Infor IHCM Infinium

Human Resources

Guide to Processing

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About This Guide

This section focuses on the following information:

- Intended audience
- Purpose of this guide
- Conventions used in this guide

Intended Audience

The *Infinium Human Resources Guide to Processing* is written for all users of Infinium Human Resources including:

- Those who perform daily data entry and processing
- Human Resources and Payroll managers and line supervisors
- System administrators that provide technical support to Infinium Human Resources users

Purpose of This Guide

The purpose of this guide is to provide you with an in-depth explanation of basic processing concepts in Infinium Human Resources and instruct you on how to perform Infinium Human Resources daily processing tasks. This guide is intended to be used as a textbook during classroom training and as a reference guide after training is complete.

This guide will not teach you about standard Human Resources practices and management concepts. However, it will show you how to use Infinium Human Resources to complete specific personnel processing tasks.

Organisation of This Guide

This guide is task-oriented. Related tasks are grouped into topics. Topics are grouped into chapters. The topics are presented in the order in which the Infinium Human Resources application training course is taught. Each topic contains overview information and step-by-step instructions to lead you through the tasks. Most topics also contain workshop exercises for you to practice what you learn.

The Infinium Human Resources Controls and Processing course covers both control setup and daily processing with Infinium Human Resources. This two day course is presented as a series of lectures and hands-on workshops. This guide contains information on basic processing using Infinium Human Resources.

Information for establishing controls in Infinium Human Resources is not included in this guide. Refer to the *Infinium HR Guide to Controls* for information on how to define and maintain Infinium Human Resources controls.

Conventions Used in This Guide

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

- Prompt and Selection Screens
- Promptable fields
- Infinium applications and abbreviations

Font and Wording Conventions

Convention	Description	Example
Italic typeface	Menu options and field names The guide uses the same abbreviations as the screen.	*Master Files* Use *Max Lnth* to specify the maximum length of alpha user fields.
Bold standard typeface	Used for notes, cautions and warnings	**Caution:** You must ensure that all Infinium PY users are signed off before reorganizing and purging. If there are jobs in the queue, those files will not be reorganized.

Convention	Description	Example
Bold monospaced typeface	Characters that you type and messages that are displayed	Type **Infinium PY** in the *System* field. The following message is displayed: **Company not found**
F2 through F24	Keyboard function keys used to perform a variety of commands.	Press F2 to display a list of available function keys.
F13 through F24	Function keys higher than F12 require you to hold down the Shift key and press the key that has the number you require minus 12.	Press F16 to update the journal.
Select	Choose a menu option or choose a record or field value after prompting.	Select *Employer Controls.* Select a record. From the *List* menu, select *Display*.
Press Enter	Provide information on a screen and when you have finished, press Enter to save your entries and continue.	Press Enter to save your changes and continue.
Exit	Exit a screen or function, usually to return to a prior selection list or menu. May require exiting multiple screens in sequence.	Press F3 to return to the main menu.
Cancel	Cancel the work at the current screen or dialog box, usually to return to the prior screen.	Press F12 to cancel your entries.

Convention	Description	Example
Help	To access online help for the current context (menu option, screen or field), press Help (or the function key mapped for help). To move through the other applicable levels of help, press Enter at each help screen. To return directly to the screen from which you accessed help, exit the help screen by clicking Exit or by pressing F3.	Press Help for more information about the current field.
[Quick Access Code]	Quick access codes provide direct access to functions. Most quick access codes in Infinium Payroll consist of the first letter of each word of the menu option name. Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.	Select *Update Employer Controls* [UCO].
Publication and course titles	Unless otherwise stated, titles refer to Infinium applications and use standard name and abbreviations.	*Infinium Training Administration Guide to Setup and Processing* is referred to as *Infinium TR Guide to Setup and Processing.*

Function Keys

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

Function Key	Name	Description
F1	Help	Displays help text
F2	Function keys	Displays window of valid function keys
F3	Exit	Returns you to the main menu
F4	Prompt	Displays a list of values from which you can select a valid entry
F10	Quick Access	Enables you to access another function from any screen
F12	Cancel	Returns you to the previous screen
F22	Delete	Deletes selected item(s)
F24	More keys	Displays additional function keys at the bottom of the screen

Character-Based and. Graphical-based Screens

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

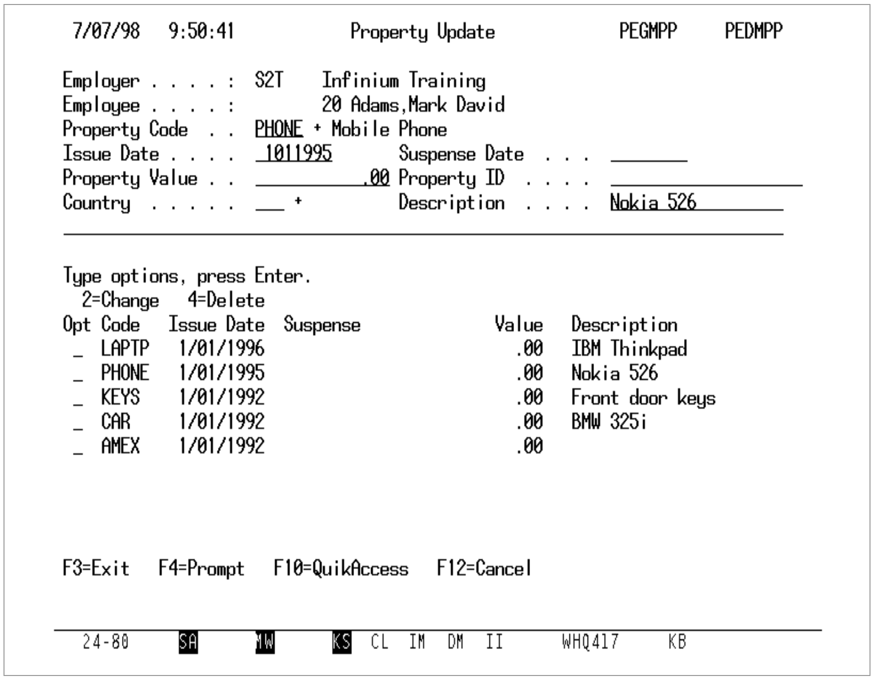


Figure 1: Sample character-based screen

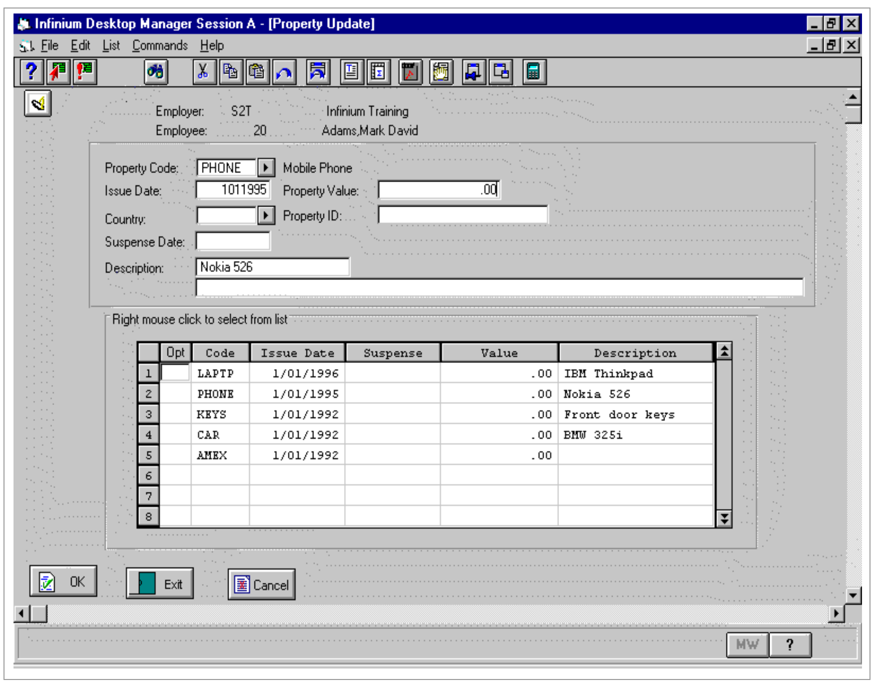


Figure 2: Sample graphical-based screen for Infinium HR suite

Prompt and Selection Screens

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

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

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

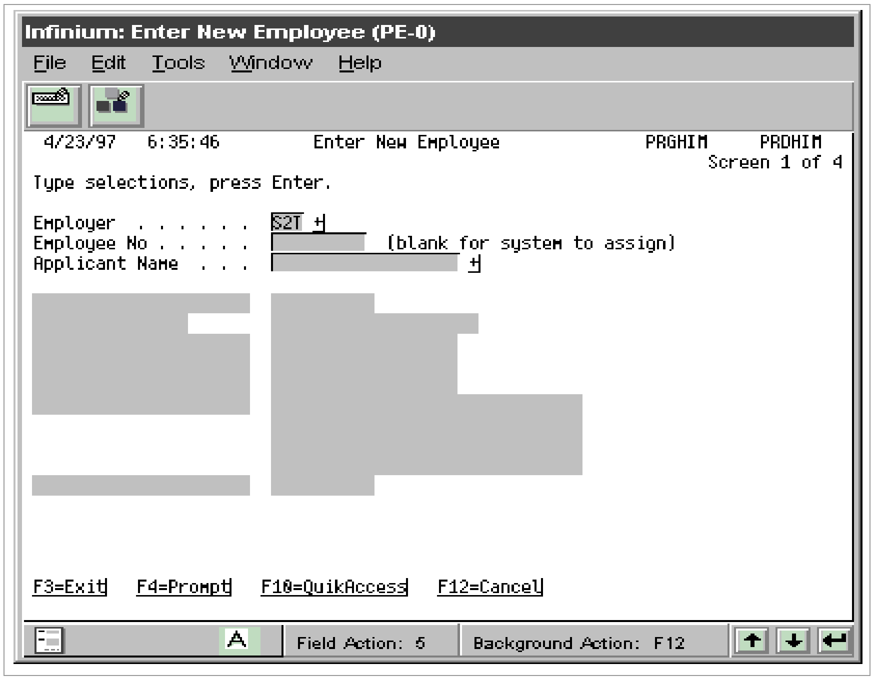


Figure 3: Enter New Employee prompt screen

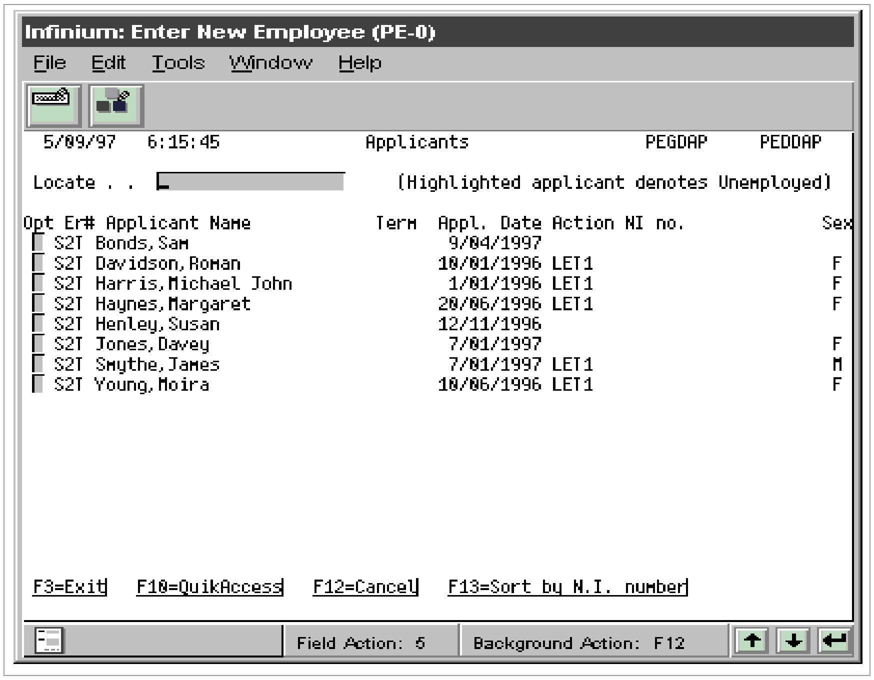


Figure 4: Applicant selection screen

Promptable Fields

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

To select an entry perform one of the following:

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

Infinium Applications and Abbreviations

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

Application	Abgreviation
Infinium Application Manager Infinium Application Manager Extended	Infinium AM Infinium AM/X
Infinium Query Infinium Query Extended	Infinium QY Infinium QY/X
Infinium Financial Management Suite	**Infinium FM**

Application	Abgreviation
Infinium General Ledger	Infinium GL
Infinium Payables Ledger	Infinium PL
Infinium Project Accounting	Infinium PA
Infinium Human Resources Suite	**Infinium HR**
Infinium Flexible Benefits	Infinium FB
Infinium Human Resources	Infinium HR
Infinium Human Resources/Payroll	Infinium HR/PY
Infinium Payroll	Infinium PY
Infinium Training Administration	Infinium TR
Infinium International Human Capital Management Suite	**Infinium IHCM**
Infinium International Human Resources	Infinium IHR
Infinium International Human Capital Management	Infinium IHCM
Infinium Intrnational Payroll	Infinium IPY
Infinium International Training Administration	Infinium ITR

Related Documentation

For further information about the Infinium HR system, refer to the *Infinium HR (International) Guide to Controls*.

About Training

Infinium Software offers the Infinium Human Resources training courses listed below at our regional training centres and on site at your location. Refer to the *Infinium Software Education Services Catalog* for complete course descriptions and schedules.

- UK Tax Year End Training
- UK IMP/HR Infinium Human Resources Implementors Training
- UK-PE1 Infinium Human Resources Basic Application Training
- UK-PE2 Infinium Human Resources Advanced Application Training
- UK-PY1 Infinium Payroll Basic Operations Training
- UK-PY2 Infinium Payroll Advanced Operations Training
- UK-QYHR Infinium Query for Human Resources Training
- UK-TR Infinium Training Administration Application Training

Infinium HR Training

Course Objectives

At the conclusion of the Infinium Human Resources Basic Application Training course you should be able to:

- Set up, maintain, display and generate reports for high-level controls that are shared with Infinium Payroll
- Set up, maintain, display and generate reports for human resources-specific controls
- Enter new employees onto the system
- Create history transactions and maintain employee information
- Display and print employee information

Course Organisation

Infinium Human Resources Implementors is a 2-day course. The first day of the course covers setup of controls that are necessary for you to implement Infinium HR. The second day of the course covers basic processing activities in Infinium HR, such as how to enter applicant information, enter employees and create history transactions to maintain employee information.

Throughout this course, information is presented in a lecture and then reinforced through hands-on workshops. These workshops provide you with the opportunity to practice what you have learned.

Course Agenda

Day 1 - Control Files and New Employees

- Introduction
- Overview of Infinium Human Resources
- Key Infinium HR concepts and terminology
- Relationship with Infinium Payroll
- Control file maintenance (levels, pay grades, jobs, locations etc.)
- Positions and workforce levels
- New employee process

Day 2 - Employee Maintenance

- Employee data (basic, personnel, qualifications, licences, property etc.)
- Employee history (end employments, position changes, salary changes, personal changes etc.)
- Enquiries and reports
- Summary

Notes

Chapter 1 Infinium Human Resources: An Overview

1

Infinium Human Resources is a comprehensive human resources management system that enables you to manage employee information and perform human resources reporting and administrative activities.

Infinium Human Resources shares information with Infinium Payroll and Infinium Training Administration. Each of these products uses core employee information contained in Infinium Human Resources to avoid redundancy and to avoid duplicate maintenance of basic employee data.

The chapter consists of the following topics:

Understanding Infinium Human Resources

The flowchart on the following page identifies key components of Infinium Human Resources and Infinium Payroll. Information that is shared between the two systems is displayed in the middle of the chart. Information that is unique to Infinium Human Resources or Infinium Payroll is shown in the lower section of the chart under the appropriate product heading.

A brief description of the main Infinium Human Resources components follows the overview chart.

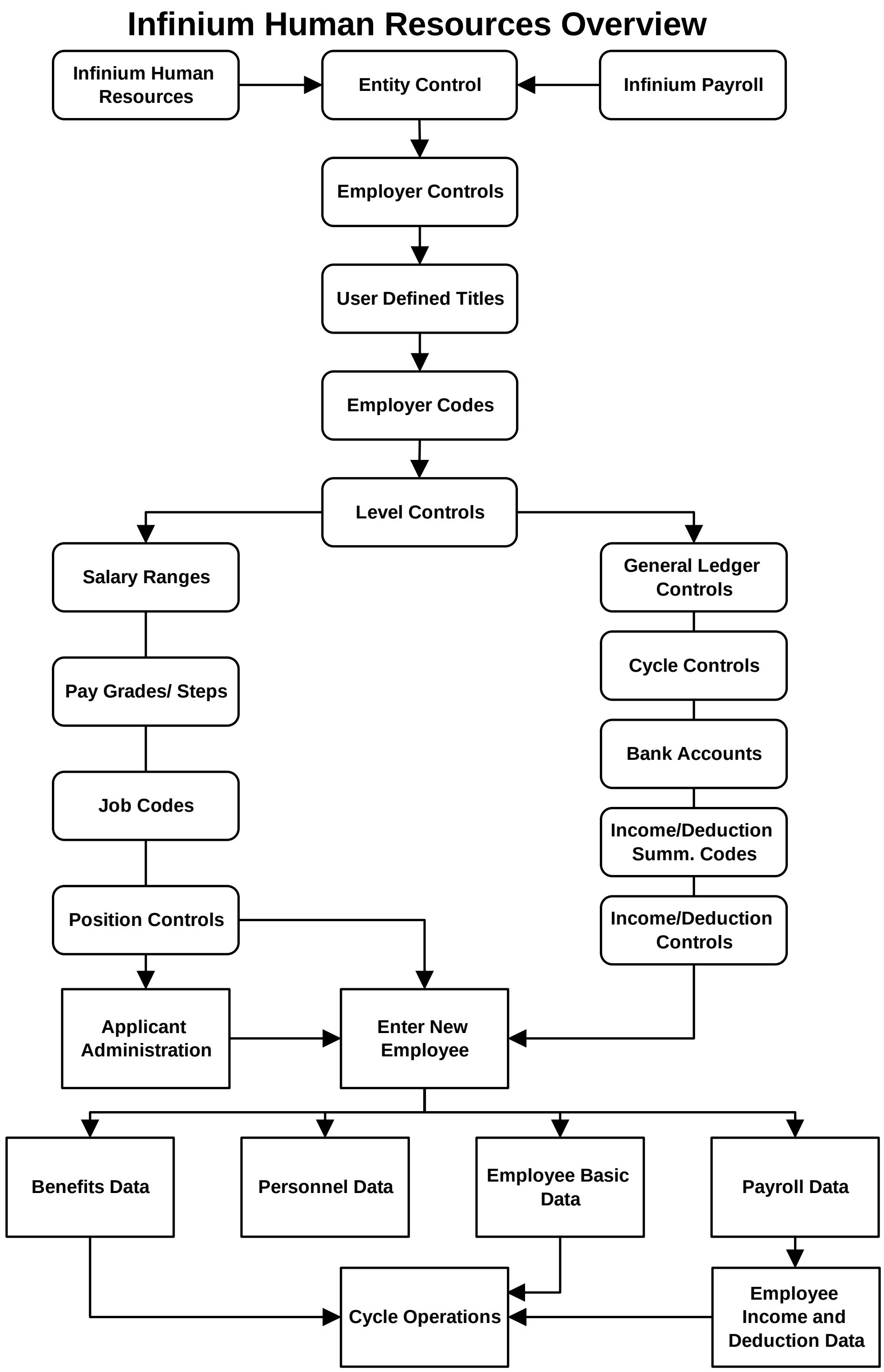


Figure 1-1: Infinium Human Resources and Infinium Payroll Overview

Terminology and Concepts

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

Entity Control

The entity control governs how you assign unique numbers to employees. It also displays current release numbers and allows you to identify the related Infinium Software products that are installed on your system. You define the entity control once regardless of the number of employers you define on your system.

Employer Control

You define an employer to group employees together for processing and reporting. You define controls for each employer and enter employees into an employer. You must specify an employer to perform most processing activities. Generally, you set up an employer for each company registration number or tax reference in your organisation.

Employer Code Types and Code Values

Code types are pre-defined three-character designators the system uses to categorise information and ensure that your employee data is consistent and reliable. For each code type, you develop a list of code values that suit your business and reporting requirements. For example, you use code type **STS** to define the employment status of your employees. You can establish code values that indicate if an employee is full time permanent, part time, temporary or a pensioner.

Infinium Software has defined approximately 150 code types for Infinium Human Resources. You must define code values for less than twenty code types to perform basic processing.

Employer Groups

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

Levels

Levels define the organisational structure of each employer. You can establish up to four levels for each employer on Infinium Human Resources; you must define at least one level for each employer. Each employee is assigned to a set of levels within an employer. The system uses levels for processing, reporting, security and general ledger number resolution.

There is no limit to the number of level codes that you can define at each of the four levels. Level codes define the organisational units within the organisation, such as departments and divisions.

Salary Ranges

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

Job Evaluation Groups

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

Job Controls

Job controls define classes or types of work performed in your organisation. You can establish very broadly defined jobs, such as Clerk or Manager, or more specific jobs, such as Senior Payroll Administrator or Recruitment Supervisor. Employees in different parts of your organisation can be assigned to the same job code.

Position Controls

Position controls identify where jobs are performed in your organisation. You must set up at least one position for each job and associate it with levels to specify where the work is performed in the employer. You hire employees into a position and perform budgeting by position.

Pay Grades

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

Applicant Tracking

You can use the system to track applicant information including skills, interviews and recruitment costs. You can utilise several convenient displays and reports including the Recruitment Costs report. If you employ an applicant, you can use his or her applicant information to expedite the employment process.

Hiring Employees

When you enter new employees into a position using Infinium Human Resources, you enter essential information that the system requires to establish the employee's record including the following:

- Basic Data
- Personnel Data
- Payroll Data

Maintaining Employee Information

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

Infinium Human Resources Reporting

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

Infinium Human Resources also contains several statutory reports.

Benefits Administration

Infinium Human Resources contains a module that allows you to set up and track employee benefit enrolments. You can track key dates and employee and employer costs, along with the employees' dependents and beneficiaries.

Conventions Used in Infinium Human Resources

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

System Names

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

Update

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

Display

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

List or Print

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

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

Default

A default is a value that the system automatically assigns or an action that the system automatically takes. Some default values and actions are pre-defined by Infinium Software; others are defined by users as they set up the system. Default values are generally entered on control screens.

Quick Access

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

You can use Quick Access codes to move to options within Infinium HR or to an option in any other system to which you are authorised. Quick Access codes are displayed in brackets following all menu options listed in this guide.

Prompting and Selecting

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

Required Fields

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

Field Exit

With numeric and date fields, the numbers you type will not always fill the entire field. You can press the FieldExit key to complete the field and move the cursor to the next field on the screen. You should take particular care to complete fields containing monetary values, such as pay rates, to avoid storing incorrect information on the employee's record, as the system completes the fields with zeros.

If you use Infinium Desktop, you do not need to complete the field; however, you must ensure that any unused space in the field is blank. You can use the spacebar or the Delete key to remove any unwanted text.

Exiting a Screen

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

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

The default value is **1**.

Cancelling an Action

When you press F12 or click on the F12 button to cancel an operation, the system displays a message asking you to confirm the action. Press F12 again to confirm, and the system returns you to the previous screen without saving any changes you may have made. To continue to work with the screen, press Enter.

System Help

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

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

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

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

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

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

Working with Sub-Files

Most screens in Infinium HR that allow you to create, update or delete information use the standard two screen format, with F6 to create, and so on.

However, on some screens, the system displays one or more lines of previous information related to the function and specific control or employee details with which you are working at the bottom of the screen. The area of the screen in which the system displays these records is called a sub-file.

You can review, modify or, in some cases, delete records from the sub-file. The system displays one line of key information for each record in the sub-file. To review all of the information for a record, you must retrieve it from the sub-file.

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

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

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

To delete a record from the sub-file, type **4** in the *Opt* field adjacent to the record. When you press Enter, the system displays **DELETED**, or an abbreviation such as **DELTD** in place of that line in the sub-file.

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

Note: You must ensure that your record has been returned to the sub-file before you press F3; otherwise, the information is not saved.

Entering Data Consistently

Users should agree on a consistent format for entering and editing information in Infinium Human Resources. Much of the data that you type can be used for displays and reports elsewhere in Infinium HR and for external communication. Adhering to consistent standards for entering data can improve understanding and ease of use of this information for all users.

Considerations include:

- Use of upper and lower case in names, addresses, titles and so on
- Use of abbreviations in addresses, such as Rd., Ave., St.
- Use of separating characters such as parentheses or dashes in telephone numbers

References to Currencies

Infinium HR contains several fields that require the user to enter a monetary value. When describing these fields, we do not refer to specific currencies wherever possible, as these fields may be used by all international users.

However, where an example is given in the guide for clarification, we use UK pounds (sterling).

Commonly Used Fields in Infinium Human Resources

Selecting an Employee

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

- *Employee*
- *Last Name*

This field is not named on Infinium HR screens; it is the field located next to the *Employee* field.

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

Using the Employee Field

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

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or all of his or her last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number and last name of the employee you selected.

Using the Last Name Field

If you know the employee’s complete last name, you can type it in the *Last Name* field and then press F4 to display the Employee Locate screen. The system positions your cursor adjacent to the employee’s name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee’s entire last name, type as much as you know using the appropriate case (upper, lower or a mix) and press F4. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

Selecting an Employer

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

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

Notes

Chapter 2 Tracking Applicants

2

This chapter of the guide explains how to track information about applicants seeking positions in your company and includes the following topics:

The chapter consists of the following topics:

Overview of the Applicant Tracking Functions

Applicant Data Functions

The *Applicant Data* menu provides the following functions:

- *Update Applicant Records*

  Use *Update Applicant Records* to maintain and display basic information about applicants, related activity logs, applicant skills and qualifications, their job applications, interviews, references, and past employment, and to maintain information about costs.

- *Mass Enter Applicants*

  Use *Mass Enter Applicants* for efficient entry of multiple applicants who share basic information such as employer, job requisition ID, position applied for, or applicant source. By using this function, you avoid re-keying the same information for each applicant.

- *Applicant Enquiry*

  Use *Applicant Enquiry* to display information about one or more selected applicants. You can first define which applicants to include in the selection list by a wide range of criteria such as interviewer, position, application date, current employment status, gender, skill, source, and so forth.

  At the selection list of matching applicants, you can choose to display applicant details, or the related activity log, skill list, qualifications, job applications, interviewer, costs, references, or prior employment information.

- *Print Applicant Records*

  Use *Print Applicant Records* to print selected details for a selected set of applicants. You can restrict the set of applicants by employer, job requisition, a range of application dates, and applicant employment status (employed, unemployed, or all applicants).

  You can choose which details to include from the applicant information. The available choices include activity log entries, employment, job applications, qualifications, references, and skills.

- *Print Applicant List*

  Use *Print Applicant List* to list a selected set of applicants based on any combination of the following: employer, interviewer, position applied for, and application date range, job requisition ID, current employment status, gender, a key skill or skill/competency model, the application source, status of the application, willingness to relocate, and ethnic ID.

- *Update Fair Employment Details*

  Use *Update Fair Employment Details* to record information required by the current Fair Employment Legislation for Northern Ireland. The information includes community background, monitoring method, and, if you use the residuary method, the details.

Job Requisitions Menu Function

The *Job Requisitions* menu provides two functions, *Update Job Requisitions* and *Job Requisitions Enquiry*.

Use *Update Job Requisitions* to create and maintain information about job requisitions for open jobs including requisition IDs and dates, job titles, positions, job status, and location. The detailed job requisition information includes job details, justification, duties and responsibilities, compensation, and miscellaneous information such as years of experience required, proposed start date, and so forth.

The Update Job Requisitions selection page also provides access to information about the job applicants including activity log entries and interview information, and about requisition costs and advertising.

Use *Job Requisitions Enquiry* to find and display information about job requisitions. An initial filter screen allows you to enter any combination of 15 different selection criteria to locate the job requisitions you require.

Interviews Menu Function

The *Interviews* menu provides the following functions:

- *Print Applicant Interviews*

  Use *Print Applicant Interviews* to generate a report on interviews with persons seeking employment in your organisation.

You can restrict the report contents by any combination of employer, job requisition, application date range, applicant employment status, interview type and interviewer.

For all selection criteria except ending date and applicant type (employment status), leaving a value blank indicates including all, such as all employers if the employer value is blank.

- *Disply Interviews by Interviewer*

  Use *Disply Interviews by Interviewer* to display a subset list of interviews and to select interviews from the list to view details. You can restrict the list by employer, interviewer, and a range of interview dates.

  The selection list provides summary information including the date, time, location, applicant name, and type of interview such as 1^{ST} or 2^{ND}. You can select an interview to view information about the application, applicant, activity log, and interview details.

- *Display Interviews by Location*

  Use *Display Interviews by Location* to display information about a interviews held for a particular employer at a specified location during a specified time period. The selection page of these interviews summarises the date, time, interviewer, applicant name, and interview type such as 1^{ST} or 2^{ND}.

  From the selection page you can display related interview, applicant, activity log, and job application details.

Recruitment Costs Menu Functions

The *Recruitment Costs* menu provides the following functions:

- *Recruitment Costs Enquiry*

  Use *Recruitment Costs Enquiry* to view recruitment cost information and compare the recruitment costs to budgeted costs.

  You can select information by employer, function, department, team, cost centre, cost type, date range for when costs were incurred, and job requisition ID. The details also include position applied for, cost date, cost type, amount, and any associated comment.

- *Print Recruitment Costs*

  Use *Print Recruitment Costs* for a report on the costs of recruiting applicants for open positions. You can limit the report to any combination of employer, job requisition, position applied for, and a date range for when the costs were incurred.

You can also include all applicants, only unemployed applicants, or only employed applicants.

Interview Locations Menu Function

The *Interview Locations* menu provides a single function, *Update Interview Locations*.

Use *Update Interview Locations* to maintain information about the locations where interviewers meet applicants for positions. The information includes the employer, a location code and description, the full address, telephone number, contact name, e-mail and fax number.

Update Interviewers/Recruiters Menu Function

The *Update Interviewers* menu provides a single function, *Update Interviewers/Recruiters*.

Use *Update Interviewers/Recruiters* to record and maintain information about the people who recruit or interview applicants for positions in your organisation.

The information includes name, title, initials, name to be used in correspondence, whether the person is a recruiter or interviewer, regular and cellular telephone numbers, e-mail address, employer, and employee number.

Update Document Definitions Menu Function

Update Document Definitions provides the ability to define the locations on a PC of documents that can be used to communicate with applicants.

Updating Applicant Records

Overview

Use *Update Applicant Records* to maintain and display basic information about applications and to work with related activity logs, applicant skills and qualifications, their job applications, interviews, references, and past employment, and to maintain information about costs.

For rapid entry of summary information about applicants who share the same information such as employer, job requisition ID, position applied for, or applicant source, use *Mass Enter Applicants*. *Mass Enter Applicants* lets you avoid re-keying information for multiple applicants.

Map of *Update Applicant Records*

The following diagram summarises actions available in *Update Applicant Records* and the pages for those actions.

Use the menu path below.

- *Applicants*
- *Applicant Data*
  - *Update Applicant Records [UAR]*

Update Applicant Details Subset Details (Prompt) Page

About This Page

On the Update Applicant Details Subset Details (prompt) page, you can specify criteria for restricting the selection list of applicants on the Update Applicants selection page.

You can restrict the list by a wide range of criteria such as employer, interviewer, position applied for, a range of application dates, and various applicant characteristics. You must specify at least the employer.

Field Information

Employer

Specify the employer to which the applicants are applying for a position.

Interviewer

Specify an interviewer ID to include only applicants who have been or are scheduled to be interviewed by this person.

Position Applied For

Specify a position code to include only applicants who applied for this position. Define position codes in *Controls / Position Controls / Update Organisation Positions*.

From Application Date

Specify a date to include only applicants who applied on or after this date.

To Application Date

Specify a date to include only applicants who applied on or before this date.

Job Requisition ID

Specify the code for a job requisition to include only applicants who have applied for that job.

Define requisitions in *Applicants / Job Requisitions / Update Job Requisitions*.

Currently unemployed?

Type **0** to exclude unemployed applicants, **1** to include only unemployed applicants, or **2** to include both unemployed and employed applicants.

Gender

Type **M** to include only male applicants, **F** to include only female applicants, or leave blank to include both.

Skill

Specify a skill code to include only applicants whose information includes that skill.

Skill Model

Specify a skill/competency model to include only applicants who have all the skills that have been defined in the skill/competency model. If required skill levels have been defined on skills within the model, the applicants' skill levels must also match or be greater than those skill levels, in order for the applicants to be included.

A skill/competency model is a grouping of skills and competencies defined in *Skills & Competencies / Skills Maintenance / Update Skill/Competency Models* and then associated with a position.

Application Source

Specify the code for a particular source to limit the list to applicants from that source. Define applicant source codes such as RADIO or NET for radio or internet channels in *Controls / Employer Codes / Update Employer Codes* using code type HIR.

Status

Specify an applicant status to limit the list to applicants with that status. Define applicant status codes such as JOBOF for job offered in *Controls / Employer Codes / Update Employer Codes* using code type ALS.

Relocate

Specify a relocation code to limit the list to applicants with that code in their information. Define relocation codes such as willingness to relocate in *Controls / Employer Codes / Update Employer Codes* using code type RLO.

Ethnic ID

Specify a code for ethnic background to restrict the selection list to applicants of that background. Define ethnic ID codes in *Controls / Employer Codes / Update Employer Codes* using code type ETH.

Internal Applicants

Type **0** to exclude internal applicants, **1** to include only internal applicants, or **2** to include internal and external applicants.

Applicants Hired

Type **0** to exclude already hired applicants with an employee number in their application information, **1** to include only hired applicants, or **2** to include both hired and unhired applicants.

The system adds the employee number to the applicant information when you select an applicant for hire in *Enter New Employee*.

How do I...

Display the list of applicants matching your selection criteria	Press Enter to display the Update Applicants selection page.
Exit to the menu	press F3.

Update Applicants Selection Page

About This Page

On the Update Applicants selection page, you can create new applicant information or select any listed applicant to edit or display basic applicant details or related activity logs, skills, qualifications, job applications, interviews, costs, references, employment and job preferences. You can also delete a listed applicant.

The selection list identifies applicants by employer applied to, applicant name and number, application date, tax ID, and whether the applicant is an internal or external applicant.

Highlighting indicates that the applicant is an internal candidate.

How do I...

Create new applicant information	Press F6 to display the first of four basic applicant information pages.
Edit any of the four basic applicant information pages	Type **2** next to the applicant and press Enter.
Delete a listed applicant	Type **4** next to the applicant and press Enter. Confirm the deletion. The system deletes all related information such as job applications and interviews, skills and qualifications.
Display the four basic applicant information pages	Type **5** next to the applicant and press Enter. Press Enter at each page to return to the selection list.
Access application activity log information	Type **6** next to the applicant and press Enter.

