset information.

End Chg Data

Specify the last date in the range of dates to reset information.

5 Press F16 The system resets the information

Deactivating the Talent Management Triggers

Use the *Deactivate Talent Mgmt Trigger* function to deactivate the audit trigger processing. Use this function during software upgrades or other related activities

Complete the steps below to deactivate the Talent Management trigger programs..

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations*.

3 Select *Deactivate Talent Mgmt Trigger* [DTMT]. The system displays the Deactivate Talent Mgmt Trigger screen similar to Figure 14-22.

Figure 14-22: Deactivate Talent Mgmt Trigger screen

4 Press Enter. The system deactivates the trigger programs and returns to the main menu.

Purging Talent Management Audit Data

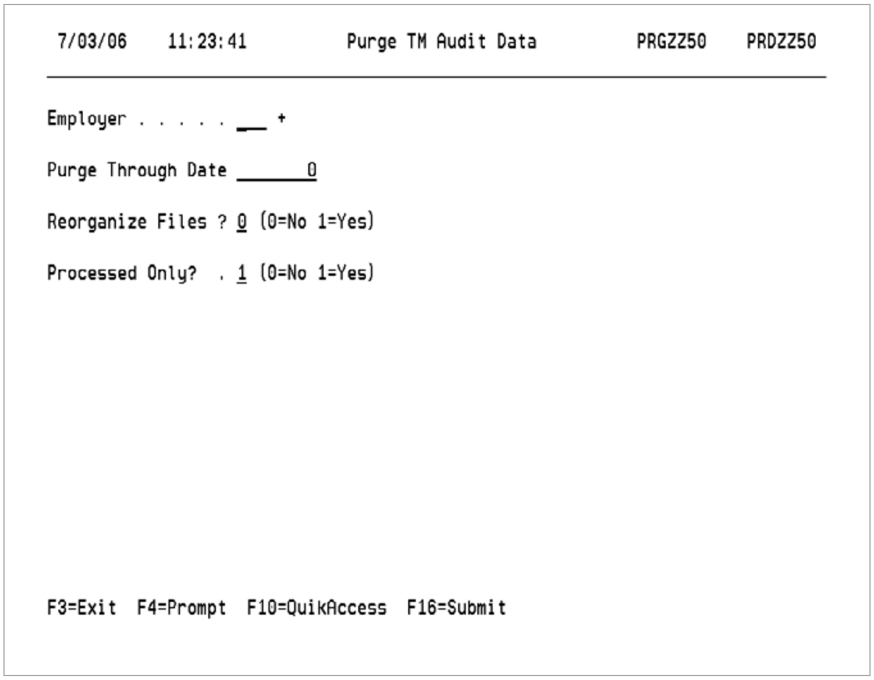
Caution: The system needs exclusive use of the audit file to reorganize it. Reorganize the file when no users are using HCM functions.

Use the *Purge TM Audit Data* function to purge audit information if the extract/import process is successful and you no longer need the audit data. Follow the steps below to purge audit information.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Talent Management Operations*.

3 Select *Purge TM Audit Data* [PTMAD]. The system displays the Purge TM Audit Data screen similar to Figure 14-23.



```
7/03/06    11:23:41          Purge TM Audit Data          PRGZZ50    PRDZZ50

Employer . . . . . ___ +

Purge Through Date ______0

Reorganize Files ? 0 (0=No 1=Yes)

Processed Only?  . 1 (0=No 1=Yes)

F3=Exit  F4=Prompt  F10=QuikAccess  F16=Submit
```

Figure 14-23: Purge TM Audit Data screen

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

Employer

Specify the employer whose Talent Management information you want to purge.

Purge Through Date

Specify the date through which to purge the audit file.

Reorganize Files?

Specify whether the system will reorganize the audit file, PRPMSTM, after the purge of records is complete. Valid values:

0	Do not reorganize the file after records are deleted.
1	Reorganize the file after records are deleted.

Reorganizing the file recovers disk space by removing the space that was occupied by the purged records.

Processed Only?

Specify whether to purge all records or only records that were marked as processed and sent to Talent Management. Valid values:

0	Purge all records that meet the selection criteria.
1	Purge only processed records that were sent to Talent Management that meet the selection criteria.

5 Press F16.

Chapter 15 Auditing Employee Information

15

This chapter discusses how you can track various types of employee information.

The chapter consists of the following topics:

Overview

You can audit information about changes and updates to employee information in Infinium HR and Infinium PY. Infinium HR and Infinium PY provide the following audit information:

- Point-in-time

  You can view historical basic, personnel, or payroll information for each employee for a specified date or point in time.

- Deduction and user defined

  You can obtain the last date and time deduction and user-defined information was updated in addition to the last user and program used to update the information.

Using Point-in-time Reporting

Overview

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

If you elect to use point-in-time reporting, you use *Point In Time Inquiry* to specify an audit date and then search your database for employees who meet a specified combination of criteria. You can then view historical basic, personnel, or payroll information for each employee for the specified date. Included are the user profile of the user who made the change and a timestamp of the date and time of the change.

Caution: Some functions such as *Enter Personnel Actions* can perform multiple separate updates to the same master file as part of one personnel action. In order to log each update as a separate audit record, the system waits until one second has passed before creating the audit record for each additional update of the same master file. This can affect users' screen performance.

Setting up Point-in-time Reporting

Before you can use point-in-time reporting, you must use *Update Employer Controls* and specify **Yes** in *Point In Time Rpting* for each employer using point-in-time reporting.

You then use *Point In Time Initialization* to create audit files that the system uses for baseline information for each employee within your employer. During initialization, the system copies the files listed below to set up corresponding audit files that contain the date and time of the initialization.

File Copied	Description	Audit File	Description
PRPMS	Employee basic data file	PRPMSA	Employee basic data audit file
PEPMS	Employee personnel master file	PEPMSA	Employee personnel master audit file

File Copied	Description	Audit File	Description
PYPMS	Employee payroll master file	PYPMSA	Employee payroll master audit file

After initializing the audit files, you use the *Activate Point In Time* function to activate point-in-time reporting. Once activated, the system adds individual historical records with date and time information to the corresponding audit file whenever you update an employee's basic data, personnel, or payroll master file.

The system does not update the audit files when you use the following functions:

- *Correct Employee YTD Totals*
- Payroll cycle processing functions
- Functions for purging records from employee's basic data, personnel master, or payroll master files

If you are activating point-in-time reporting for the first time, consider scheduling the activation of point-in-time reporting to coincide with critical calendar or fiscal year reporting requirements.

Caution: *Point In Time Inquiry* sorts employee records interactively. Searches performed across a large employee database affect system performance by slowing down response and processing times.

The point-in-time audit files collect audit records each time you use a function that results in an update to an employee basic data, personnel master, and payroll master file. The increase in the size of the audit files can affect system performance when you perform a search across a large employee database.

Using Point-in-time Reporting

After you activate point-in-time reporting, you use *Point In Time Inquiry* to specify criteria for audit reports of employees' basic data, personnel master, or payroll master file information for any date subsequent to the point-in-time activation date.

Deactivating Point-in-time Reporting

Whenever you install upgrade versions of Infinium HR or Infinium PY that include changes to the basic data file, PRPMS, the personnel master file, PEPMS, or the payroll master file, PYPMS, you must use *Deactivate Point In Time* to deactivate point-in-time reporting temporarily.

Caution: If users have access to the system when point-in-time reporting is deactivated, the system does not update the audit files with changes to basic data, personnel, or payroll master files.

Coordinate with your IS department when to schedule deactivating and reactivating point-in-time reporting so that users do not have access to the system when point-in-time reporting is deactivated.

Purging Point-in-time Files

When you use point-in-time reporting, the audit records collected by the system can increase significantly which can affect system performance. You can use *Purge Point in Time Files* to remove these audit files from the system:

- PRPMSA
- PYPMSA
- PEPMSA

You can specify that the files should be saved as temporary files or deleted. If you save the purged files, the system creates these temporary files and deletes the audit files:

- PRPMSAT
- PYPMSAT
- PEPMSAT

If you do not save the purged files, the system deletes the audit files.

Initializing Point-in-time Reporting

Overview

Use *Point In Time Initialization* to set up audit files for use as baseline basic data, personnel, and payroll information for point-in-time reporting for each employee within your employer.

Caution: Be sure that all Infinium HR and Infinium PY users are signed off the system before you use the *Point In Time Initialization* function. Users signed onto the system cause the *Point In Time Initialization* function to fail.

Use the menu path below.

- Infinium HR
- *System Operations*
- *Point In Time Operations*
  - *Point In Time Initialization* [IPIT]

Initializing Point-in-time Reporting

On the Point In Time Initialization page, you specify the employer for whom to set up audit files for point-in-time reporting.

Use the information below to complete this page.

Employer

Specify an employer.

Include Term?

Specify **Yes** to include terminated employees for point-in-time reporting. Otherwise, specify **No**.

How Do I…

Initialize point-in-time reporting	Complete the information on the page and press Enter.

Activating Point-in-time Reporting

Overview

Use *Activate Point In Time Triggers* to activate Infinium HR to collect updates to employees’ basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

Use the menu path below.

- Infinium HR
- *System Operations*
- *Trigger Functions*
  - *Activate Point In Time Triggers* [ACTPITTRG2]

Activating Point-in-time Reporting

On the Activate Point In Time Triggers page, you can activate Infinium HR to collect updates to employees' basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

How Do I…

Activate point-in-time reporting	Press Enter.

Deactivating Point-in-time Reporting

Overview

Use *Deact. Point In Time Triggers*to deactivate Infinium HR from collecting updates to employees' basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

- Infinium HR
- *System Operations*
- *Trigger Functions*
  - *Deactivate Point In Time Triggers* [DEAPITTRG2]

Deactivating Point-in-time Reporting

On the Deactivate Point In Time page, you can deactivate Infinium HR from collecting updates to employees' basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

How Do I…

Deactivate point-in-time reporting	Press Enter.

Using Point-in-time Reporting

Overview

Use *Point In Time Inquiry* to generate audit reports of employees' basic data, personnel master, or payroll master file information.

Use the menu path below.

- Infinium HR
- *Employee Data*
- *Display Employee Data*
  - *Point In Time Inquiry* [PITEI]

Specifying Employee Criteria

On the Employee Point In Time Inquiry criteria selection page, you specify the criteria to use for locating employees for whom to generate point-in-time audit information.

Use the information below to complete this page.

Employer

Specify an employer.

Employee

Specify the number of the employee for whom to display point-in-time audit information. If you do not know the employee number, use *Last Name*.

Leave blank to display all employees who meet your selection criteria.

If you specify a value in *Employee* or *Last Name* and leave *Date* blank, the system displays all audit records for the specified employee.

Last Name

Specify the last name of the employee for whom to display point-in-time audit information.

You can also type the last name or a portion of the last name and press F4 to display a list of employees who share the same name or portion of the name. From this list, you can select the employee for whom you want to display point-in-time audit information.

If you specify a value in *Employee* or *Last Name* and leave *Date* blank, the system displays all audit records for the specified employee.

Date

Type the date for which you want to generate the point-in-time audit information.

If you leave *Date* blank and specify a value in *Employee* or *Last Name*, the system displays all audit records for the specified employee.

Time

Type the time of day for the specified date to see how your organization looked at that date and time.

If you leave this field blank and specify a value in *Employee* or *Last Name*, the system displays all audit records for the specified employee.

Level 1, 2, 3, 4

Specify the values for the levels to display point-in-time audit information for employees assigned to one or more levels within an employer.

Payroll cycle

Specify the payroll cycle used to pay the employees whose point-in-time audit information you want to display.

If you specify *Payroll cycle* and *Pay frequency* values on this page, the *Pay frequency* value must equal the *Pay Frequency* value on the cycle control.

Status

Specify the status of employees whose point-in-time audit information you want to display.

Class

Specify the class of the employees whose point-in-time audit information you want to display.

Infinium HR uses class designations for wage and salary planning.