How do I...

Access information about an applicant's skills	Type **7** next to the applicant and press Enter.
Access education and other qualification information	Type **8** next to the applicant and press Enter.
Access information about an applicant's job applications	Type **9** next to the applicant and press Enter.
Access interview information for the applicant's most recent job or position application	Type **10** next to the applicant and press Enter.
Access interview information for a job or position applications before the applicant's most recent application	Type **9** next to an applicant and press Enter to display the applicant's applications. Select one with **6** and press Enter to access the interviews for the job.
Access information about the costs associated with this applicant's application	Type **11** next to the applicant and press Enter.
Access information about an applicant's references	Type **12** next to the applicant and press Enter.
Access information about an applicant's prior employment	Type **13** next to the applicant and press Enter.
Access information about an applicant’s job and location preferences	Type **14** next to the applicant and press Enter.
Limit the applicant list by specifying further subset criteria	Press F17 or F12 to return to the subset page.
Exit to the menu	Press F3.

Create or Update Applicant Details Personal Information Page

About This Page

On the Create or Update Applicant Details personal information page, you can specify basic personal information including name information, birth date, gender, and national insurance number.

In create mode, you also specify the employer applied to, the application date, and whether this is an internal applicant. This is the first of four details pages. The system assigns the applicant number during creation, using the *Next Applicant Number* value in *Update Entity Controls*.

Field Information

Employer

In create mode, specify the employer to which the applicant is applying. You cannot edit this value in change mode.

Application Date

In create mode, specify the date the applicant applied in the format defined in *Controls / Employer Controls / Update Employer Controls*.

You cannot edit this value in change mode.

Internal Applicant

In create mode, if this is an internal applicant, specify your organisation's employee number for this applicant or select an employee from the available list. This information appears in change mode only if this is an internal applicant. If you select an employee, the system will default that employee’s personal information into the corresponding fields on this screen.

Last Name

You must type the applicant's last name.

First Name

You must type the applicant's first name.

Middle Name

You must type the applicant's middle name if it is known.

Complete Name

The system automatically builds the complete name in accordance with the method defined in your employer controls.

Initials

Type the initial letters of the applicant's first, middle, and last names.

Name Title

Type the prefix for the name such as Mr, Ms, or Dr.

Known as

Type the nickname if applicable and known.

Birth Name

Type the applicant's name at birth if different from *Complete Name* value.

Date of Birth

Type the date the applicant was born, in format defined in *Controls / Employer Controls / Update Employer Controls*.

Gender

Type **M** for male or **F** for female.

NI Number or *Social Security*

Type the applicant's tax ID if it is known. Note that the text of the field label here is defined as the Tax ID name in employer controls.

Format for UK applicants: Two letters plus six digits plus one letter. The system validates this format for UK employers.

If the country code in the employer controls is **UK** then the Tax ID is nine characters. For other country codes the value is 20 characters.

How do I...

Continue to the next details page	press Enter.
Return to the applicant selection page after making changes	press F3 and save your changes.

Create or Update Applicant Details Communications Page

About This Page

On the Create Applicant Details communications page, you can specify the various mail addresses and telephone or fax numbers by which you can communicate with the applicant. The mailing address is typically the applicant's residence.

This is the second of four details pages.

Field Information

Address Line 1 through 3

Type the lines of the residential mailing address that precede the town or city, up to three lines.

Town or City

Type the town or city name of the residential mailing address.

County

Specify the code for the county or equivalent portion of the applicant mailing address. The text of this field label is defined as the Address text name in the employer controls.

Postal Code

Type the postal code portion of the residential mailing address.

Country

You can add the code for the mailing address country.

Home Telephone Number

Type the telephone number where the applicant can be reached at home.

Office Telephone No.

Type the telephone number where the applicant can be reached at work.

Cellular Phone Number

Type the mobile telephone number where the applicant can be reached, if any.

Fax Number

Type the fax number to which you can send facsimile paperwork to the applicant, if any.

E-Mail Address

Type the electronic mail address to which you send messages and documents for the applicant, if any.

How do I...

Continue to the next details page	Press Enter.
Return to the applicant selection page after making changes	Press F3 and save your changes.

Create or Update Applicant Details Miscellaneous Information Page

About This Page

On the Create Applicant Details miscellaneous information page, you can specify miscellaneous information about the applicant such as marital, ethnic, disability, work restriction, professional licence, and similar information.

You can also note whether the applicant is now employed, the current employer, authorisation to contact that employer, and any relatives and friends of the applicant who already work in your organisation.

This is the third of four details pages.

Field Information

Action Code

Specify an action by code.

Define your applicant action code values in *Controls / Employer Codes / Update Employer Codes* using code type ACT.

Marital Status

Type the marital status code such as **M** for married or **S** for single.

Define marital status codes in *Controls / Employer Codes / Update Employer Codes* using code type MAR.

Ethnic ID

Type a one-character code for ethnic background.

Define ethnic ID codes in *Controls / Employer Codes / Update Employer Codes* using code type ETH.

Work Restrictions

Type the code for any applicable work restrictions.

Define work restriction codes in *Controls / Employer Codes / Update Employer Codes* using code type WRE.

Disability Code

Type the code for any disability that this applicant has.

Define disability codes in *Controls / Employer Codes / Update Employer Codes* using code type DIS.

Disability Number

If the applicant officially qualifies as having a disability, type the disability registration number.

Physical Examination

Type a brief freeform indicator about a physical examination. There are no codes defined for this value.

Relocatability Code

Type a relocation factor code here, such as a code for willingness to relocate.

Define relocatability codes in *Controls / Employer Codes / Update Employer Codes* using code type RLO.

Professional Licence

Type a professional licence number, if any.

Currently unemployed?

Type **1** for currently unemployed or **0** for not unemployed. The system interprets a blank as **0** (unemployed).

Employer Name

If an external employer currently employs the applicant you may enter the name of the employer here.

Authority to Contact

Type **1** if the applicant said you are authorised to talk to this employer or **0** if the applicant said not to talk to this employer. Leave the value blank if the applicant is not currently employed.

Relatives Employed by Company

Type the names of the applicant's relatives who already work in your organisation, if any and known.

Friends Employed by Company

Type the names of the applicant's friends who already work in your organisation, if any and known.

How do I...

Continue to the next details page	Press Enter.
Return to the applicant selection page after making changes	Press F3 and save your changes.

Create or Update Applicant Details Citizenship Page

About This Page

On the Create Applicant Details citizenship page, you can specify citizenship, birthplace, visa, and alien status information. You can also indicate a routing list of people to see the curriculum vitae and add any additional brief comment about the applicant or application.

This is the last of four details pages.

Field Information

Citizen of

You can specify the country of which the applicant is a citizen.

Define country codes in *Controls / Employer Codes / Update Employer Codes* using code type CTR.

Place of Birth

You can specify where the applicant was born.

Visa Type

If the applicant has a visa to remain in your country, you can specify the type, such as temporary work visa or student visa.

Define visa type codes in *Controls / Employer Codes / Update Employer Codes* using code type VIA.

Visa Expiry Date

If the applicant has a visa to remain in your country, type the date the visa expires.

Visa Country

If the applicant has a visa to remain in your country, specify the country that issued the visa.

Define country codes in *Controls / Employer Codes / Update Employer Codes* using code type CTR.

Visa Number

Type the applicant's visa number or passport number.

Alien Number

If the applicant is classified as a resident alien, you can type the applicant's alien number here.

Circulate CV

Specify who is receiving a copy of the applicant's curriculum vitae, such as recipients' initials or names.

Comments

Type any further comments on this applicant or application.

How do I...

Return to the applicant selection page after making changes	Press F3 and save your changes.

Display Applicant Details Personal Information Page

About This Page

On the Display Applicant Details personal page, you can view the information from the Update Applicant Details personal information page except *Applicant Number*.

This is the first of four details pages.

How do I...

Continue to the next details page	Press Enter.
Exit to the applicant selection page	Press F3.

Display Applicant Details Communications Page

About This Page

On the Display Applicant Details communication page, you can view the information from the Update Applicant Details communications information page

This is the second of four details pages.

How do I...

Continue to the next details page	Press Enter.
Exit to the applicant selection page	Press F3.

Display Applicant Details Miscellaneous Information Page

About This Page

On the Display Applicant Details miscellaneous information page, you can view the information from the Update Applicant Details miscellaneous information page.

This is the third of four details pages.

How do I...

Continue to the last details page	Press Enter.
Exit to the applicant selection page	Press F3.

Display Applicant Details Citizenship Information Page

About This Page

On the Display Applicant Details citizenship information page, you can view the information from the Update Applicant Details citizenship information page.

This is the last of the four details pages.

How do I...

Exit to the applicant selection page	Press Enter or F3.

Applicant Activity Log Selection Page

About This Page

Access this page by selecting an applicant with **6** at the Update Applicants selection page.

On the Applicant Activity Log selection page, you can view summary information about activities related to this applicant, including for each activity the date, type of activity such as letter sent, status of the application such as interviewed, and any related comments.

This serves as a history of all contacts and communications between your organisation and the applicant. Note that the system automatically creates entries in the activity log following certain actions to the applicant, for example when the applicant's job application status is changed or when a letter is generated for the applicant. You can also create information about a new activity, display and change activity information, and delete an activity's information.

How do I...	
Create information for a new activity	Press F6 to display the Update Activity Log details page.
Change an activity's information	Type **2** next to the activity and press Enter.
Display an activity's information	Type **5** next to the activity and press Enter.
Delete an activity	Type **4** next to the activity and press Enter. Confirm the deletion.
Return to the Update Applicants selection page	Press F3.

Update Activity Log Details Page

About This Page

On the Update Activity Log details page, you can specify an application process activity's date, type such as letter sent, requisition ID of the job applied for, and the status of the application such as job offered.

You can also specify who entered the information about the activity and add extensive comments including up to ten lines of text.

Field Information

Date

You must type the date of this activity.

Type

The type of activity such as telephone call made . Define activity types in *Controls / Employer Codes / Update Employer Codes* using code type ALT. The system creates some activity log entries automatically. These will have activity types *STAT for status change or *LETT for letter sent. You do not have to define these activity type codes.

Requisition ID

Job requisition associated with this application activity. If the applicant applied for multiple jobs, this value clarifies which job this activity applies to

Define requisitions in *Applicants / Job Requisitions / Update Job Requisitions*.

Status

Specify the current status of this application such as job offered. Define application status codes in *Controls / Employer Codes / Update Employer Codes* using code type ALS.

Entered By

Type the name of the person who entered this activity information.

Comments

Type any brief additional comment related to this activity.

How do I...

Exit to the selection list saving your information	Press F3 and specify saving.

Display Activity Log Details Page

About This Page

On the Display Activity Log details page, you can view the activity log information that was entered on the Update Activity Log details page for the selected activity.

How do I...

Return to the selection list	Press F3.

Update Applicant Skills Selection Page

About This Page

Access this page by selecting an applicant with **7** at the Update Applicants selection page.

On the Update Applicant Skills selection page, you can view summary information about the applicant's skills, including a code for a skill, competency, or group, the level of the skill attained expressed by a number from 1 to 999, when that level was attained, and the years of experience using that skill.

You can also create information about a new skill/competency, display and change skill/competency information, and delete a skill/competency for the selected applicant.

If the applicant is an internal applicant, you cannot create or change their skill/competency data. Since they are employees the system displays their existing employee skill/competency records

How do I...

Create information for a new skill	Press F6 to display the Update Applicant Skills details page.
Change a skill's information	Type **2** next to the skill and press Enter.
Display a skill's information	Type **5** next to the skill and press Enter.
Delete a skill	Type **4** next to the skill and press Enter. Confirm the deletion.
Return to the Update Applicants selection page	Press F3.

Update Applicant Skills Details Page

About This Page

On the Update Applicant Skills details page, you can specify a skill, competency, or group by its code, and provide details concerning the level the applicant has achieved, when training occurred if any, when the applicant last used the skill, and how many years experience the applicant has.

You can also add a line of text about this applicant skill.

Field Information

Skill Code

You must identify this skill, competency, or group by code. Define skill, competency, and group codes in *Skills & Competencies / Skills Maintenance / Maintain Skills/Competencies*.

Skill Level Attained

Specify the level of this skill that the applicant has achieved as a number from **1** to the maximum defined for this skill in *Skills & Competencies / Skills Maintenance / Maintain Skills/Competencies*. The highest possible maximum is **999**. Most organisations use levels **1** to **10**.

Date Attained

Specify the date the applicant achieved this level.

Date Training Began

If the applicant was formally trained in this skill or competency, type the date the training began.

Date Completed

If the applicant was formally trained in this skill or competency, type the date the training ended.

Date Last Used

Specify when the applicant last actively used this skill or competency.

Year of experience

Specify the total number of years experience the applicant has had using this skill or competency.

Comment

You can type one line of text comment about this applicant skill.

How do I...

Exit to the selection list saving your information	Press F3 and specify saving.

Display Applicant Skill Details Page

About This Page

On the Display Applicant Skill details page, you can view information from the Update Applicant Skills details page.

How do I...

Return to the selection list	Press F3.

Update Applicant Qualifications Selection Page

About This Page

Access this page by selecting an applicant with **8** at the Update Applicants selection page.

On the Update Applicant Qualifications selection page, you can view summary information about the applicant's education and other qualifications, including for an academic or training qualification the year, qualification such as certificate or degree, subject, establishment.

You can also create information about a new qualification by copying and editing an existing qualification that has similar information, create information about a new qualification from scratch, display and change qualification information, and delete a qualification for the applicant.

If the applicant is an internal applicant, you cannot create or change their qualifications data. Since they are employees the system displays their existing employee qualifications records

How do I...

Copy a qualification to create new information for editing	Type **3** next to the qualification and press Enter. On the details page, edit the information and press F3.
Create new qualification information from scratch	Press F6 to display the Update Education/Qualifications details page.
Change a qualification's information	Type **2** next to the qualification and press Enter.

How do I...	
Display a qualification's information	Type **5** next to the qualification and press Enter.
Delete a qualification	Type **4** next to the qualification and press Enter. Confirm the deletion.
Return to the Update Applicants selection page	Press F3.

Update Education/Qualifications Details Page

About This Page

On the Update Education/Qualifications details page, you must specify a year and at least either an establishment where a qualification was achieved or a skill, competency or group.

You can specify the establishment's location and the subjects the applicant studied. You can add the exact qualification such as BSc in computer science, a free-form type value, a category such as baccalaureate, and a grade or level attained such as 2nd class honors. Finally, you can specify a method of study such as college or training program, and the time period during which study occurred.

Field Information

Year

You must specify the year the qualification or skill was acquired.

Establishment

You must specify either an educational/training establishment or a skill. To specify an establishment, type the establishment or specify the establishment in *Code*.

If you specify the establishment in *Code*, the system supplies the name in *Establishment*. Define establishment codes in *Controls / Employer Codes / Update Employer Codes* using code type SCL.

Code

Specify a code identifying the establishment, if any, where the qualification was acquired. Define establishment/school codes in *Controls / Employer Codes / Update Employer Codes* using code type SCL.

Location

Specify the city, town, or area where the establishment is located. If defined in the employer code controls for code type SCL, the location can be supplied here automatically by the system based on the establishment code.

Country

Specify the country where the establishment is located. Define country codes in *Controls / Employer Codes / Update Employer Codes* using code type CTR.

Subject

Specify the subject in which the applicant achieved the qualification.

Subsidiary

Specify the secondary subject or subjects taken as part of this qualification.

Qualification

Specify a code for an education qualification such as a masters in computer science, certificate in business administration, or O level qualification in the subject.

Define qualification codes in *Controls / Employer Codes / Update Employer Codes* using code type QTP.

Type

Specify further information abut the qualification such as grade or pass mark achieved by the applicant.

Category

Specify an educational qualification category code such as for certificate, general education, or a degree level.

Define qualification category codes in *Controls / Employer Codes / Update Employer Codes* using code type EDC.

Grade/Level

Specify a grade or level code for applicant's performance earning the qualification, such as 1st class honors, pass, or a letter grade such as B.

Define qualification grade and level codes in *Controls / Employer Codes / Update Employer Codes* using code type EDL.

Study Method

Specify a code for method of study or education through which this qualification was achieved, such as school or college, university, training program, open university, or day release.

Define study method codes in *Controls / Employer Codes / Update Employer Codes* using code type STM.

Skills

You can specify a skill, competency or group code such as for leadership ability, communicating, planning, or customer handling instead of an educational or training qualification.

Define skill, competency, and group codes in *Skills & Competencies / Skills Maintenance / Maintain Skills/Competencies*.

Date Started

Specify the date on which the applicant began studying for the qualification.

Date Completed

Specify the date the applicant completed study for the qualification.

How do I...

Exit to the selection list saving your information	Press F3 and specify saving.

Display Applicant Qualifications Details Page

About This Page

On the Display Applicant Qualifications details page, you can view the information from the Update Education/Qualifications details page.

How do I...	
Return to the selection list	Press F3.

Update Job Applications Selection Page

About This Page

Access this page by selecting an applicant with **9** at the Update Applicants selection page. If you are creating a new applicant, the system also automatically displays this page after you enter the applicant details.

On the Update Job Applications selection page, you can view summary information about the person's applications to your organisation, including job or position applied for, date applied, application status as of a specified date, and offer and acceptance dates.

You can also create information about a new job application, change application information, and delete an application for the selected applicant. In addition, you can select a listed application to work with information about interviews related to that application.

How do I...	
Create information for a new application	Press F6 to display the Update Job Application details page.
Change an application's information	Type **2** next to the application and press Enter.
Maintain interview information for a listed application	Type **6** next to the application and press Enter to display the Update Applicant Interviews selection page.
Delete an application	Type **4** next to the application and press Enter. Confirm the deletion.
Return to the Update Applicants selection page	Press F3.

Update Job Application Details Page

About This Page

On the Update Job Application details page, you must specify an application date and either a job or a position during initial creation of the information. You cannot edit these values in change mode.

You can also provide and later edit additional information including a source such as radio ad or agency, desired salary, status of the application, and rejection or acceptance and start date details.

Field Information

Application Date

In create mode, you must specify the date the person applied. You cannot edit this date in change mode.

Job Requisition ID

In create mode, you must specify either a job by requisition ID or a position applied for. You cannot edit this job or position in change mode.

Define requisitions in *Applicants / Job Requisitions / Update Job Requisitions*.

Position Applied For

In create mode, you must specify either a job by requisition ID or a position applied for. You cannot edit this job or position in change mode.

Define position codes in *Controls / Position Controls / Update Organisation Positions*.

Referral Source

Specify the source responsible for the applicant knowing about and applying for the job or position, such as a radio or Web advertisement or an agency.

Define source codes in *Controls / Employer Codes / Update Employer Codes* using code type HIR.

Preference Number

Specify a number indicating the applicant's ranking of this job or position relative to other jobs in your organisation for which the person is simultaneously applying

Desired Salary

Specify the salary the applicant is requesting for this job or position.

Status

Specify the status of this applicant for this application, such as interviewed, rejected, offered job. Define applicant status codes in *Controls / Employer Codes / Update Employer Codes* using code type ALS. The system also automatically updates this value if you enter a different and more recent status code on the applicant interview record.

Any change you make here to the status code is automatically recorded in the activity log as a change of type *STAT.

As of Date

Specify the date as of which the applicant acquired the specified status.

Reject Reason

Specify the code for reason you rejected this application. Define rejection reason codes in *Controls / Employer Codes / Update Employer Codes* using code type REJ.

Date Closed

Specify the date you closed this application either because you rejected this applicant or because you have filled the position.

Date of Offer

Specify the date you made a job offer to the applicant.

Salary Offered

Specify the amount you offered to pay the applicant in salary or wages.

Date Accepted

Specify the date applicant accepted your job offer.

Start Date

Specify, if hired, the applicant's first day of work at your organisation.

Comments

Type any brief additional comment about this application.

How do I...

View the time, date, user and workstation the information was last updated	Press F16.
Exit to the selection list saving your information	Press F3 and specify saving.

Update Applicant Interviews Selection Page

About This Page

On the Update Applicant Interviews selection page, you can view summary information about the applicant's interviews for his or her most recent job application at your organisation. The summary information includes the interview date, time, location, type such as 1ST, interviewer, result, and status of the interview.

If the interview date is after the application status as of date, the system also changes the applicant status to the same value as this interview status.

You can also create new interview information and change or delete existing interview information for this application.

How do I...

Create new interview information	Press F6 to display the Update Applicant Interviews details page.
Change an interview's information	Type **2** next to the interview and press Enter.
Delete an interview	Type **4** next to the interview and press Enter. Confirm the deletion.
Create a letter	Type **6** next to the interview and press Enter to display the Display Mailmerge Documents selection page.

How do I...	
Return to the Update Applicants selection page	Press F3.

Update Applicant Interviews Details Page

About This Page

On the Update Applicant Interviews details page, you must specify the interview's date, time, location, and interviewer or interview panel.

You can also specify the type of interview such as 1st interview, the result such as a call back for a second interview, the application status as a result of the interview, and any related comments.

Field Information

Interview Date

Specify the date on which the interview took place or is to take place.

Interview Time

Specify when on that date the interview took place or is to take place, in local time, such as 0900 for 9 AM. The format is military or 24 hour time, entered as four numbers.

Interview Type

Specify the kind of interview this is, such as 2nd. Define interview types in *Controls / Employer Codes / Update Employer Codes* using code type ITP.

Interview Location

Specify the location at which the interview took place or is to take place. Define locations and their codes in *Applicants / Interview Locations / Update Interview Locations*.

Interviewer

Specify the person responsible for conducting this interview.

Interview Result

Specify the code indicating the result of the interview, such as interview again. Define interview result codes in *Controls / Employer Codes / Update Employer Codes* using code type INV.

Status Code

Specify the code indicating the application's status based on this interview.

Define application status codes such as JOBOF for job offered in *Controls / Employer Codes / Update Employer* Codes using code type ALS.

Comments

Type any brief additional comment on this interview and its results.

How do I...	
Exit to the selection list saving your information	Press F3 and specify saving.

Display Mail Merge Documents Selection Page

Access this page by selecting an applicant with **9** at the Update Applicants selection page.

On the Display MailMerge Documents selection page, you can view summary information about your organisation's standard documents that are available to use for communication with applicants.

The summary information includes the reference and the description

Update Applicant Costs Selection Page

About This Page

Access this page by selecting an applicant with **11** at the Update Applicants selection page.

On the Update Applicant Costs selection page, you can view summary information about your organisation's costs related to the selected applicant's most recent application to your organisation.

The summary information includes the expense date, amount, type such as interview expense, and job requisition to which the expense applies. You can also view the total of all listed expenses.

You can also create information about new expenses for any job application by this person, display and change existing expense information, and delete expense information.

How do I...

Create information for a new cost	Press F6 to display the Update Applicant Costs details page.
Change a cost's information	Type **2** next to the cost and press Enter.
Display a cost's information	Type **5** next to the cost and press Enter.
Delete a cost	Type **4** next to the cost and press Enter. Confirm the deletion.
Return to the Update Applicants selection page	Press F3.

Update Applicant Costs Details Page

About This Page

On the Update Applicant Costs details page, you must specify the expense date, type, and amount. You can also add a line of comment text about this expense for this job or position application.

To record an expense for a job application other than the one initially displayed in create mode, you can replace the *Job Requisition ID* or *Position Applied for* value to the alternative job or position.

Field Information

Job Requisition ID

If you specify a job for which the applicant applied and you incurred this expense, leave *Position Applied for* blank.

Define requisitions in *Applicants / Job Requisitions / Update Job Requisitions*.

Position Applied for

If you specify a position for which the applicant applied and you incurred this expense, leave *Job Requisition ID* blank.

Define position codes in Controls / Position Controls / Update Organisation Positions.

Cost Date

You must specify the date on which you incurred this expense.

Cost Type

You must specify the type of cost, such as interview expense. Define cost type codes in *Controls / Employer Codes / Update Employer Codes* using code type CST.

Amount

You must type the amount of this expense.

Comments

Specify any brief additional comment about this expense.

To …	You must …
Exit to the selection list saving your information	Press F3 and specify saving.

Display Applicant Costs Details Page

About This Page

On the Display Applicant Costs details page, you can view all the information from the Update Applicant Costs details page.

How do I...	
Return to the selection list	Press F3.

Applicant References Selection Page

About This Page

Access this page by selecting an applicant with **12** at the Update Applicants selection page.

On the Applicant References selection page, you can view summary information about references provided to support the applicant's job application. The summary includes the referee's title, name, and occupation.

You can also create information about a new reference, display and change existing reference information, and delete reference information for that job application.

How do I...

Create information for a new reference	Press F6 to display the Applicant References details page.
Change a reference's information	Type **2** next to the reference and press Enter.
Display a reference's information	Type **5** next to the reference and press Enter.
Delete a reference	Type **4** next to the reference and press Enter. Confirm the deletion.
Generate a letter	Type **9** next to the reference and press Enter to display the list of documents.
Return to the Update Applicants selection page	Press F3.

Applicant References Details Page

About This Page

On the Applicant References details page, you can specify details about a reference supporting an application for employment including the referee's name, initials, title, occupation, company name and address, telephone number, dates the reference was requested and received, and a reference code such as a personal reference, professional reference, main reference or the like.

Field Information

Last name / first name

You must type the referee's last name and then first name.

Initials

Specify an initial letters of referee's first, middle if any, and last name.

title

Specify the referee's title such as Mr. or Prof.

Occupation

Specify the referee's occupation such as data processing supervisor or professor.

Company name

Specify the organisation where referee is employed such as a company or college.

Address

Type a one or two line referee mailing address through the street address.

Town or city

Type the town or city portion of the referee's mailing address.

post code

Type the postal code portion of the referee's mailing address.

County

Type the county or equivalent portion of the referee's mailing address. Define county codes in *Controls / Employer Codes / Update Employer Codes* using code type CNT.

Country

Specify the code indicating the country of the referee's mailing address. Define country codes in *Controls / Employer Codes / Update Employer Codes* using code type CTR.

Telephone number

Type the telephone number at which this referee can be reached.

Date contacted / received

Type the date you reached this contact to request the reference, and then date you received the reference from the referee.

Reference Code

Specify the code for this reference such as a personal reference, professional reference, or main reference. Define reference codes in *Controls / Employer Codes / Update Employer Codes* using code type REF.

How do I...	
Add up to seven lines of reference summary text	Press Enter for comments window, type text, and press Enter again to return to details.
View information about the date, time, user and workstation for the last updates to the reference information	Press F16.
Exit to the selection list saving your information	Press F3 and specify saving.

Applicant References Details Display Page

About This Page

On the Applicant References details display page, you can view the information from the Applicant References details page.

How do I...	
Return to the selection list	Press F3.

Update Applicant Employment History Selection Page

About This Page

Access this page by selecting an applicant with **13** at the Update Applicants selection page.

On the Update Applicant Employment History selection page, you can view summary information about the applicant's work experience, including employer, period of employment, and job title.

You can also create additional past employment information, display and change existing employment information, and delete a past employment item for the selected applicant.

How do I...

Create new employment information	Press F6 to display the Update Applicant Employment History details page.
Change employment information	Type **2** next to the item and press Enter.
Display employment information	Type **5** next to the item and press Enter.
Delete an employment item	Type **4** next to the item and press Enter. Confirm the deletion.
Return to the Update Applicants selection page	Press F3.

Update Applicant Employment History Details Page

About This Page

On the Update Applicant Employment History details page, you can specify an item of past experience for this applicant including the time period, employer, employer's address, one or more job titles, and reason for leaving, and last salary received annually or monthly.

You can also specify industry, role, and currency codes, and add a line of text comment related to this past employment.

Field Information

From / to date

When creating past employment information, you must specify the period of employment including start date and end date. You cannot edit this information in change mode.

Name of previous employer

When creating past employment information, you must specify the name of the company or other organisation for which applicant worked. You cannot edit this information in change mode.

Address

Specify the full address of this employer.

Job titles

You must specify at least one job title that the applicant held during this employment. You can specify multiple titles.

Reason for leaving code

Define employment termination codes in *Controls / Employer Codes / Update Employer Codes* using code type TRM.

Industry code

Specify the industry with which this previous employer is associated, such as electronics, agriculture, or entertainment industry.

Define industry codes in *Controls / Employer Codes / Update Employer Codes* using code type IND.

Role code

Specify the role the applicant had within this employer's organisation, such as supervisor or clerk.

Define role codes in *Controls / Employer Codes / Update Employer Codes* using code type RLE.

Last salary

Specify the most recent salary the applicant was earning from this employer, expressed either annually or monthly. Specify annual or monthly and the currency in which this amount is expressed later on this page.

Annual or monthly

Type **1** if the specified salary is per year or **0** if the salary is per month.

Currency code

Specify the currency in which the salary is expressed, such as pounds sterling. Define currency codes in *Controls / Employer Codes / Update Employer Codes* using code type CUR,

Comment

Specify further information about this experience.

How do I...

View information about the date, time, user and workstation for the last updates to the applicant's history	Press F16.
Exit to the selection list saving your information	Press F3 and specify saving.

Display Applicant Employment History Details Page

About This Page

On the Display Applicant Employment History details page, you can view information from the Update Applicant Employment History details page.

How do I...

View information about the date, time, user and workstation for the last updates to the applicant's history	Press F16.
Return to the selection list	Press F3.

Updating Applicant Job and Location Preferences

About This Page

On the Update Applicant Preferences page, you can specify the job and location preferences for the specified applicant.

Use job preferences when you do not have a specific job vacancy or job requisition for which the applicant can apply. Job preferences allow you to record information about the type of work being sought by the applicant and their preferred job location if you have multiple sites. This provides ‘waiting list’ functionality so that when you do need to recruit for a job requisition, you can search for potential matching candidates.

Field Information

Occupation Code

Specify up to four occupation codes that identify the applicant’s preference.

Job Reporting Group

Specify the job reporting group that identifies the applicant’s preference. The job group defines a set of job codes.

Employment Type

Specify the type of employment that identifies the applicant’s preference. This could be used for recording whether the applicant is seeking part time or full time work.

Location

Specify the applicant’s location preference. If you have multiple locations you can select more than 1 preferred location

How do I...

Specify all locations are the applicant’s preference	Press F9.
Exit and save	Press F3.

Mass Entering Applicants

Overview

Use *Mass Enter Applicants* for efficient entry of multiple applicants who share certain kinds of basic information such as employer, job requisition ID, position applied for, or applicant source. By using this function, you avoid re-keying the same information for each applicant. The system also automatically creates the job application records for the applicants.

Use the menu path below.

- *Applicants*
- *Applicant Data*
  - *Mass Enter Applicants [MASSAPPLIC]*

Mass Enter Applicants Selections Page

About This Page

On the Mass Enter Applicants selections page, you can specify information that is shared by each of the applicants in the group you are entering. You must specify the employer and either a job requisition or the position applied for or you can specify that the applicants are being entered with only job preference information.

You can also specify an application date, application status, application source, and number of applicants in the group being entered.

Field Information

Employer

Specify the employer to which the applicants in this group are applying.

Default Application Date

If entering a set of applicants that share the same application date, type that date. The system supplies that date for each applicant you enter.

Job Requisition ID

If entering a set of applicants that are applying under the same job requisition, specify the requisition ID. If you leave this value blank, you must specify a position in *Or Position Applied for* or specify **Yes** for *Or Job Preferences*.

Define requisitions in *Applicants / Job Requisitions / Update Job Requisitions*.

Or Position Applied for

If you leave the value for job requisition blank and specify **No** for the job preferences, you must specify the position for which the applicants are applying.

Define position codes in *Controls / Position Controls / Update Organisation Positions*.

Or Job Preferences

If you leave the job requisition and the position applied for values blank, you must specify **Yes** for the applicant job preference. Otherwise, specify **No**. You would use the Job Preferences option when the applicants being mass entered are not applying for specific job vacancies.

Status

You can specify the status of the applications you are entering.

Application Source

If all the applicants are from the same source, you can specify a source.

Number of Applicants

The control total you specify here ensures that you enter the correct number of applicants on the mass entry screen. If you leave this field blank the system uses the default of 16 applicants.

To …	You must …
Enter details for each applicant such as name and address	Press Enter to display the Mass Enter Applicants details page.

To …	You must …
Exit to the menu	Press F3.

Mass Enter Applicants Details Page

About This Page

On the Mass Enter Applicants details page, you can specify the name, address, and date of application for each applicant. You must specify the name, town, and date applied.

The system provides for as many sets of information as there are applicants, based on the number you specified on the selections page.

Use *Update Applicant Records* to specify any additional information that you cannot specify on this page.

Field Information

Last

Specify the applicant's last name as it is to be formally used.

First

Specify the applicant's first name as it is to be formally used.

Title

The title to use with this name as it is to be formally used.

Adr 1, 2, and *3*

Specify at least the first line of the street address.

Town

Specify the town or city of this address.

Cnty

The county of the applicant's address, if applicable.

Postcode

The postal code for the preceding address.

Date Applied

You must specify the date of this application.

How do I...

Enter additional applicants	Complete this same information for each additional applicant.
Save information for the new applicants	Press F3 and confirm saving. At the second confirmation prompt, confirm creation of the new applicant information. The system will also automatically create job application records for the applicants The system returns you to the menu.
Return to the menu without saving	Press F12. The system returns you directly to the menu, bypassing the selections page.

Mass Enter Applicants Preferences Page

About This Page

On the Mass Enter Applicants preferences page, you can specify an applicant's name, address, and date of application. You also can enter job preferences including occupation code, job reporting group and employment type and preferred locations.

The system provides for as many sets of information as there are applicants, based on the number you specified on the selections page.

Use *Update Applicant Records* to specify any additional information that you cannot specify on this page.

Field Information

NI

Specify the applicant's national insurance number.

Last

Specify the applicant's last name as it is to be formally used.

First

Specify the applicant's first name as it is to be formally used.

Title

The title to use with this name as it is to be formally used.

Adr 1, 2, and *3*

Specify at least the first line of the street address.

Town

Specify the town or city of this address.

Cnty

The county of the applicant's address, if applicable.

Postcode

The postal code for the preceding address.

Date Applied

You must specify the date of this application.

Job Preferences: Occupation Code

Specify up to four occupation codes in the order of preference, highest first, for the occupation preferred by the applicant.

Define occupation codes in *Controls / Employer Codes / Update Employer Codes* using code type OCC,

Job Preferences: Job Reporting Group

Specify a job reporting group to identify the set of job codes preferred by the applicant.

Define job reporting group codes in *Controls / Employer Codes / Update Employer Codes* using code type JRP and then define the job codes within the groups using the *Update Job Reporting Groups* function

Job Preferences: Employment Type

Specify the employment type preferred by the applicant.

Define employment type codes in *Controls / Employer Codes / Update Employer Codes* using code type JTY.

Location: Sel

Specify the location or locations preferred by the applicant

How do I...

Enter applicant preferences	Complete this information and press Enter. Complete this information for the next applicant and press Enter. Continue until preferences for the specified number of applicants are entered.
Specify all locations are the applicant's preference	Press F9.
Save information for the new applicants	Press F3 and confirm saving. At the second confirmation prompt, confirm creation of the new applicant information. Note that job application records are not created. The system returns you to the menu.
Return to the menu without saving	Press F12. The system returns you directly to the menu, bypassing the selections page.