Security group

Specify the security group to which employees whose point-in-time audit information you want to display are assigned.

You cannot display information for employees assigned to security groups from which you are restricted.

Position

Specify the position of the employees whose point-in-time audit information you want to display.

Job code

Specify the job code of the employees whose point-in-time audit information you want to display.

Sex

Specify the gender of the employees whose point-in-time audit information you want to display.

Valid values are:

F	Female
M	Male

Pay grade

Specify the pay grade of the employees whose point-in-time audit information you want to display.

Step number

Specify the step number of the employees whose point-in-time audit information you want to display.

Leave *Pay grade* blank to display all employees assigned to the specified step regardless of the assigned pay grade.

Ethnic code

Specify the ethnic code of the employees whose point-in-time audit information you want to display.

Pay frequency

Specify the pay frequency of the employees whose point-in-time audit information you want to display.

Valid values are:

D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
10	10 pay periods per year
13	13 pay periods per year

22	22 pay periods per year
27	27 pay periods per year
53	53 pay periods per year

Salary range

Specify the salary range of the employees whose point-in-time audit information you want to display.

Base rate GE

Type the minimum base pay rate amount for employees whose point-in-time audit information you want to display.

Express the base rate as a monthly salary for a salaried employee or as a primary hourly rate for an hourly employee.

Quartile

Type the value for the salary range quartile in which the base pay rate resides for employees whose point-in-time audit information you want to display.

Infinium HR uses an employee’s base pay rate and the salary quartiles assigned to the salary range to compute each employee’s salary quartile on the employee basic data record.

Each salary range comprises four equal quartiles. The minimum of the salary range is the lower boundary of quartile 1. The midpoint of the salary range is both the upper boundary of quartile 2 and the lower boundary of quartile 3. The upper boundary of quartile 4 is the maximum of the salary range.

Infinium HR also defines quartile 0 for employees whose base rate is below the minimum of the salary range and quartile 5 for employees whose base rate exceeds the maximum of the salary range.

Base rate LE

Type the maximum base pay rate amount for employees whose point-in-time audit information you want to display.

Express the base rate as a monthly salary for a salaried employee or as a primary hourly rate for an hourly employee.

Compa ratio GE

Type a value that represents a comparison ratio that is less than the comparison ratio of employees whose point-in-time audit information you want to display.

The comparison ratio is equal to an employee’s salary divided by the mid-point salary range. When the base rate equals the mid-point of the salary range, the comparison ratio is 100%.

Infinium HR updates an employee’s comparison ratio whenever you use *Enter Personnel Actions* to process a salary change transaction.

Last increase prior to

Type a date before which the last pay increases occurred for employees whose point-in-time audit information you want to display.

Compa ratio LE

Type a value that represents a comparison ratio that is greater than the comparison ratio of employees whose point-in-time audit information you want to display.

The comparison ratio is equal to an employee’s salary divided by the mid-point salary range. When the base rate equals the mid-point of the salary range, the comparison ratio is 100%.

Infinium HR updates an employee’s comparison ratio whenever you use *Enter Personnel Actions* to process a salary change transaction.

Location

Specify the location of the employees whose point-in-time audit information you want to display.

Hired after

Type a date after which your employer hired employees whose point-in-time audit information you want to display.

Include Inactive

Specify whether to include employees with an inactivate status for point-in-time reporting.

Valid values are:

0	Include only active employees.

1	Include active and inactive employees.

Terminated after

Type a date after which your employer terminated employees whose point-in-time audit information you want to display.

How Do I…

Display a list of employees for whom to generate point-in-time audit information	Complete the information on this page and press Enter.

Selecting Audit Reports

On the Employee Point In Time Inquiry audit report selection page, you select to display audit reports of basic data, personnel data, or payroll data for employees who meet your selection criteria.

From this page, you have access to the following audit report pages within the three audit files:

- Employee basic data audit file (PRPMSA)
  - Display Employee Basic Data personal information page
  - Display Employee Basic Data job-related and performance information page
  - Display Employee Basic Data contact and miscellaneous information page
  - Display Employee Basic Data compensation information page
  - Display Employee Basic Data break-in-service information page
  - Display PTO Accruals page with paid-time-off accrual information

    You can display additional paid-time-off accrual information from this page by typing **5** in *Opt* next to an accrual type.
- Employee personnel master audit file (PEPMSA)
  - Display Employee Personnel Data information page
  - Display Employee Personnel Data emergency and military information page

    You can display an Employment Eligibility Verification page from any of the employee personnel master audit report pages by pressing F8.
  - Display Employee Personnel Data previous information page

- Employee payroll master audit file (PYPMSA)
  - Display Employee Payroll Data previous information page

Use the information below to complete this page.

Opt

Specify the type of point-in-time audit report to display.

Valid values are:

1	Basic data
2	Personnel data
3	Payroll data

How Do I…

Display an audit report	Type the value for the audit report to display and press Enter.

Using Purge Point-in-time Files

Overview

Use *Purge Point In Time Files* to delete audit records created when you used *Point in Time Inquiry.*

Use the menu path below.

- Infinium HR
- *System Operations*
- *Point in Time Operations*
  - *Purge Point in Time Files* [PRPPIT]

Purging Point in Time Files

On the Purge Point in Time Files page you specify the criteria to be used to purge Point-in-time files.

Use the information below to complete this page.

Employer

Specify the employer for whom you are purging point in time data. Leave blank if you are specifying an employer group. You must enter an employer or employer group.

Employer Group

Specify the employer group for whom you are purging point in time data. Leave blank if you are specifying an employer. You must enter an employer or employer group.

Purge through Dt

Specify the ending date for the system to use when it purges point in time audit records. The system compares this date to the *Creation Date* (Date Created) field in the three employee master audit files, PEPMSA, PRPMSA, and PYPMSA, and purges audit records with creation dates that are the same as or before the date you specify.

Save Purged Data?

Type **1** to save to a disk file basic data, personnel master, and payroll master audit records, if applicable, purged by this function.

Type **0** if you do not want to save basic data, personnel master and payroll master audit files to a disk file.

Tracking Deduction and User-Defined Information

Use the deduction and user-defined trigger programs to track the last time and date a record was updated or added to the Employee Deduction file, PYPDE, the Employee Multi-tax Deduction Crossover file, PYPDX, and the User-defined Data file, PRPUD. The system also tracks the user and program that updated the file.

Activating the Deduction and User-defined Trigger

Follow the steps below to activate the deduction and user-defined trigger program.

1. From the Infinium HR main menu select *System Operations.*

2. Select *Trigger Functions*.

3. Select *Activate Ded./User Def. Triggers* [ACTDEDUTRG]. The system displays the screen shown in Figure 15-1.

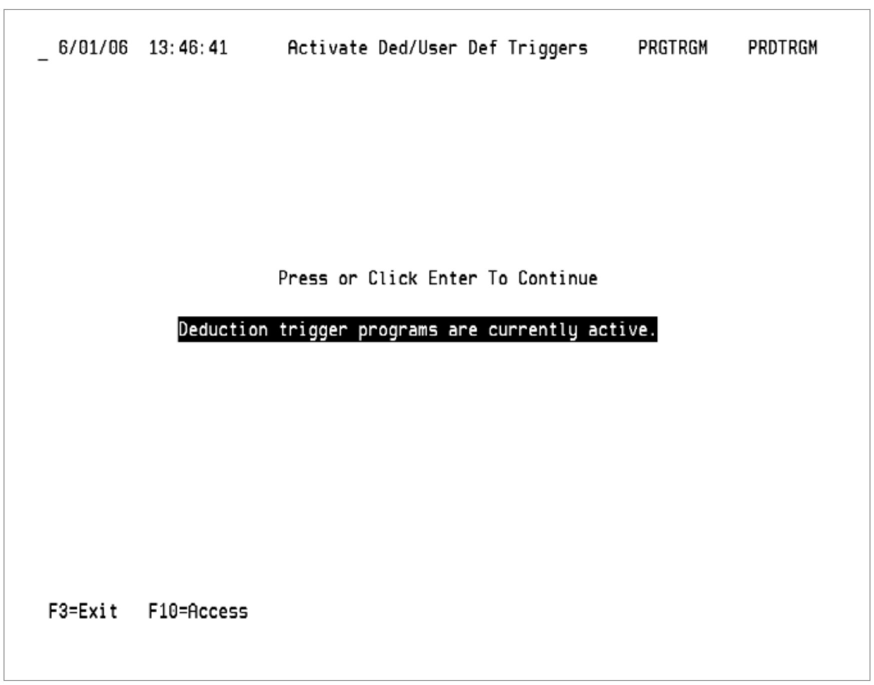


Figure 15-1: Activate Ded/User Def Triggers screen

4 Press Enter to activate the deduction and user-defined trigger programs. The system activates the trigger programs.

Deactivating the Deduction and User-defined Trigger

Follow the steps below to deactivate the deduction and user-defined trigger program.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Trigger Functions*.

3 Select *Deactivate Ded./User Def. Triggers* [DEADEDUTRG]. The system displays the screen shown in Figure 15-2.

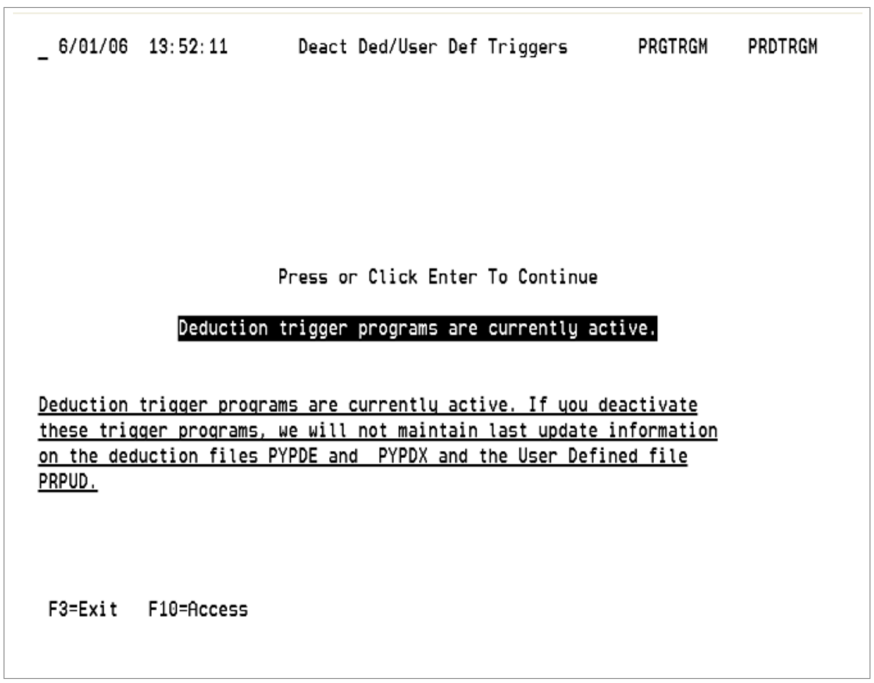


Figure 15-2: Deac Ded/User Def Triggers screen

4 Press Enter to deactivate the deduction and user-defined trigger programs. The system deactivates the trigger programs.

Listing the Deduction and User-defined Trigger Activity

Use this function to generate the following reports:

- Last Update Info - User Defined Data (PRPUD)
- Last Update Info - Employee Deductions (PYPDX)
- Last Update Info - Employee Deductions (PYPDE)

Follow the steps below to list the deduction and user-defined triggers.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Trigger Functions*.