Applicant Enquiry

Overview

Use *Applicant Enquiry* to search for and to display information about one or more selected applicants.

You can first define which applicants to include in the selection list by a wide range of criteria such as interviewer, position, application date, current employment status, gender, skill, source, and so forth.

At the selection list of matching applicants, you can choose to display applicant details, or the related activity log, skill list, qualifications, job applications, interviews, costs, references, or prior employment information.

Use the menu path below.

- *Applicants*
- *Applicant Data*
  - *Applicant Enquiry [APPENQUIRY]*

Printing Applicant Records

Overview

Use *Print Applicant Records* to print selected details for a selected set of applicants. You can restrict the selection of applicants by employer, job requisition, a range of application dates, and applicant employment status (employed, unemployed, or all applicants).

You can choose which details to include in the report. The available choices include activity log entries, costs, employment, interviews, job applications, qualifications, references, and skills.

Use the menu path below.

- *Applicants*
- *Applicant Data*
  - *Print Applicant Records [PAR]*

Printing an Applicant List

Overview

Use *Print Applicant List* to list a selected set of applicants based on any combination of the following: employer, interviewer, position applied for, and application date range, job requisition ID, current employment status, gender, a key skill or skill/competency model, the application source, and the status of the application. You can also select applicants by whether they are relocatable, and by ethnic ID.

The report includes the employer, applicant name and number, date applied, tax ID, and whether the applicant is internal or external.

Use the menu path below.

- *Applicants*
- *Applicant Data*
  - *Print Applicant List [PELFB220]*

Updating Fair Employment Details

Overview

Use *Update Fair Employment Details* to record information required by the current Fair Employment Legislation for Northern Ireland. The information includes community background, monitoring method, and, if you use the residuary method, the details.

You can enter the information by applicant number, without showing the applicant name or address.

Use the menu path below.

- *Applicants*
- *Applicant Data*
  - *Update Fair Employment Details [UPDFEDET]*

Update Fair Employment Details Applicant Selection Page

About This Page

On the Update Fair Employment Details applicant selection page, you must specify the number of the applicant for whom you are tracking community background.

Update Fair Employment Details is designed not to display the applicant's name or address to the user who enters the fair employment information from anonymous forms. Tracking this information about each applicant enables you to meet the requirements of Northern Ireland Fair Employment legislation.

Field Information

Applicant Number

Number of the applicant whose community background you are tracking.

How do I...

Continue to the details page	Type and right-justify an applicant ID number. Then press Enter.

Update Fair Employment Details Page

About This Page

On the Update Fair Employment Details page, the system displays the applicant's occupation code and job category such as technical staff from the applicable job requisition information.

Specify an applicant's community background, along with the principal monitoring method or, if you use the residuary method, a brief statement of the details.

Field Information

Community Background

You must specify the community background by code such as **RC** for Roman Catholic. Define community background codes in *Controls / Employer Codes / Update Employer Codes* using code type CMB.

Method of Monitoring

Specify your method of monitoring applicants' community background by code such as **DIR** for direct question or **SSCH** for secondary school. Define method of monitoring codes in *Controls / Employer Codes / Update Employer Codes* using code type MON.

If you do not specify a standard method of monitoring, you must specify a residuary method.

Residuary Method

If you left *Method of Monitoring* blank, you must specify a residuary method of monitoring here, such as indications from address and sporting or other clubs or societies.

How do I...

Return to the menu saving your information	Press F3 and confirm saving.

Updating Job Requisitions

Overview

Use *Update Job Requisitions* to create and maintain information about open jobs, including requisition IDs and dates, position, where in the organisation the job is to be, job code, category, occupation, and job type, skill/competency model, location, requisition status, and whether this opening is an apprenticeship.

Additional detailed requisition information includes job details, justifications, duties and responsibilities, compensation, and miscellaneous information such as years of experience required, proposed start date, and the like.

The Update Job Requisitions selection page also provides access to applicants' applications along with applicant specific details, activity log entries, and interviews, as well as to expense, advertising, and skill/competency details associated with each requisition.

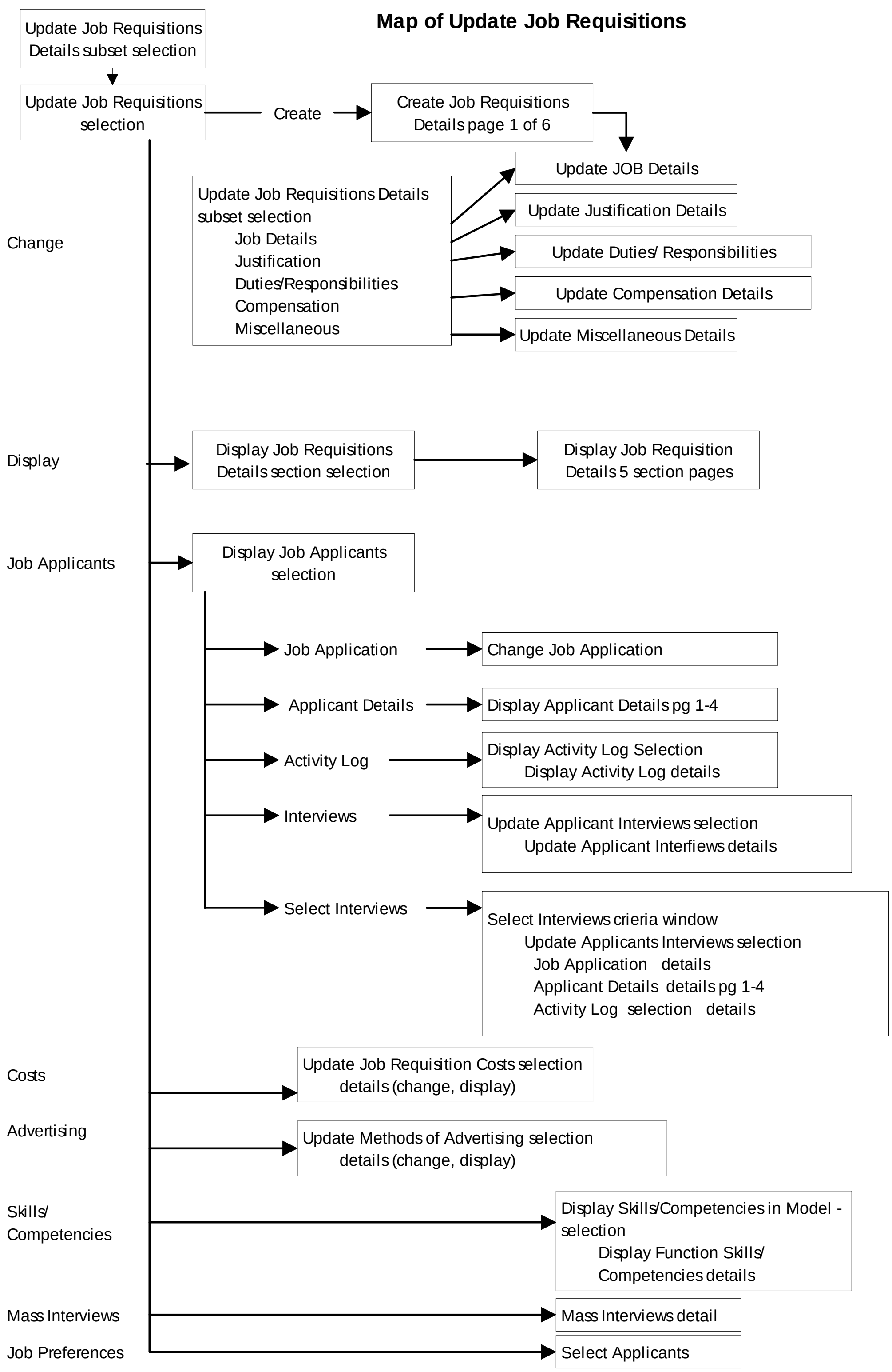


Figure 2-1: Job Requisition map

Use the menu path below.

- *Applicants*
- *Job Requisitions*
    - *Update Job Requisitions [UPDJOBREQ]*

Update Job Requisition Details Subset Selection Page

About This Page

On the Update Job Requisition Details subset selection page, you can specify criteria for selecting the requisitions to be listed on the Update Job Requisitions selection page.

In addition to specifying the employer, you can restrict the list by position code, organisational levels such as department or cost centre, job code or category, occupation code, job type, skill/competency model, location, and requisition status. You can also choose whether to limit the list to current requisitions, and limit the requisitions to apprenticeships.

Field Information

Employer

Specify the employer for which you are maintaining job requisitions.

Position Code

Specify a position code to limit the list to requisitions for this position.

Define position codes in *Controls / Position Controls / Update Organisation Positions*.

Level 1 through 4

Narrow the list by specifying particular organisational level values. For example, you can limit the list to information for a specific department or cost centre or an equivalent defined level within your organisation.

Job Code

Specify a job to limit the list to requisitions for this job. Assign job codes such as telephonist or senior account executive in *Controls / Job Controls / Update Job Controls*.

Job Category

Specify a job category to limit the list to requisitions for jobs within this category of jobs, such as technical staff or administrative staff.

Define job categories in *Controls / Employer Codes / Update Employer Codes* using code type EEO.

Occupation Code

Specify a code to limit the list to requisitions related to this occupation.

Define occupation codes in *Controls / Employer Codes / Update Employer Codes* using code type OCC.

Employment Type

Specify an employment type such as full time or part time to limit the list to requisitions for this kind of employment .

Define job type codes in *Controls / Employer Codes / Update Employer Codes* using code type JTY.

Skill/Competency Model

Specify a skill/competency model to limit the list to requisitions that have that model in their information.

Define skill/competency models in *Skills & Competencies / Skills Maintenance / Update Skill/Competency Models.*

Location Code

Specify a location to limit the list to requisitions for jobs located there.

Define your organisation's locations and their codes in *Controls / Locations / Update Locations*.

Requisition Status

Specify a status such as filled or open to limit the list to requisitions having this status. Define requisition status codes in *Controls / Employer Codes / Update Employer Codes* using code type RQS.

Current Requisitions

Type **1** to list only requisitions that do not specify a requisition end date by which they were filled or made inactive. Otherwise type **0**.

Apprentice

Type **1** to list only requisitions for apprenticeships. Otherwise type **0**.

How do I...

Display the Update Job Requisitions selection page listing matching requisitions	Provide applicable values on this page and press Enter.
Return to the menu	Press F3.

Update Job Requisitions Selection Page

About This Page

On the Update Job Requisitions selection page, you can view summary information about requisitions that match the criteria you specified on the subset selection page. You can create a new requisition, and edit, display, and delete requisitions. The summary information includes employer, requisition ID and date, job title, position code, status of the requisition, and location of the opening.

You can also access applicant, cost, advertising, and skill/competency information related to any listed job requisition. From the list of applicants who have applied for the selected job, you can change application information and display applicant, activity, and interview information, and can also update interview information. You can also set up mass interviews and display job preferences for candidates for a specified job.

Field Information

Employer

Change the employer code to display a list of requisitions for a different employer Use a blank value to display a list of requisitions for all employers.

If you specify a different employer or a blank employer value, the system still applies the other subset details you specified at the preceding page.

Search for

If the list is long, use *Search for* to find a specific requisition by any job requisition ID, date, or job title text.

How do I...

Create new job requisition information	Press F6 to display the Create Job Requisition page.
Change a requisition	Type **2** next to the requisition and press Enter to display the Update Job Requisition Details section selection page. Select the sections to be changed and press Enter.
Delete a listed job requisition	Type **4** next to the requisition and press Enter. Confirm the deletion.
Display requisition information	Type **5** next to the requisition and press Enter to access the Update Job Requisitions selection page.
Modify job application information	Type **6** next to the requisition and press Enter to access the Update Job Applications details page. Select the information to be changed with a 2 to access the Update Application page.
Access information about applicants, their applications, activities, and an applicant's interviews for a listed job	Type **6** next to the requisition and press Enter to display the Update Job Applicants selection page. Continue to desired information.
Generate letters for applicants	TYPE **6** next to the requisition and press Enter to display the Update Job Applications selection page . Select the applicant with **9** to access the Display MailMerge Documents selection page.
Update an applicant's interview information for a listed job opening	Type **6** next to the requisition and press Enter to display the Update Job Applications s selection page. Select the applicant with **8** to access the Update Applicant Interviews selection page.
Change cost information for filling a listed job opening	Type **7** next to the requisition and press Enter to display the Update Job Requisition Costs selection page.
Change advertising information for an opening	Type **8** next to the requisition and press Enter to display the Update Methods of Advertising selection page.

How do I...	
Display skill/competency details for the job's skill/competency model	Type **9** next to the requisition and press Enter to display the Display Skills/Competencies in Model selection page.
Set up mass interviews	Type **10** next to the requisition and press Enter to display the Mass Interviews page.
Create job applications from job preference data	Type **11** next to the requisition and press Enter to display the Create Job Applications from Applicant Job Preferences selection page.

Create Job Requisition Page

About This Page

On the Create Job Requisition page you can specify the employer, requisition date and ID, position code, and job title for this new job requisition.

You can either type a freeform ID, or have the system automatically assign a new requisition ID at this page.

When you have created the requisition ID at this page, you can continue directly to the five detail section pages to complete any available information for the new requisition.

Field Information

Employer

Specify the employer that has the job opening.

Date of Requisition

Specify the date as of which this requisition is open.

Requisition ID

Either type an identifier for this requisition or use the Generate ID action to have the system assign an ID.

Position Code

Specify the position that is open. Define position codes in *Controls / Position Controls / Update Organisation Positions*.

If you specify a position, the system supplies information from the position in the corresponding fields in the Job details section of the requisition.

Job Title

Type the job title that a successful applicant will have in your organisation.

How do I...

Auto generate a new requisition ID	Press F13.
Continue to the details pages for this new job opening	Press Enter to display the Update JOB Details page; continue pressing Enter for each of the remaining four pages.
Exit the creation process without completing the job details	Press F3 and specify saving the new requisition ID information.

Update Job Requisition Details Section Selection Page

About This Page

On the Update Job Requisition Details section selection page, you can select one or more sections of this job requisition for update.

The sections include job details, justification, duties/responsibilities, compensation, and miscellaneous other information.

How do I...

Display a listed section for update	Type any character next to the section name and press Enter.
Exit to the Update Job Requisitions selection page	Press F3.

Update JOB Details Page

About This Page

Access the Update JOB Details page by selecting *Job Details* at the Update Job Requisition Details section selection page.

On the Update JOB Details page, you can specify basic information about the job such as organisational level information like department, the occupation code, job code, category such as technical or professional, type such as full time, the skill set expected, and the job location.

If you associated the requisition with a position the system supplies information from the corresponding fields on the position record.

You can also specify requisition status and end date, the last date applications will be taken for this job, and whether the opening is an apprenticeship. Refer to the field information for where to define the various codes used on this page.

The system displays summary requisition information and the position code, if any, from information specified during creation of this requisition.

Field Information

Level 1 to 4

You must specify at least where this opening fits into your organisation, such as a level 1 value. You can also specify additional levels such as department and cost centre, or your equivalent organisational levels.

Job Code

You must specify the code for the open job. Assign job codes such as telephonist or senior account executive in *Controls / Job Controls / Update Job Controls*.

Job Category

You must specify the category into which this job falls, such as technical staff or administrative staff. Define job categories in *Controls / Employer Codes / Update Employer Codes* using code type EEO.

Occupation Code

You must specify the code for the occupation to which this job belongs.

Define occupation codes in *Controls / Employer Codes / Update Employer Codes* using code type OCC.

Employment Type

You must specify the code for the job type, such as for full or part time.

Define employment type codes in *Controls / Employer Codes / Update Employer Codes* using code type JTY.

Skill/Competency Model

Model code for the set of skills and competencies looked for in applicants for this position. Define skill/competency models in *Skills & Competencies / Skills Maintenance / Update Skill/Competency Models.*

Location Code

You must specify the location where the hired application is to work. Define your organisation's locations and their codes in *Controls / Locations / Update Locations*.

Requisition Status

You must specify the status of the requisition, such as open. Define requisition status codes in *Controls / Employer Codes / Update Employer Codes* using code type RQS.

Requisition End Date

When the requisition has been filled or made inactive, enter the end date. Requisitions with no end date are treated as current requisitions.

Application Close Date

Specify the date by which applications must be received in order to be considered for this job.

Apprentice

You must type **1** if this requisition is for an apprenticeship; otherwise **0**.

How do I...

Continue to the next section that you selected, if any	Press Enter.
Exit to the section selection page saving updates	Press F3 and specify saving.

Update Justification Details Page

About This Page

Access the Update Justification Details page by selecting *Justification* at the Update Job Requisition Details section selection page.

On the Update Justification Details page, you can specify the reason and detailed justification for the requisition, the number of new employees needed, how many are hired to date, and contacts for this requisition.

Field Information

Reason for requisition

Specify why one or more new employees are needed, such as VACNT for a job with vacancies. Define requisition reason codes in *Controls / Employer Codes / Update Employer Codes* using code type RRQ.

Justification

Type a brief freeform statement of justification for this requisition, up to one line in length.

Number Required

Specify how many new employees are needed under this requisition.

Number Filled To Date

Specify how many of these openings have been filled so far.

Requested by

Type the name of the person who requisitioned the new employees.

Approved by

Type the name of the person who approved the requisition.

Contact Phone

Type the telephone number of a contact such as the hiring supervisor or PE specialists working on filling the position.

Contact E-Mail

Type the e-mail address of the contact.

How do I...

Continue to the next section that you selected, if any	Press Enter.
Return to the JOB Details page	Press F12.
Exit to the section selection page saving your updates	Press F3 and confirm saving.

Update Duties/Responsibilities Page

About This Page

Access the Update Duties/Responsibilities page by selecting *Duties/Responsibilities* at the Update Job Requisition Details section selection page.

On the Update Duties/Responsibilities page, you can specify the reporting structure and detailed description for the open position.

Field Information

Reports to Employer

Specify the employer for which the new employee is to work.

Reports to Position

Specify the position to which the new employee's position reports.

Define position codes in *Controls* / *Position Controls* / *Update Organisation Positions*.

Reports to Employee

Specify the number of the employee to whom the new employee is to report or tab to the right and type the last name of the employee to whom the new employee is to report.

Enter Job Description

Type a detailed job description for the open position, up to ten lines.

How do I...	
Continue to the next section that you selected, if any	Press Enter.
Return to the Justification Details page	Press F12.
Exit to the section selection page saving your updates	Press F3 and confirm saving.

Update Compensation Details Page

About This Page

Access the Update Compensation Details page by selecting *Compensation* at the Update Job Requisition Details section selection page.

On the Update Compensation Details page, you can specify a pay frequency, salary range, and summary commission potential, bonus potential, and share option information for the open position.

Field Information

Pay Frequency

Specify the frequency with which the new employee is to be paid, such as **W** for weekly, **M** for monthly, or **13** for 13 pay periods. The system will default in the value from the pay grade of the job requisition's job code.

Salary Range From

Specify the lower limit of the salary range for the open job. The system will default in the value from the salary range record associated with the job requisition's job code.

Salary Range To

Specify the upper limit of the salary range for the open job. The system will default in the value from the salary range record associated with the job requisition's job code.

Commission Potential

If applicable, specify a probable commission amount that the person filling this position might earn.

Bonus Potential

Specify a likely bonus amount that the person filling this position might receive.

Share Option

Type **1** if this position is eligible for options on shares in the company stock; otherwise **0**.

How do I...

Continue to the Miscellaneous Details section if selected	Press Enter.
Return to the Duties / Responsibilities page	Press F12.
Exit to the section selection page saving your updates	Press F3 and confirm saving.

Update Miscellaneous Details Page

About This Page

Access the Update Miscellaneous Details page by selecting *Miscellaneous* at the Update Job Requisition Details section selection page.

On the Update Miscellaneous Details page, you can specify additional information about the open position such as years of experience required, minimum educational level required of applicants, security clearance type required, proposed start and, if applicable, end date, and length of contract if applicable.

You can also specify the recruiter, who filled the position, and for statistical analyses, the numbers of application forms sent out, of applications received, and interviews held. You can add a brief freeform text comment.

Field Information

Years Experience Req

Specify how many years of experience an applicant should have.

Education Level

Specify the minimum level of educational background an applicant should have, such as ALVL for A levels. Define education level codes in *Controls / Employer Codes / Update Employer Codes* using code type EDU.

Security Clearance Type

Specify the type of security clearance required, such as **HIGH** or **NONE**. Define security clearance type codes in *Controls / Employer Codes / Update Employer Codes* using code type SCT.

Proposed Start Date

Type the date on which the employer wants the new employee to start work in your organisation.

End Date

If this position is for only a specified period of time, type the last date on which the employer anticipates the leaver to report for work.

Length of Contract

If this position involves a contract, specify the length of employment to be stipulated in the contract.

Recruiter Name

Specify the ID for the recruiter responsible for finding applicants for this requisition.

Define recruiter IDs and the corresponding names in *Applicants / Update Interviewers/Recruiters / Update Interviewers/Recruiters*.

Filled By

Specify the name of the HR person who processed the vacancy.

Number of App Forms Sent

Type how many applications were distributed to potential applicants.

Number of Applicants

Type how many individuals actually applied for this opening. This value is not currently automatically maintained by the system.

Number of Interviews

Type how many interviews were performed for this opening. This value is not currently automatically maintained by the system.

Comments

Type any brief additional information for this opening.

How do I...

Exit to the section selection page saving your updates	Press F3 and confirm saving.

Display Job Requisitions Details Page

About This Page

On the Display Job Requisition Details section selection page, you can select one or more sections of this job requisition for display.

The sections include job details, justification, duties/responsibilities, compensation, and miscellaneous other information.

How do I...

Display a listed section	Type any character next to the section name and press Enter.
Exit to the Update Job Requisitions selection page	Press F3.

Update Job Applicants Selection Page

About This Page

Access the Update Job Applicants selection page by selecting a listed job requisition with **6** at the Update Job Requisitions selection page.

From this page, you can access these pages for a listed applicant:

- Update Job Application page and update applicant job application information from the *Update Applicant Records* Update Job Application page

- Display Applicant Details pages 1 through 4 as in *Update Applicant Records*
- Display Activity Log selection page, with access to the Display Activity Log details page as in *Update Applicant Records*
- Update Application Interviews selection and details pages as in *Update Applicant Records*
- Select Interviews criteria window for defining and displaying a subset list of interviews. From the interview list, you can display related job application details, applicant details as in *Update Applicant Records*, and an activity log selection list with access to the *Update Applicant Records* activity details.
- Mass Change Application Status window to change the status of all applicants for the specified job requisition
- Display Applicant Details Subset Details page to limit the applicants who will be displayed
- Display Mailmerge Documents selection page to select the document to be sent to all applicants for the specified job requisition

To …	You must …
Update a listed applicant's job application details as entered in *Update Applicant Records*	Type **2** next to the applicant and press Enter for the Update Job Application details page.
Display four basic applicant information pages as entered in *Update Applicant Records* for a listed applicant	Type **6** next to the applicant and press Enter.
Display the activity log entries associated with a listed applicant	Type **7** next to the applicant and press Enter.
Access the Update Applicant Interviews selection page for a listed applicant	Type **8** next to the applicant and press Enter. Process interview updates as in *Update Applicant Records*.
Access the Display Mailmerge Documents selection page	Type **9** next to the applicant and press Enter. Process letters as in *Update Document Definitions.*
Define criteria for a subset of interviews in order to display application, applicant, and activity log information related to those interviews	Press F14 to display the Select Interviews criteria window. Specify the criteria and press Enter to display the interview list and choose related displays.

To …	You must …
Mass change applicant status	Press F16 to display the Mass Change Applicant Status criteria window. Specify the criteria and press Enter to change the status of all applicants associated with the specified job requisition.
Send a letter to all applicants for the specified job requisition	Press F18 to display the Display Mailmerge Documents selection screen. Select the letter to be sent to all applicants for the specified job requisition.
Exit to the Update Job Requisitions selection page	Press F3.

Update Job Application Details Page

About This Page

Access the Update Job Applications details page by selecting an applicant with **2** at the Update Job Applicants page.

On the Update Job Application details page, you can modify the application details that were specified in *Update Applicant Records*, such as application date, requisition ID, position applied for, applicant's job preference, asking salary, source of referral, and application status information and dates along with any associated comment.

How do I...	
View the time, date, user and workstation for the most recent updates to this applicant’s record	Press F16.
Return to the Update Job Applications selection page	Press F3.

Display Applicant Details Pages 1 through 4

About This Page

Access the Display Applicant Details pages for an applicant by selecting the applicant with **6** at the Display Job Applicants selection page.

On the Display Applicant Details pages, you can view the same information as in *Update Applicant Records*.

How do I...

Continue through the four pages and automatically return to the Display Job Applicants selection page	Press Enter at each page.
Return directly to the Display Job Applicants selection page from any applicant details page	Press F3.

Display Activity Log Selection Page

About This Page

Access the Display Activity Log selection page for an applicant by selecting the applicant with **7** at the Display Job Applicants selection page.

On the Display Activity Log selection page, you can view summary information about activities related to the selected applicant, including activity date, type such as acknowledgement sent, status of the application such as pre-interview, and any comments.

You can also display the full details for a listed activity, to determine the meaning of listed type and status codes and to view who entered the activity information.

You define these details in *Update Applicant Records*.

How do I...

To view details for a listed activity	Type **5** next to the activity and press Enter.

How do I...	
Return to the Display Job Applicants selection list	Press F3.

Display Activity Log Details Page

About This Page

Access the Display Activity Log details page by selecting an activity with **5** at the Display Activity Log selection page.

On the Display Activity Log details page, you can view activity information that was defined in *Update Applicant Records*.

This display page is also accessible through *Update Applicant Records* and through the *Select Interviews* action at the Display Job Applicants selection page in *Update Job Requisitions*.

How do I...	
Return to the Display Activity Log selection page	Press Enter.

Update Applicant Interviews Selection Page

About This Page

Access the Update Applicant Interviews selection page by selecting an applicant with **8** at the Update Job Applicants selection page.

On the Update Applicant Interviews selection page, you can view summary information for interviews with the selected applicant, including interview date, time, location, type such as first, interviewer, interview result such as passed or offer, and the application status such as post interview.

From this page you can also create new interview information, change information for a listed interview, and delete interview information as in *Update Applicant Records*.

To …	You must …
Create, change, or delete interview information	Follow the procedures outlined in the instructions for this page within *Update Applicant Records*.
Return to the Display Job Applicants selection page	Press F3.

Update Applicant Interviews Details Page

About This Page

Access the Update Applicant Interviews details page by selecting an interview with **2** or choosing to create new interview information from the Update Applicant Interviews selection page.

You can create or change the interview information on this page as in *Update Applicant Records*. The information is shared between *Update Job Requisitions* and *Update Applicant Records*. Any changes you make affect the information as accessed through either function.

How do I...	
Return to the Update Applicant Interviews selection page saving new or changed information	Press F3 and specify saving.

Select Interviews Criteria Window

About This Page

Access the Select Interviews criteria window through the Interviews choice at the Update Job Applications selection page.

In the Interviews criteria window, you can define criteria for selecting a subset of interviews, including interview type such as first or second, location, interviewer, result such as passed or offer, and interview date.

From the resulting list of interviews, you can display related information for a listed interview: Application, applicant, and activity details and also send a interview letter to the applicant .

Field Information

Interview Type

Kind of interview this is, such as 2nd. Define interview types in *Controls / Employer Codes / Update Employer Codes* using code type ITP.

Interview Location

Location at which the interview took place or is to take place. Define locations and their codes in *Applicants / Interview Locations / Update Interview Locations*.

Interviewer

The person responsible for conducting this interview.

Interview Result

Code indicating the result of the interview, such as interview again. Define interview result codes in *Controls / Employer Codes / Update Employer Codes* using code type INV.

Interview Date

Date the interview took place or is to take place.

Interview Status

Code indicating the status of the interview, such as job offered. Define interview status codes in *Controls / Employer Codes / Update Employer Codes* using code type ALS.

How do I...

Display a list of interviews matching these criteria	Press Enter.

Display Applicant Interviews Selection Page

About This Page

Access the Display Applicants Interviews selection page by defining a list of interviews for a specified job requisition at the Interviews criteria window.

From the Display Applicant Interviews selection page you can display details of the job application , display details of the applicant, display the activity log entries or send an interview letter to the applicant

How do I...

Display a job application	Type **5** next to the interview and press Enter.
Display details of the applicant	Type **6** next to the interview and press Enter.
Display details of the activity log	Type **7** next to the interview and press Enter.
Send a letter to the applicant	Type **9** next to the interview and press Enter.
Send a letter to all interviewees	Press F18.
Return to the Display Job Applicants selection page	Press F3.

Update Job Application Details Page

About This Page

Access this page by selecting a job application with **2** at the Update Job Applications page.

On the Update Job Application details page, you can modify details from the applicant's job application as defined in *Update Applicant Records*.

How do I...

View the most recent time, date and interviewer for this applicant	press F16.
Return to the list of interviews	press F3.

Display Applicant Details Pages 1 to 4

About This Page

Access these pages by selecting an interview with **6** at the Display Applicants Interviews page after defining the interview list at the Select Interviews criteria window.

On the Display Applicant Details pages, you can view details about the interviewed applicant as defined in *Update Applicant Records*.

How do I...

Return to the list of interviews	Press F3.

Display Activity Log Selection Page

Access this page by selecting an interview with **7** at the Update Job Applications page after defining the interview list for a job requisition at the Select Interviews criteria window.

On the Display Activity Log selection page, you can view summary information about activities related to the selected interviewed applicant as defined in *Update Applicant Records*. The summary information includes the activity date and type, the application status, and the beginning of any comment in the activity details.

How do I...

Display more details about a listed activity	Type **5** next to the activity and press Enter.
Return to the list of interviews	Press F3.

Display Activity Log Details Page

Access the Display Activity Log Details page by selecting an activity with **5** at the Display Activity Log selection page.

On the Display Activity Log details page, you can view additional information about an activity, including who entered the activity information, and full comment text of up to ten lines.

These details were entered in *Update Applicant Records*.

How do I...

Return to the activity selection list	Press F3.

Update Applicant Interviews Selection Page

About This Page

Access the Update Applicant Interviews selection page by selecting a job application with an **8** on the Update Job Applications selection page.

On the Update Applicant Interviews selection page, you can create a new interview or select an interview to update or delete or specify that a letter be sent to the applicant associated with the interview.

These details were entered in *Update Applicant Records.*

How do I...

Create a new applicant interview	Press F6.
Change an applicant interview	Type **2** next to the applicant record.
Delete an applicant record	Type **4** next to the applicant record.
Send the applicant a letter	Type **6** next to the applicant who should receive the letter.
Exit and save	Press F3 and confirm saving.

Create Applicant Interviews Page

About This Page

Access the Update Applicant Interviews page by specifying **Create** on the Update Applicant Interviews selection page.

On the Update Applicant Interviews page, you can create a new interview.

These details were entered in *Update Applicant Records.*

How do I...

Create a new applicant interview	Complete the information on this page and press Enter.
Exit and save	Press F3 and confirm saving.

Change Applicant Interviews Page

About This Page

Access the Update Applicant Interviews page by specifying **Change** on the Update Applicant Interviews selection page.

On the Update Applicant Interviews page, you can change an existing interview.

These details were entered in *Update Applicant Records.*

How do I...

Update an applicant interview	Complete the information on this page and press Enter.
Exit and save	Press F3 and confirm saving.

Display Mailmerge Documents Selection Page

About This Page

Access the Display Mailmerge Documents page by specifying **Letter** on the Update Applicant Interviews selection page.

On the Display Mailmerge Documents selection page, you can select a letter to be sent to the applicant.

These details were entered in *Update Document Definitions.*

How do I...

Save	Press F3.

Confirm Mailmerge Details

About This Page

On the Confirm Mailmerge Details page, you can modify mail merge information.

These details were entered in *Update Document Definitions.*

How do I...

Modify mail merge details	Complete the information on this page and press Enter.
Exit	Press F3.

Update Job Requisition Costs Selection Page

About This Page

Access the Update Job Requisition Costs selection page by selecting a listed job requisition with **7** at the Update Job Requisitions selection page.

On this page, you can view summary information about costs associated with filling this job opening, including the expense date, amount, type such as interview expense, and the beginning of any associated comment. The selection page also displays the total of all costs included in the listed expense details.

You can also create new cost information, change or display listed costs, and delete a listed cost.

How do I...

Create new cost information	Press F6.
Change information for a listed cost	Type **2** next to the cost and press Enter to display the Update Job Requisition Costs details page.
Display cost information	Type **5** next to the cost and press Enter for the Display Job Requisition Costs page.

How do I...	
Delete cost information	Type **4** next to the cost and press Enter. Confirm the deletion.
Exit to the Update Job Requisitions selection page	Press F3.

Update Job Requisition Costs Details Page

About This Page

On the Update Job Requisition Costs details page, you can specify the date, cost type such as interview expense, amount, and a brief comment.

Field Information

Cost Date

Date the expense was incurred.

Cost Type

Type of cost, such as interview expenses. Define cost type codes in *Controls / Employer Codes / Update Employer Codes* using code type CST.

Amount

The amount expended. This amount is included in the total costs amount displayed on the Update Job Requisition Costs selection page.

Comments

A brief one-line comment.

How do I...	
Exit saving your information	Press F3 and specify saving.

Display Job Requisition Costs Details Page

About This Page

On the Display Job Requisition Costs details page, you can view the information that was entered at the Update Job Requisition Costs details page. This includes the cost date, type, amount, and any associated comment.

How do I...

Return to the cost selection list	Press Enter.

Update Methods of Advertising Selection Page

About This Page

Access the Update Methods of Advertising selection page by selecting a listed job requisition with **8** at the Update Job Requisitions selection page.

On this selection page, you can view summary information about the media through which this job opening is advertised, such as through a recruitment agency, the internet, radio, or a newspaper. The summary includes the method with the start and end dates for each listed method.

From this page you can also create new advertising information, change or display existing advertising information, and delete information.

How do I...

Create new advertising method information	Press F6.
Change information for a listed advertisement method	Type **2** next to the method and press Enter to display the Update Methods of Advertising details page.
Display advertising information	Type **5** next to the method and press Enter for the Display Methods of Advertising details page.
Delete advertising information	Type **4** next to the method and press Enter. Confirm the deletion.
Exit to the Update Job Requisitions selection page	Press F3.

Update Methods of Advertising Details Page

About This Page

On the Update Methods of Advertising details page, you can specify a method, period, status and cost of the advertising method, contact information, and a brief comment.

The details apply to the selected method for the selected job requisition.

Field Information

Method of Advertising

You must specify a medium through which you are advertising this opening, such as recruitment agency, internet site, local newspaper, or radio commercial message.

Define advertising method codes in *Controls / Employer Codes / Update Employer Codes* using code type MOA.

From Date

Date this advertisement through this medium begins.

To Date

Date this advertisement through this medium ends.

Status

Status of the advertisement through this medium such as in progress or unsuccessful. Define advertising status codes in *Controls / Employer Codes / Update Employer Codes* using code type MST.

Cost/Fees

The expense of running this advertisement for this opening through this medium for this time period.

Contact Name

Name of the person with whom you placed the advertisement, such as the advertising staff contact at a radio station or newspaper.

Telephone

Where you can call the contact at the media such as radio station or newspaper.

Comments

A brief one-line comment.

How do I...

Exit saving your information	Press F3 and specify saving.

Display Method of Advertising Details Page

About This Page

On the Display Method of Advertising details page, you can view the information that was entered at the Update Methods of Advertising details page. This includes the method code, period of advertising by that method, status, cost, contact name and telephone and any comment.

How do I...

Return to the Update Methods of Advertising selection list	Press Enter.

Display Skills/Competencies in Model Selection Page

About This Page

Access the Display Skills/Competencies in Model selection page by selecting a listed job requisition with **9** at the Update Job Requisitions selection page.

On this selection page, you can view summary information about the skills and competencies or groups of skills and competencies associated with the model in the job requisition.

For each included skill or competency, the summary includes the skill code, description, whether this is a skill, competency, or group, the skill level, priority, and whether the skill is required for the position or job. The summary also indicates when this model was last evaluated.

From this page you can access the details display page for a listed skill or competency.

How do I...

Display the details page for a listed skill or competency	Type **5** next to the skill and press Enter.
Exit to the Update Job Requisitions selection page	Press F3.

Display Function Skills/Competencies Details Page

About This Page

On the Display Function Skills/Competencies details page, you can view the information that was defined for a skill or competency in *Update Skill/Competency Models.*

The information includes the skill code and description, the priority this skill has for this job with the highest priority being **1**, whether the skill is required for the job with **1** meaning yes, and the level of this skill that the job requires with the lowest level being **1**. The summary also indicates when this model was last evaluated.

Skill codes are defined in *Skills & Competencies / Skills Maintenance / Maintain Skills/Competencies*.

How do I...

Return to the Display Skills / Competencies in Model selection list	Press Enter.

Update Mass Interviews Details Page

About This Page

On the Update Mass Interviews details page, you can specify an interview, type, location, interviewer and other details for creating mass interviews or for selecting existing interviews for entering interview results

Field Information

Interview Type

Specify the type of interview you are updating. If you are creating interviews and you leave this field blank you can manually enter the interview type on each interview record. If you entering interview results leave blank to select all interview types.

Interview Location

Specify the location of the interview.

Interviewer

Specify the person who will conduct the interview.

Interview Status

Specify the status of the interview. If you entering interview results leave blank to select all interview statuses.Interview Date

Specify the date of the interview.

First Start Time

Specify the starting time of the first interview.

Duration (minutes)

Specify the length of the interview.

Calculate Start Times?

Specify **Yes** to calculate the starting time for each interview. Otherwise, specify **No**.

Last Interview End By

Specify the time the last interview should end.

Referral Source

Specify where the applicant learned of the job. Leave blank for all.

Status Code

Specify the status of the application. Leave blank for all.

How do I...	
Select applicants to be scheduled for an interview	Press F6.
Record the results of the interviews	Press F8.
Exit saving your information	Press F3 and specify saving.

Create Job Applications from Job Preferences Selection Page

About This Page

Access the Create Job Applications from Applicant Job Preferences selection page by selecting a listed job requisition with **11** at the Update Job Requisitions selection page.

On this selection page, you select applicants from a list of those whose job preferences match the requirements of the job requisition and you create job applications..

How do I...	
Select applicants to create a job application	Type any character next to each applicant to create job application.
Exit and save.	Press F3.

Job Requisition Enquiry

Overview

Use *Job Requisitions Enquiry* to define a requisition selection list by a wide range of criteria and for any selected requisition to display the five pages of requisition details that were defined for specified requisitions in *Update Job Requisitions*.

In addition to specifying an employer, you can restrict the list by position code, organisational levels such as department or cost centre, job code or category, occupation code, job type, skill/competency model, location, and requisition status. You can also choose whether to limit the list to current requisitions, and limit the requisitions to apprenticeships.

The details provide information about the job, requisition justification, job duties/responsibilities, employee compensation, and miscellaneous other information. The miscellaneous information includes such items as experience, education, and security clearance level required, proposed start and end date, length of contract, and application/interview statistics.

From the selection list, you can also display related job applicant, cost, advertising, and skill/competency information.

Use the menu path below.

- *Applicants*
- *Applicant Data*
  - *Job Requisitions Enquiry [JOBREQENQ]*

Printing Applicant Interviews

Overview

Use *Print Applicant Interviews* to generate a report with information about interviews with persons seeking employment in your organisation.

You can restrict the report contents by any combination of employer, job requisition, a range of application dates, applicant employment status, and interviewer.

For all selection criteria except ending date and applicant type (employment status), leaving a value blank indicates including all, such as all employers if the employer value is blank.

Path

- *Applicants*
- *Interviews*
  - *Print Applicant Interviews [PAI]*

Displaying Interviews by Interviewer

Overview

Use *Disply Interviews by Interviewer* to display a subset list of interviews for a selected interviewer and to select interviews from the list to view details. You can restrict the list by employer, interviewer, and a range of interview dates.

The selection list provides summary information including the date, time, location, applicant name, and type of interview such as 1st or 2nd. You can select an interview to view information about the application, applicant, activity log, and interview details.

You can also select an interview to access the Display Applicant Interviews selection page from this list, enabling you to display detailed interview information.

Use the menu path below.

- *Applicants*
- *Interviews*
  - *Disply Interviews by Interviewer [DSPINTBINT]*

Displaying Interviews by Location

Overview

Use *Display Interviews by Location* to display information about interviews held for a specified employer at a specified location. You can choose also to limit the display choice to interviews within a particular time period.

The selection page of these interviews summarises the date, time, interviewer, applicant name, and interview type such as 1ST or 2ND.

Choices at the Selection Page

From the selection page you can display related interview, applicant, activity log, and job application details.

You can also select a listed interview to access the Display Applicant Interviews selection page, enabling you to display interview information.

Interview Details

The interview details include applicant, job requisition ID or position applied for, interview result, interview status, and any comments from the interview information as well as the basic information already displayed on the selection page.

Applicant Details

The applicant details selection displays the standard four pages of information that you maintain in *Update Applicant Records*.

Activity Log Details

Selecting a listed interview's activity log displays a related activity log selection page for this applicant and job requisition. The list summarises each log item's date, type, status, and the opening of any comment. You can display a log item's details to identify who entered the item and view the full text of the comment.

All Interviews

Select *All Interviews* to access a Display Applicant Interviews selection page listing all of an applicant's interviews for that job opening. You can display the additional details for each listed interview.

Job Application Details

The details for this applicant's application for this job are the standard details that were entered in *Update Applicant Records*.

Use the menu path below.

- *Applicants*
- *Interviews*
  - *Display Interviews by Location [DSPINTBLOC]*

Recruitment Costs Enquiry

Overview

Use *Recruitment Costs Enquiry* to view recruitment cost information and compare the recruitment costs to budgeted costs.

You can select information by employer, function, department, team, cost centre, cost type, range of dates for the period in which the costs were incurred, and job requisition ID. The details also include position applied for, cost date, cost type, amount, and any associated comment.

Use the menu path below.

- *Applicants*
- *Recruitment Costs*
  - *Recruitment Costs Enquiry [DRC]*

Printing Recruitment Costs

Overview

Use *Print Recruitment Costs* for a report on the costs of recruiting applicants for open positions.

You can limit the report to any combination of employer, job requisition, position applied for, and a range of dates for the period in which the costs were incurred. You can also choose to include all applicants, only unemployed applicants, or only employed applicants.

The employer, job requisition, position, and beginning date selection criteria allow you to use blank values for all, such as all employers.

Use the menu path below.

- *Applicants*
- *Recruitment Costs*
  - *Print Recruitment Costs [PRC]*

Updating Interview Locations

Overview

Use *Update Interview Locations* to maintain information about the locations where interviewers meet applicants for positions. The information includes the employer, a location code and description, the full address, telephone number, contact name, e-mail and fax number.

Use the menu path below.

- *Applicants*
- *Interview Locations*
  - *Update Interview Locations [INTERVULU]*

Update Interview Locations Prompt Page

About This Page

On the Update Interview Locations prompt page, specify the employer for which you are maintaining interview location information.

Field Information

Employer

Specify the code that identifies the employer for which you are maintaining interview location information.

How do I...

Display the Update Interview Locations selection page	Press Enter after specifying an employer.

Update Interview Locations Selection Page

About This Page

On the Update Interview Locations selection page, you can select a listed interview location for update or deletion. You can also create new interview location information.

This page lists the specified employer's interview locations by location code, description, and the first line of the location's address.

How do I...

Create new interview location information	Press F6 to display the Update Interview Locations details page.
Update a listed interview location	Type **2** next to the location and press Enter to display the Update Interview Locations details page.
Delete a listed location	Type **4** next to the location and press Enter. Confirm the deletion.
Exit to the prompt page	Press F3.

Update Interview Locations Details Page

About This Page

On the Update Interview Locations details page, you can define a new location code and specify details about a new interview location in create mode, or update information other than the code for an existing location in change mode.

Field Information

Location Code

If you are creating new interview location information, type a new freeform code to identify this location. You cannot update this code in change mode.

Description

Brief identifying description of this location, such as room name or number and building.

Address line 1

First line of this location's address.

Address line 2

Second line of this location's address, if any.

Town/city

Town or city where this location is.

County

County where this location is. The label may vary to indicate your local alternative to country structure.

Country Code

Code identifying the country of this location.

Post code

This location's postal code.

Telephone number

Telephone number at which you can reach this location.

Contact name

Name of your organisation's contact at this location such as for scheduling the use of the interview location.

E-Mail address

Address to which messages and materials can be electronically mailed at this location.

Fax Number

Number to which materials can be faxed at this location.

How do I...

Save the new or updated information and return to the selection list	Press F3 and specify saving.

Updating Interviews/Recruiters

Overview

Use *Update Interviewers/Recruiters* to record and maintain information about the people who recruit or interview applicants for positions in your organisation.

The information includes name, title, initials, name to be used in correspondence, whether the person is a recruiter or interviewer, regular and cellular telephone numbers, e-mail address, employer, and employee number.

Defining recruiters and interviewers with code values allows you to perform searches for applicants, requisitions, or interviews involving a particular interviewer/recruiter.

Use the menu path below.

- *Applicants*
- *Update Interviewers/Recruiters*
    - *Update Interviewers/Recruiters [RECRUITERU]*

Update Interviewers/Recruiters Prompt Page

About This Page

On the Update Interviewers/Recruiters prompt page, specify the employer for which you are maintaining interviewer or recruiter information.

Field Information

Employer

Specify the code that identifies the employer for which you are maintaining interviewer or recruiter information.

If this interviewer/recruiter is also an employee you can enter the employer code and employee number. The system then copies the name and address information from the employee record.

How do I...

Display the Update Interviewer/Recruiter selection page	Press Enter after specifying an employer.

Update Interviewer/Recruiter Selection Page

About This Page

On the Update Interviewer/Recruiter selection page, you can select a listed interviewer or recruiter for update or deletion. You can also create new interviewer or recruiter information.

This page lists the specified employer's interviewer and recruiters by ID, name, and code indicating whether the person is an interviewer, recruiter, external consultant interviewer, or the like.

How do I...

Create new interviewer or recruiter information	Press F6 to display the Update Interviewer/Recruiter details page.
Update a listed interviewer or recruiter	Type **2** next to person and press Enter to display the Update Interviewer/Recruiter details page.
Delete a listed interviewer or recruiter	Type **4** next to the person and press Enter. Confirm the deletion.
Exit to the prompt page	Press F3.

Update Interviewer/Recruiter Details Page

About This Page

On the Update Interviewer/Recruiter details page, you can define the ID for a new interviewer, recruiter or the like and specify details about that person in create mode, or update the information for an existing interviewer, recruiter, or the like in change mode.

Field Information

Recruiter ID

If you are creating new interviewer or recruiter information, type an identifier for this person. You cannot update this ID in change mode.

If the interviewer/recruiter you are creating is also an employee you can enter the employer code and employee number. The system copies the name and address information from the employee record.

Last Name

You must type the interviewer's or recruiter's last name.

First Name

You must type the interviewer's or recruiter's first name.

Name Title

The interviewer's or recruiter's formal name prefix such as Mr, Mrs, or Dr.

Initials

The interviewer's or recruiter's full initials.

Type

You must specify the person's role, such as RECRT for recruiter.

Correspondence Name

Interviewer's or recruiter's name as it is to appear on formal correspondence such as letters to applicants.

Telephone number

Interviewer's or recruiter's office telephone number.

Cellular Phone

Interviewer's or recruiter's cellular telephone number.

E-Mail Address

Address to which messages and materials can be electronically mailed to this recruiter or interviewer.

Employer Code

If the interviewer/recruiter you are creating is also an employee you can enter the employer code and employee number. The system copies the name and address information from the employee record

Employee Number

Number uniquely identifying this recruiter or interviewer as an employee of this employer.

How do I...

Save the new or updated information and return to the selection list	Press F3 and specify saving.

Updating Document Definitions

Overview

Use *Update Document Definitions* to record and maintain information about correspondence you use to communicate with job applicants.

Use U*pdate Document Definitions* with Infinium HR Office Connect, a PC application that provides the ability to use Microsoft Word mail merge capability with applicant information in Infinium HR (I).

Infinium provides three categories of applicant letter described in the table below.

Category of Applicant Letter	Description
Job application	Use for acknowledgements, rejections and so on
Interview	Use to invite applicants to various types of interview
References	Use to obtain past information about future employees

When you specify that you want to generate letters, the system selects only information associated with the processing you are performing on the AS/400. For example, if you are processing interview information, the system will only select information associated with interviews to send to the PC.

The information includes:

- applicant name and address
- the interview date, time and location
- job requisition ID
- the position
- the interviewer
- optionally, the interviewer’s job title, phone number and email address
- many other fields

Use the menu path below.

- Infinium Human Resources
- *Applicants*
  - *Update Document Definitions* [OFCDOCUPD]

Updating Document Definitions

About This Page

On the Update Mailmerge Documents selection page, you can define a mail merge document or you can select a document to update or delete.

How do I...

Create a document definition	Press F6.
Modify a document definition	Type **2** next to the document.
Delete a document definition	Type **4** next to the document.``
Exit	Press F3.

Creating a Document Definition Sender Details

About This Page

On the Update Mailmerge Documents sender details page, you can specify a reference and description of the mail merge document. You can also specify whether the document is active and information about the person who is sending the document.

Field Information

Reference

Specify a reference for the mail merge document.

Description

Specify a description for the mail merge document.

Merge Type

Specify the merge type for the mail merge document. The merge type identifies the data or function being processed in the mail merge document. Infinium provides three merge types for applicant processing:

- JOBAPPLIC Use for application information for applicants such as acknowledgements, rejections and so on
- INTERVIEW Use for interview information for applicants such as inviting an applicant to an interview
- REFERENCE Use to obtain past information about an applicant

Infinium limits mail merge information to the category of merge document. For example, when you are working with applicant interviews, only documents defined with merge type INTERVIEW are displayed.

Active

Specify **Yes** if the document is currently active. Otherwise, specify **No**.

Use sender details

Sender details are mail merge fields, some or all of which can be used at the bottom of the letter to provide information about the sender. These fields are sender name, job title, telephone number and e-mail address. You can set up sender details within this document or you can specify that sender details be taken from the *Recruiter ID* field in the Job Requisition. Using the Recruiter ID would allow a document to be generic.

Specify **Yes** to include the sender's name, job title, phone number and e-mail address in the letter. You can override sender details when you generate the letter. Specify **No** to use sender details from the *Recruiter Name* field on the Miscellaneous Details page job requisition page.

Name

Specify the name of the person who is sending the document.

Job Title

Specify the job title of the person who is sending the document.

Phone No.

Specify the phone number of the person who is sending the document.

E-Mail

Specify the e-mail address of the person who is sending the document

How do I...

Create a mail merge document	Complete the information on this page and press Enter.
Exit without saving	Press F12.

Creating a Document Definition Document Information

About This Page

On the Update Mailmerge Documents document information page, you can specify the name of the document and its location and the name of the resulting document and its location.

Field Information

Standard Document Name

Specify the name of the mail merge document as it exists on your PC This must be a Microsoft Word document with the .doc file extension .

Path

Specify the location, drive and folder, of the mail merge template into which you are merging applicant information.

For example, C:\mmoffice\doc_open

Result Document Name

Specify the prefix name for the document that results after applicant information is merged into it. A date and time suffix will be added to this document name to make it unique.

For example, if you define a result document name of **INTERVIEW1** the full document name will be INTERVIEW1_aabbddmmyy.doc where aa is the hour, bb the minutes, dd the day, mm the month and yy the year.

Path

Specify location, drive and folder, where the documents will be saved after applicant information is merged into them. For example, c:\mmoffice\doc_save.

How do I...

Create a document definition	Complete the information on this page and press Enter.
Exit and save	Press F3 and specify save.

Chapter 3 Entering New Employees

3

This chapter of the guide contains an overview of the *Enter New Employee* process and the records that the system creates during that process.

This chapter then explains how to use *Enter New Employee* to record information about new employees and describes all the Enter New Employee screens. Depending on your security restrictions, you may not have access to all of these screens.

The chapter consists of the following topics:

Overview

Objectives

When you complete this part you should be familiar with:

- Specifying information about new employees
- Records that the system creates when you use Enter New Employee
- How system security affects the Enter New Employee procedure

Understanding the *Enter New Employee* Process

Enter New Employee provides an efficient and accurate method for entering new employees into your system. You can use this function to set up a full range of controls and information for each new employee.

Enter New Employee takes you through a specific set of screens to ensure consistent setup for all employees and reduces keying time and errors through the use of default information. Enter New Employee works only in conjunction with Infinium HR position controls. You must first use Update Organisation Positions to create positions.

Use position controls to define information such as the position name, organisation level assignments for employees working in this position, job information, location details, personnel benefit groups and so on. Refer to the Infinium HR Guide to Controls for additional information.

In Enter New Employee, you specify the new employee's position on the first screen. The system then supplies default information for the new employee from the position control record on many Enter New Employee screens and in the new employee records.

You can change default information at certain Enter New Employee screens. Once you have finished the initial Enter New Employee procedure, you can change additional default information only through Update Employee Data and Enter Personnel Actions. You cannot use Enter New Employee to update existing employee records.

Records Created with *Enter New Employee* Information

Enter New Employee provides four basic screens followed by whichever additional screens your user profile is set up to access in this function. Refer to “Including Additional Screens in the Enter New Employee Process” later in this overview for information about these screens.

The system uses information from the Enter New Employee screens to establish various records within Infinium HR and Infinium Payroll (Infinium PY).

The following descriptions and accompanying flow chart illustrate the relationship between the information from the Enter New Employee screens and specific records that the system creates.

Personnel and Payroll Information

On the initial four basic *Enter New Employee* screens you specify personnel and payroll information for the new employee. The system uses the information from these screens to create the following records:

- Employee Basic Data record

  This record includes such important information as the employee’s name and address, date of birth, reporting levels, position, job code, location, base salary rate, hours and employment date.

- Employee Personnel Data record

  This record contains more personal information about the employee such as marital status, spouse information, and emergency contacts.
  Employee Payroll Data record

  This record contains information such as the employee's pay cycle, pay rate or rates, National Insurance letter and PAYE tax coding.

- Personnel Action records

  These records allow you to build a history of information about the employee, as prior information is saved when you make changes to an employee’s record. The system creates three personnel action records for a new employee:

  - New Employee record

    This record contains new employee information such as location, hours, step number, starting base rate and pay frequency.

  - Personal Change record

This record contains the baseline information for the employee's name, address and marital status.

- Salary Change record

  This record contains the baseline information for the employee's personnel base rate and payroll rate or rates.

Benefits Information

If you established benefit plans through the Infinium HR Benefits menu functions, you can use the Enter New Employee benefit enrollment screens. Typical plans include private medical insurance, company cars, pension plans and so on.

The system uses the benefit group code from the position control for the employee's position, or the code you enter for the employee on the third Enter New Employee screen, to display a list of benefit plans for which the employee is eligible.

When you select plans from this list for the new employee, you create Employee Benefit Enrolment records. For each plan, these records contain enrolment information such as eligibility date, employee and employer costs, and associated dependents or beneficiaries. The system processes these pending enrolment records when you use Infinium HR function Mass Update Enrollments.

Deduction, Pay Component and Income Information

Subsequent possible Enter New Employee screens allow you to specify deduction authorisation, pay component, and payroll income authorisation information. The system uses the information from these screens to create the following records:

- Employee Deduction Authorisation records

  These records contain authorisations for individual deductions.

- Employee Pay Component records

  These records contain the individual pay elements that make up the employee's total salary package. You can use these records to track the elements, such as basic pay and car and relocation allowances.

- Employee Income Authorisation records

  This record contains authorisations for the employee's incomes.

User Defined Information

Additional possible *Enter New Employee* screens let you enter user defined employee data.

The system uses the information from these screens to establish the Employee User Defined Data record. This record contains employee specific information that is unique to your organisation and not tracked elsewhere in the system.

To establish field names and code values for your user defined fields based on your business requirements, use the following functions:

- *Maintain Employer Titles*, to define names for user defined fields. User defined data includes seven categories of information including 10 code fields, 10 date fields, 10 amount fields, 10 hour fields, 20 character fields, 10 numeric fields, and a lengthy comment field.
- *Update Employer Codes*, to establish code values to use in the code fields.

For information on how to define your user defined data fields and code values refer to the *Infinium HR Guide to Controls*.

Default Paid Time Off (PTO) Control Values

Enter New Employee then displays a screen where you can choose to modify the default paid time off (PTO) controls for this employee. The default values are from the job controls. Refer to “Recalculating the Prorated PTO Entitlement for New Employees in the “Processing Paid Time Off (PTO) Accruals” chapter of this guide.

Additional Personnel and Payroll Information

Next, *Enter New Employee* can display one or more of the *Update Employee Data* screens that you use to update information about existing employees. Which screens you can access depends upon user control settings described later in this overview.

If you have access to these screens, you can choose whether to enter employee data for both Infinium HR and Infinium PY.

The system uses the information from the Employee Update screens to update the following records:

- Employee Basic Data record
- Employee Personnel Data record
- Employee Payroll Data record

These records were already created using the information you entered on the first four basic *Enter New Employee* screens. Here you can enter more information than allowed in the four basic *Enter New Employee* screens, such as skills and competencies, education data, and so on.

The flowchart in Figure 3-1 provides a summary of the records created when you enter a new employee in Infinium HR.

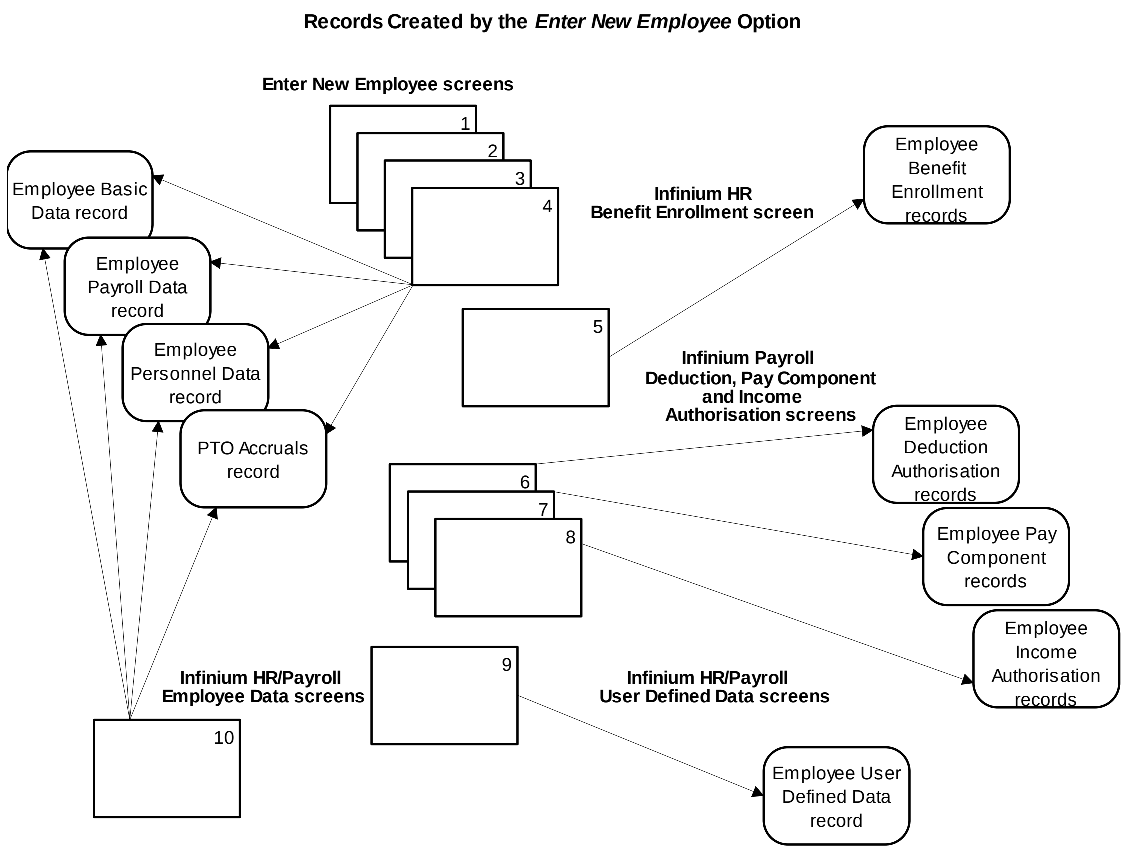


Figure 3-1: Records Created by the Enter New Employee Option

Including Additional Screens in the Enter New Employee Process

Your system administrator uses Update User Controls to establish or restrict access to the optional screens or sets of related screens in addition to the four standard initial Enter New Employee screens. These additional screens are shared with other functions specified in the instructions later in this chapter of the guide.

For example, the Update Employee Benefit Enrollments screen is as in Benefits / Benefit Entrollments / Update Employee Enrollments.

The following table summarizes the sequence of screens displayed in Enter New Employee if you have access to all the groups of screens. If your user controls grant you access to only some of these screens, the system presents only the screens you are authorised to use. Any combination of the optional screen groups can be enabled.

Screen Sequence	Screen Description	Automatic /Optional
1	Enter New Employee identification screen	Automatic
2	Enter New Employee personal data screen	Automatic
3	Enter New Employee miscellaneous data Displayed unless a flag in PE Supervisor function Update PE User Security specifies omitting this screen for your user profile	See Description
4	Enter New Employee payroll data If you specify a part time schedule, the system also displays an Update Scheduled Hours screen for entry of the hours worked.	Automatic
5	Update Employee Benefit Enrollments, with access to screens for each benefit's details, dependent data, and taxable benefits	Optional
6	Update Employee Deductions selection, with access to the Update Employee Deduction Codes details screen for a selected deduction, and, if electronic transfer applies, a B.A.C.S. details screen	Optional
7	Update Pay Components, with access to a selection screen for available pay components	Optional
8	Update Employee Incomes selection, with access to the Update Employee Incomes details screen for a selected income	Optional
9	Update User Defined Data selection, with access, if applicable, to the three user defined data detail screens	Optional
10	Update Employee PTO Data selection screen, with access to the Update Employee PTO Control screen	Optional
11	All the Update Employee Data screens specified for you in Update User Controls	Optional

Using Employee Defaults

For information that applies to all or most new employees, you can define default entries for the following values so that you need not repeatedly retype the same information:

- Pay cycle
- Pay method
- Tax code
- Tax basis
- National insurance letter
- Status

For each combination of user and pay frequency such as monthly, define the defaults in Controls / Employee Defaults Maintenance. When you enter a new employee, the system finds the pay frequency from the pay grade frequency in the position controls and supplies the appropriate default values for the new employee. You can edit the defaults.

Refer to the Infinium HR (International) Guide to Controls for more information on establishing employee defaults.

Entering a New Employee

Both the Infinium HR and Infinium PY menus include Enter New Employee. The results are identical regardless of which system you use to hire employees. Enter New Employee automatically creates records for the new employee in both systems.

You can expedite entry of new employee information by automatically reusing data already entered into the new employee’s applicant record.

Using Applicant Data to Enter New Employees

You can reuse applicant information regardless of whether you access Enter New Employee through Infinium HR or through Infinium PY.

The system automatically supplies information from the Applicant Data record, such as address, home telephone number and applied-for position, in the corresponding employee Basic Data fields as you proceed through the Enter New Employee screens. You can update any incomplete, incorrect, or outdated information.

When you complete the Enter New Employee procedure, the system updates the applicant’s record to indicate that he or she has been hired. Infinium HR retains the applicant record for analysis and reporting.

To use applicant data, specify the applicant’s name or select an applicant at the Enter New Employee identification screen as indicated in the step-by-step instructions later in this topic. The system supplies values from the applicant record on the Enter New Employee screens.

Steps to Enter a New Employee

Follow the steps below to enter a new employee into your system.

1. From the Infinium HR main menu select Employees.
2. Select Create New Employee Records.
3. Select Enter New Employee [ENE]. The system displays a screen similar to Figure 3-2.

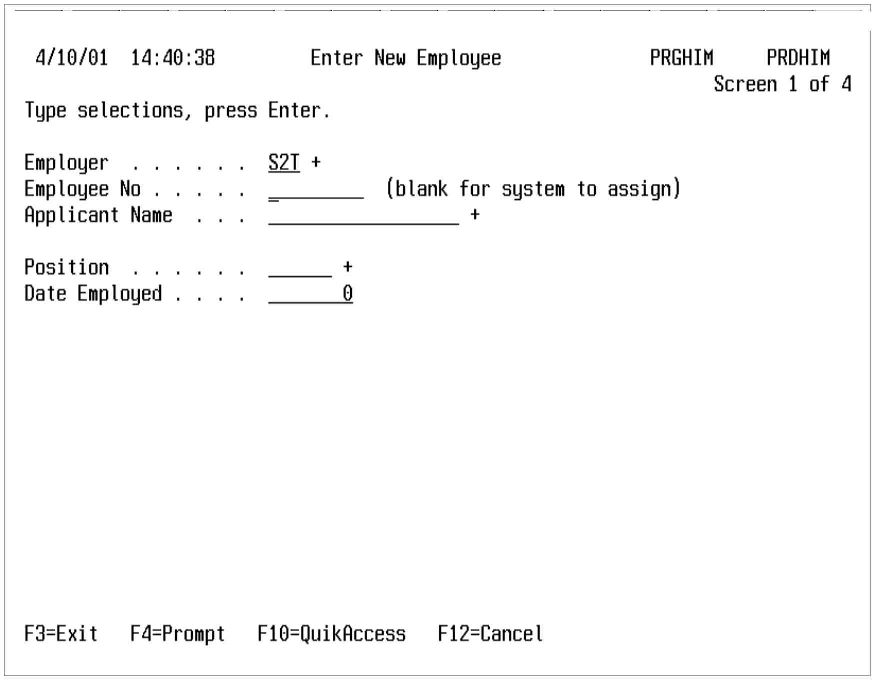


Figure 3-2: Enter New Employee identification screen

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

Employer

Specify the employer that is hiring the new employee.

If your administrator has defined a default employer for you in *Update User Controls*, the system displays that employer.

Employee No

Use one of the following methods to assign an employee number:

- Leave the *Employee No* field blank. The system automatically assigns the employee number based on the value in the *Next Employee Number* field on the entity control record.
- Type the employee number in the *Employee No* field. If the number has fewer than nine digits, press the FieldExit key to complete the field value.

Refer to the “Setting up Entity Controls” chapter in the *Infinium HR Guide to Controls* for more information on selecting a method of assigning employee numbers.

Applicant Name

If you are not using information from an applicant record, leave this field blank.

To bring information already supplied in the new employee’s applicant record into the *Enter New Employee* screens and records, specify the applicant's name by one of the following methods:

- Type the applicant's surname using the upper and lower case letters exactly as they are in the applicant record. If you specify a name for which the system finds more than one match among the applicants, the system displays a list of applicants for your selection when you press Enter later at this screen.
- Press F4 to display a list of applicants. At the applicant list, type any character next to the applicant being hired press Enter to return to the Enter New Employee identification screen.

If you select an applicant by this method, the bottom portion of the Enter New Employee identification screen displays additional information from the applicant record, if present, such as the applicant's application date, national insurance number, full name, and address from the relevant applicant data record similarly to Figure 3-3.

Position

Verifying or Specifying the Position

Verify the position supplied from the applicant record, if any. Otherwise, specify the position code now.

Specifying the position here allows validation of the position before you enter employee details, ensuring the provision of the correct default data from the applicable position controls.

If you selected an applicant who applied for multiple positions, the system supplies the code for the applicant's preferred position. If this is not the position for which you hired the employee, specify the correct position. You can display a list of codes and the corresponding position descriptions to verify the position.

Date Employed

Type the date as of which this employee begins working for this employer. You can type a past or future date.

If the employee has was hired in the past and you are entering that employee for the first time, ensure that you specify the date of employment, not the date you are entering the information.

5 If the system has re-displayed the identification screen with additional information from the applicant record, refer to Figure 3-3 and continue to the next step. Otherwise omit the next step.

```
 4/10/01  14:43:50        Enter New Employee            PRGHIM     PRDHIM
                                                              Screen 1 of 4
Type selections, press Enter.

Employer  . . . . . .  S2T +
Employee No . . . . .  _________  (blank for system to assign)
Applicant Name  . . .  Jones__________ +

Position  . . . . . .  ______ +
Date Employed . . . .  _______0

Application Date  . :  10/04/2001

1st Name  . . . . . :  Mary
Middle Name . . . . :  M.
Surname . . . . . . :  Jones
Address . . . . . . :



Post Code . . . . . :

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

Figure 3-3: Enter New Employee identification screen with applicant data

If the national insurance number is in the applicant record, the system displays that number beneath the application date.

Verifying your Applicant Selection

6 Verify that this is the intended applicant. You cannot change the name and address information here. You can update these values on subsequent screens for the employee record.

Continuing to the Personal Information Screen

7 Whether or not you omitted the preceding step, press Enter. The system displays the Enter New Employee personal information screen similar to Figure 3-4.

```
 4/10/01  14:47:26         Enter New Employee             PRGHIM     PRDHIM
                                                                Screen 2 of 4
Employer  . . . :  Infinium Software
Position  . . . :  ADTL01 Telephonist
Date Employed . :  10/04/2001          New Employee Number . . :        143

Title, First Name, Surname  . .  ____  Mary__________     Jones__________
Middle Name, Initials . . . . . . . .  M.____________     M.M.____
Known as Name, Birth Name . . . . . .  ________________   _______________
Complete Name . . . . . . . . . . . .  ___________________________________

Address 1 . . . .  *______________________________
(Line 2). . . . .  _______________________________
(Line 3). . . . .  _______________________________
Town or City. . .  *______________________________  County         .  _____ +
Post Code . . . .  __________                      Country . . . . .  UK___ +
Telephone . . . .  ___________________ (Home No.)  ____________ (Office No.)