3 Select *List Ded./User Def. Last Updates* [PRLUD500]. The system displays the screen shown in Figure 15-3.

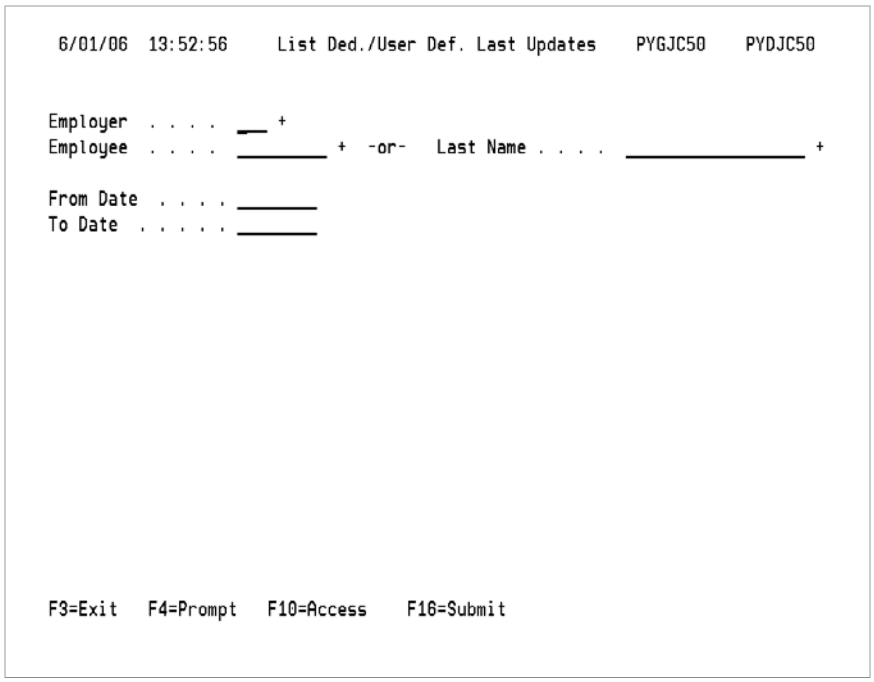


Figure 15-3: List Ded./User Def. Last Updates screen

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

Employer

Specify the employer code for which you want to list data. Leave blank to include all employers on the report.

Employee

Specify the employee number for which you want to list data. Leave blank to include all employees on the report.

Last Name

To include only one employee on the report, type part or all of the last name and press the prompt key to display a list of employees that match the last name you entered.

From Date

Type the earliest last change date to include on the report. Leave this field blank to include all records that have a last change date up to the date you specify in the *To Date* field.

To Date

Type the latest last change date to include on the report. You must specify a date in this field if you specify a date in the *From Date* field.

5. Press Enter. The system generates the audit reports.

Accessing audit information

You can access the deduction audit information by pressing F9 on the following screens:

- Correct Employee Deduction Data
- Correct DX-Employee Multi-Tax Ded
- Display Employee Deduction Data
- Display Employee Multi-Tax Ded

The system displays the following information:

- Last update user
- Last update date
- Last update time
- Last update program

Notes

Chapter 16 Working with Infor HCM Learning Management

16

This chapter discusses the setup requirements and the processing options for using Infinium HCM with Learning Management.

The chapter consists of the following topics:

Overview

Use the functions under *Learning Management Operations* to export Infinium HR employee data to Learning Management. You can export the information in these ways:

- Export data for all level controls associated with a specific employer code to a file that can you can later import into Learning Management. Use this method to send level control data periodically to Learning Management.
- Export data for all employees associated with a specific employer code to a file that can you can later import into Learning Management. Use this method to send employee data initially to Learning Management.
- Export only changed employee information. Use this method to send periodic updates such as daily changes in employee data to Learning Management.

The interface information is stored in a standard location on the Integrated File System (IFS) of the IBM i machine. The information is stored as a .txt file in the pipe delimited format.

Setting up Infinium HR information for use with Learning Management

Before you can work with Infinium Human Resources data to use it with Learning Management, you use these functions to complete specific setup tasks.

If this is the first time you are setting up processing for Learning Management and you do not see the Learning Management functions, refer to “Adding Learning Management Menu Options” section later in this chapter for the steps to add these menu options to your menu.

1 *Update Entity Controls*

You must specify yes in the *LM Interface Active* field to activate the Learning Management interface. The trigger program for this interface runs only if you activate Learning Management on the entity control.

2 *Update Employer Controls*

You must specify yes in the *Act Learning Mgmt* field to activate the Learning Management interface for the specified employer. The system tracks employee information for Learning Management only for employers for whom you activate this interface.

3 *Update LM Default Data*

Optionally, you can enter a default file name override for when you generate Learning Management files on the IFS. You can override this value at the time you generate the files.

4 *Update LM Mapping Rules*

You must enter configuration information related to establishing level and employee data during the interface process. This process includes entering information about the creation of a level ID, an employee login name, password, email address, department, and other required and optional fields. You can use *List LM Mapping Rules* to print this configuration information.

Extracting and capturing Infinium HR information for Learning Management

Use these functions to complete tasks to extract and capture Infinium HR information for Learning Management.

1 *Extract Data for LM – All*

Use this function to populate interface files initially with all applicable level and employee information that you can later import into Learning Management. You specify the employer, record type, and format of the data, whether to include terminated employees and inactive level records, and specify a file name if it must be different from the standard name for the record type. When you begin using the interface, you must run this function at least once for a LEVELS record type and once for a USERS record type.

2 *Activate LM Trigger*

Use this function after your initial load of Infinium HR information into Learning Management to activate a trigger process that tracks changes in the Infinium HR database for fields that must change in Learning Management.

3 *Extract Data for LM – Changes*

Use this function to create an interface file that contains employee changes that occurred since the last time the function was run. Run this function regularly: daily, weekly, and so on. The system marks the records as being processed so that they are not included the next time you run the function. You specify the employer, record type, and format of the data and specify a file name if it must be different from the standard name for the record type. You can also use the *Display LM Extract Files* function to view the information in the interface files that you create.

4 *Update LM Login Name*

Use this function to enter or modify the employee login names used for the interface with Learning Management, if you are not using the SHCM user ID as the login name for Learning Management. This provides you with the ability to modify an employee's login name if you want to change it when you do not want to continue using the value previously stored in the LM *Login Name* field. The system updates this file, based on your mapping rules, when you run the *Extract Data for LM - Al*l or the *Extract Data for LM - Changes* function and the system does not find an employee record or the system finds an employee record and the LM *Login Name* field is blank. Otherwise, the system continues to use the existing value.

Use the *Display LM Login Name* function to view the employee login names for the interface with Learning Management. Use the *List LM Login Name* function to print a list of the employee login names for the interface with Learning Management.

5 *Reset LM Audit Data*

You use this function if you previously ran the *Extract Data for LM-Changes* function and an unrecoverable error occurred while generating the interface file. This function resets the processed records for the specified date range to an unprocessed status. The records are then available for processing again.

6 *Deactivate LM Trigger*

Use this function to remove the Learning Management triggers temporarily from the employee Basic Data file. For example, when you install a new release of HCM, you may need to deactivate the trigger while the installation is run. You reactivate the trigger program after the installation is complete.

7 *Purge LM Audit Data*

Use this function to delete records from the audit file that tracks employee changes for the Learning Management interface. If you use this function outside of normal business hours when no changes are being made to the employee basic data records, you can reorganize the file to reclaim the disk space the deleted records occupy after processing the deletions is complete. For performance and disk space reasons, run this function on a regular basis, such as weekly or monthly.

Setting up Infinium HR to use with Learning Management

This section provides information about setting up Infinium HR to use with Learning Management.

Updating the Entity Control

To specify that you are using Learning Management:

1. From the Infinium HR main menu select *Master Files.*
2. Select *Update Master Files.*
3. Select *Update Entity Controls* [UN].
4. Type **2** in the *Opt* field for Installed Systems and press Enter. The system displays the Update Entity Controls screen.
5. Type **Yes** in the *LM Interface Active* field.
6. Complete the other fields as you normally would. See the “Setting up the Entity and Employer Controls” chapter in the *Infinium HR Guide to Controls* for more information.
7. Press Enter to save your changes and return to the main menu.

Updating the Employer Control

To activate Learning Management for a specific employer:

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

4 Specify the employer and press Enter. The system displays the first Employer Update screen.

5 Complete the fields on this screen as you normally would and press Enter. The system displays the second Employer Update screen.

6 Type **1** in the *Act Learning Mgmt* field.

7 Complete the remaining fields as you normally would.

8 Press Enter. The system displays the third Employer Update screen.

9 Complete the fields on this screen as you normally would and press Enter. The system displays the Employer Update prompt screen.

10 Enter information for another employer or press F3 to exit. See the “Setting up the Entity and Employer Controls” part in the *Infinium HR Guide to Controls* for more information.

Updating LM Default Data

To update the Learning Management default data:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Learning Management Operations.*

3 Select *Update LM Default Data* [ULMDD]. The system displays the Update LM Default Data screen similar to the screen below.

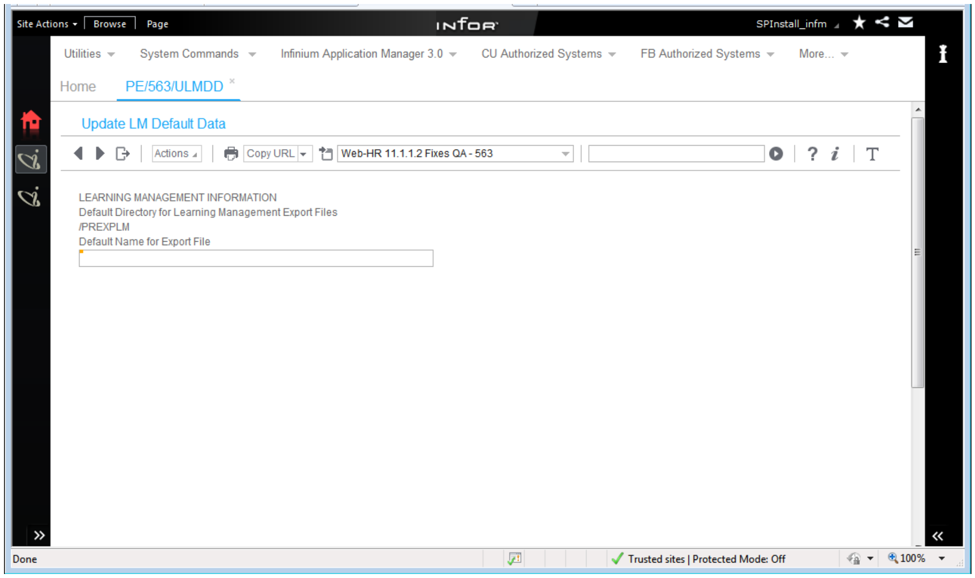


Figure 16-1: Update LM Default Data screen

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

Default Directory for Learning Management Export Files

This is the name of the directory where Learning Management extract files are stored.

Default Name for Export File

Type the name of the default file for the interface file created for Learning Management. When you type a value here, the system enters the default value in the appropriate place on the screens for the *Extract Data for LM-All* and *Extract Data for LM-Changes* functions the first time the functions are run or when the user left the *File Name Override* field blank the last time the user ran the function.

Leave this field blank to use as the default the standard system file name for each record type you extract.

Note: You can type the name with or without a leading forward slash (/). The system requires a leading forward slash to build the system command properly and adds the forward slash if it is missing from the value you type.

Updating Learning Management Mapping Rules

Use the *Update LM Mapping Rules* function to enter configuration information related to building level and employee data during the interface process. This process includes entering information about the creation of a level ID, an employee login name, password, email address, department, and required and optional fields.

You can also call a custom program instead of using the standard mapping rules.

Use the *Display Learning Management Mapping Rules* function to view the rules for an employer. Use the *List LM Mapping Rules* function to print Learning Management mapping rule information.

Note: You must define all of the mapping rules for an employer before you run the *Extract Data for LM – All* or *Extract Data for LM - Changes* function to extract user data for the integration files. These functions generate an error message and immediately end without extracting data if one or more mapping rules are undefined.

To select the category of data for which to update the mapping rules:

1. From the Infinium HR main menu select *System Operations.*
2. Select *Learning Management Operations.*
3. Select *Update LM Mapping Rules* [ULMMR]. The system displays the Update LM Mapping Rules prompt screen.
4. Specify the employer and press Enter. The system displays the screen similar to the screen below.

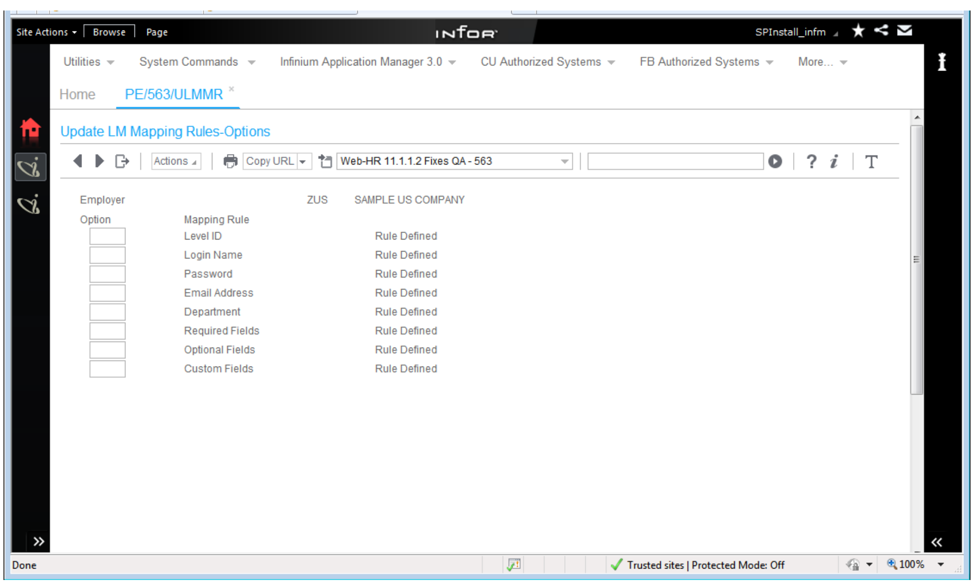


Figure 16-2: Update LM Mapping Rules - Options screen

5 Type **2** in the *Opt* field to select each category to update.

6 After you select a category and press Enter, the system displays the mapping rule screen for the first category you selected.

Level ID Mapping

Use this screen to specify the fields and the separation character to use to build a unique level ID from the following information that you can export to Learning Management:

- Employer
- Levels 1-4

The recommended unique key in Infinium HCM is the employer and all four levels.

This mapping rule is used when building both the extraction file for levels and the extraction file for users.

You can also call a custom program instead of using the standard mapping fields.

To update the mapping rules for the level ID:

1 Type **2** in the *Opt* field next to Level ID on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules - Build Level ID screen similar to the screen below.

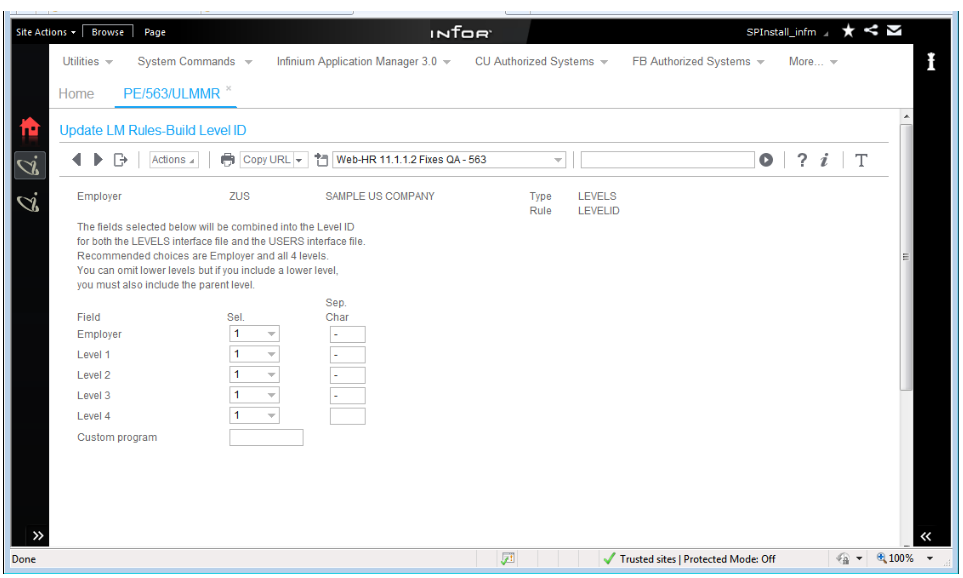


Figure 16-3: Update LM Rules - Build Level ID screen

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

Sel

Specify how to complete the associated optional field. Valid values are:

0	Omit this field when sending interface data to Learning Management.
1	Include the value specified as the default.
2	Use a custom program to provide the appropriate value.

Sep Char

If you type a value in the *Sel* field and you want to add a separator character after the characters in a field, type a separator character. Leave this field blank if you do not want to separate this value from the next one.

Custom Program

Type the name of a custom program to use if the system mapping rule does not produce the necessary *Level ID* value. The system calls the custom program and uses the returned value for each field where a custom value was selected.

Login Name Mapping

Use this screen to specify that the system uses the existing user ID from SHCM as the *Login Name* or to specify a sequence number, the range within the sequence number to use, and the separation character that the system used to build a login name.

The following information can be referenced when exporting user information to Learning Management:

- *Employer*
- *Employee*
- *Clock*
- *Tax ID*
- *Levels 1 through 4*
- *First Name*
- *Last Name*

For example, the system uses the sequence number, the associated *From* and *To* values and the value in the associated *Sep. Char* field to build the login name. If you specify the values in the table below for each specified item of data, the system builds the login name in the format of firstname.lastname.last4ssn.

Field	Sequence value	From value	To value	Separator character value
First Name	1	1	18	.
Last Name	2	1	18	.
Tax ID	3	6	9	blank

The login name for an employee named Jane Smith with a tax ID of 123456789 is **JANE.SMITH.6789**.

To update the mapping rules for the login name:

1 Type **2** in the *Opt* field next to Login Name on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules - Build Login Name screen similar to the screen below.

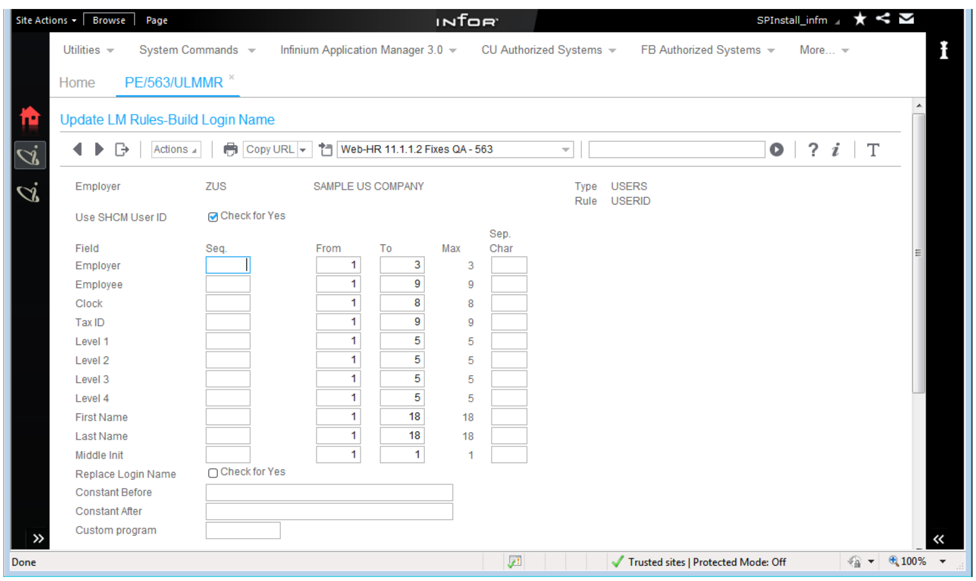


Figure 16-4: Update LM Rules - Build Login Name screen

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

Use SHCM User ID

Specify whether the *User ID* field for an employee in the Self Service (SHCM) system should be used as the *Login Name* for the Learning Management system each time you generate an interface record for an employee.

If you do not use the SHCM user ID, the system generates a new *Login Name* value based on the mapping rules when a record is not found in the Web/Interface file, PRPWA, or when a record is found but the LM *Login Name* field is blank. Valid values are:

0	No, do not use the SHCM user ID as the LM login name.
1	Yes, use the SHCM user ID as the LM login name. This can be selected only when Self Service is installed and is active for the employer.

Seq

Type a valid sequence number to include the field when the system builds the login name value to send to Learning Management.

From

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Sep Char

If you type a value in the *Seq* field and you want to add a separator character after the characters in a field, type a separator character. Leave this field blank if you do not want to separate this value from the next one.

Replace User ID?

Specify whether to replace the value in the Learning Management *Login Name* field each time you generate an interface record for an employee.

If you do not replace the login name each time you generate an employee interface record, the system generates a new login name value based on the mapping rules only when a record is not found in the Web Interface file, PRPWA, or when a record is found and the Learning Management *Login Name* field is blank.

Valid values are:

0	Do not replace the Learning Management login name if you already generated it.
1	Always replace the Learning Management login name value.

Note: You must specify **0** if you are using the SHCM user ID for the login name.

Constant Before

If applicable, type a value that the system inserts at the start of the *Login Name* field for every employee. Leave this field blank if you do not use standard beginning characters.

Constant After

If applicable, type a value that the system adds at the end of the *Login Name* field for every employee. Leave this field blank if you do not use standard ending characters.

Custom Program

Type the name of a custom program to use if the system mapping rules do not produce the necessary *Login Name* value. The system calls the custom program and uses the returned value as the login name.

A sample custom program, PRGLMCU1, is provided to use as a model for your custom programs.

3 Press Enter.

Password Mapping

Use this screen to specify a sequence number and the range within the sequence number to use to build passwords from the following information to export to Learning Management:

- *Employer*
- *Employee*
- *Clock*
- *Tax ID*
- *Levels 1 through 4*
- *First Name*
- *Last Name*

- *Middle Init*

The system uses the sequence number and the associated *From* and *To* values to build the password. For example, if you type **1** as the sequence for *First Name* and a *From* value of **1** and a *To* value of **1**, type **2** as the sequence for *Last Name,* and type **3** as the sequence for *Tax ID* with a *From* value of **6** and a *To* value of **9**, the system combines the values for an employee named Susan Smith, Tax ID 123456789, into the password **SSMITH6789**.

You can also call a custom program instead of using the standard mapping rules.

Note: The password is limited to 15 characters by Learning Management.

To update the mapping rules for the password:

1 Type **2** in the *Opt* field next to Password on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules - Build Password screen similar to the screen below.

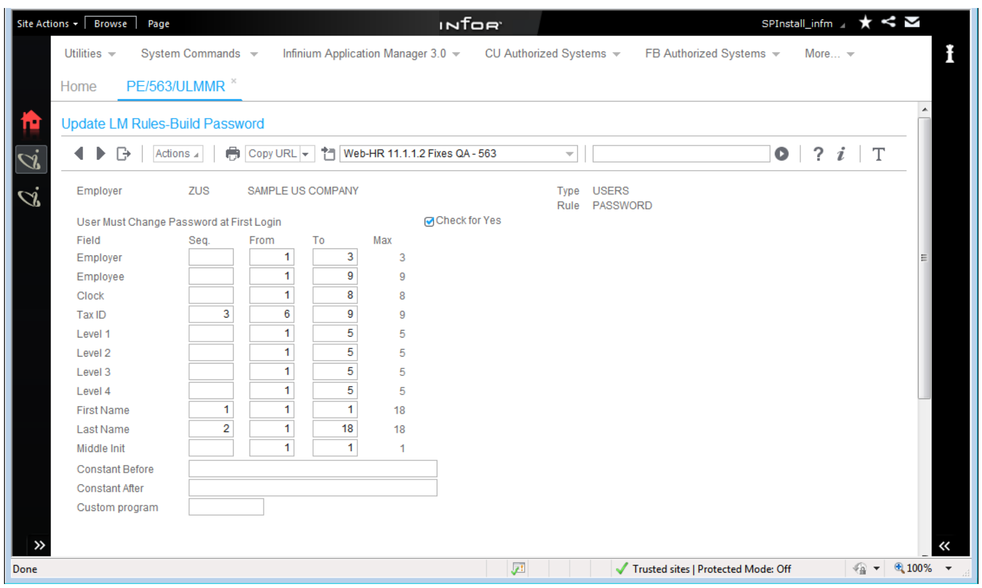


Figure 16-5: Update LM Rules - Build Password screen

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

User Must Change Password at First Login

Specify whether the user is forced to change the password when the user logs in for the first time on the Learning Management system. Valid values are:

0	No, do not force new users to change their password at first login.
1	Yes, force new users to change their password at first login.