Date of Birth . .  _______0                        Sex (M/F) . . . .  _
NINO            .  _________                       Ethnic ID . . . .  _ +
Status  . . . . .  _____ +                         Work Schedule . .  5DAY_ +

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

Figure 3-4: Enter New Employee personal data screen

If you specified an applicant at the identification screen, the system may supply many values here from the applicant data. Since almost all applicant data fields are optional, the number of values supplied here depends on the completeness of the applicant record.

8 Use the following information to complete the fields on this screen and to update any information from the applicant record that is no longer correct for the new employee.

Title
First name
Surname

Specify the employee’s title, first name, and surname.

If you leave the title blank, the system supplies **Mr.** or **Ms.** depending on the gender that you specify when you press Enter to exit this screen..

Middle Name

Specify the employee's middle name, if any and known.

Initials

If you leave this field blank, the system supplies the initials of the first and middle names such as M.M. for Mary M. Jones when you press Enter to exit this screen.

Known As Name

Type the employee’s preferred name or nickname if it is different from the employee's first name. This is a 20-character field that you can use to locate the employee after he or she is employed.

If you leave this field blank, the system supplies the employee’s first name when you press Enter to exit this screen.

Birth Name

Type the employee’s maiden name or name given at birth, if it differs from his or her current surname. This is an 18-character field.

Complete Name

The system uses the complete name to sort employees alphabetically on standard system reports. The system supplies the complete name from the values in the other name fields as specified in the *Employee Complete Name Meth.* field in *Update Employer Controls* unless those controls indicate that you can type the complete name here.

The possibilities you can defined in the controls for constructing the name are: Surname, first name, middle name; surname, first name; surname, first name, and middle intitials; surname and known as; or the value that you type in *Complete Name*.

Allowing an entry here allows you to provide for very long employee surnames that do not entirely fit in the surname field. This is a 39 character field.

Address 1
(Line 2)
(Line 3)

Your system can be set up in *Update Employer Controls* to provide an automatic asterisk (*****) in the first line of the address and in the *Town or City* field for this employer’s new employees. This allows you to enter employee data quickly when the address is unknown or not needed at this stage.

If you know the employee’s address, type the address. Each line has 30 characters.

The system uses the *Address 1, (Line 2), (Line 3), Town or City, County* and *Post Code* fields wherever the address is needed, including payroll processing, payslip printing and generation of year-end tax forms.

Town or City

Type the name of the city or town in which the employee resides.

County (or your equivalent label)

This label is user defined and may differ from *County* in your system. The label is defined in the *Address Field Text* field in *Update Employer Controls*.

Type the code that represents the county (or equivalent) in which the employee lives. Define code values for counties in *Update Employer Codes* using code type **CNT**.

Post Code

Type the employee's postal code. This is a 10-character free-form field.

Country

Type the code that represents the country in which the employee lives. Define code values for countries in *Update Employer Codes* using code type **CTR**.

If the country is **UK** and you use Infinium Payroll (International), the system sets the correct length for the employee's National Insurance number and enables validation of this number.

Telephone (Home No.)
(Office No.)

Type the employee's home telephone number, and then the employee's office telephone number with or without the extension. You can generate an office phone directory based on the office numbers through *Administrative Reports / Miscellaneous Reports / Internal Telephone Directory*.

These are 19-character free-form fields. You can include the STD code or other international codes. If you do, you can use any character (such as parentheses or dashes) to separate the codes from the rest of the telephone number.

For example, you can type 01234-123456 or (01234) 123456 for local telephone numbers. For international numbers you can type the number using the appropriate format for each country such as 001-508-555-1212 for telephone numbers in the USA.

Users should agree on a consistent format for these telephone number fields to ensure compatible data for displays and reports.

Date of Birth

Type the employee's birth date in the format defined for this employer in *Update Employer Controls*. Refer to the *Infinium HR (International) Guide to Controls* for details.

When you press Enter, the system calculates the employee's age and displays a warning if the employee is under 16 years old.

Sex (M/F)

Type **M** for male or **F** for female.

NI Number (or your equivalent label)

This field's label is defined in the *Tax ID No. Text* field in *Update Employer Controls*. In the UK, the tax ID and the National Insurance number are the same.

Type the employee's National Insurance number or your country's equivalent number.

Note the following:

- If the country code is **UK** or **IRL** and you do not know the number, you can leave this field blank to have the system assign a temporary number. When you press Enter, the system displays a warning and allows you to press F16 to generate the number.

  For country **UK**, the number is **TN** + *DDMMYY* + *Sex*, such as **TN17071969F** for a female born 17 July 1969.

TN	Indication that this number is temporary
DDMMYY	The employee’s date of birth
Sex	The employee’s sex (**M** or **F**)

  For country **IRL**, the number is **9** + *DDMMYY* + *Sex* such as **911061974M** for a male born 11 June 1974.

9	Indication that the this number is temporary
DDMMYY	The employee’s date of birth
Sex	The employee’s sex (**M** or **F**)

- This field is required for all UK employees. The *(Required)* field value next to the *Tax ID No. Text* field in *Update Employer Controls* specifies whether the number is required in *Enter New Employee* and *Update Employee Data* for non-UK employers.

Ethnic ID

Type the one-character ethnic identification code. Define ethnic ID code values in *Update Employer Codes* using code type **ETH**.

Status

Type the employee's active employment status code using status codes defined in *Update Employer Codes* for code type **STS** such as **PART** for part time or **FULL** for full time.

Work Schedule

Type a code for the employee's usual working schedule. Define work schedule codes in *Update Work Schedules*.

If a work schedule code is specified for this position in *Update Job Controls*, the system automatically supplies that schedule here from the position control. You can specify an alternative code.

Infinium Payroll uses the value in this field to calculate company sick pay and statutory sick pay.

9 When done processing these fields, press Enter to display the next screen.

Entering Employee Miscellaneous Information

When you press Enter at the personal information screen, the system displays a screen similar to Figure 3-5 unless your user controls in *Update PE User Security* specify omitting this screen.

```
 4/10/01  14:52:44        Enter New Employee            PRGHIM     PRDHIM
Employer  . . . . :  S2T      Infinium Software               Screen 3 of 4
Employee  . . . . :        143 Jones,Mary M.
Position  . . . . :  ADTL01    Telephonist
Level 1     . . . :  FINAD                Level 2    . . . :  FINAD
Level 3     . . . :  FINAD                Level 4    . . . :  30000

Security Group  . .  _____ +              Class  . . . . . .  _____ +
Benefit Group . . .  MONTHLY  +           Union  . . . . . .  _____ +
Next Review Type  .  _____ +              Next Review Date .  _______0
Employment Source .  _____ +              Shift Code . . . .  __ +
Handicap Code . . .  _____ +              Pension Plan     .  _____ +

Marriage Status . .  _ +                  Marriage Date  . .  _______0
Spouse Name . . . .  _______________________________________
                                          Staff Initiative .  __________ +
Emergency Contact Data
Contact Name   . . .  _______________________________________
Contact Address . .  ______________________________
Town or City   . . .  ______________________________
Relationship   . . .  _____ +
Telephone 1 & 2 . .  ___________________  ___________________
F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F17=First
```

Figure 3-5: Enter New Employee miscellaneous data screen

Depending on this position's control information, the system can display the organisational levels below the position at the top of the screen and can provide default values from the position controls for the following:

- *Security Group*
- *Benefit Group*
- *Union*
- *Shift Code*

10 Use the following information to complete the fields on this screen or override any inapplicable default information on this screen.

Security Group

You can use this field to prevent user access to this employee's records in the system. To use this feature you must:

- Define security group codes in *Update Employer Codes* using code type **SEC**.
- Specify a security group for this employee in this *Security Group* field or at the *Update Employee Basic Data* Miscellaneous Data screen.
- Use *Update User Security Controls* to restrict users from accessing records for employees in this security group. Refer to the *Infinium HR Guide to Controls* for more information.

Class

You can use this field to classify employees for reporting purposes. For example, you can use this field to classify employees into categories such as clerical, managerial or executive. You can use Infinium Query to develop reports using this field.

Define classification code values in *Update Employer Codes* using code type **CLA**.

Benefit Group

Assign the employee to a benefit group if you have defined benefit groups in the Infinium HR *Benefits* menu functions.

If you specify a code in this field and your *Enter New Employee* screen sequence includes the benefit screens, the system displays a list of the applicable benefits at the Update Employee Benefit Enrollments selection screen later in this procedure. You can enrol the employee in authorised benefit plans from that screen.

Union

Specify the union that represents the employee, if any. Define union codes in *Update Unions*.

Next Review Type

Specify a code for the employee's first scheduled performance review such as six month review. Define these codes in *Update Employer Codes* using code type **RTP**.

If you specify a value here, you must also specify a value in the *Next Review Date* field.

Once you have entered this employee into the system, you can use *Enter Personnel Actions* to maintain this information.

Next Review Date

Type the scheduled date for the employee's first performance appraisal. If you type the date in this field, you must also specify a *Next Review Type* field value.

Employment Source

Specify a recruitment source for the employee. The system uses this source for turnover analysis in *Display Employee Turnover Data*.

The default, if any, is from the applicant record. Define employment source codes in *Update Employer Codes* using code type **HIR**.

Shift Code

If this employee's position is associated with a particular shift, specify the shift. Define shift codes using code type **SHF**.

The default is from the position controls or, if that is lacking, from the level controls. If both are lacking, the default is from the employer controls.

Handicap Code

Specify the employee's handicap status, if any. Define handicap codes in *Update Employer Codes* using code type **HDC**.

Pension Plan

Specify this employee's pension plan for retirement. Define pension plan codes in *Update Employer Codes* using code type **BEN**.

Marriage Status

Specify the employee's marital status only for informational purposes. Define marital status codes in *Update Employer Codes* using code type **MAR**.

Marriage Date

Type the date this employee was married, if any.

Spouse Name

Type the employee's spouse's name, if the employee is married.

Staff Initiative

If the employee has been hired as part of a particular staffing initiative or plan, specify the initiative. Define staff initiative codes in *Positions / Staffing Initiative / Staffing Initiative M/F Maint*.

The system records the change from the addition of this employee and attaches it to the chosen initiative. Refer to the "Maintaining Staffing Initiatives" chapter of this guide for more information.

Emergency Contact Data

Type name, address and telephone information for the employee's emergency contact. If you specify a contact name, you must also specify the contact's relationship to the employee.

Define relationship codes in *Update Employer Codes* using code type **REL**.

You can display this information in *Health & Safety / Incident Logging - Analysis / Display Employee Emergency Data*.

11 Press Enter. If you use Infinium Payroll the system displays a screen similar to Figure 3-6.

```
 4/10/01  14:54:18        Enter New Employee            PRGHIM     PRDHIM
                                                              Screen 4 of 4
Employee  . . . . :        143 Jones,Mary M.
Position  . . . . :  ADTL01    Telephonist
Personnel Rate Information
Pay Grade . . . . . . . : TL01             Scheduled Hours . . .  165.00
Step Number . . . . . . . 1 +              Scheduled Pay Pds . .   12.0000
Personnel Base Rate . .       5575.0000    Base Rate Frequency .  A  +
Base Rate Currency  . . STG +              Part Timer  . . . . .  0
Payroll Information                        Pay Message Code  . .  _____ +
1  Basic      . .        464.5800          Bank Branch . . . . .  _____ +
2  Daily      . .         16.5900          Pay Slip Sequence . .  _____ +
3  Weekly     . .        116.1500          Auto Pay Group  . . .  _____ +
4  Hourly     . .          2.8156          Authorisation Group .  GENERALOT +
5  Prev Rate  . .           .0000          Pay Frequency . . . .  M  +
Pay Cycle . . . . . . .  MTH01 +           Pay Type  . . . . . .  S +
Pay Method  . . . . . .  2 (1=BACS 2=Cheque 3=Giro 4=Cash )
Tax Code  . . . . . . .  BR                Tax Basis . . . . . .  0
SVR Indicator . . . . .  _ (blank or S)    Payroll No      . . .  _______________
Nat. Ins. Letter  . . .  A                 Directors NI  . . . .  0 (0/1)
Contracted Out  . . . .  0 (0/1)           P45 (Part 3) or P46 .  0 (0/1)
Previous Taxable Pay  .         .00        Previous Tax Paid . .         .00
F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel  F17=First  F18=Calc Pay Rate
```

Figure 3-6: Enter New Employee payroll screen

If you do not use Infinium Payroll, the system displays a alternative version of this screen similar to Figure 3-7.

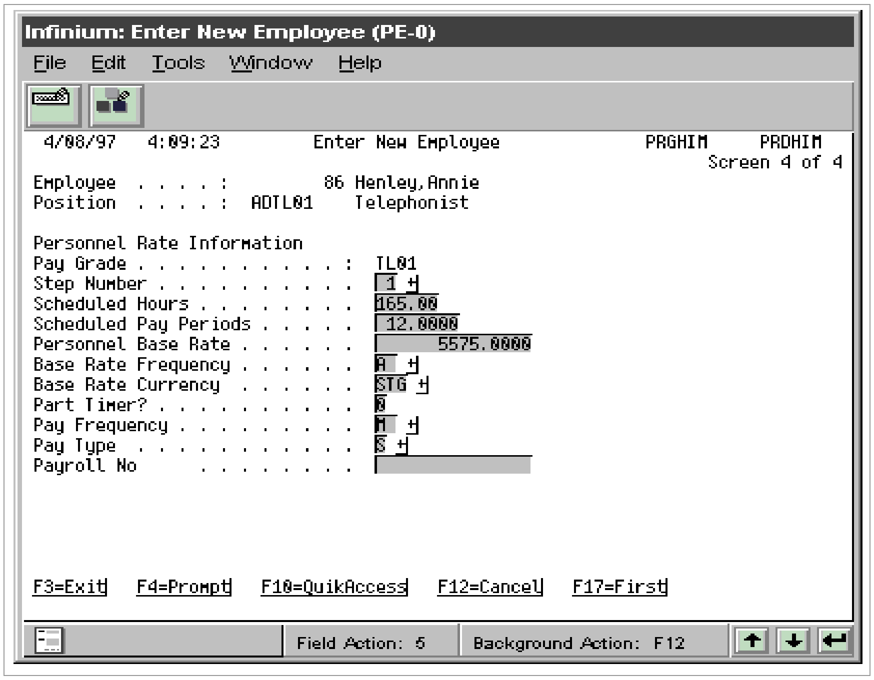


Figure 3-7: Enter New Employee payroll screen without Infinium PY data

Some fields described below do not appear on this alternate screen. Refer to the applicable field instructions on the following pages for both versions of this screen.

The system displays the pay grade from the applicable job control. Depending on the information specified in your controls, the system can also supply the following default information at this screen:

Field	Default Is From
Scheduled Hours	Job control
Step Number	Pay grade, which is from the job control
Scheduled Pay Pds	Numeric value of the pay frequency code
Base Rate Frequency	Pay grade of the employee’s position
Base Rate Currency	Employer control
Basic, hourly, and other pay rate fields	Job control
Authorisation Group	Position control
Pay Frequency	Pay frequency code associated with the employee’s base rate frequency
Pay Type	Job control

A flag in *Update PE User Security* controls determines whether you can change the default *Base Rate Frequency* or *Pay Frequency* value if you are a PE only user (that is, your user profile is for only Infinium HR).

Depending on this control setting, the system may protect the *Base Rate Currency*, *Scheduled Pay Pds*, *Base Rate Frequency*, *Pay Frequency*, and *Pay Type* fields if all of these fields have default values.

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

Scheduled Hours

Type the number of hours per pay period that this employee is to work. This value must be compatible with the amount in the *Scheduled Pay Pds* field.

For example, if you specify 40 regular hours in this field, you ordinarily specify **52** in the *Scheduled Pay Pds* field.

The system can use the scheduled hours information to generate auto pay entries for the employee during cycle processing, or you can establish auto pay groups to generate time entry records. The information is also used for PTO accrual calculations.

Step Number

If your organisation uses step-in-grade processing, type a step number in this field to assign this employee to a starting step.

If you do not use step-in-grade processing, type **99**.

If you use step-in-grade processing with age related steps, the system enters the appropriate step number for the employee’s age.

If you press F4 to select a step, the system returns the appropriate values to the *Personnel Base Rate* and *Base Rate Frequency* fields.

Scheduled Pay Pds (if you use Infinium Payroll)
Schedule Pay Periods (if you do not use Infinium Payroll)

Specify the number of pay periods scheduled during the calendar year for this employee.

The system bases the default on the employee’s pay frequency code, such as **12** if the pay frequency is **M** for monthly.

Personnel Base Rate

Specify the base rate that your human resources department uses for this employee. This field can contain hourly, monthly, annual or several other types of rates.

The personnel base rate must be compatible with the *Base Rate Frequency* value. For example, if you specify a monthly salary amount in this field, specify **M** (monthly) in *Base Rate Frequency*.

Note the following:

- Infinium Payroll does not calculate pay directly from the value in this field. Infinium HR uses this base rate to calculate the employee pay rate. Example: If the base rate is an annual salary and the employee has a monthly pay frequency, the system supplies one twelfth of the base rate in the first payroll rate field.

  The system uses this rate in personnel reports and to calculate the employee's annualised base rate.

- If the personnel base rate is outside of the salary range established for this job, the system displays a warning message before you exit this screen. The message shows the salary range code and the maximum and minimum salary for the position.

Exception: Your organisation can prevent the system from displaying maximum and minimum salaries by using code type **JRP** to create a job group code *SREX. If the system finds this code, it displays zeros instead of actual salary range values.

If you receive a salary range exceeded warning, you can change the rate or press F11 to override the warning.

Base Rate Frequency

Specify the frequency for the value in the *Personnel Base Rate* field.

If you use step-in-grade processing, the system supplies the frequency for the pay grade of the position.

Base Rate Currency

Specify the currency in which the base rate is calculated. The default is the employer's currency code.

Define base rate currency codes in *Update Employer Codes* using code type **CUR**.

Part Timer

Indicate whether the employee is a part time or full time employee. Valid values are:

0	No. The employee works full time.
1	Yes. The employee works part time. The system displays the Update Scheduled Hours screen for specifying the hours the employee works. This screen is also accessible through the Scheduled Hours section of *Update Employee Basic Data*.

Completing the Payroll Information Fields

Payroll Information: Fields 1 to 5

Available only if you use Infinium PY. Define the names for these fields in the Infinium Payroll *Update Employer Controls* function. Infinium Payroll refers to these fields during income calculations.

Entering the First Payroll Rate or Using F18 to Calculate the Rate

Typically, the value in the first field is equivalent to the value you enter in the *Personnel Base Rate* field, even if the rates are stated differently. For example, you can enter the employee's personnel base rate on an annual basis but express the first payroll rate on a monthly, weekly, or hourly basis.

Example: For an annual personnel base rate of **25000** that you pay monthly using a flat amount income, enter **2083.33**. For weekly payments, enter **480.77**.

Press F18 to have the system calculate this rate from the base rate.

The value in the first field must be compatible with the value in the *Pay Type* field on this screen. For example, if you type an amount per hour rate in this field, you must specify **H** (hourly) in the *Pay Type* field on the following column. If you type a flat amount in this field, you should enter **S** (salaried) in the *Pay Type* field.

Entering Additional Payroll Rates

If applicable, type the employee's other payroll rates. The system uses these values to compute incomes during cycle processing if you entered **2**, **3**, **4** or **5** in the *Income Basis* field on the associated income controls. Typically, you use these fields for exceptions, previous rates, or alternate rates.

Leave these fields blank if you have not defined any income controls whose basis is **2**, **3**, **4** or **5**.

For example, in your transportation company you pay truck drivers at a standard hourly rate when they drive alone and a lower hourly rate when they share the driving with another employee. You set up two hourly incomes. The first income for solo drivers uses the first payroll rate; the income for team drivers uses the second payroll rate.

Pay Message Code

Displayed only if you use Infinium PY.

Specify a message to be printed on the payslip. Define pay message codes in the Infinium PY *Update Pay Message* function.

Bank Branch

Displayed only if you use Infinium PY.

If the employee is paid by cheque or giro, specify the bank branch or Post Office at which the employee can cash the payment. Define bank branch codes in *Update Employer Codes* using code type **BCH**.

This information can be used by custom payslip printing programs.

Pay Slip Sequence

Displayed only if you use Infinium PY.

Use this field to facilitate payslip distribution by using codes to group payslips. For example, if you have multiple locations, you can define a payslip sequence code for each location. If you enter the appropriate code for each employee, you can print payslips for each location together.

Define sequence codes in *Update Employer Codes* using code type **CSQ** and select the sequence you want to use through the Infinium Payroll *Update Cycle Controls* function.

Auto Pay Group

Displayed only if you use Infinium PY.

Use auto pay groups to generate incomes that are the same in each pay period. If you want to generate incomes automatically for this employee during cycle processing, specify the auto pay group here.

Define auto pay group codes in *Update Employer Codes* using code type **APG**. Assign incomes to a group in *Update Auto Pay Groups*.

Authorisation Group

Displayed only if you use Infinium PY.

Use this field to assign the employee to a pre-defined set of incomes and deductions. Establish authorisation groups through *Update Payroll Authorisation Groups* when you set up your system controls.

If you are using Infinium HR for *Enter New Employee*, the default, if any, is from the *Standard Auth Group* field on the Organisation Update screen in *Update Organisation Positions*.

Pay Frequency

The default is from the employee’s base rate frequency. If that base rate frequency and the pay frequency differ, indicate how often you expect to pay this employee.

For example, if the base rate frequency is annual but the pay frequency is monthly, change the value from the default **A** to **M**.

The value in this field must be compatible with the value in the *Scheduled Pay Pds* field. For example, if you type **12** in the *Scheduled Pay Pds* field, type **M** in this field.

Pay Cycle

Displayed only if you use Infinium PY.

Specify the normal payroll cycle to which you assign this employee. You must assign each employee to a pay cycle for normal processing. You can also process special payslips through other cycles, such as a bonus or on-demand cycle, but you do not need to assign the employee to a special cycle.

When you press Enter the system checks that:

- The employee’s pay cycle and pay frequency are the same
- The employee’s pay cycle and pay type are compatible
- The employee is not assigned to a level that is restricted from this pay cycle

If any of these conditions are not met, the system displays an error message and you must correct the fault before continuing.

Pay Type

The default is from the *Pay Type* field on the job control record. Valid values are:

S	Salaried
H	Hourly
N	Salaried and non-exempt, and so qualifies for overtime pay

The value in this field does not affect the personnel base rate you typed on the previous screen. If the value is **H**, the system can use this information to automatically compute the appropriate hourly payroll rate or rates when human resources users enter salary change transactions through *Enter Personnel Actions*.

For example, the employee may have an annual base rate, but be paid weekly at an hourly rate.

The system also uses the information in this field when you press F18 to calculate the payroll rate.

The pay type you specify here must be compatible with the value you typed in the first payroll rate field. For example, if you specify **H** (hourly) in this field, the first payroll rate field should contain an amount per hour rate.

Payroll cycle processing validations do not include this field. You can pay overtime to employees classified as Pay Type **S** without receiving an error or warning.

Pay Method

Displayed only if you use Infinium PY.

Specify how the employee is paid. Valid values are:

1	BACS
2	Cheque
3	Giro
4	Cash

The system uses the value here to ensure that an appropriate deduction is made for the employee. For example, if the employee is paid by B.A.C.S., the system checks that there is a B.A.C.S. deduction for the employee.

Tax Code

Displayed only if you use Infinium PY.

Valid values for the employee's tax code are:

NT	No tax
BR	Basic tax rate on all earnings
D0 to D4	Non-cumulative code
K	Negative free pay
nnnns	Where **nnnn** is a 4 digit number such as 0100 or 0260 and **s** is the suffix letter H, L, P, T, or V.

Tax Basis

Displayed only if you use Infinium PY.

Specify how the employee’s tax is calculated. Valid values are:

0	Tax is calculated on a cumulative basis, taking into account previous earnings and tax paid for the previous week or month.
1	Tax is calculated based on week 1 or month 1.

If a particular basis always applies in the case of a particular tax code, the value in this field has no effect on the tax calculation.

SVR Indicator (blank or S)

Leave blank if the employee is to be taxed at standard UK P.A.Y.E. rates. Type **S** if the employee is to be taxed using the Scottish P.A.Y.E. rates.

User Field Text

Define this field label in the *User Field Text* field in *Update Employer Controls*.

Type up to 15 characters of applicable text. For example, if the field is labelled *Payroll No*, type the employee’s payroll number.

Nat. Ins. Letter

Displayed only if you use Infinium PY.

Type the employee's National Insurance letter. The system uses this for calculating the National Insurance deduction. Valid values are: **A**, **B**, **C**, **D**, **E**, **F**, **G**, **S** and **N**.

Directors NI

Displayed only if you use Infinium PY.

Indicate whether the employee is a director. Valid values are:

0	No. The employee is not a director.
1	Yes. The employee is a director. The system calculates the employee's National Insurance contribution using the rules for company directors.

Contracted Out

Displayed only if you use Infinium PY.

Indicate whether the employee is contracted out of the State Earnings Related Pay Scheme (SERPS). Valid values are

0	No. The employee is not contracted out of SERPS and must have National Insurance letter A, B or C.
1	Yes. The employee is contracted out of SERPS and must have National Insurance letter D, E, F, G or S.

P45 (Part 3) or P46

Indicate whether the employee is bringing a valid P45 from past employment indicating payments from the previous employer? What is a P45 and what is a P46? Field applies only to UK employees?

0	No.
1	Yes.

Previous Taxable Pay

Type the taxable pay the employee earned from the previous employer. In the UK, use this field only upon receipt of a valid P45.

Leave this field blank if the amount is not known.

Previous Tax Paid

Displayed only if you use Infinium PY.

Type the amount of tax paid by the employee through the previous employer. In the UK, use this field only upon receipt of a valid P45.

Leave this field blank if the amount is not known.

13 Press Enter. The system creates the new employee records and does one of the following:

- If your user controls specify displaying additional screens when you enter a new employee, the system displays the specified screens. Continue to the “Entering Additional New Employee Information” topic.
- Otherwise, the system returns you to the Enter New Employee identification screen so that you can either exit this function by pressing F3 or begin entry of another new employee.

Entering Additional New Employee Information

If your user controls specify access to additional screens in *Enter New Employee*, perform the applicable following steps to enter the additional information for each of the displayed screens. Omit the instructions for screens shown in these steps that you do not access.

Refer to the overview at the beginning of this chapter of the guide for a summary of the possible screens or groups of screens.

Defining the Employee’s Benefit Enrollments

The system may display a screen similar to Figure 3-8. You can also access this screen through *Benefits / Benefit Entrollments / Update Employee Enrollments*.

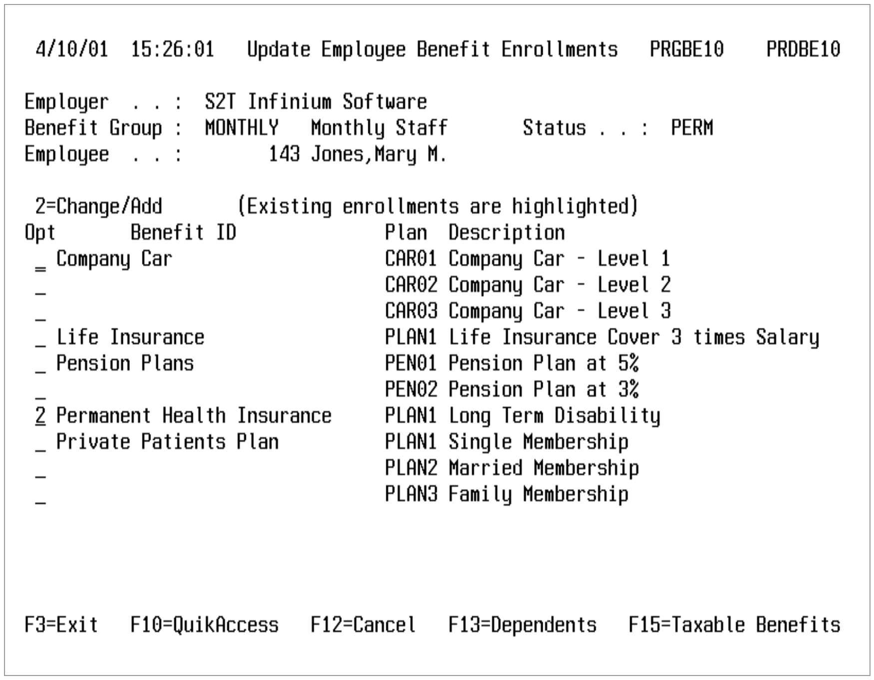


Figure 3-8: Update Employee Benefit Enrollments screen

To assign benefits, you must have already defined the benefit plans in the Infinium HR *Benefits* menu's functions.

The system uses the benefit group code from the position controls, or the alternative code you specified at the *Enter New Employee* miscellaneous data screen, to identify the plans for which the employee is eligible.

1. If responsible for assigning benefit plans to new employees, type **2** in the *Opt* field next to each benefit plan selected by the employee.

2. Press Enter. The system displays a screen for each benefit plan you select for this employee, unless the benefits administrator has defined a plan as an auto entry plan.

3. Process the information at each screen and press Enter to proceed through the screens for the selected benefits. If pressing Enter does not exit a screen, press F3 and specify saving your information. After the last screen, the system returns you to the Update Employee Benefit Entrollments benefit selection list.

   The system creates a pending enrolment record for each of the employee's plans.

   The employee is not actually enrolled in the plans until the Benefits Administrator runs *Mass Update Enrollments*. The system then authorises the employee's deductions for the plans when you process the Begin step of pay cycle processing.

4 From the Update Employee Benefit Enrollments screen, you can also perform the following actions:

- Press F13 to update dependent data
- Press F15 to update information about the employee's taxable benefits such as use of a company car

  The system displays a selection list of taxable benefits from which you can choose to change, display, or delete items as well as access mileages, payments, writeoffs, the benefit master, and car details as in *Update Employee Taxable Benefits*.

5 When done at the Update Employee Benefit Enrollments screen, press F3. Then type **1** in the Exit Options window and press Enter to continue to the next screen you are assigned to access.

Authorising the Employee's Deductions

The system may display a screen similar to Figure 3-9. You can also access this through Infinium PY *Update Employee Deduction Data*.

```
 4/10/01  15:40:13    Update Employee Deductions          PYGDEM10   PYDDEM10

Employer . . . . : S2T        Infinium Software
Employee . . . . :       143  Jones,Mary M.
Levels   . . . . : FINAD   FINAD  FINAD  30000       Payroll Cycle   MTH01
Position ADTL01    Job Code TL01    Pay Grade TL01   Employment date 10/04/2001
Tax Basis 0        Tax Code BR      NI Table  A      Date of Birth   11/06/1974
Type options, press Enter.          NINO             TN110674F
  2=Change/reactivate   4=Delete/deactivate (reverse image)
Opt Code              Start Date  End Date   Amount     Limit      Balance Summ
 _ *NIC  National Ins                            .00        .00        .00  10
 _ *PAYE PAYE                                    .00        .00        .00  01
 _ BACS2 Net Pay all                             .00        .00        .00  99

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

Figure 3-9: Update Employee Deductions selection screen

If you specified an authorisation group for this employee at the Enter New Employee payroll data screen, the system automatically displays a list of the deductions associated with that group at this Update Employee Deductions selection screen.

1 To delete or deactivate a listed deduction, type **4** next to the deduction and press Enter.

2 To authorise and review details for a listed deduction, type **2** next to the deduction and press Enter to display an Update Employee Deduction Codes screen similar to Figure 3-10.

You can also create a new deduction by press F6 and completing the requested information for the new deduction.

```
 3/19/08  14:39:27     Update Employee Deduction Codes     PYGDEM20   PYDDEM20
Employer . :  SAY          Say it with Flowers Plc                SALES  REG01
Employee . :     101220 Helen Abbey                               1034   01

Deduction Code    *NIC                 National Insurance
Priority            10                  Deduction Method 4 (tax deduction)

Starting Date     ________              Ending Date     ________
Employee Amount   _______.00            Employer Amount _______.00
Employee Rate/Pct _____.0000            Employer Rate/% _____.0000
Employee Limit    _______.00            Employer Limit  _______.00
Frequency         _                     Arrears Type    _  0
Deduction Basis   _                     Deduction Factor __________
Deduction Matrix  _____ +
Matrix Column     _____ +               Matrix Row      _____ +

Deduction Expense ____________________________________ +

Protected Earnings _______.00                Charging Authority ___ +
Insurance Amount   _______.00                Ded. Limit Group   _____ +
Information        _________________________ Cycle Group        _____ +

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

Figure 3-10: Update Employee Deduction Codes screen

3 Specify the information that applies to this employee. The information you specify here overrides the corresponding information in the applicable deduction control record.

For example, if the deduction control *Deduction Amount* field has **50.00**, but you specify **25.00** in the *Employee Amount* field here, the system uses **25.00** when processing the employee's payslip.

If you specify a rate or amount, you must type **I** in the *Deduction Basis* field at this Update Employee Deduction Codes screen.

4 Press F3 to exit to the deduction selection list. The system does one of the following:

- If you are authorising a deduction that was defined in Infinium PY function *Update Deduction BACS Data* and the definition requires employee B.A.C.S. data, the system displays another screen for employee bank account information.

5 Specify the information. Press F3 again and specify saving your information to the return to the selection list.

- If the deduction does not require bank account transfer information, the system displays the Exit Options window. Specify saving your information to return to the Update Employee Deductions selection screen.

6 When done with deductions at the selection screen, press F3 to continue to the next screen you are assigned to access.

Updating Pay Components

The system may display the screen shown in Figure 3-11. You can also reach this screen through the *Salary Change (SC)* and *Position Change* (PS) options in *Enter Personnel Actions*.

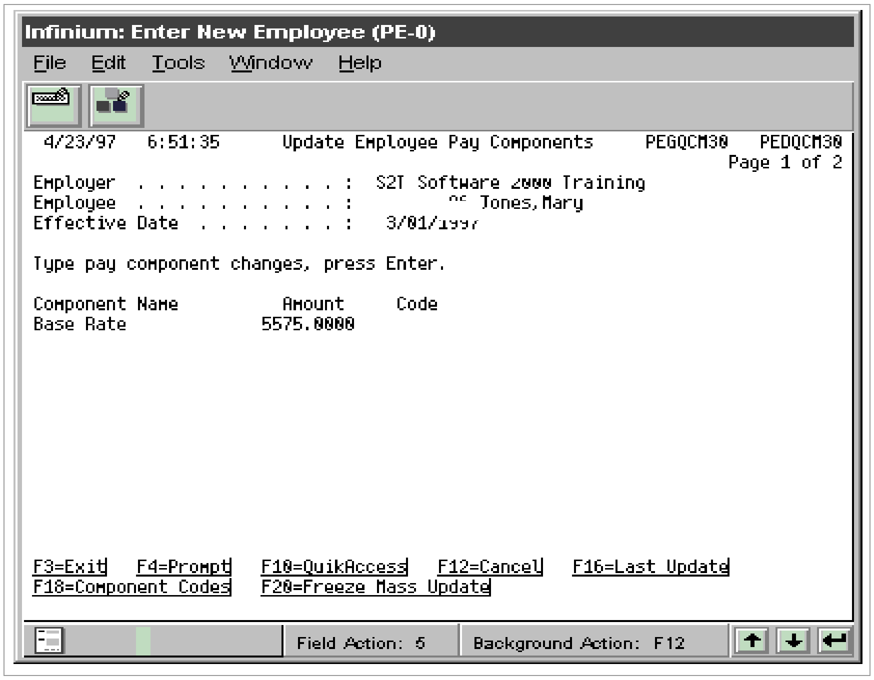


Figure 3-11: Update Employee Pay Components screen

If you assigned a personnel base rate to this employee on screen 4 of the *Enter New Employee* option, the system displays the rate you entered.

1 To change the pay components for this employee, press F18. The system displays a screen showing all available pay components.

2 For each pay component you want to select, type a sequence number and press Enter.

3 When you have selected all the required pay components, press F3. The system returns you to the Update Employee Pay Components screen, where you can change the pay components you selected.

The system highlights the components that are specific to the employee rather than table-based from a code. In addition, if you selected a table-based component for which the table has only one code, the system automatically supplies that code in the employee pay component record.

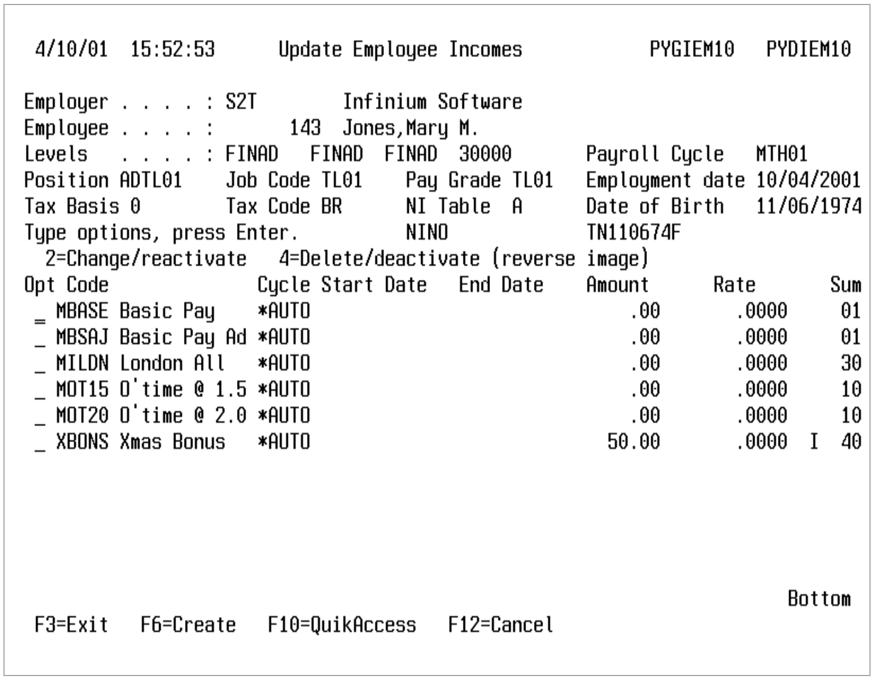
4 When done with the Pay Components screen, press F3. Then type **1** in the Exit Options window and press Enter to continue to the next screen you are authorised to access.

Note: If you left any component amounts zero, the system displays a window when you exit identifying the affected components and allowing you to choose one of the following actions:

- Remove any or all of these components from the record.
- Press F11 to override the warning and continue.
- Press F3 to return to the component screen to make changes.

Authorizing the Employee's Incomes

The system may display the screen shown in Figure 3-12. You can also reach this screen through Infinium PY function *Update Employee Income Data*.


```
 4/10/01  15:52:53      Update Employee Incomes          PYGIEM10   PYDIEM10

Employer . . . . : S2T        Infinium Software
Employee . . . . :       143  Jones,Mary M.
Levels   . . . . : FINAD   FINAD  FINAD  30000      Payroll Cycle   MTH01
Position ADTL01    Job Code TL01    Pay Grade TL01  Employment date 10/04/2001
Tax Basis 0        Tax Code BR      NI Table  A     Date of Birth   11/06/1974
Type options, press Enter.          NINO            TN110674F
  2=Change/reactivate   4=Delete/deactivate (reverse image)
Opt Code              Cycle Start Date   End Date   Amount       Rate       Sum
 _ MBASE Basic Pay    *AUTO                              .00       .0000     01
 _ MBSAJ Basic Pay Ad *AUTO                              .00       .0000     01
 _ MILDN London All   *AUTO                              .00       .0000     30
 _ MOT15 O'time @ 1.5 *AUTO                              .00       .0000     10
 _ MOT20 O'time @ 2.0 *AUTO                              .00       .0000     10
 _ XBONS Xmas Bonus   *AUTO                            50.00       .0000  I  40

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

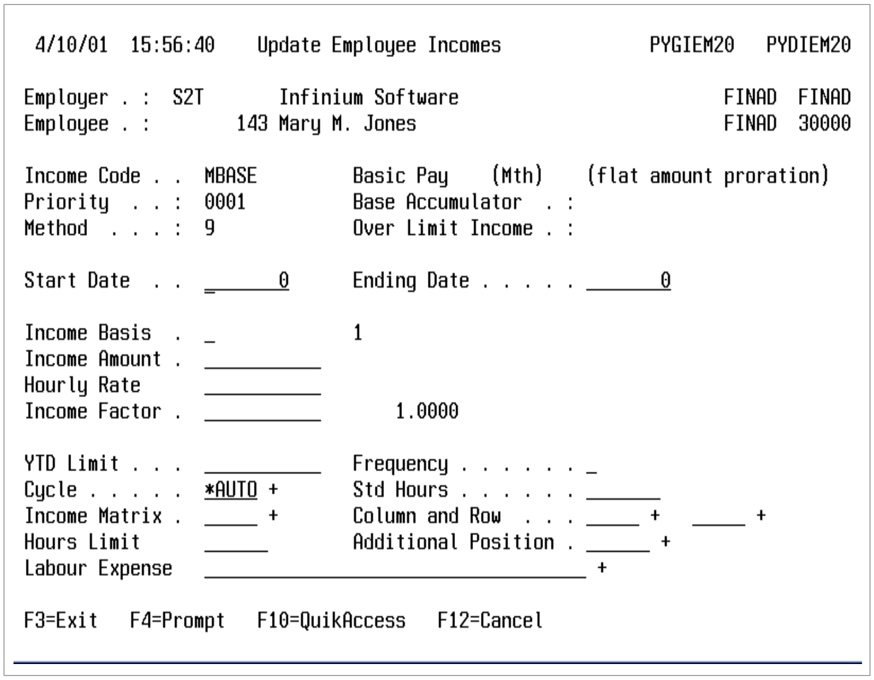
Figure 3-12: Update Employee Incomes selection screen

If you specified an authorisation group for this employee at the Enter New Employee payroll information screen, the system automatically displays the incomes associated with that group here.

You can add additional incomes by pressing F6, change/activate details for an existing income, or delete/deactivate a listed income.

1 To delete a listed income, type **4** in the *Opt* field next to the income and press Enter.

2 To change/activate a listed income, type **2** in the *Opt* field next to the income and press Enter. The system displays an Update Employee Incomes details screen similar to Figure 3-13.



```
 4/10/01  15:56:40    Update Employee Incomes            PYGIEM20   PYDIEM20

Employer . :  S2T       Infinium Software                        FINAD  FINAD
Employee . :        143 Mary M. Jones                            FINAD  30000

Income Code . .  MBASE         Basic Pay    (Mth)    (flat amount proration)
Priority  . . :  0001          Base Accumulator  . :
Method  . . . :  9             Over Limit Income . :

Start Date  . .  _______0      Ending Date . . . . . _______0

Income Basis  .  _             1
Income Amount .  ___________
Hourly Rate      ___________
Income Factor .  ___________       1.0000

YTD Limit . . .  ___________   Frequency . . . . . . _
Cycle . . . . .  *AUTO +       Std Hours . . . . . . _______
Income Matrix .  _____ +       Column and Row  . . . _____ +    _____ +
Hours Limit      ______        Additional Position . ______ +
Labour Expense   ____________________________________ +

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

Figure 3-13: Update Employee Incomes details screen

3 Specify the cycle during which this employee can receive this income. The generic cycle name ***AUTO** instructs the system to make this income available for the employee during any normal pay cycle to which this employee is assigned.

The ***AUTO** cycle does not automatically pay this income. To make an income automatic for the employee, use the *Auto Pay Group* field on the Enter New Employee payroll information screen.

4 Type any additional information for this income for this employee.

Note the following:

- Information that you enter on this screen overrides information in the corresponding income controls. For example, if you enter **2000** in the *YTD Limit* field on the income control, but specify **2400** in the *YTD Limit* field here, the system uses the higher employee value when it processes the employee's payslip.
- If you specify a rate or amount, you must specify **I** in the *Income Basis* field.

5 Press F3 and save the information. The system returns to the income selection screen.

6 When done authorising incomes for this employee, press F3 at the Update Employee Incomes selection screen to continue to the next screen that you are authorised to access.

Specifying User Defined Information

The system may displays an Update User Defined Data selection screen similar to Figure 3-14. You can also reach this screen through *Update User-Defined Emp. Data*.

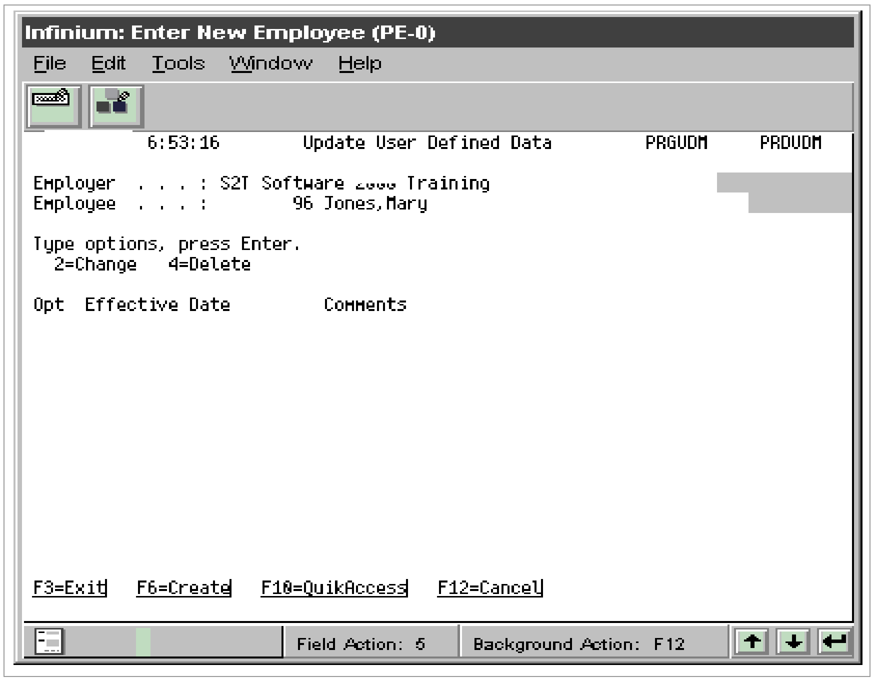


Figure 3-14: Update User Defined Data selection screen

The user defined data screens are for tracking information that is specific to your organisation and not found in the standard Infinium HR database. Define these screen's field descriptions in *Maintain Employer Titles*. Define code values for the up to 10 user defined code fields in *Update Employer Codes* using code types UC1 through UC9 and UCX.

You can use only the fields for which descriptions are defined and only the code fields for which code values are also defined. Once the definitions and codes are defined, you can specify this information for the employee now or do so later in *Update User-Defined Emp. Data*.

1 To add new user defined information, press F6. The system displays the screen shown in Figure 3-15.

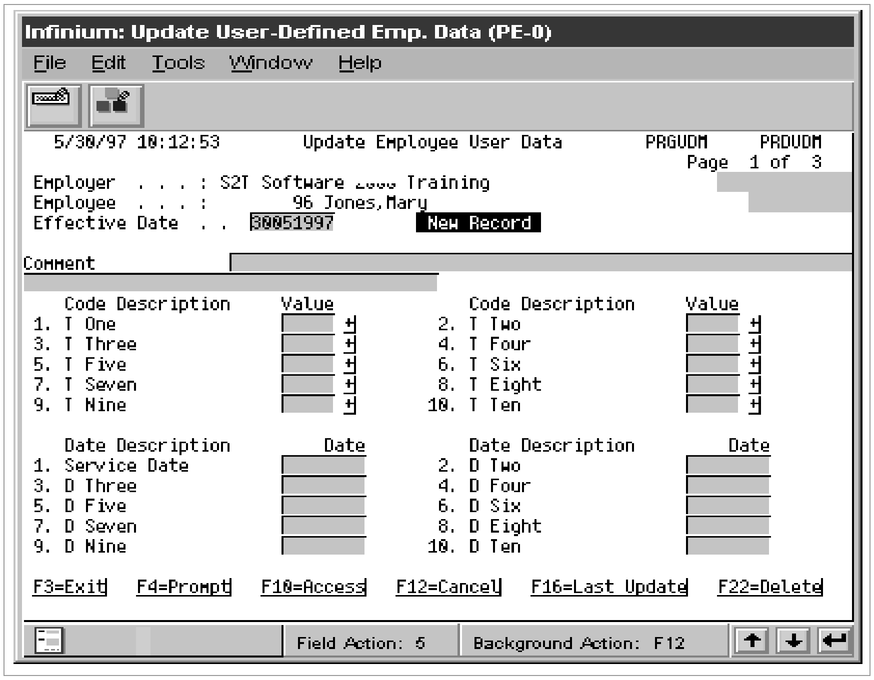


Figure 3-15: Update Employee User Data screen

2 Use the following information to complete the fields on these screens.

Screen 1

Comment

Type up to 100 characters of miscellaneous information related to the new employee.

Code Descriptions

Specify codes for fields that have been defined and for which code values have also been defined. There are up to 10 user defined code fields. The fields must have already been defined using code types UC1 to UC9 and UCX in *Update Employer Codes*.

Date Descriptions

You can specify a date in up to 10 user defined date fields.

Screen 2

Amount Descriptions

You can type numeric information in up to 10 user defined numeric fields. The system allows a value of up to 9,999,999.99 per field.

Character Description

You can type alphanumeric information in up to 20 user defined character fields. Each character field is 20 characters long.

Screen 3

Hours Description

You can type hours information into up to 10 user defined hours fields. The system allows a value of up to 99,999,99 per field.

Numeric Description

You can type numeric information in up to 10 user defined numeric fields. The system allows a value of up to 99,999,999,999 per field.

3. When you press F3 at the last Update Employee User Data screen, the system returns you to the initial user defined data selection list.

4. When done with user defined information, press F3. Then type **1** in the Exit Options window and press Enter to continue to the next screen you are authorised to access.

Overriding Default PTO Control Values

The system may display a screen that enables you to override the default Paid Time Off (PTO) control values from the job controls.

Refer to “Recalculating the Prorated PTO Entitlement for New Employees” in the “Processing Paid Time Off (PTO) Accruals” chapter of this guide for details.

Processing Assigned Update Employee Data Screens

Depending on the settings for your profile in *Update User Controls*, the system may display screens from *Update Employee Data*.

Update Employee Data allows entry of additional information about an employee beyond what you can specify in *Enter New Employee*.

Repeating the Procedure for Other New Employees

When you exit the last screen you are allowed to access in *Enter New Employee*, the system returns you to the initial Enter New Employee identification screen. Repeat the preceding procedures for any other new employees or press F3 at the identification screen to exit to the menu.

Verifying Information for New Employees

You can use the List PE Actions or List PE Action Details reports in the *List Employee Data* option to verify key information about new employees hired during a specified time period.

Hands-on Workshop

Exercise 3-1

Enter New Employees

Follow these steps to enter new employees for your workshop employer:

1. From the Infinium HR main menu select *Employees.*
2. Select *Create New Employee Records.*
3. Select *Enter New Employee* [ENE].
4. Enter at least three employees for your employer.
5. If you are using Infinium Payroll, do the following for each employee you enter:
   - Assign an authorisation group
   - Assign an auto pay group
   - Add or change incomes included in the authorisation group
   - Add or change deductions included in the authorisation group

   The values you enter for each employee’s payroll rates on the Enter New Employee payroll screen must be compatible with the basis and method in the income control records to which the employee will be assigned:

   - If you assign the employee to a salaried income (methods 1 or 3) whose *Income Basis* field is **1**, state the employee’s first payroll rate as a flat amount corresponding to the employee’s pay frequency.
   - If you assign the employee to an hourly income (method 2) whose *Income Basis* field is **2**, state the employee's Payroll Rate 2 as an hourly rate.

   For example, if you assign the employee to a salaried income and the value in the *Pay Frequency* field shown in Figure 3-6 is **M**, state the employee's first payroll rate as a monthly flat amount such as **2000**. If you assign the employee to an hourly income, type an hourly rate such as **5.0000** in the first payroll rate field regardless of the pay frequency.

Notes

Chapter 4 Updating Information about an Employee

4

Use *Update Employee Data* to review or update information about employees after you enter their new employee information into Infinium HR. Refer to the chapter in this guide entitled "Entering New Employees" for more information.

The system automatically establishes information for the new employee in several files including basic data and personnel data. Basic data is accessible to users of both Infinium HR and Infinium PY. Personnel data is accessible only to Infinium HR users.

This chapter contains overviews of the employee information you can update by *Update Employee Basic Data, Update Employee Personnel Data*, and *Change Employee Number*. It also provides procedural instructions for using these functions to update an employee's record.

Depending on your security restrictions, you may not have access to all of this information.

The chapter consists of the following topics:

Overview

Objectives

When you complete this chapter, you should be familiar with:

- How to use *Update Employee Data* to change and add employee information
- The difference between *Update Employee Data* and *Enter Personnel Actions*, and the circumstances in which you use these two
- How to use *Change Employee Number* to change employee numbers
- Where to find the information you want to update
- How system security can affect which *Update Employee Data* sections you can use

Understanding the Update Employee Data Process

When you enter a new employee into Infinium HR, the system automatically creates several records for the information you enter. In addition, if the employee was previously an applicant for whom you had entered education and/or skills information, it also creates employee skill and education records. You can use *Update Employee Data* to review and maintain all this information, and to record additional information about the employee.

Organisation of Information in *Update Employee Data* Sections

Update Employee Data organises employee information into the following sections.

Section	Type of Information
Basic Data	Essential information such as name, address, birthdate, address and telephone, job and position, performance review and employment information, pay related information, scheduled hours, and paid time off (PTO) accruals. Much of this information is also used for payroll purposes.

Section	Type of Information
Personnel Data	Mainly optional information such as marital status, emergency contact information, bank details, and disability information.
Education and Qualifications Data	Education, qualifications and tuition reimbursement information. The system can keep multiple records for each employee.
Previous Employment Data	Information about previous employers and positions held. The system can keep multiple records for each employee.
Vehicle and Property Data	Information about company property issued to employees, and about employees' personal vehicles. The system can keep multiple records for each employee.
Dependent Data	Information about dependents and beneficiaries of employees. The system can keep multiple records for each employee.
Pay Component Data	Pay component codes assigned to an employee. The system uses pre-defined monetary amounts for each pay component to calculate the employee's base rate.
Licences Data	Information about professional licences held by employees, plus any expiry or renewal dates.
Scheduled Hours Data	Information about the employee's working hours.
User-Defined Employee Data	User-defined fields to track information that is unique to your company or business.
Log Data	An on-screen memo area where you can enter lengthy free-form text about an employee. The system can keep multiple records for each employee.
Additional Position Data	Information about other positions held concurrently by the employee. The system can keep multiple records for each employee.

Your system administrator can use *Update PE User Security* to define which of these sections you can access. Refer to the *Infinium HR (I) Guide to Controls* for more information on establishing user security.

Updating Employee Information Using Personnel Actions

You can update information in any of the records listed in the above table using the *Update Employee Data* options by typing over the existing information in the fields.

Caution: When you do this, the prior information is lost; therefore, you should use extreme caution when you enter information directly into the basic data record.

When you want to make significant changes to the employee's information and save his or her prior information in history, you use the *Enter Personnel Actions* options rather than entering the new information directly into fields on the employee record. For example, you use the *Enter Personnel Actions* options to make changes to the employee's salary, status and position, as well as for ending employment and re-employment.

When you enter a personnel action transaction, the system creates a record in the employee's on-line history and, depending on the type of transaction you enter, automatically updates his or her basic data, personnel data and payroll data records with the new information.

If you want to create historical information for the employee that can be used in reports and displays, you should use the *Update Employee Data* options to update only those fields that are not updated through the *Enter Personnel Actions* options. Most of the fields in the basic data and personnel data records are updated through the *Enter Personnel Actions* options or through other processing.

Before you use the *Enter Personnel Actions* option, you must define position controls and type **1** in the *Position Control Used?* field in the employer control record. When you choose to record employees' positions in Infinium HR, the system does not allow you to enter information in certain fields in the employee's basic data record. These fields are updated automatically when the employee is assigned to a position.

Refer to the *Infinium HR (I) Guide to Controls* for more information on how to establish position controls. The following discussion assumes that you have established position control records and use the *Enter Personnel Actions* option to update the employee's information.

Updating an Employee's Basic Data

You establish a basic data record for an employee when you enter his or her new employee information into Infinium HR. The basic data record contains essential information about the employee, such as his or her name, address, telephone number, date of birth, position, date of employment and so on. The basic data record can be accessed by users of both Infinium HR and Infinium PY.

Your security administrator can restrict which basic data screens and fields you can view or update. It is therefore possible that you do not see or access all of the screens and fields described here. Refer to the "Setting Up User Controls" chapter of the *Infinium HR (I) Guide to Controls* for more information on security restrictions.

Updating Basic Data Using Personnel Actions

The following table identifies the basic fields you should maintain through the *Enter Personnel Actions* options or through other processing. For most of these fields, you cannot use the *Update Employee Data* options to enter information unless you have supervisory access, in which case you can press F18 to update the fields on a screen.

To update these fields…	which you see on this Basic Data screen…	select this *Personnel Action* option
Last Name *First Name* *Middle Name* *Initials* *Name Title* *Known As*	Personal Details	Personal Change
Position Title *Alternative Title* *Location Code*	Personal Details	Position Change; but see note on *Alternative Title* under Job and Position Data later in this table.
Address Line 1 *Address Line 2* *Address Line 3*	Address and Telephone Data	Personal Change

To update these fields…	which you see on this Basic Data screen…	select this *Personnel Action* option
Town or City User-Defined *Address* field *Postal Code* *Country* *Home Telephone Number*	Address and Telephone Data	Personal Change
Position *Pay Grade* *Position Title* *Alternative Title* *Date Entered Position* *Level 1* *Level 2* *Level 3* *Level 4* *Job Code* *Job Seniority Date* *Location Code* *Reports to Position* *Manager's Name*	Job and Position Data	Position Change If the employee record has an alternative title that differs from the alternative title in the old position's controls, however, the system recognises the employee record value as an override and does not change the alternative title in the employee record.
Status Code *Last Status Change Date*	Job and Position Data	Status Change
Next Review Type *Next Review Date* *Last Rating Code* *Last Rating Score Potential Code* *Mobility Code*	Performance Review Data	Performance Review
Date of Employment *Adjusted Date of Employment*	Employment Information	New Employee
Leaving Date *Leaving Reason Code* *Keep records permanently?* *Re-employment Eligibility* *Re-employment Date*	Employment Information	End Employment
Leave of Absence Begin Date *Leave of Absence Reason* *Expected Date of Return* *Expected Length of Break* *Employee Laid Off?*	Employment Information	Status Change
Benefit Group Code	Miscellaneous Data	*Update Employee Benefits* option
Previous Status	Miscellaneous Data	Status Change

To update these fields…	which you see on this Basic Data screen…	select this *Personnel Action* option
Occupation Code *Shift Code*	Miscellaneous Data	*Update Organisation Positions* option
Standard Hours *Scheduled Pay Pds*	Pay Related Data	Salary Change and Status Change
Pay Grade & Cur *Grade Begin Date* *Step Number* *Next Step Number* *Step Begin Date* *Next Step Date* *Base Rate* *Currency* *Base Rate Freq* *Pay Type* *Pay Frequency* *Last Incr. Amt.* *Last Increase %* *Last Incr. Date* *Increase Reason* *Prev Base Rate* *Totl Hrs all Pos* *Salary Range* *Salary Quartile* *Date Last Worked* *Compa Ratio*	Pay Related Data	Salary Change
Allow Step Increase *Allow Increase*	Pay Related Data	Status Change

Accessing Basic Data Information

You can access the employee's basic data record in two ways:

- Using the *Update Employee Basic Data* option

  When you select this option, the system displays the basic data record directly. Choose this method if you want to update only basic data information for the employee.

- Using the *Update Employee Data* option

When you select this option, the system displays a selection screen containing several options, one of which is *Basic Data*. Choose this method if you want to update other employee information as well as basic data.

The system presents you with the same screens of employee information, whichever method you use to reach the basic data record.

Using the *Update Employee Basic Data* Option

Follow the steps below to access the employee's basic data directly.

1 From the Infinium HR main menu select *Employees*.

2 Select *Employee Records*.

3 Select *Update Employee Basic Data* [UEBD]. The system displays the Update Employee Basic Data prompt screen similar to the one shown in Figure 4-1.

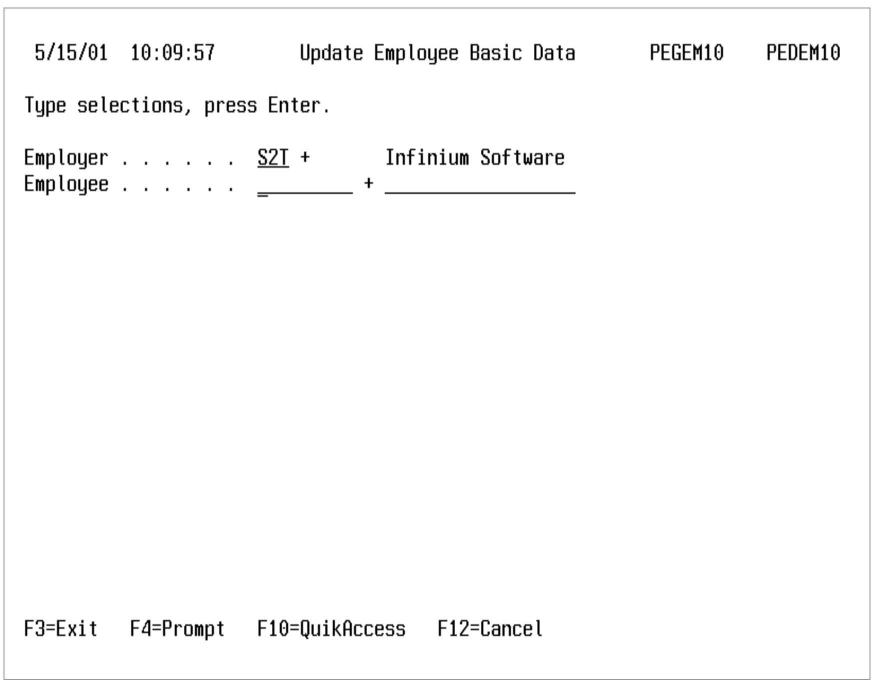


Figure 4-1: Update Employee Basic Data prompt screen

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

Employer

Specify the employer for which the employee works.

Employee (Number followed by Name)

In the first field, specify the number assigned to the employee for whom you are updating information.

5 Press Enter. The system displays the Update Employee Basic Data selection screen shown in Figure 4-3. Complete the procedure described in the “Steps to Update an Employee’s Basic Data” section later in this topic to update the information.

6 When you finish updating employee data, press F3 to return to the Update Employee Basic Data prompt screen shown in Figure 4-1.

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

Using the *Update Employee Data* option

Follow the steps below to access the employee’s basic data through the Update Employee Data section selection screen.

1 From the Infinium HR main menu select *Employees*.

2 Select *Employee Records*.

3 Select *Update Employee Data* [UED]. The system displays an Update Employee Data prompt screen for you to specify the employer and employee, similar to the prompt screen shown in Figure 4-1 but with a different title.

4 Use the information in the section entitled “Using the *Update Employee Basic Data* Option” to complete the fields on this screen.

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

```
 5/15/01  10:50:38      Update Employee Data            PEGMZZ     PEDMZZ

Employer . . : S2T      Infinium Software
Employee . . :       67 Davis,Stephen

Level 1     . . . . . . . . . . :  CUSTS  Customer Services
Level 2     . . . . . . . . . . :  PSERV  Professional Services
Level 3     . . . . . . . . . . :  PFINN  Financials Team
Level 4     . . . . . . . . . . :  20100  Financials Team Costs

                Sel Function Description
                 _  Basic Data
                 _  Personnel Data
                 _  Education & Qualifications
                 _  Training History
                 _  Property Data
                 _  Dependent Data
                 _  Vehicle Data
                 _  Employee Log
                 _  Additional Employee Positions
                 _  Previous Employment History
                                                                        More...
F3=Exit  F10=Quikaccess  F12=Cancel
```

Figure 4-2: Update Employee Data section selection screen

To view the additional sections available at this screen (*Skills and Competencies* and *Benefit Enrollments*) page down.

6 Type a character in the *Sel* field next to *Basic Data*.

7 Press Enter. The system displays the screen shown in Figure 4-3. Complete the procedure described in the "Steps to Update an Employee's Basic Data" section later in this topic to update the information.

8 When you have finished updating employee data, press F3 from the Update Employee Basic Data selection screen. The system displays the screen shown in Figure 4-2.

9 Press F3 to return to the Update Employee Data prompt screen, and press F3 again to return to the Infinium HR main menu.

Steps to Update an Employee's Basic Data

When you follow one of the methods described in the previous section to access the employee's basic data record, the system displays the screen shown in Figure 4-3.

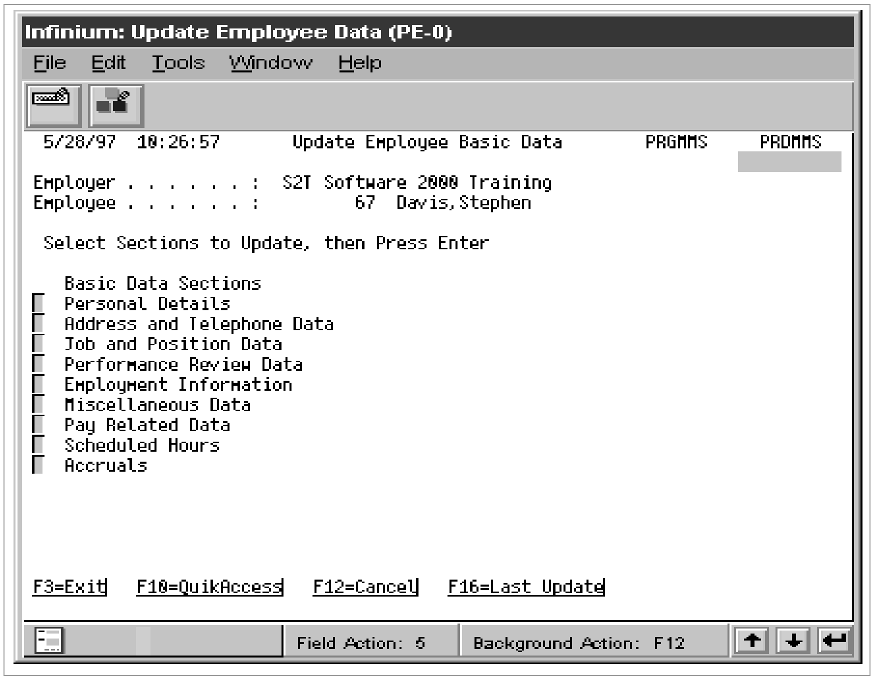


Figure 4-3: Update Employee Basic Data selection screen

From this screen you can access all sections of the employee's basic data record to which you have access. Depending on your security restrictions, you may not be able to update all of these sections. Basic data comprises:

- Personal Details
- Address and Telephone Data
- Job and Position Data
- Performance Review Data
- Employment Information
- Miscellaneous Data
- Pay Related Data
- Scheduled Hours
- Accruals

To update a section of data, type a character next to the appropriate section and press Enter. You can select more than one section at a time; type a character next to each section you want to update. When you press F3 to exit a section, the system automatically displays the next section you selected.

Updating Personal Details

Follow the steps below to update an employee's personal details.

1 From the Update Employee Basic Data selection screen, type a character next to *Personal Details*.

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

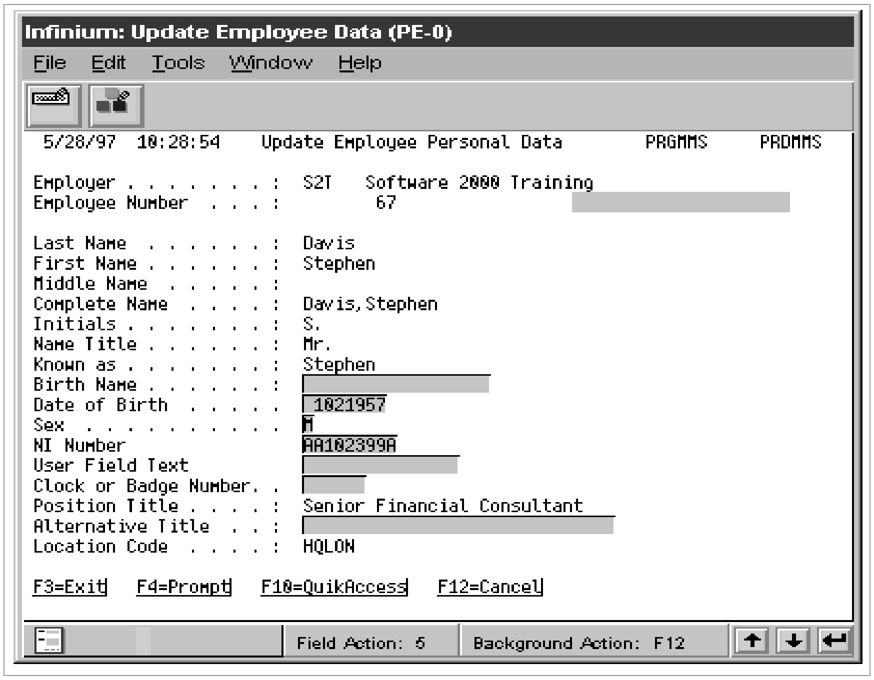


Figure 4-4: Update Employee Personal Data screen

The system automatically completes many of these fields when you enter the employee into the system using the *Enter New Employee* option. Some of the fields on this screen are maintained through the *Enter Personnel Actions* option; refer to the preceding table for a list of these fields. You must use the *Enter Personnel Actions* option to update these fields; they are not described here.

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

Birth Name

Type the employee's maiden name or name given at birth, if it is different from his or her current name. This is an 18-character field.

Date of Birth

Type the employee's date of birth using the appropriate date format for this employer.

You specify the date format for your employer when you create the employer control. Refer to the *Infinium HR (I) Guide to Controls* for more information.

Sex

Type a value that represents the employee’s sex. Valid values are:

M	Male
F	Female

NI Number

This label is user-defined in the *Tax ID No. Text* field in *Update Employer Controls*. Your system may display a different description.

Type the employee's National Insurance number or your country's equivalent number.