Seq

Type a valid sequence number to include this field when the system builds the password value to send to Learning Management.

From

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in the field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Constant Before

If applicable, type a value that the system inserts at the start of the *Password* field for every employee. Leave this field blank if you do not use standard beginning characters.

Constant After

If applicable, type a value that the system adds at the end of the *Password* field for every employee. Leave this field blank if you do not use standard ending characters.

Custom program

Type the name of a custom program if the system mapping rules do not produce the necessary password value. The system calls the custom program and uses the value returned as the password.

A sample custom program, PRGLMCU1, is provided to use as a model for your custom programs.

3 Press Enter.

Email Address Mapping

Use this screen to specify a sequence number, the range within the sequence number to use, the maximum number of characters, and the separation character for the following information that you can export to Learning Management:

- *First Name*
- *Last Name*
- *Middle Init*

The system uses the sequence number, the value in the associated *From* and *To* fields, and the value in the associated *Sep. Char* field to build the email address. You can also add standard text to the address. For example, if you specify the values in the table below, the system builds the email address in the format of firstname.lastnameCONSTANTAFTER.

Data	Sequence	Separator character value
First Name	1	.
Last Name	2	
Constant After	@TESTMAIL.COM	

The email address for an employee named Jane Smith is **JANE.SMITH@TESTMAIL.COM**.

You can also call a custom program instead of using the standard mapping rules.

To update the mapping rules for the email address:

1. Type **2** in the *Opt* field next to Email Address on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules - Email Address screen similar to the screen below.

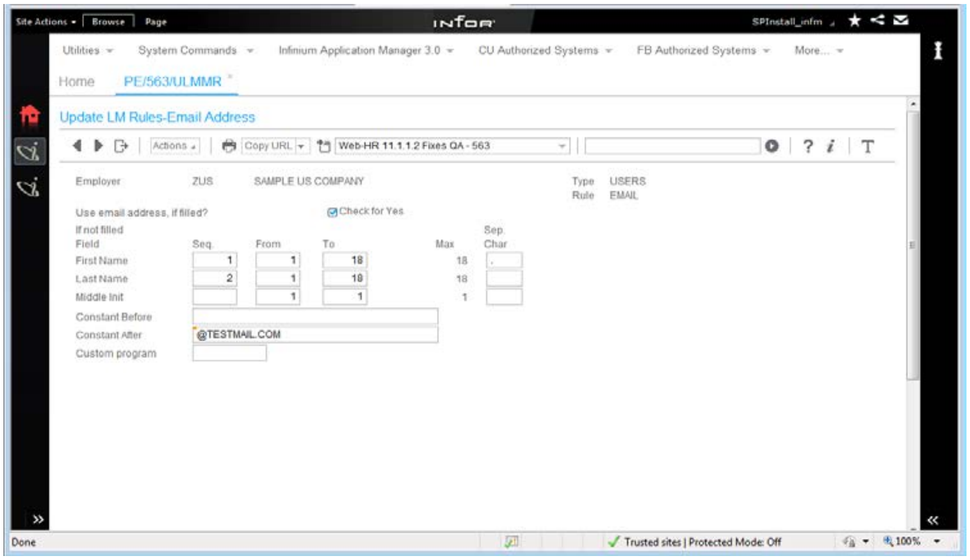


Figure 16-6: Update LM Rules-Email Address screen

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

Use email address, if filled?

Specify whether to use the email address from the Infinium system. Valid values are:

0	No, do not use the Infinium email address value. Always apply mapping rules and build the address.
1	Yes, use the value in the *Email address #1* field on the employee basic data screen if a value exists. If the field is blank, apply the mapping rules and build an address.

Seq

Type a valid sequence number to include this field when the system builds the email address value to send to Learning Management.

From

If you type value in the *Seq* field and you do not want to include all of the characters in field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Sep Char

If you type a value in the *Seq* field and you want to add a separator character after the characters in a field, type a separator character. Leave this field blank if you do not want to separate this value from the next one.

Constant Before

If applicable, type a value that the system inserts at the start of the *Email address* field for every employee. Leave this field blank if you do not use standard beginning characters.

Constant After

If applicable, type a value that the system adds at the end of the *Email address* field for every employee. Leave this field blank if you do not use standard ending characters.

Custom program

Type the name of a custom program if the system mapping rules do not produce the necessary *Email address* value. The system calls the custom program and uses the returned value as the email address.

A sample custom program, PRGLMCU1, is provided to use as a model for your custom programs.

3 Press Enter.

Department Mapping

Use this screen to specify a sequence number and the range within the sequence number to use to build the department from the following information that you can export to Learning Management:

- Level 1
- Level 2
- Level 3
- Level 4
- Location

The system uses the sequence number and the associated *From* and *To* values to build the department number. If you specify the values in the table below for each specified item of data, the system builds the department in the format of 1st3ofLEVEL1LEVEL4.

Data	Sequence value	From value	To value
(Level 1) ADMIN	1	1	3
(Level 4) 123	2	1	5

The department number for an employee with a level one value of ADMIN and level four value of 123 is **ADM123**.

You can also call a custom program instead of using the standard mapping rules.

To update the mapping rules for the department number:

1 Type **2** in the *Opt* field next to Department on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules - Build Department screen similar to the screen below.

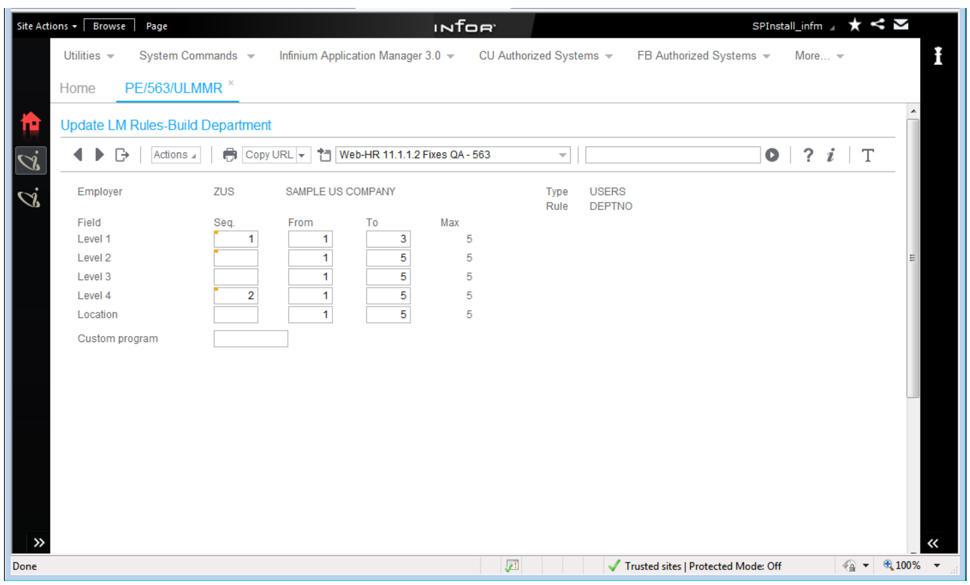


Figure 16-7: Update LM Rules - Build Department screen

2 Complete the steps below to update the mapping rules for the department.

Seq

Type a valid sequence number to include this field when the system builds the department value to send to Learning Management.

From

If you type a value in the *Seq* field and you do not want to include all of the characters in field, type a valid starting position.

To

If you type a value in the *Seq* field and you do not want to include all of the characters in field, type a valid ending position.

Max

This is the maximum number of characters you can use in this field.

Custom Program

Type the name of a custom program if the system mapping rules do not produce the necessary department value. The system calls the custom program and uses the returned value as the department value.

A sample custom program, PRGLMCU1, is provided to use as a model for your custom programs.

3 Press Enter.

Required Fields Mapping

Use this screen to specify the source of the default value in the required fields. Infinium supplies the field that provides the default value for the following fields.

- *First Name*
- *Last Name*
- *Active* flag, based on the value in the *Termination code* field
- *Inactive Date*, the LM leaving date is based on the employee termination date

You can also call a custom program instead of using the standard mapping rules.

To update the mapping rules for required fields:

1 Type **2** in the *Opt* field next to Required Fields on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules - Required Fields screen similar to the screen below.

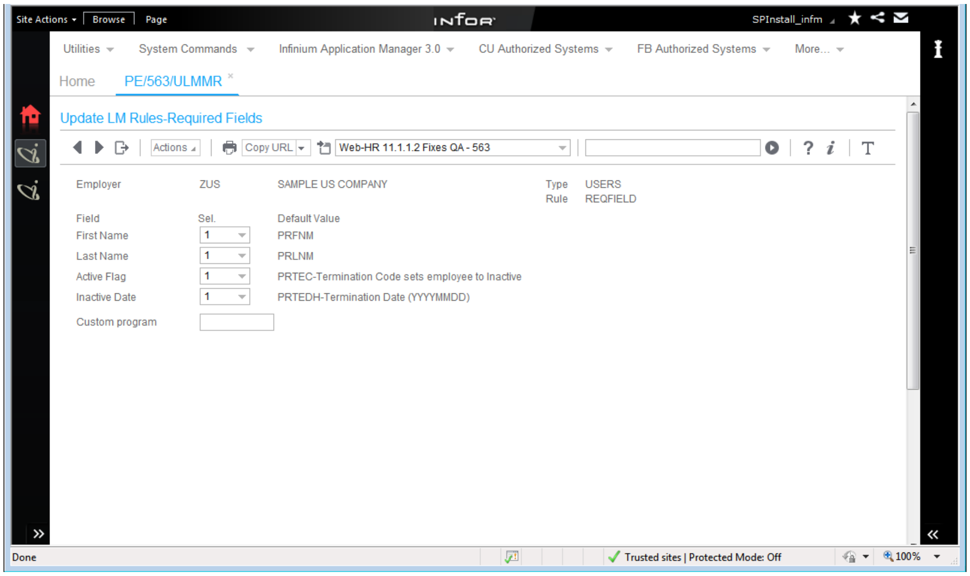


Figure 16-8: Update LM Rules - Required Fields screen

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

Sel

Specify how to complete the associated required field. Valid values are:

1	Use the values specified on this screen as the default.
2	Use a custom program to provide the appropriate value.

Default Value

The system displays the default value for the associated field.

Custom program

Type the name of a custom program if the system mapping rules do not produce the necessary value for one or more of the required fields. The system calls the custom program and uses the value returned as the required field value.

A sample custom program, PRGLMCU1, is provided to use as a model for your custom programs.

3 Press Enter.

Optional Fields Mapping

Use this screen to specify the source of the default value in the fields below. The system displays the field name where the default value is stored.

- *Address Line 1*
- *Address Line 2*
- *City*
- *State/Province*
- *Postal Code*
- *County*
- *Country*
- *Title*
- *Date of Hire*
- *Date of Birth*
- *Home Phone*
- *Phone*
- *Fax*
- *Manager ID*
- *UI Language ID*
- *Region Language ID*
- *Education*
- *Gender*

You can also call a custom program instead of using the standard mapping rules.

To update the mapping rules for the optional fields:

1. Type **2** in the *Opt* field next to Optional Fields on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules - Optional Fields screen similar to the screen below.

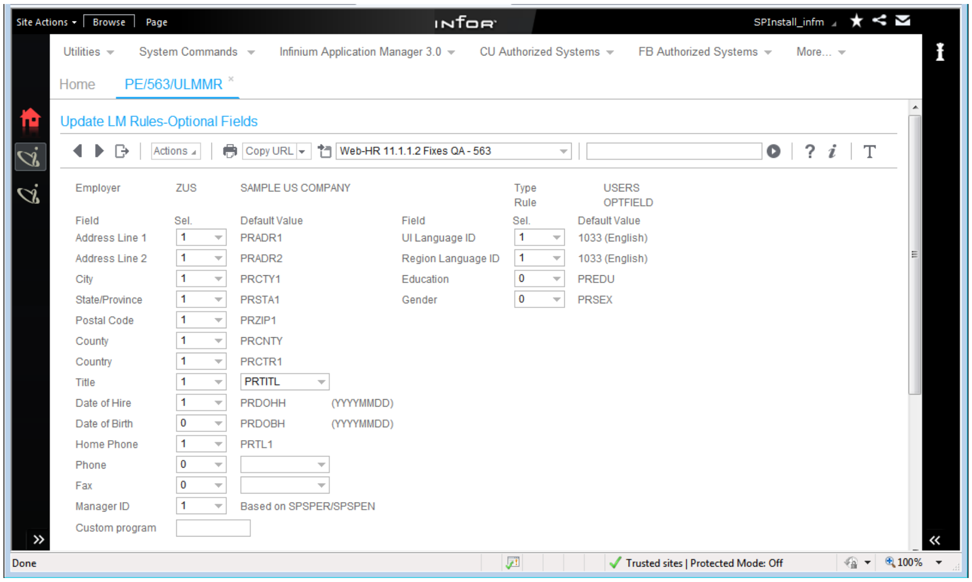


Figure 16-9: Update LM Rules - Optional Fields screen

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

Sel

Specify how to complete the associated optional field. Valid values are:

0	Omit this field when sending interface data to Learning Management.
1	Use the values specified on this screen as the default.
2	Use a custom program to provide the appropriate value.

Default value

Infinium HR provides the default value for the following fields:

- *Address Line 1*
- *Address Line 2*
- *City*
- *State/Province*
- *Postal Code*
- *County*
- *Country*
- *Date of Hire*

- *Date of Birth*
- *Home Phone*
- *Manager ID*
- *UI Language ID*
- *Region Language ID*
- *Education*
- *Gender*

Infinium does not supply standard values for the following fields, but the user can select from a list of system choices or can use a custom program to supply values, if needed:

- *Title*
- *Phone*
- *Fax*

For *Title,* specify the default value. Valid values are:

Blank	Do not provide a default value.
PRTITL	Use the value in the *Position Title* field on the employee basic data record.
PRJOB1	Use the value from the *Job Code 1* field on the employee basic data record.
PRPOS	Use the value in the *Position* field on the employee basic data record.

For *Phone* and *Fax,* specify the default value. Valid values are:

Blank	Do not provide a default value.
PROFFN	Use the value in the *Office Tel. No.* field on the employee basic data record.
PRTL2	Use the value in the *Misc Phone #2* field on the employee basic data record.
PRTL3	Use the value in the *Misc Phone #3* field on the employee basic data record.
PRTL4	Use the value in the *Misc Phone #1* field on the employee basic data record.

Custom program

Type the name of a custom program if the system mapping rules do not produce the necessary value for one or more of the optional fields. The system calls the custom program and uses the value returned as the optional field value.

A sample custom program, PRGLMCU1, is provided to use as a model for your custom programs.

3 Press Enter.

Custom Fields Mapping

Use this screen to specify whether to include values for the custom fields provided by Learning Management.

To update the mapping rules for the custom fields:

1 Type **2** in the *Opt* field next to Custom Fields on the Update LM Mapping Rules Options screen. The system displays the Update LM Rules – Custom Fields screen similar to the screen below.

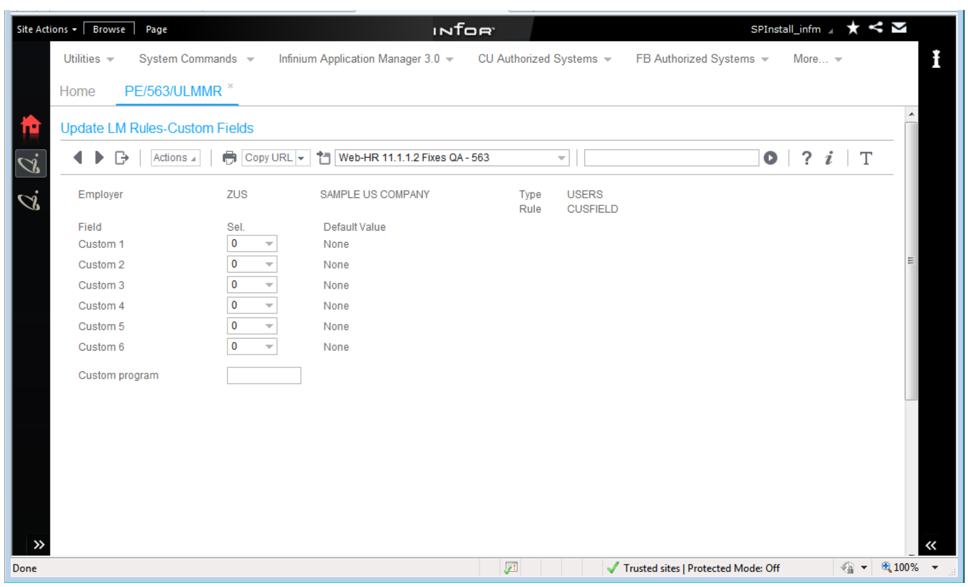


Figure 16-10: Update LM Rules – Custom Fields screen

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

Sel

Specify how to complete the associated required field. Valid values are:

0	Omit this field when sending interface data to Learning Management.
2	Use a custom program to provide the appropriate value.

Default Value

The system displays the default value for the associated field.

Custom program

Type the name of a custom program if the system mapping rules do not produce the necessary value for one or more of the required fields. The system calls the custom program and uses the value returned as the optional field value.

A sample custom program, PRGLMCU1, is provided to use as a model for your custom programs.

3 Press Enter.

Processing Infinium HR with Learning Management

This section discusses extracting Infinium HR information and preparing it for Learning Management.

Extracting all Infinium HR information

Use the *Extract Data for LM - All* function to extract all applicable information for Learning Management to a specified file that you can later import into Learning Management.

You can run this extract to capture your organizational level information or your employee/user information.

You specify the employer, file name, format of the data, type of record, and whether to include terminated employees.

When you initially activate the interface, you must run this function once for LEVELS and once for USERS so that all data is sent to the Learning Management system.

After you load this initial data, you must run this function only when you add new organization levels to the level controls, or when you want to do a mass refresh of the employee user data.

To extract all data for Learning Management:

1. From the Infinium HR main menu select *System Operations.*
2. Select *Learning Management Operations*.
3. Select *Extract Data for LM - All* [EDLM1]. The system displays the Extract Data for LM - All screen similar to the screen below.

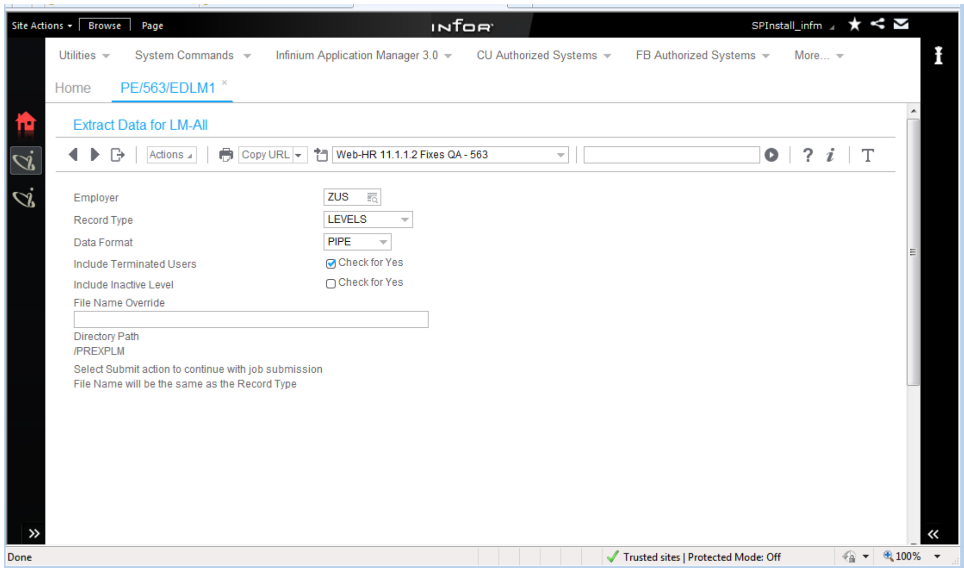


Figure 16-11: Extract Data for LM - All screen

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

Employer

Specify the employer whose data you are extracting.

Record Type

Type the value that indicates the kind of information written to the interface file for Learning Management. Valid values are:

USERS	Include user (employee) information.
LEVELS	Include level information.

If you leave the *File Name Override* field blank, the system creates an interface file with the same name as the *Record Type*.

Data Format

Type **PIPE** to create a file as a pipe delimited (|) text file for the interface file to Learning Management.

The system appends the file suffix associated with the data format value to the *File Name Override* value when it creates the full file name. For example, if you type **MYTEST** as the file name override and **PIPE** as the data format, the system creates the full file name as MYTEST.txt.

Include Terminated Users

Specify whether terminated employees are included in the file when you run the extraction when the *Record Type* value is **USERS**. Valid values:

0	No, do not include terminated employees.
1	Yes, include terminated employees.

Include Inactive Level

Specify whether inactive levels are included in the file when you run the extraction when the *Record Type* value is **LEVELS**. Valid values are:

0	No, do not include inactive levels.
1	Yes, include inactive levels.

Note: Employees who are assigned to inactive levels are always extracted when you run the extraction where the *Record Type* value is **USERS**, but a warning message is printed on the listing.

File name Override

Specify an override file name for the interface file to Learning Management, when needed.

Leave blank to create a file with the same name as the *Record Type*.

You can use any alphanumeric combination to create your override file name. The system appends the file suffix associated with the *Data Format* value to the file name you enter when it creates the full file name. For example, if you type **MYTEST** as the file name and **PIPE** as the data format, the system creates the full file name as MYTEST.txt.

If the file is not found in the applicable directory, the system creates it.

If the file is found, the system replaces it.

Directory Path

This is the path where the file you are creating is stored.

5 Press F16 to submit the job and return to the main menu.

Activating the Learning Management Trigger

Use the *Activate LM Trigger* function to activate the trigger program that records changes to the HR system for use with Learning Management.

To activate the Learning Management trigger:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Learning Management Operations*.

3 Select *Activate LM Trigger* [ALMT]. The system displays the Activate LM Trigger screen with a message indicating whether the triggers are inactive or active, similar to the screen below.