- If the country code is **UK** or **IRL** and you do not know the number, you can leave this field blank to have the system assign a temporary number. When you press Enter, the system displays a warning and allows you to press F16 to generate the number.

  For country **UK**, the number is **TN** + *DDMMYY* + *Sex*, such as **TN17071969F** for a female born 17 July 1969.

TN	Indication that this number is temporary
DDMMYY	The employee's date of birth
Sex	The employee's sex (**M** or **F**)

  For country **IRL**, the number is **9** + *DDMMYY* + *Sex* such as **911061974M** for a male born 11 June 1974.

9	Indication that this number is temporary
DDMMYY	The employee's date of birth
Sex	The employee's sex (**M** or **F**)

- This field is required for all UK employees. The *(Required)* field value next to the *Tax ID No. Text* field in *Update Employer Controls* specifies whether the number is required in *Enter New Employee* and *Update Employee Data* for non-UK employers.

User Field Text

This is a 15-character free-form field. Type text appropriate to the field description.

Note: This field name is a user-defined name. You define the text that you want to display here in the *User Field Text* field in the *Update Employer Controls* option.

Clock or Badge Number

You can use this field to record the employee’s timeclock or badge number, or any other number associated with the employee. This is for information only; the system does not maintain or use this field.

Alternative Title

Type an alternative job title, if appropriate. This is a 30-character free-form field. The system uses the title you type here to update the *Alternative Title* field in the *Job and Position Data* section.

Note: If the alternative title here if the same as the alternative title that is specified in the controls for the position to which this employee is assigned, the system automatically updates this field if you perform either of the following actions:

- Use *Update Organisation Position*s to change the *Alternative Title* value in the controls for this employee's position
- Use *Enter Personnel Actions* to change the employee to a different position whose controls have a different alternative title

If the employee's alternative title differs from the one in the old position record, however, the system recognises the employee's alternative title as an override and does not change the title when you change the position control or the employee's position.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Basic Data selection screen.

Updating Address and Telephone Data

Follow the steps below to update an employee’s address and telephone data.

1 From the Update Employee Basic Data selection screen, type a character next to *Address and Telephone Data*.

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

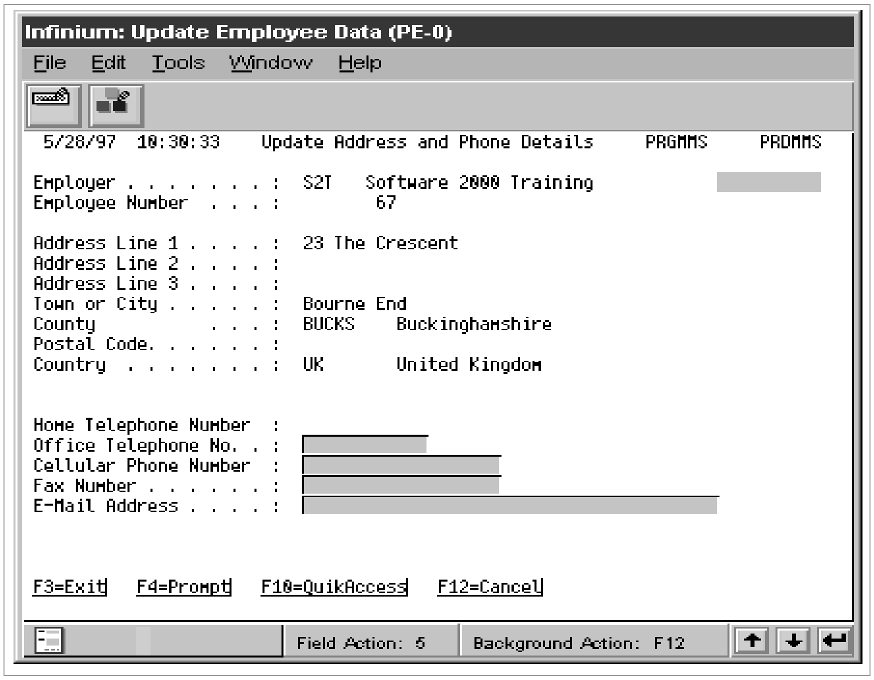


Figure 4-5: Update Address and Phone Details screen

The system automatically completes many of these fields when you enter the employee into the system using the *Enter New Employee* option. Some of the fields on this screen are maintained through the *Enter Personnel Actions* option; refer to the preceding table for a list of these fields. You must use the *Enter Personnel Actions* option to update these fields; they are not described here.

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

Office Telephone No.

Type the employee's office telephone number and/or extension. This is a 12-character free-form field.

Cellular Phone Number

Type the employee's cellular or mobile phone number. This is a 19-character free-form field.

Fax Number

Type a fax number for the employee. This is a 19-character free-form field.

E-Mail Address

Type the employee's e-mail address. This is a 40-character free-form field.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Basic Data selection screen.

Updating Job and Position Data

Follow the steps below to update an employee's job and position data.

1 From the Update Employee Basic Data selection screen, type a character next to *Job and Position Data*.

2 Press Enter. The system displays the screen shown in Figure 4-6.

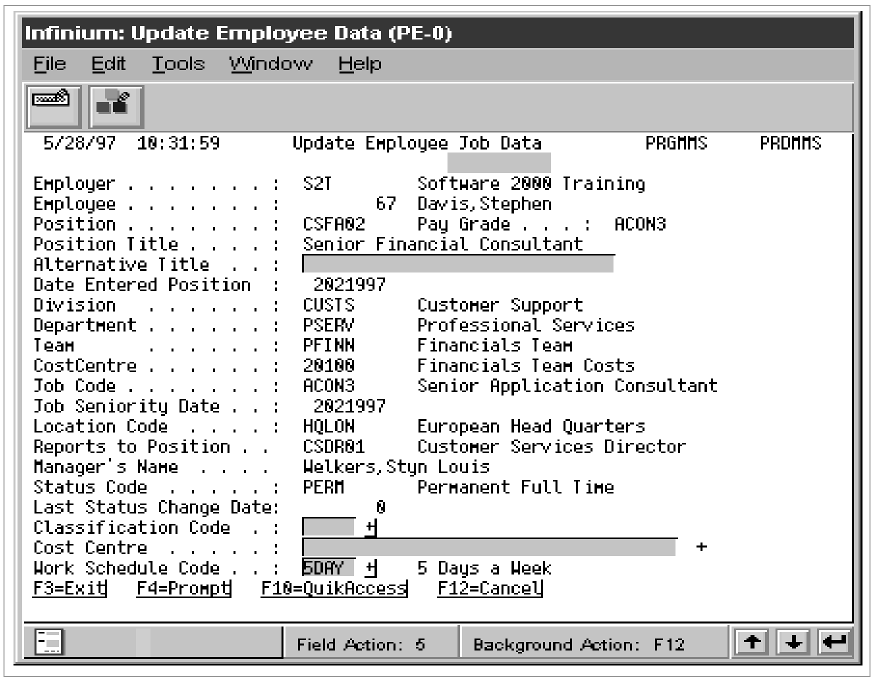


Figure 4-6: Update Employee Job Data screen

The system automatically completes many of these fields when you enter the employee into the system using the *Enter New Employee* option. Some of the fields on this screen are maintained through the *Enter Personnel Actions* option; refer to the preceding table for a list of these fields. You must use the *Enter Personnel Actions* option to update these fields; they are not described here.

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

Alternative Title

Type an alternative job title, if appropriate. This is a 30-character free-form field. The system uses the title you type here to update the *Alternative Title* field in the *Personal Details* section.

Note: If the alternative title here if the same as the alternative title that is specified in the controls for the position to which this employee is assigned, the system automatically updates this field if you perform either of the following actions:

- Use *Update Organisation Position*s to change the *Alternative Title* value in the controls for this employee's position
- Use *Enter Personnel Actions* to change the employee to a different position whose controls have a different alternative title

If the employee's alternative title differs from the one in the old position record, however, the system recognises the employee's alternative title as an override and does not change the title when you change the position control or the employee's position.

Classification Code

Use this field to specify a classification that is specific for your company, and to assign the employee to an appropriate group. For example, a hospital may choose to classify employees as medical and non-medical.

You define code values for this field through the *Update Employer Codes* option, using code type **CLA**.

Cost Centre

If you do not use Infinium PY, type a code value to represent the cost centre for the employee. The value you enter here is only used in Infinium HR and is not chapter of the Infinium PY and Infinium GL expense processing cycle.

You define code values for this field through the *Update General Ledger Company* and *Update Chart of Accounts* options.

If you enter a value in this field on the position control record to which the employee is assigned, the value on the position control record defaults to this field.

Work Schedule Code

Type a code value that identifies the employee’s usual working schedule. You define work schedule code values through the *Update Work Schedules* option. Refer to the *Infinium HR (I) Guide to Controls* for more information.

Note: You can assign a work schedule to a job through the *Update Job Controls* option, in which case the system automatically completes this field when the employee is assigned to the position.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Basic Data selection screen.

Updating Performance Review Data

Unless you have supervisor access to Infinium HR, you cannot update performance review data using *Update Employee Basic Data*. When you select *Performance Review Data* from the Update Employee Basic Data selection screen, the system displays the screen shown in Figure 4-7 but does not allow you to make any changes.

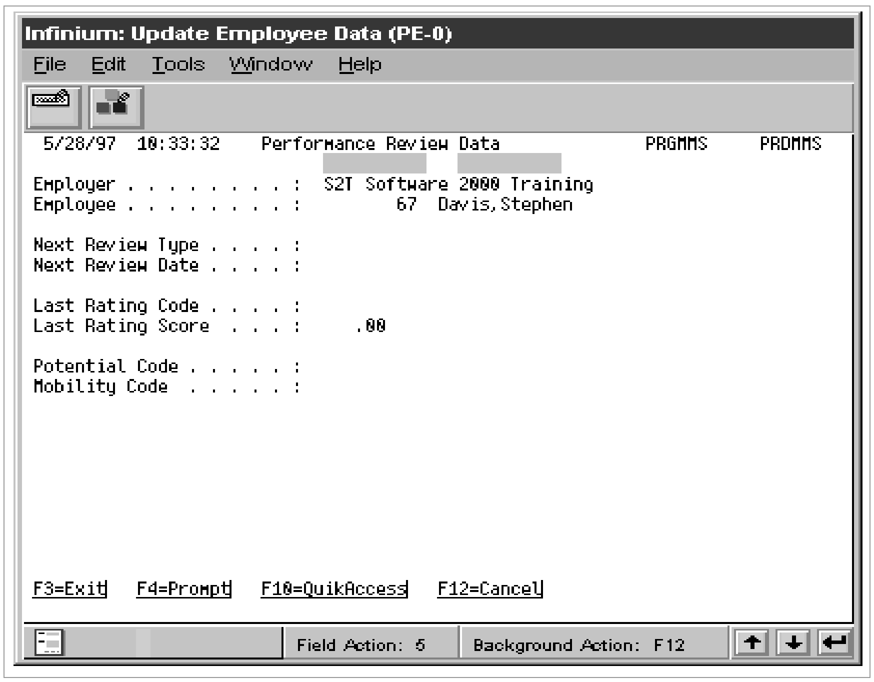


Figure 4-7: Performance Review Data screen

Depending on the information you typed when you entered the employee using the *Enter New Employee*, the system may automatically complete some of the fields on this screen. To update these fields, use *Enter Personnel Actions*.

Press F3 to return to the Update Employee Basic Data selection screen.

Updating Employment Information

Unless you have supervisor access to Infinium HR, you cannot update employment information using the *Update Employee Basic Data* option. When you select *Employment Information* from the Update Employee Basic Data selection screen, the system displays the screen shown in Figure 4-8 but does not allow you to make any changes.

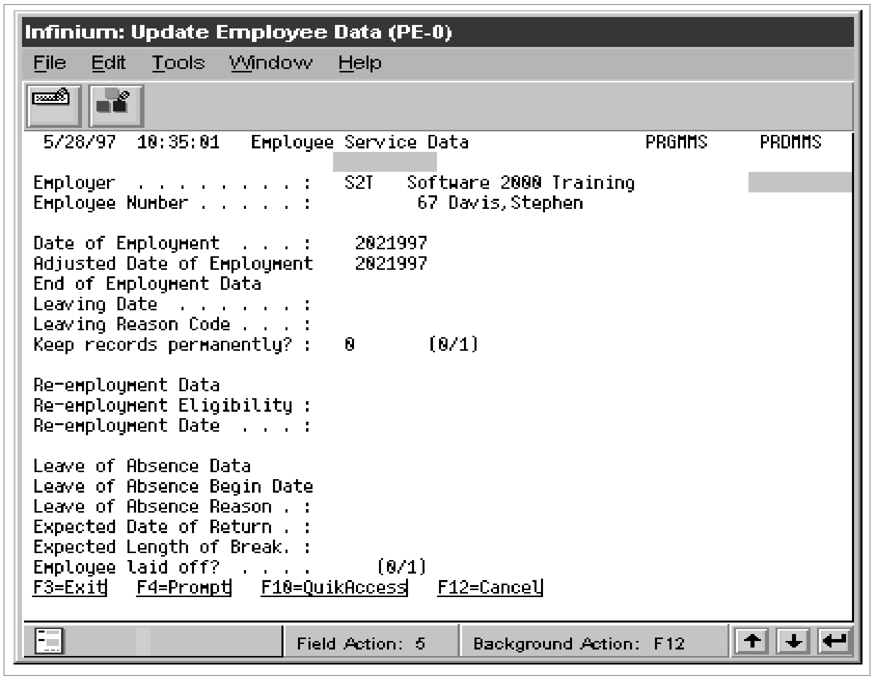


Figure 4-8: Employee Service Data screen

Depending on the information you type when you enter the employee into the system using the *Enter New Employee* option, the system may automatically complete some of the fields on this screen. To update these fields, use the *Enter Personnel Actions* option.

Press F3 to return to the Update Employee Basic Data selection screen.

Updating Miscellaneous Data

Follow the steps below to update an employee's miscellaneous data relating to training, benefits and so on.

1. From the Update Employee Basic Data selection screen, type a character next to *Miscellaneous Data*.
2. Press Enter. The system displays the screen shown in Figure 4-9.

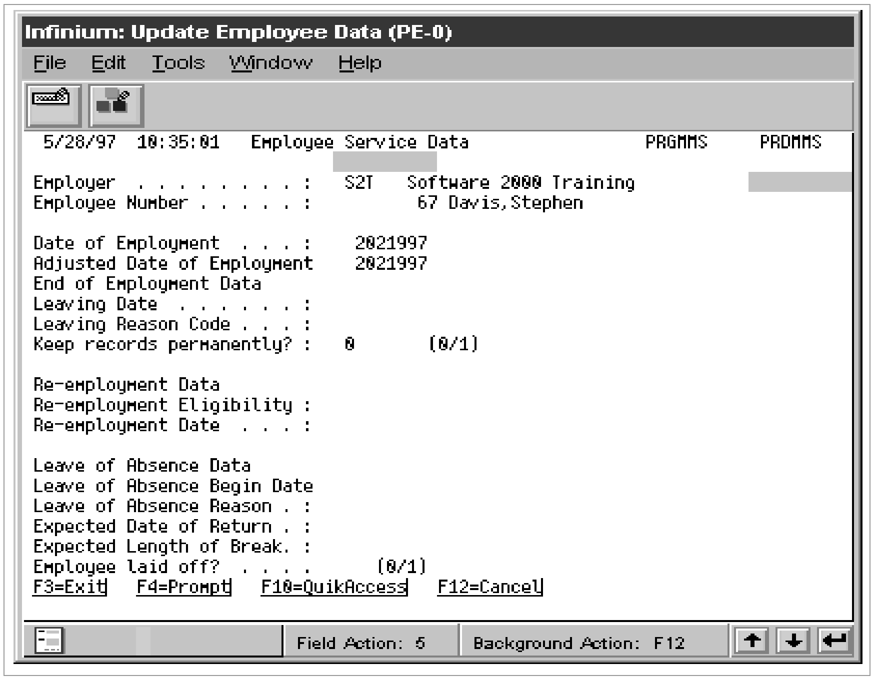


Figure 4-9: Update Employee Miscellaneous Data screen

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

Ethnic Code

Type a one-character ethnic identification code. You define code values for the ethnic ID through the *Update Employer Codes* option, using code type **ETH**.

Security Group Code

Use this field to restrict user access to this employee's records in the system.

Note: You establish user security restrictions through the *Update User Security Controls* option. Refer to the *Infinium HR (I) Guide to Controls* for more information.

To use this feature you must:

- Define security group code values through the *Update Employer Codes* option, using code type **SEC**.
- Enter the code value that represents the security group to which you assign the employee. The code value in the *Security Group* field can default from the position control to which the employee is assigned.
- Type the security group restriction on the user profile of the users who should not access records of employees in the specified security group.

Training Group Code

The value in this field is taken from the position control. To override, type a code value that represents the set of job-related training courses required for the employee.

You define code values for this field through the *Update Employer Codes* option, using code type **TGP**.

Benefit Group Code

If you use the *Benefits* options in Infinium HR and you have created benefit groups, use this field to assign the employee to a benefit group.

If you enter a value in this field on the position control record to which the employee is assigned, the value on the position control record defaults to this field. You can override this value if required. You define benefit group code values through the *Update Benefit Group Controls* option.

Note: You can also use the *Update Employee Enrollments* option to assign a benefit group to an employee.

User Field

This field allows you to enter a user-defined code value. You define code values for this field through the *Update Employer Codes* option, using code type **LAB**.

If you enter a value in this field on the position control record to which the employee is assigned, the value on the position control record defaults to this field. You can override this value if required.

Note: This field name is a user-defined name. You define the text that you want to display here in the *Position User Defined Name* field in the *Update Employer Controls* option.

Education Level Code

Type a code value that represents the highest educational level attained by the employee. You define code values for this field through the *Update Employer Codes* option, using code type **EDU**. Use the *Update Employee Education Data* option to type additional education information for the employee.

Employment Source Code

Type a code value that identifies the recruitment source for the employee. You define code values for this field through the *Update Employer Codes* option, using code type **HIR**.

The system uses this information for turnover analysis when you select the *Display Employee Turnover Data* option.

Mail Group Code

Type a code value that identifies the mail stop or mail group for the employee. You define code values for this field through the *Update Employer Codes* option, using code type **MAI**.

Operation

Use this field to type any unique information you need to track within your organisation. This is a 10-character free-form field that does not require pre-defined values.

Union Code

Type a code value that identifies the union that represents the employee. You define union code values through the *Update Unions* option.

If you enter a value in this field on the position control record to which the employee is assigned, the value on the position control record defaults to this field. You can override this value if required.

Union Membership Number

Use this field to track the membership number assigned to the employee by his or her union, or to track the union's local identification number. This is a 10-character free-form field.

Occupation Code

The system completes this field with the value you enter through the *Update Organisation Positions* option; you cannot update it here.

Retirement Age

The system completes this field with the value in the *Retirement Age* field on the employer control. To change it, type the retirement age applicable to the employee or the age at which he or she retired.

In Pension Plan?

You use this field to indicate if the employee is eligible for or participates in a pension plan. Valid values are:

0	The employee is eligible for or participates in a pension plan.

1 The employee is not eligible for or does not participate in a pension plan.

Note: The value in this field is not used for any of the *Benefits* options.

Shift Code

If the employee's position is associated with a particular shift, type the appropriate shift code in this field. You define values for this field through the *Update Employer Codes* option, using code type **SHF**.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Basic Data selection screen.

Updating Pay-Related Data

Follow the steps below to update an employee's pay-related data.

1 From the Update Employee Basic Data selection screen, type a character next to *Pay Related Data*.

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

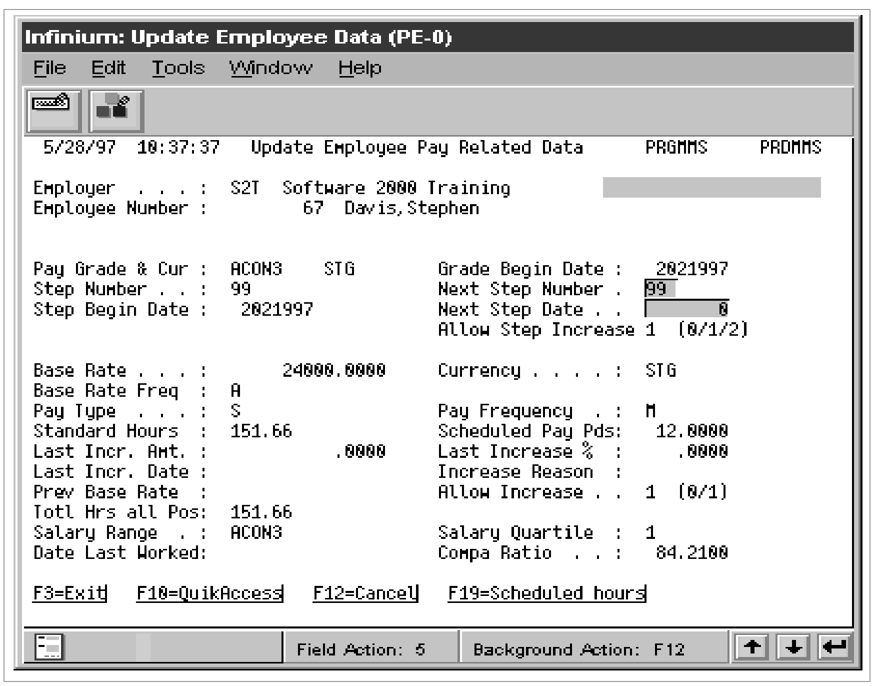


Figure 4-10: Update Employee Pay Related Data screen

The system automatically completes many of these fields when you enter the employee into the system using the *Enter New Employee* option. Some of the fields on this screen are maintained through the *Enter Personnel Actions* option; refer to the preceding table for a list of these fields. You must use the *Enter Personnel Actions* option to update these fields; they are not described here.

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

Next Step Number

The system displays the step to which the employee is scheduled to advance when he or she has met the age and/or service criteria specified on the pay grade control record. The system uses the date in the *Next Step Date* field when you use the *Mass Update Step-In-Grade* option to move the employee to his or her next step.

To override this value, type a valid number in this field.

Next Step Date

The system displays the date the employee is scheduled to advance to his or her next step. The system uses this date when you use the *Mass Update Step-In-Grade* option to move the employee to his or her next step.

To override this date, type a new date in this field.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Basic Data selection screen.

Updating Scheduled Hours

When you type a character next to the *Scheduled Hours* option on the Update Employee Basic Data selection screen, the system displays the Update Scheduled Hours screen for the selected employee. You can reach the same option by selecting *Scheduled Hours* from the *Employees* menu.

Refer to the section in this guide entitled “Updating an Employee’s Scheduled Hours” for more information about this option.

Updating Accruals

When you type a character next to the *Accruals* option on the Update Employee Basic Data selection screen, the system displays the Employee Accruals screen for the selected employee. You can reach the same option by selecting *Update Employee PTO Accruals* from the *Employee PTO Accruals* menu, under *Paid Time Off (PTO) Accruals* in *Absences*.

Refer to the chapter in this guide entitled "Processing Paid Time Off (PTO) Accruals" for more information about this option.

Updating an Employee's Personnel Data

You establish a personnel data record for each employee when you enter his or her new employee information into Infinium HR. The personnel data record contains information such as marital status, emergency contacts, bank details, disability information and so on. The personnel data record can only be accessed by users of Infinium HR.

Most of the information in the personnel data record is optional. Marital status is the only field you must complete and is the only field that you must update through the *Enter Personnel Actions* option. You can update all other fields as described below.

Your security administrator can define which personnel data screens and fields you can view or update. You may therefore not access all the screens and fields described here.

Refer to the “Setting Up User Controls” chapter of the *Infinium HR (I) Guide to Controls* for more information on security restrictions.

Accessing Personnel Data Information

You can access the employee's personnel data record in two ways:

- Using *Update Employee Personnel Data*

  This function provides a selection screen from which you can reach each component of the employee's personnel data record. Use this method to update only personnel data information for the employee.

- Using *Update Employee Data*

  This function provides a selection screen with a *Personnel Data* option. Use this method to update other employee information as well as personnel data.

Both methods provide the same employee information screens.

Using *Update Employee Personnel Data*

Follow the steps below to reach the employee's personnel data directly.

1 From the Infinium HR main menu select *Employees*.

2 Select *Employee Records*.

3 Select *Update Employee Personnel Data* [UEPD]. The system displays an Update Employee Personnel Data prompt screen.

4 Specify the employer and employee.

5 Press Enter. The system displays the Update Employee Personnel Data selection screen shown in Figure 4-12. Process the personnel data as described in “Steps to Update an Employee’s Personnel Data” later in this section.

6 When you have finished updating employee data, press F3 at the Update Employee Personnel Data selection screen. The system displays the Update Employee Personnel Data prompt screen.

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

Using the *Update Employee Data* option

Follow the steps below to reach the employee’s personnel data through the employee data selection screen.

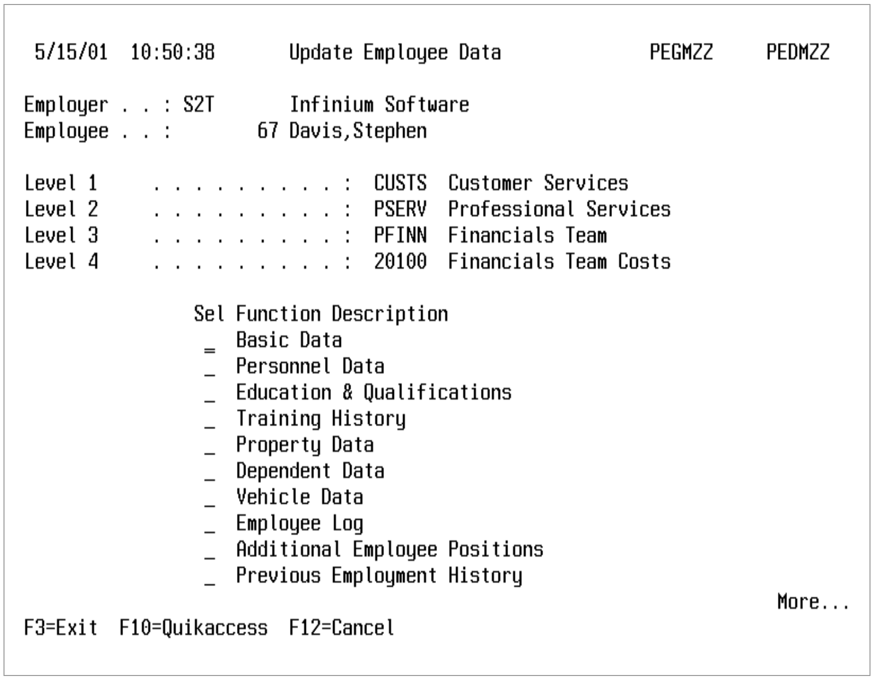
1 From the Infinium HR main menu select *Employees*.

2 Select *Employee Records*.

3 Select *Update Employee Data* [UED]. The system displays an Employee Update prompt screen.

4 Specify the employer and employee.

5 Press Enter. The system displays a screen similar to Figure 4-11.



```
 5/15/01  10:50:38       Update Employee Data            PEGMZZ     PEDMZZ

Employer . . : S2T       Infinium Software
Employee . . :        67 Davis,Stephen

Level 1     . . . . . . . . . . :  CUSTS  Customer Services
Level 2     . . . . . . . . . . :  PSERV  Professional Services
Level 3     . . . . . . . . . . :  PFINN  Financials Team
Level 4     . . . . . . . . . . :  20100  Financials Team Costs

                Sel Function Description
                 _  Basic Data
                 _  Personnel Data
                 _  Education & Qualifications
                 _  Training History
                 _  Property Data
                 _  Dependent Data
                 _  Vehicle Data
                 _  Employee Log
                 _  Additional Employee Positions
                 _  Previous Employment History
                                                                      More...
F3=Exit  F10=Quikaccess  F12=Cancel
```

Figure 4-11: Employee Update selection screen

6 Type a character in the *Opt* field next to Personnel Data.

7 Press Enter. The system displays the screen shown in Figure 4-12. Process the personnel data as described in “Steps to Update an Employee’s Personnel Data” later in this section.“

8 When you have finished updating employee data, press F3 at the Update Employee Personnel Data selection screen. The system displays the Employee Update selection screen.

9 Press F3 to return to the Employee Update prompt screen, and press F3 again to return to the Infinium HR main menu.

Steps to Update an Employee’s Personnel Data

When you follow one of the methods described in the previous section to reach the employee’s personnel data record, the system displays a screen similar to Figure 4-12.

```
 5/15/01  10:50:38      Update Employee Data            PEGMZZ     PEDMZZ

Employer . . : S2T      Infinium Software
Employee . . :       67 Davis,Stephen

Level 1     . . . . . . . . . . :  CUSTS  Customer Services
Level 2     . . . . . . . . . . :  PSERV  Professional Services
Level 3     . . . . . . . . . . :  PFINN  Financials Team
Level 4     . . . . . . . . . . :  20100  Financials Team Costs

                Sel Function Description
                 _  Basic Data
                 _  Personnel Data
                 _  Education & Qualifications
                 _  Training History
                 _  Property Data
                 _  Dependent Data
                 _  Vehicle Data
                 _  Employee Log
                 _  Additional Employee Positions
                 _  Previous Employment History
                                                                     More...
F3=Exit  F10=Quikaccess  F12=Cancel
```

Figure 4-12: Update Employee Personnel Data selection screen

From this screen you can reach all sections of the employee's personnel data record to which you have access. Depending on your security restrictions, you may not be able to update all of these sections.

Personnel data comprises:

- Personal Information
- Marital and Spouse Information
- Emergency Information
- Citizenship Information
- Bank Information
- Previous Information
- Disability Information
- Fair Employment Information

Type any character next to each section to be updated and press Enter. When you press F3 to exit a section, the system automatically displays the next section you selected. When you complete the last selected section and press F3, the system returns you to the selection list.

Updating Personal Information

Follow the steps below to update an employee's personal information.

1 From the Update Employee Personnel Data selection screen, type a character next to *Personal Information*.

2 Press Enter. The system displays the screen shown in Figure 4-13.

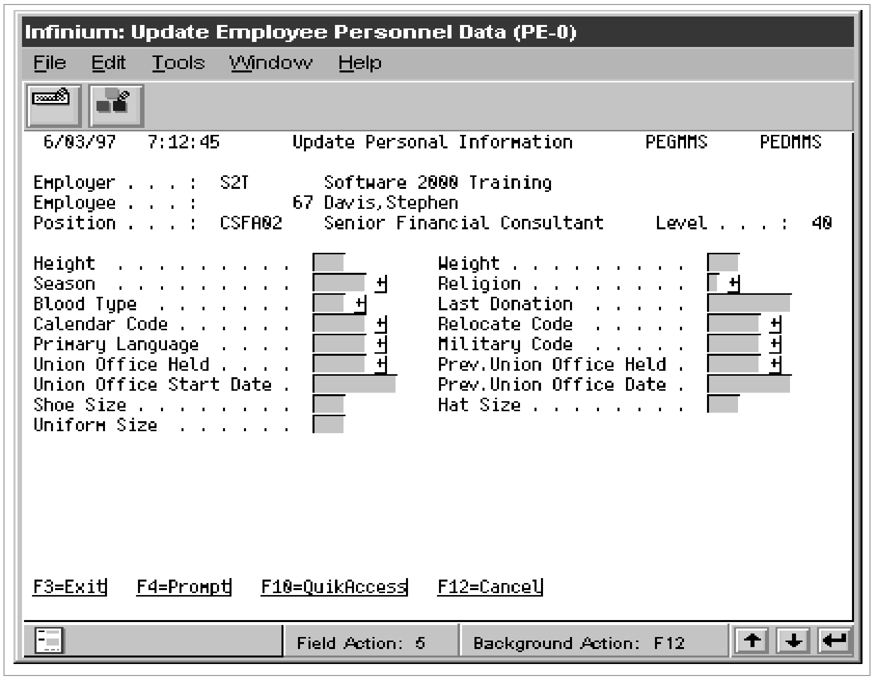


Figure 4-13: Update Personal Information screen

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

Height

Type the employee's height using inches or centimetres.

Weight

Type the employee's weight using pounds or kilograms.

Season

If applicable, type a code value that represents the season during which the employee works. This code value can default from the employee's position. You define code values for this field through the *Update Employer Codes* option, using code type **SEA**.

Religion

Type a code value that indicates the employee's religion. You define code values for this field through the *Update Employer Codes* option, using code type **RLG**.

Blood Type

Type a code value that represents the employee's blood type. You define code values for this field through the *Update Employer Codes* option, using code type **BLD**.

Last Donation

Type the date of the employee's last blood donation.

Calendar Code

The system completes this field with the calendar code for the position to which you assign the employee through the *Enter New Employee* process.

To change this, type a code value that represents the employer calendar that applies to the employee. You define code values for this field through the *Update Employer Codes* option, using code type **CAL**.

Relocate Code

Type a code value that indicates whether the employee is prepared to move to another work location. This value can default from the employee's applicant record. You define code values for this field through the *Update Employer Codes* option, using code type **RLO**.

Primary Language

Type a code value that represents the employee's native language. You define code values for this field through the *Update Employer Codes* option, using code type **LNG**.

Military Code

Type a code value that represents the employee's current military status. You define code values for this field through the *Update Employer Codes* option, using code type **MIL**.

Union Office Held

Type a code value that represents the union office that the employee currently holds. You define code values for this field through the *Update Employer Codes* option, using code type **UOF**.

Prev. Union Office Held

Type a code value that represents the previous union office that the employee held. You define code values for this field through the *Update Employer Codes* option, using code type **UOF**.

Union Office Start Date

Type the date on which the employee's term of office in his or her current union post began.

Prev. Union Office Date

Type the date on which the employee's term of office in his or her previous union post began.

Shoe Size

Type the employee's shoe size.

Hat Size

Type the employee's hat size.

Uniform Size

Type the employee's uniform size.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Updating Marital and Spouse Information

Follow the steps below to update an employee's marital and spouse information.

1 From the Update Employee Personnel Data selection screen, type a character next to *Marital and Spouse Information*.

2 Press Enter. The system displays the screen shown in Figure 4-14.

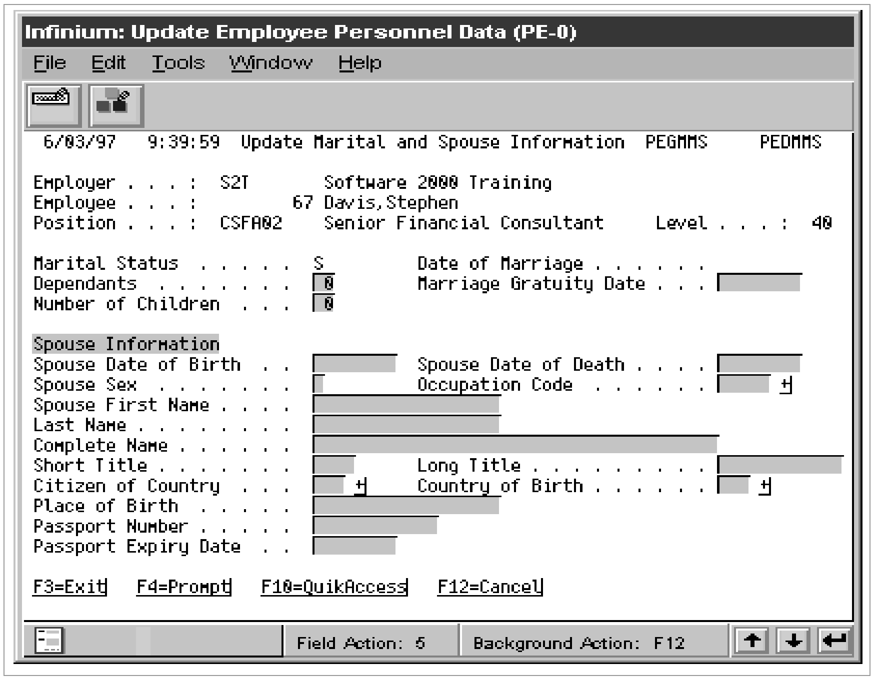


Figure 4-14: Update Marital and Spouse Information screen

You must use the *Enter Personnel Actions* option to update some of the fields on this screen; they are not described here.