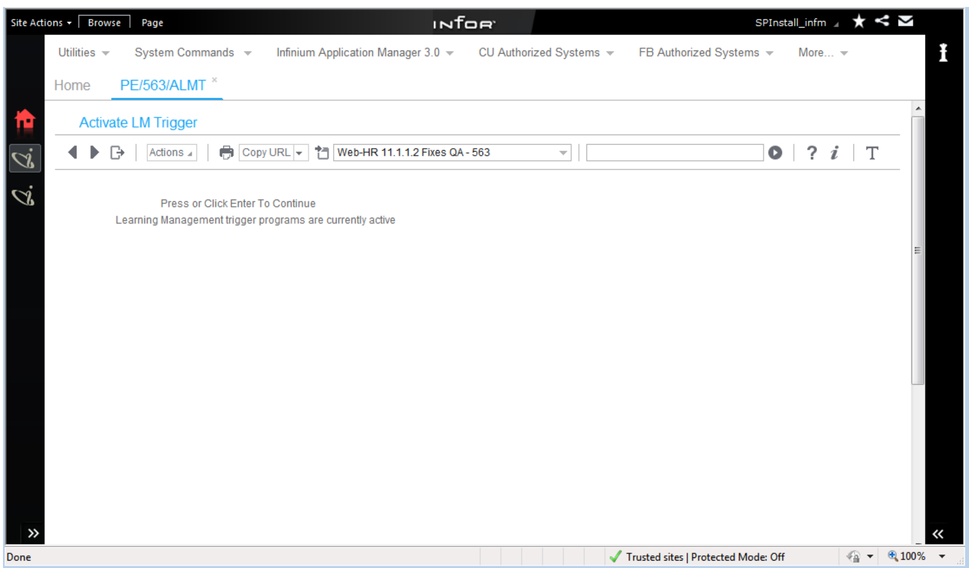


Figure 16-12: Activate LM Trigger screen

4 Press Enter to activate the trigger program if they are inactive.

5 Press Exit to return to the main menu.

Extracting Changed Infinium HR information

Use the *Extract Data for LM - Changes* function to create an interface file that contains changes that occur after the last time the function is run. Run this function regularly, such as daily, weekly, and so on. Records that are included are marked as processed so that they are not included the next time you run this function. You specify the employer, file name, format of the data, and the type of record.

To extract changes to data for Learning Management:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Learning Management Operations*.

3 Select *Extract Data for LM - Changes* [EDLM2]. The system displays the Extract Data for LM - Changes screen similar to the screen below.

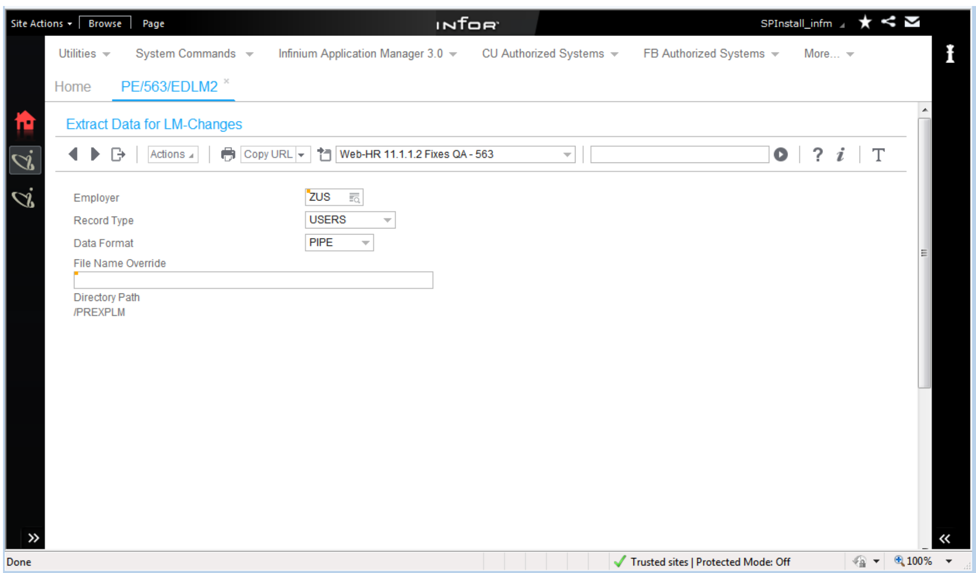


Figure 16-13: Extract Data for LM - Changes screen

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

Employer

Specify the employer whose data you are extracting.

Record Type

Type **USERS**, include user (employee) information, to indicate the kind of information to write to the interface file for Learning Management.

If you leave the *File Name Override* field blank, the system creates an interface file with the same name as the *Record Type*.

Data Format

Type **PIPE** to create a file as a pipe delimited (|) text file for the interface file to Learning Management.

The system appends the file suffix associated with the data format value to the *File Name Override* value when it creates the full file name. For example, if you type **MYTEST** as the file name and **PIPE** as the data format, the system creates the full file name as MYTEST.txt.

File Name Override

Specify an override file name for the interface file to Learning Management, when needed.

Leave blank to create a file with the same name as the *Record Type*.

You can use any alphanumeric combination to create your override file name. The system appends the file suffix associated with the *Data Format* value to the file name you enter when it creates the full file name. For example, if you type **MYTEST** as the file name and **PIPE** as the data format, the system creates the full file name as MYTEST.txt.

If the file is not found in the applicable directory, the system creates it.

If the file is found, the system replaces it.

Directory Path

This is the path where the file you are creating is stored.

5 Press F16 to submit the job and return to the main menu.

Updating the LM Login Name

If your mapping rule is configured to build the login name, use the *Update LM Login Name* function to change or delete the *Login Name* value the system stores when you use the *Extract Data for LM* functions.

If you delete the login name or erase the existing value, the next extraction of changes builds a new login name based on the mapping rules, sends the new login name to Learning Management, and stores it in the Infinium Employee Master Web/Interface File (PRPWA).

If your mapping rule is configured to use the SHCM user ID as the login name, any changes you make with this function are ignored.

You can also use the *Display LM Login Name* function to display login name information for a specified employer and employee. Use the *List LM Login Name* function to generate a list of login name information for a specified employer.

To make changes to the login name for Learning Management:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Learning Management Operations*.

3 Select *Update LM Login Name* [ULMLN]. The system displays the Update LM Login Name - Select screen similar to the screen below.

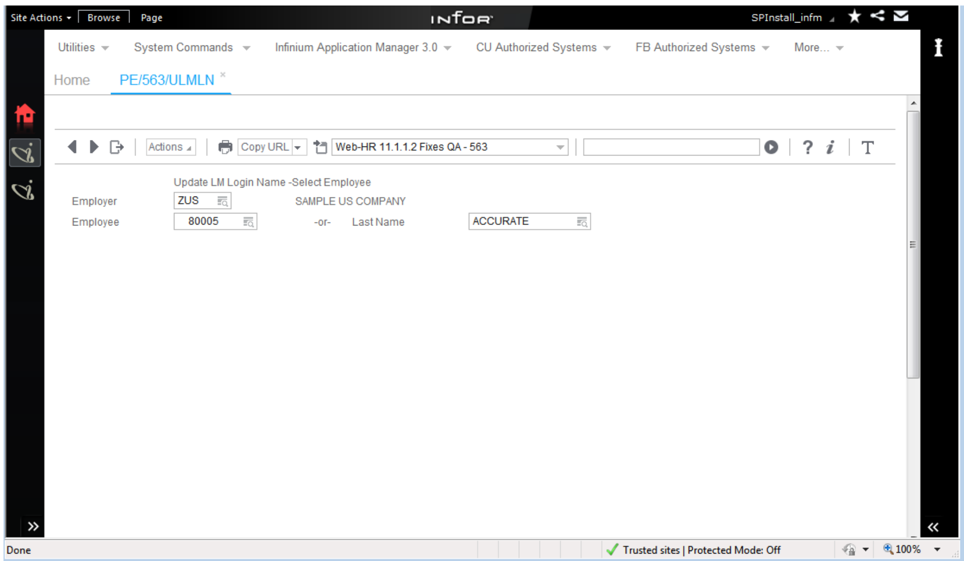


Figure 16-14: Update LM Login Name - Select EE screen

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

Employer

Specify the employer for whom you are updating information.

Employee

Specify the employee whose information you are updating, or leave this field blank, specify the employee's last name in the *Last Name* field, and prompt to view a list of all employees by last name.

Last Name

Type some or all of the employee's last name and prompt to view a list of employees by last name. You can select the employee from this list, and the system completes the *Employee* field on this screen.

5 Press Enter. The system displays the Update LM Login Name screen similar to the screen below.

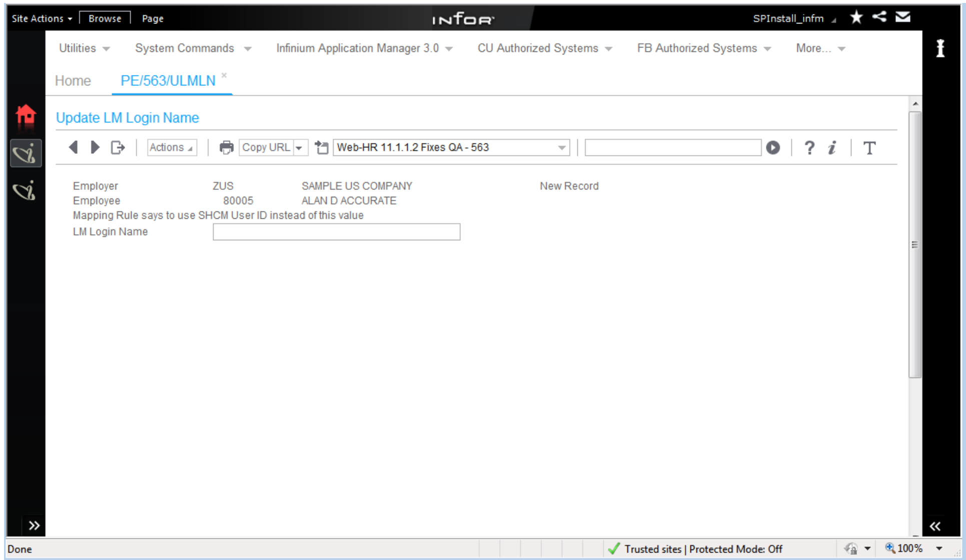


Figure 16-15: Update LM Login Name screen

6 Use the information below to complete this screen.

LM Login Name

Specify the *Login Name* value to send to Learning Management for this employee when you send changes to the Learning Management file. If you leave this field blank, then if a record does not exist for the employee, or if the mapping rule for the login name specifies to always replace the value, the system builds a login name value from the mapping rules and stores that value in the file that contains the employee information you extract to Learning Management.

If the mapping for the login name does not specify replacement and a value exists in this field, the system uses this value as the login name for the employee when you send changes to Learning Management.

If you previously sent data to Learning Management for an employee, and you want to force the system to send a new value as the login name, type the new value here.

If your mapping rule is configured to use the SHCM user ID as the login name, any changes you make with this function are ignored. You must use the *Maintain Web Security File* within SHCM to view or change the employee information.

7 Press Enter. The system updates the information.

Resetting Learning Management Audit Data

Use the *Reset Learning Management Audit Data* function to reset records in the Learning Management audit file so that you can regenerate an interface file for Learning Management. Use this function when you extract changed data and you encounter problems during the import process, which requires that you resubmit the data. The system resets records in the audit file that were created for the interface to LM so that you can extract them again.

To reset audit data:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Learning Management Operations*.

3 Select *Reset LM Audit Data* [RLMAD]. The system displays the Reset LM Audit Data screen similar to the screen below.

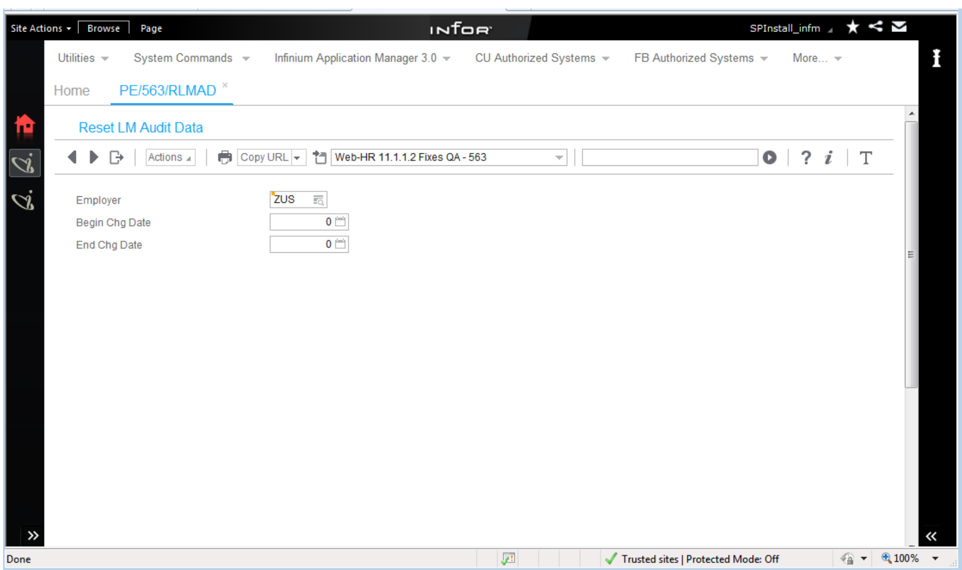


Figure 16-16: Reset LM Audit Data screen

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

Employer

Specify the employer whose Learning Management information you want to reset.

Begin Chg Data

Specify the first date in the range of dates to reset information.

End Chg Data

Specify the last date in the range of dates to reset information.

5 Press F16 to submit the job and return to the menu.

Deactivating the Learning Management Triggers

Use the *Deactivate LM Trigger* function to deactivate the audit trigger processing. Use this function during software upgrades or other related activities.

To deactivate the Learning Management trigger program:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Learning Management Operations*.

3 Select *Deactivate LM Trigger* [DLMT]. The system displays the Deactivate LM Trigger screen similar to the screen below.

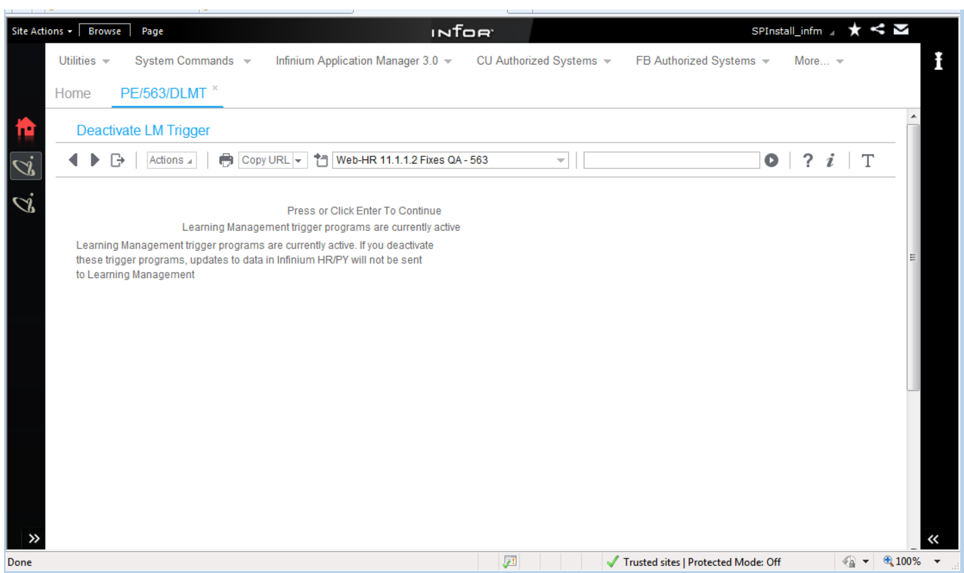


Figure 16-17: Deactivate LM Trigger screen

4 Press Enter. The system deactivates the trigger programs and returns to the main menu.

Purging Learning Management Audit Data

Caution: The system requires exclusive use of the audit file to reorganize it. Reorganize the file when no users are using HCM functions.

Use the *Purge LM Audit Data* function to purge audit information if the extract/import process is successful and you no longer require the audit data.

To purge audit information:

1 From the Infinium HR main menu select *System Operations.*

2 Select *Learning Management Operations*.

3 Select *Purge LM Audit Data* [PLMAD]. The system displays the Purge LM Audit Data screen similar to the screen below.

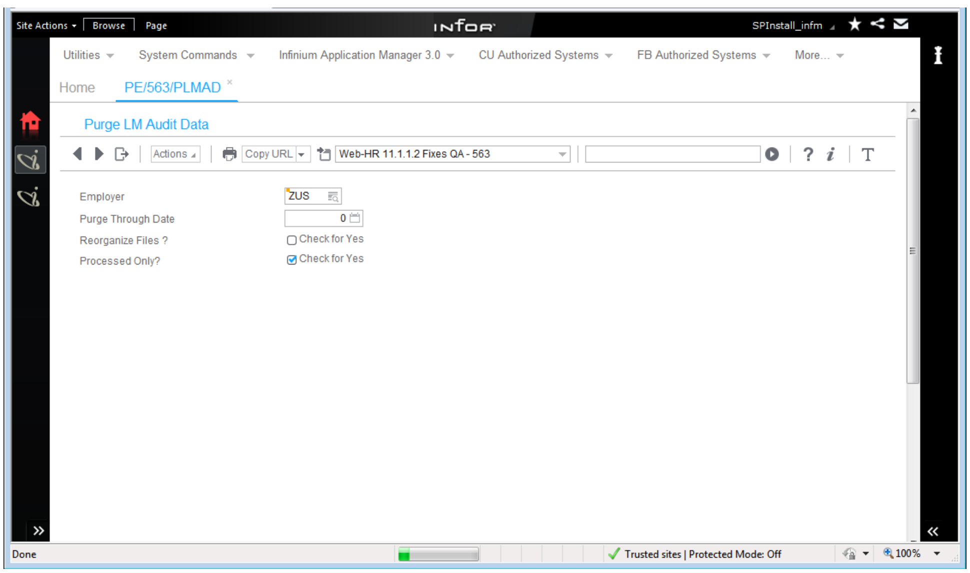


Figure 16-18: Purge LM Audit Data screen

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

Employer

Specify the employer whose Learning Management information you want to purge.

Purge Through Date

Specify the date through which to purge the audit file.

Reorganize Files?

Specify whether the system reorganizes the audit file, PRPMSLM, after the purge of records is complete. Valid values:

0	Do not reorganize the file after records are deleted.
1	Reorganize the file after records are deleted.

Reorganizing the file recovers disk space by removing the space that was occupied by the purged records.

Processed Only?

Specify whether to purge all records or only records that were marked as processed and sent to Learning Management. Valid value are:

0	Purge all records that meet the selection criteria.
1	Purge only processed records that were sent to Learning Management that meet the selection criteria.

5 Press F16 to submit the job and return to the menu.

Adding Learning Management Menu Options

Multiple menu options are provided to support the interface to Learning Management processing:

Menu option	Job control
*Learning Management Operations	LMSOPER
Extract Data for LM-Changes	LMSEXT2
Extract Data for LM-All	LMSEXT1
Display LM Extract Files	DSPIFSLM
Reset LM Audit Data	LMSRESET
Purge LM Audit Data	LMSPURG
Activate LM Trigger	ACTLMSTRG
Deactivate LM Trigger	DEALMSTRG
Update LM Default Data	LMSUDFT
Display LM Default Data	LMSDDFT
Update LM Mapping Rules	LMSUMAP
Display LM Mapping Rules	LMSDMAP
List LM Mapping Rules	LMSLMAP
Update LM Login Name	LMSUPDUSER
Display LM Login Name	LMSDSPUSER
List LM Login Name	LMSLSTUSER

If these menu options are not already on your menus, complete these steps to add the new functions to the system and version menus of Infinium PE.

1. Sign on to AM2000. Use the **AM2000** user ID.
2. Select *Systems and Versions* from the Infinium Application Manager main menu. The system displays the first System Version Maintenance screen.
3. Type **5** in the *Opt* field next to PE and press Enter. The system displays the System Definition Maintenance screen.
4. To add these menu options to the PE System menu, press F11.

5 To add these menu options to a PE version menu, press F7 to display a list of versions and type **8** in the *Opt* field next to the required version.

The system displays the Menu Control Maintenance screen.

6 Type **5** in the *Opt* field next to the menu line for *System Operations* and press Enter.

7 Type **5** in the *Opt* field next to the menu line for *Trigger Functions* and press Enter.

8 On the top line, type **BLANK** in the Job Name column and press Enter. This adds a blank line to the end of the *Trigger Functions* menu.

9 On the top line, type **ACTLMSTRG** in the Job Name column and press Enter. This adds the *Activate LM Trigger* menu option to the end of the *Trigger Functions* menu.

10 On the top line, type **DEALMSTRG** in the Job Name column and press Enter. This adds the *Deactivate LM Trigger* menu option to the end of the *Trigger Functions* menu.

11 When you finish adding the new menu options, press F3 to go back a menu level.

12 On the top line, type a value in the Seq column that is after the sequence value assigned to **Trigger Functions* and before the sequence value assigned to **Talent Management Operations,* type **LMSOPER** in the Job Name column, and press Enter. This adds a line for menu option **Learning Management Operations* to the end of the *System Operations* menu. Press F5 to resequence the menu.

13 Type **5** in the *Opt* field next to the menu line for ** Learning Management Operations* and press Enter.

14 On the top line, type **LMSEXT2** in the Job Name column and press Enter. This adds the *Extract Data for LM-Changes* menu option to the ** Learning Management Operations* menu. Repeat this step for each of the remaining job controls listed above.

15 You should insert a blank line for readability after each of these job controls:

- DSPIFSLM
- LMSPURG
- DEALMSTRG
- LMSDDFT

- LMSLMAP

16 When you finish adding the new menu options, press F3 until the system displays the Exit Operations Confirmation window. Type **1** on the Exit Options Confirmation window and press Enter to exit and save your changes.

Refer to the *Infinium Guide to Application Manager* for additional information on how to add or modify system, version and user menus.

Setting up Security

The data that you extract for Learning Management is written to files in the PREXPLM directory on the Integrated File System (IFS) of the IBM i, owned by S2KOBJOWNR.

To share access to the integration directory and the integration files between the HCM user profiles that create the data files and the user profile that Learning Management uses to sign on to your system and import the data, you must do the following:

- Use CRTUSRPRF to create a primary group profile, such as LMSECGROUP.
- Use CRTUSRPRF to create the user profile that Learning Management uses to sign on to your system and import the data, and assign the *Primary Group* value as the group profile.
- Use CHGUSRPRF to assign the *Primary Group* value as a group profile or the *Supplemental Group* value for the Learning Management user profile and all HCM user profiles that run the functions to extract the integration data.
- Use the WRKAUT command or Operations Manager to assign the primary group to the PREXPLM directory.

To perform these steps:

1 Sign on as QSECOFR or as a user with security administrator authority.

2 Type the appropriate commands to create a primary group profile for sharing security access, such as LMSECGROUP, and a user profile for Learning Management, such as LMUSER:

- To create a Primary Group profile for sharing security access, type:

  CRTUSRPRF USRPRF(yourLMSECGROUP)
  PASSWORD(password)
  INLPGM(*NONE)

INLMNU(*SIGNOFF
LMTCPB(*YES)
SPCAUT(*NONE)
GRPPRF(*NONE)
TEXT('PRIMARY GROUP ACCESS TO LM IFS FILES AND FOLDERS')

- To create the Learning Management user profile, type:

  CRTUSRPRF USRPRF(yourLMUSER) PASSWORD(password)
  INLPGM(*NONE)
  INLMNU(*SIGNOFF)
  LMTCPB(*YES)
  SPCAUT(*NONE)
  GRPPRF(yourLMSECGROUP)
  OWNER(*GRPPRF)
  TEXT('LM user profile name')

3 Use CHGUSRPRF to assign the *Primary Group* name value as a group profile or the *Supplemental Group* value for all the HCM user profiles that run the functions to extract the Learning Management integration data.

4 Use the WRKAUT command and press F20 to assign the primary group, or use Operations Manager to assign the primary group to the PREXPLM directory.

   For additional technical information, refer to these chapters and appendices in the *Human Resources/Payroll Technical Guide*:

- "File Management" chapter
- "Customizing and Interface Considerations" chapter

  This chapter describes the mapping between HCM fields and the fields in Learning Management.

- "Working with Documents on the Integrated File System" chapter
- "Database Triggers in Infinium HR/PY" chapter
- "Customizing Considerations" appendix