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

Dependants

Type the number of dependants for the employee. You can use the *Update Employee Dependents* option to type additional information about the employee's dependants, such as their name, address and date of birth. You can use dependent information in the *Benefits* options.

Marriage Gratuity Date

If your company has a policy of awarding gratuities to employees when they get married, type the date on which the employee received his or her gift.

Number of Children

Type the number of children for the employee. You can use the *Update Employee Dependents* option to type additional information about the employee's children, such as their name, address and date of birth. You can use this information in the *Benefits* options.

Spouse Date of Birth

Type the date of birth of the employee's spouse.

Spouse Date of Death

Type the date that the employee’s spouse died.

Spouse Sex

Type a value that represents the sex of the employee’s spouse. Valid values are:

M	Male
F	Female

Occupation Code

Type a code that represents the occupation of the employee’s spouse. You define code values for this field through the *Update Employer Codes* option, using code type **OCC**.

Spouse First Name

Type the first name of the employee’s spouse. This is an 18-character field.

Last Name

Type the last name of the employee’s spouse. This is an 18-character field.

Complete Name

Type the complete name of the employee’s spouse. This is a 39-character field.

Short Title

Type an abbreviation for the employee’s spouse’s title. This is a 4-character field.

Long Title

Type the full title for the employee’s spouse. This is a 12-character field.

Citizen of Country

Type a code value that represents the country of which the employee’s spouse is a citizen. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Country of Birth

Type a code value that represents the country in which the employee's spouse was born. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Place of Birth

Type the town or city in which the employee's spouse was born. This is an 18-character field.

Passport Number

Type the number on the passport issued to the employee's spouse. This is a 12-character field.

Passport Expiry Date

Type the date on which the employee's spouse's passport expires.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Updating Emergency Information

Follow the steps below to update an employee's emergency information.

1 From the Update Employee Personnel Data selection screen, type a character next to *Emergency Information*.

2 Press Enter. The system displays the screen shown in Figure 4-15.

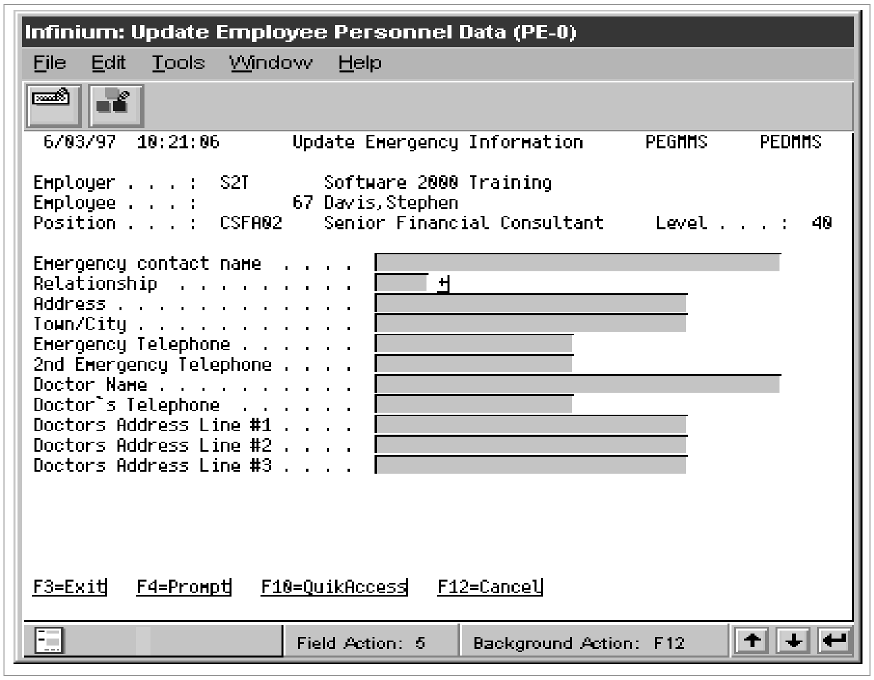


Figure 4-15: Update Emergency Information screen

If you entered this information in the Emergency Contact Data section on screen 3 of the *Enter New Employee* option, it is displayed in the appropriate fields on this screen.

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

Emergency contact name

Type the name of the person to be contacted if the employee is involved in an emergency situation. This is a 39-character field.

Relationship

Type a code value that indicates the relationship of the employee’s emergency contact to the employee. You define code values for this field through the *Update Employer Codes* option, using code type **REL**.

Address

Type the street address of the employee’s emergency contact. This is a 30-character field.

Town/City

Type the town or city in which the employee’s emergency contact lives. This is a 30-character field.

Emergency Telephone

Type the first telephone number you should use to reach the employee's emergency contact.

2nd Emergency Telephone

Type an alternative telephone number you should use to reach the employee's emergency contact.

Doctor Name

Type the name of the employee's doctor. This is a 39-character field.

Doctor's Telephone

Type the telephone number you should use to reach the employee's doctor. This is a 19-character field.

Doctors Address lines #1, 2, 3

Type the address of the employee's doctor. Each line is a 30-character field.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Updating Citizenship Information

Follow the steps below to update an employee's citizenship information.

1 From the Update Employee Personnel Data selection screen, type a character next to *Citizenship Information*.

2 Press Enter. The system displays the screen shown in Figure 4-16.

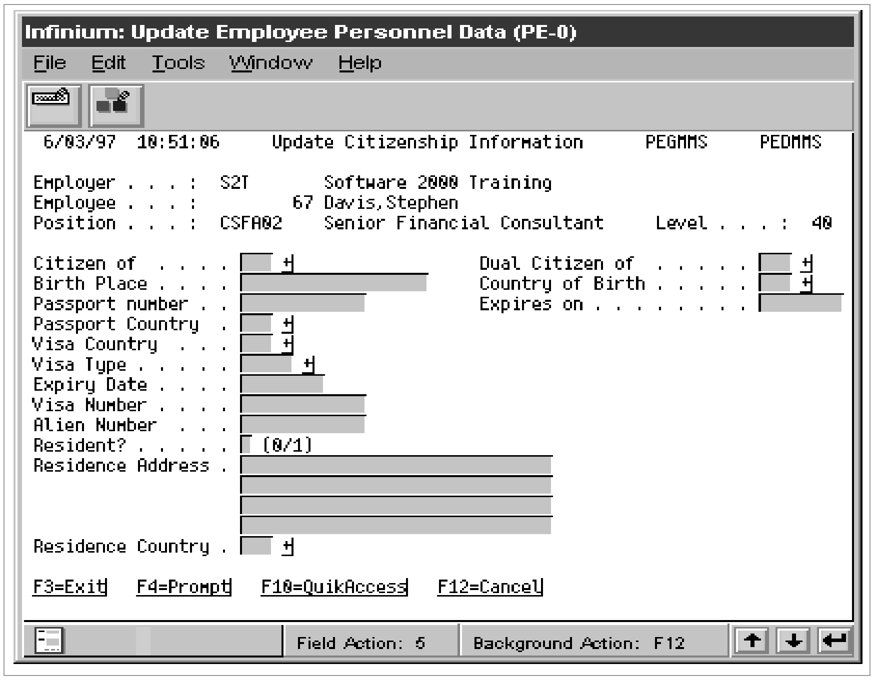


Figure 4-16: Update Citizenship Information screen

The system completes some of the fields on this screen if you entered the information for this employee through the *Update Applicant Records* option.

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

Citizen of

Type a code value that represents the country of which the employee is a citizen. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Dual Citizen of

If the employee holds dual citizenship, type a code value that represents the second country of which the employee is a citizen. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Birth Place

Type the town or city in which the employee was born. This is an 18-character free-form field.

Country of Birth

Type a code value that represents the country in which the employee was born. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Passport number

Type the number on the passport issued to the employee. This is a 12-character free-form field.

Expires on

Type the date on which the employee's passport expires.

Passport Country

Type a code value that represents the country that issued the employee's passport. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Visa Country

Type a code value that represents the country that issued the employee's visa. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Visa Type

Type a code value that identifies the type of visa held by the employee. You define code values for this field through the *Update Employer Codes* option, using code type **VIA**.

Expiry Date

Type the date on which the employee's visa expires.

Visa Number

Type the number assigned to the employee's visa. This is a 12-character free-form field.

Alien Number

If the employee is a legal alien, type his or her registration number. This is a 12-character free-form field.

Resident?

Type a value to indicate whether the employee is a resident. Valid values are:

0	Yes. The employee is a resident of the country in which he or she works
1	No. The employee is not a resident of the country in which he or she works.

Residence Address

Type the employee's residence address. Each line is a 30-character free-form field.

Residence Country

Type a code value that represents the country of which the employee is a resident. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Updating Bank Information

Follow the steps below to update an employee's bank information.

Note: The details you record on this screen are for information only; the system does not use these details for payroll processing.

1 From the Update Employee Personnel Data selection screen, type a character next to *Bank Information*.

2 Press Enter. The system displays the screen shown in Figure 4-17.

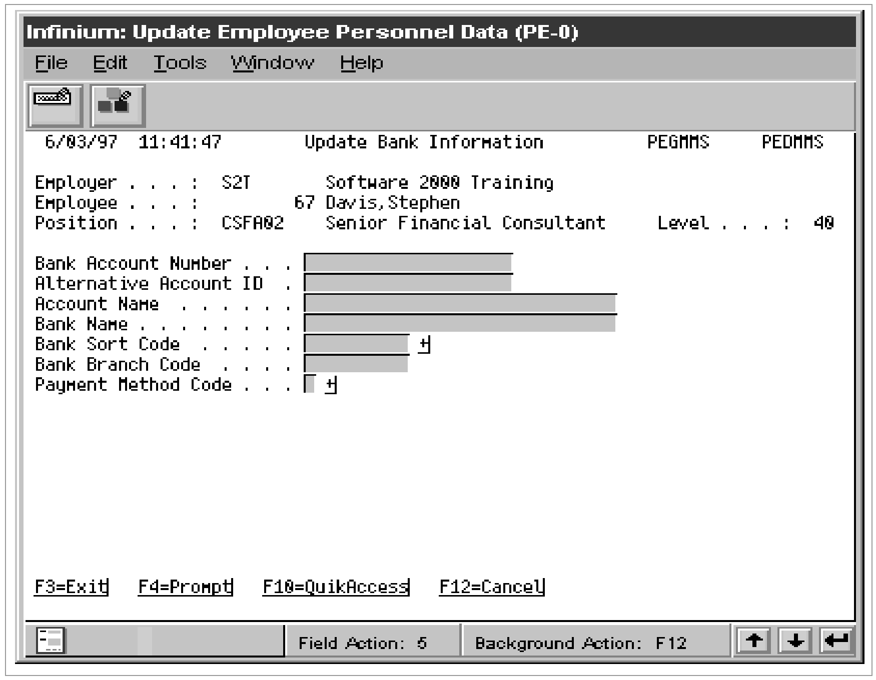


Figure 4-17: Update Bank Information screen

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

Bank Account Number

Type the employee's bank account number. This is a 20-character field.

If you enter **UK** as the country code through the *Enter New Employee* option, the system checks that the account number you type here is entirely numeric. If the country code is not UK, this field is free-form.

Alternative Account ID

Type an alternative identification number for the employee's bank account. This is a 20-character field.

Account Name

Type the name of the person to whom the account is registered. This is a 30-character field.

Bank Name

Type the name of the bank where the employee's account is held. This is a 30-character field.

Bank Sort Code

Type a code value that represents the sort code for the bank branch at which the account is held. You define code values for this field through the *Update BACS Control Table* option in Infinium PY.

Bank Branch Code

Type the code for the bank branch at which the account is held. This is a 10-character free-form field.

Payment Method Code

Type a code value that represents the way the employee is paid. You define code values for this field through the *Update Employer Codes* option, using code type **PAM**.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system checks that the bank account number and bank sort code that you have typed match those in the employee's BACS deduction payroll record, and displays a warning message if they are different. This warning is for information only; incorrect information on this screen does not affect payroll processing.

5 Press F16 to override. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Updating Previous Information

Follow the steps below to update an employee's previous information.

1 From the Update Employee Personnel Data selection screen, type a character next to *Previous Information*.

2 Press Enter. The system displays the screen shown in Figure 4-18.

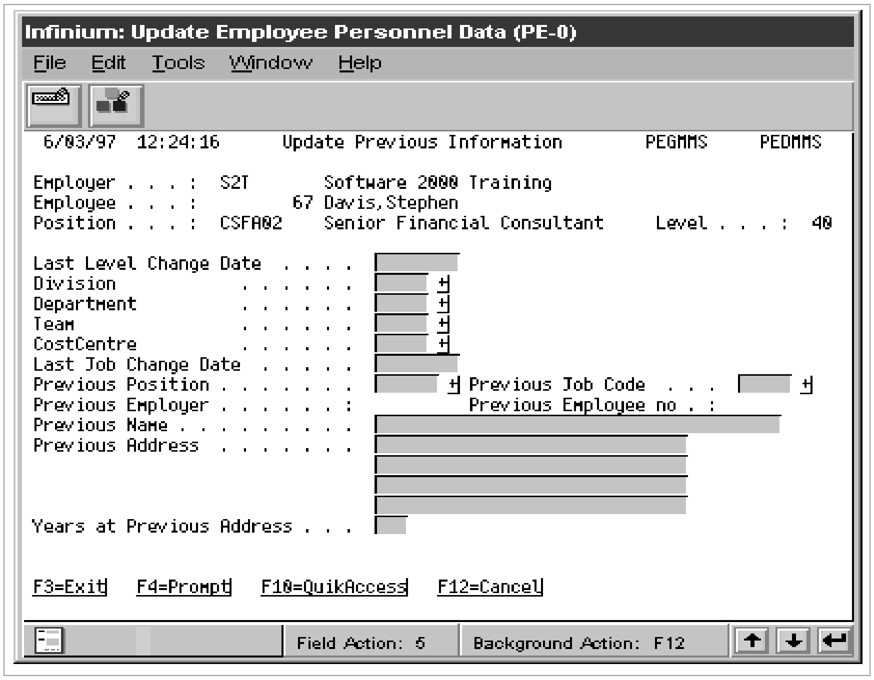


Figure 4-18: Update Previous Information screen

All of the information on this screen is completed automatically by the system when you use the *Enter Personnel Actions* options to update the current information for these fields. You use this screen to view the employee's information prior to their most recent personal change, position change, transfer or re-employment.

You can update the fields either from this screen or through the *Enter Personnel Actions* option, although if you make changes from this screen, the system does not save the prior information.

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

Last Level Change Date

The system displays the date on which the employee moved into his or her current level assignments in this field. The system automatically updates this field when you enter a position change, transfer or re-employment transaction for the employee through the *Enter Personnel Actions* option if the level associated with the old position is different from the level associated with the new position.

Levels 1, 2, 3, 4

The system displays the codes associated with the employee's previous level assignments. The system automatically updates this field when you enter a position change, transfer or re-employment transaction for the employee through the *Enter Personnel Actions* option if the level associated with the old position is different from the level associated with the new position.

Last Job Change Date

Type the date on which the employee was assigned to his or her current job. The system automatically updates this field when you enter a position change, transfer or re-employment transaction through the *Enter Personnel Actions* option to move the employee from one position to another.

Previous Position

The system displays the employee's previous position code in this field. The system automatically updates this field when you enter a position change, transfer or re-employment transaction through the *Enter Personnel Actions* option to move the employee from one position to another.

Previous Job Code

The system displays the employee's previous job code in this field. The system automatically updates this field when you enter a position change, transfer or re-employment transaction through the *Enter Personnel Actions* option to move the employee from one position to another if the job code associated with the new position is different from the job code associated with the employee's previous position.

Previous Employer

If the employee was transferred from one employer to another, the system displays the code that represents the employee's previous employer in this field. The system automatically updates this field when you enter a position change, transfer or re-employment transaction through the *Enter Personnel Actions* option to move the employee from one employer to another.

Previous Employee no

If the employee was transferred from one employer to another and the change resulted in a change of employee number, the system displays the employee's previous employee number in this field. The system automatically updates this field when you enter a transfer transaction through the *Enter Personnel Actions* option if the employee's number changes.

Previous Name

The system displays the employee's previous name. The system automatically completes this field when you enter a personal change transaction for the employee through the *Enter Personnel Actions* option. The system also completes this field when you complete the *Birth Name* field in the *Enter New Employee* option.

Previous Address

The system displays the employee's previous address. The system automatically completes this field when you enter a personal change transaction for the employee through the *Enter Personnel Actions* option.

Years at Previous Address

Type the length of time that the employee lived at his or her previous address. This is a three-character free-form field.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Updating Disability Information

Follow the steps below to update an employee's disability information.

1 From the Update Employee Personnel Data selection screen, type a character next to *Disability Information*.

2 Press Enter. The system displays the screen shown in Figure 4-19.

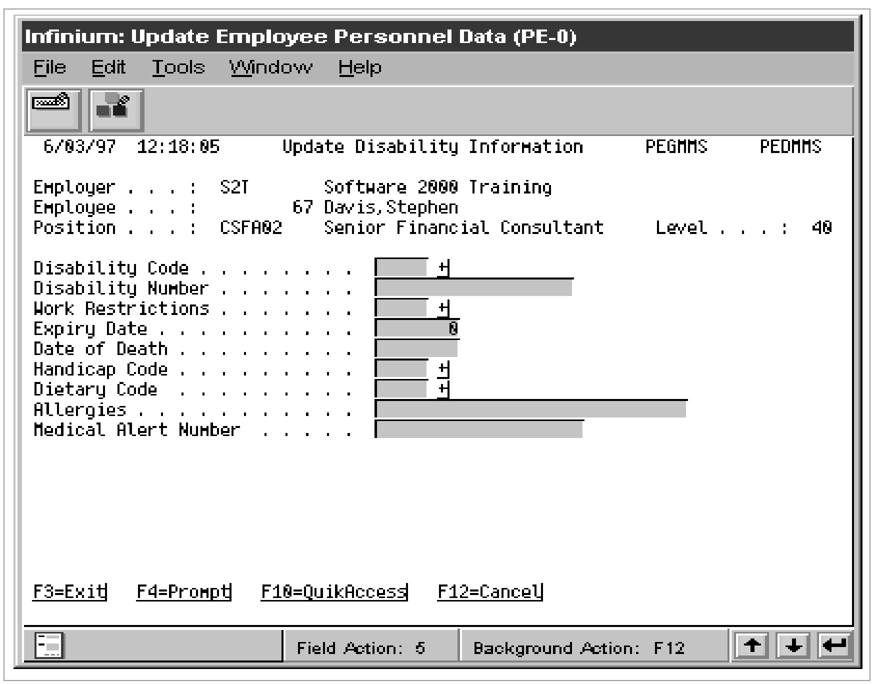


Figure 4-19: Update Disability Information screen

The system completes some of the fields on this screen if you entered the information for this employee through the *Update Applicant Records* option.

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

Disability Code

Type a code value that indicates the nature of the employee's disability. You define code values for this field through the *Update Employer Codes* option, using code type **DIS**.

Disability Number

Type the employee's disability number. This is a 19-character field.

Work Restrictions

Type a code value that indicates whether the employee has any physical limitations on the type of work he or she can perform. You define code values for this field through the *Update Employer Codes* option, using code type **WRE**.

Expiry Date

Type the date on which the employee's disability number expires.

Date of Death

Type the date on which the employee died.

Note: This field is for information only; the system does not automatically end the employee's employment if you type a date here. You must still use the *Enter Personnel Actions* option to enter an end employment transaction for the employee.

Handicap Code

Type a code value that indicates the nature of the employee's physical handicap. You define code values for this field through the *Update Employer Codes* option, using code type **HDC**.

Dietary Code

Type a code value that indicates the employee's dietary requirements. You define code values for this field through the *Update Employer Codes* option, using code type **DIT**.

Allergies

Type any allergies from which the employee suffers. This is a 30-character field.

Medical Alert Number

Type the employee's medical alert number. This is a 20-character field.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Updating Fair Employment Information

Use *Update Fair Employment Details* to record information required by the current Fair Employment Legislation for Northern Ireland. The information includes community background, monitoring method, and, if you use the residuary method, the details.

Follow the steps below to update an employee's fair employment information.

1 From the Update Employee Personnel Data selection screen, type a character next to *Fair Employment Information*.

2 Press Enter. The system displays a screen similar to Figure 4-20.

```
 6/03/08  14:27:22      Update Fair Employment Data       PEGMMS     PEDMMS

Employer . . . :  SAY          Say it with Flowers Plc
Employee . . . :     101220 Abbey,Helen
Position . . . :  1034BM    B&C Shop Manager              Level . . . :  00
Date Employed  :   3/10/1989

Occupation Code
Job Category . :  SHMGR     Shop Managers

Community Background . . .  _____ +

Method of Monitoring . . .  _____ +

Residuary Method . . . . .  __________________________________________________




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

Figure 4-20: Update Fair Employment Details screen

The system completes some fields on this screen if you entered the information for this employee in *Update Applicant Records*. The system typically displays the employee's occupation code and job category such technical staff. If necessary, update the employee's community background, along with the principal monitoring method or, if you use the residuary method, a brief statement of the details.

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

Community Background

Specify the community background by code such as **RC** for Roman Catholic. Define community background codes in *Controls / Employer Codes / Update Employer Codes* using code type CMB.

Method of Monitoring

Specify your method of monitoring community background by code such as **DIR** for direct question or **SSCH** for secondary school. Define method of monitoring codes in *Controls / Employer Codes / Update Employer Codes* using code type **MON**.

If you do not specify a standard method of monitoring, you must specify a residuary method.

Residuary Method

If you left *Method of Monitoring* blank, you must specify a residuary method of monitoring here, such as indications from address and sporting or other clubs or societies.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Employee Personnel Data selection screen.

Changing an Employee’s Number

You establish a unique number for an employee when you enter his or her new employee information on the basic data record in Infinium HR or Infinium PY. The *Change Employee Number* option allows a user with supervisory authority to change the employee number on all employee files, including historical files. The *Change Employee Number* option is accessible by Infinium HR users only. It is not accessible by Infinium PY users.

When you change an employee number in Infinium HR, the system also updates the number in Infinium PY if you have installed Infinium PY and in Infinium TR if you have installed Infinium TR.

The system security administrator at your site makes decisions regarding supervisor access to the information in the *PE Supervisor’s Functions* option. The administrator can restrict the number of screens or fields that you can view or update; therefore, you may not have access to all of the screens or fields shown below. Refer to the chapter entitled “Setting Up User Controls” in the *Infinium HR (I) Guide to Controls* for more information on security restrictions.

WARNING! Ensure that all users are signed off of Infinium HR and Infinium PY before you use this option.

Using the *Change Employee Number* Option

Follow the steps below to change an employee’s number.

1. From the Infinium HR main menu select *PE Supervisor’s Functions*.
2. Select *Change Employee Number*. The system displays the *Change Employee Number* selection screen similar to the one shown in Figure 4-21.

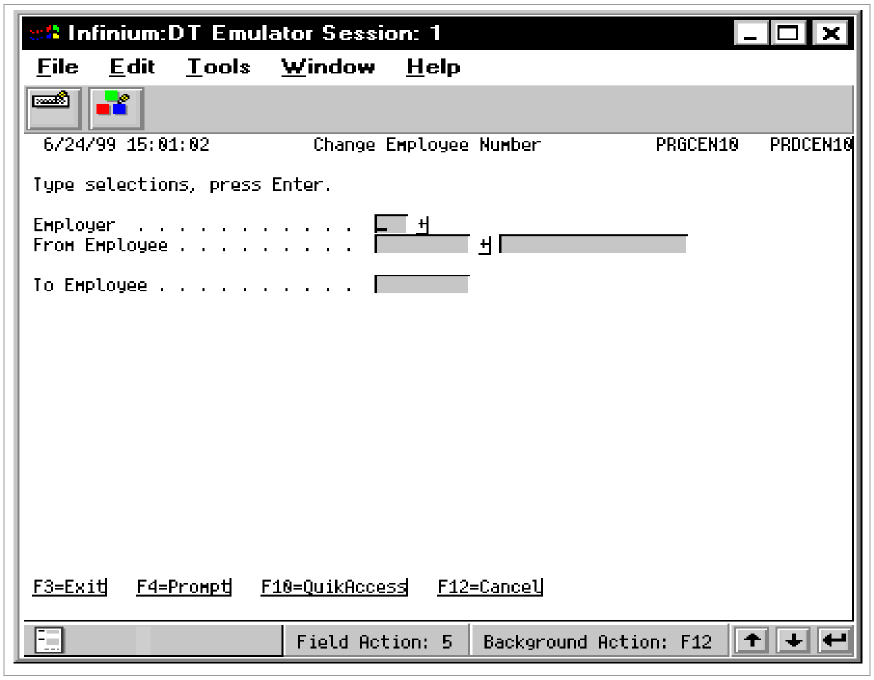


Figure 4-21: Change Employee Number screen

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

Employer

Type the value that identifies the employer of the employee whose number you are changing.

Press F4 to display a list from which you can select a valid entry.

From Employee

Type the employee number that you want to change.

Press F4 to display a list from which you can select a valid entry.

If you know the employee's name but not his or her number, type all or a portion of the employee's name in the field to the right of the employee number field.

To Employee

Type the new employee number.

This number must be an unused number. If you type a number already in use by either an active or inactive employee, the system displays the message, **The To Employee already exists.**

4 Press Enter. The system changes the employee number on all Infinium HR and, if applicable, Infinium PY and Infinium TR files.

Summary

In summary, you have learned the following:

- How to use the *Update Employee Data* options to change and add employee information
- The difference between the *Update Employee Data* and *Enter Personnel Actions* options, and the circumstances in which you use these two options
- How to use the *Change Employee Number* option to change employee numbers
- Where to find the information you want to update
- How system security can affect the *Update Employee Data* options you can use

Chapter 5 Updating Further Information about an Employee

5

You use the *Update Employee Data* options to review or update information about employees after you enter their new employee details into Infinium HR. Refer to the chapter in this guide entitled “Entering New Employees” for more information.

The system automatically establishes information for the new employee in several files including basic data and personnel data. Refer to the chapter in this guide entitled "Updating Information about an Employee" for more information on entering basic and personnel data.

This chapter contains an overview of the employee details that are not contained in either the basic data record or the personnel data record. All the information in the sections that follow is optional.

The chapter consists of the following topics:

Overview

Objectives

When you complete this chapter, you should be familiar with:

- How to use the *Update Employee Data* options to add, change and delete employee information
- Where to find the information you want to update

Organisation of Employee Information

The employee information described in this chapter is organised into several sections, as shown in the table below.

Type of Information	Description
Education and Qualifications Data	Contains education, qualifications and tuition reimbursement information. The system can keep multiple records for each employee.
Training History	Contains company-sponsored training courses set up through Infinium Training Administration.
Previous Employment Data	Contains information about previous employer(s) and position(s) held. The system can keep multiple records for each employee.
Vehicle and Property Data	Contains information about company property issued to employees and about employees' personal vehicles. The system can keep multiple records for each employee.
Dependent Data	Contains information about dependents and beneficiaries of employees. The system can keep multiple records for each employee. You can use dependent information when entering employee benefit enrolments.

Type of Information	Description
Licences Data	Contains information about professional licences held by employees, plus any expiry or renewal dates.
Scheduled Hours Data	Contains information about the employee's working hours and days.
Additional Position Data	Contains information about other positions held concurrently by the employee. The system can keep multiple records for each employee.
Log Data	An on-screen memo area where you can enter lengthy free-form text about an employee. The system can keep multiple records for each employee.
Pay Component Data	Contains information about the individual components that make up an employee's total salary and compensation package.
User-Defined Employee Data	Contains user-defined information to track information that is unique to your organisation.

Accessing the Required Information

You can access much of this information in two ways:

- From the appropriate option on the *Employees* menu

  Choose this method if you want to update only one category of information only for one or more employee(s). For example, you might select *Update Employee Education Data*.

- From the *Update Employee Data* menu option from the *Employee Records* menu

  Choose this method if you want to update more than one type of employee information for a specific employee.

The system presents you with the same screens of employee information, whichever method you use.

The table below shows the methods you can use to access each section of employee information.

Type of Information	How to Access
Education and Training Data Previous Employment Data Vehicle and Property Data Dependent Data	*Employees* menu or Employee Update selection screen
Pay Component Data Licences Data Scheduled Hours Data	*Employees* menu
User-Defined Employee Data	*Employee Records* menu
Log Data Additional Position Data	*Employee Records* menu or Employee Update selection screen

Accessing Screens from the *Employee* Menu

Follow the steps below to access a screen directly.

1. From the Infinium HR main menu select *Employees*.
2. Select the option you require, for example *Education & Training Data*.
3. Select the update menu option from the sub-menu displayed, for example *Update Employee Education Data* [UEED]. The system displays the appropriate Employee Update prompt screen, similar to the one in Figure 5-1.

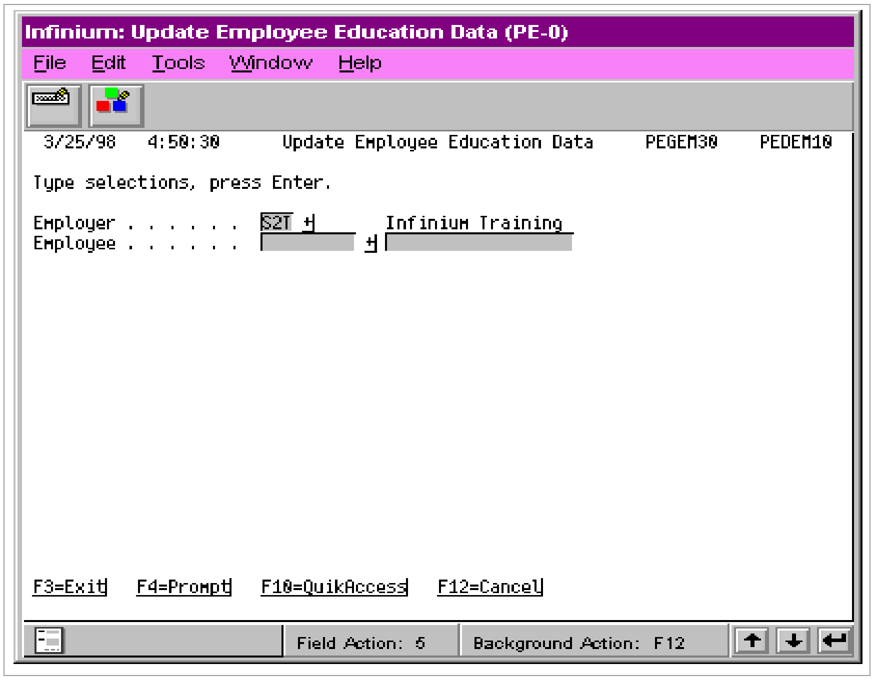


Figure 5-1: Update Employee Education Data prompt screen

The system displays the same fields on the prompt screen regardless of the option you select.

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

Employer

Type the value that identifies the employer into which you entered the employee.

Employee (Number, Name)

In the first field, type the number assigned to the employee for whom you are updating information.

5 Press Enter. The system displays the update screen that corresponds to the option you selected. Refer to the appropriate section in this chapter for more information on how to update the employee’s data.

6 When you have finished, press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Employee Update prompt screen from which you started.

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

Accessing Screens Using the *Update Employee Data* Option

Follow the steps below to access a screen through the Employee Update selection screen.

1. From the Infinium HR main menu select *Employees*.
2. Select *Employee Records*.
3. Select *Update Employee Data* [UED]. The system displays the Employee Update prompt screen.
4. Use the information in the previous section to complete the fields on this screen.
5. Press Enter. The system displays the screen shown in Figure 5-2.

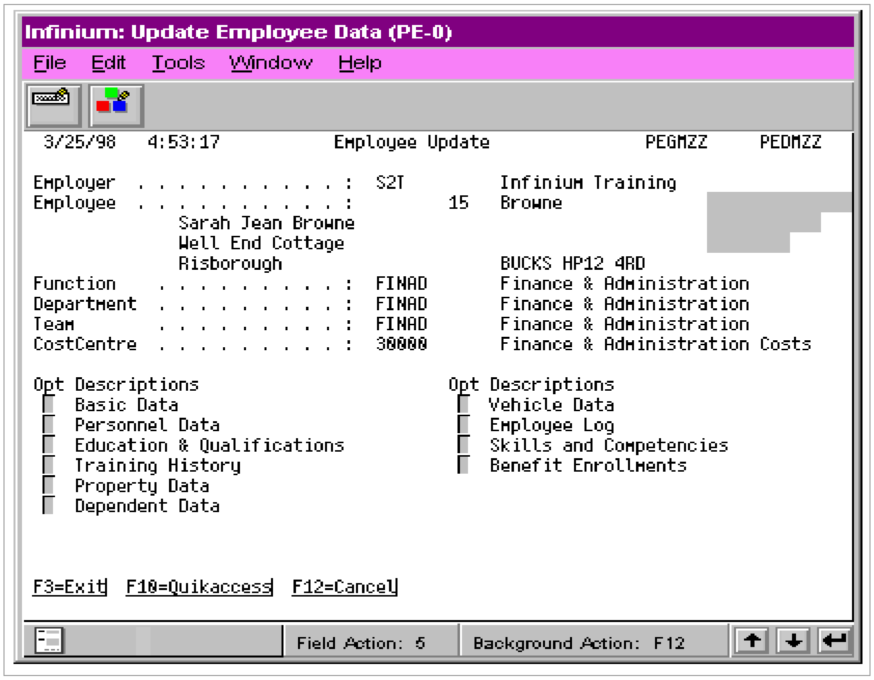


Figure 5-2: Employee Update selection screen

6. Type a character in the *Opt* field next to the option(s) you want to access. If you select more than one option, the system displays them in the order in which they are listed on this screen.
7. Press Enter. The system displays the update screen that corresponds to the option you selected. Refer to the appropriate section in this chapter for more information on how to update the employee's data.

8 When you have finished, press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and either returns you to the Employee Update selection screen or displays the next option you selected.

9 Press F3 to return to the Employee Update prompt screen and press F3 again to return to the Infinium HR main menu.

Throughout this chapter, only the first method of accessing information screens is explained, as the second method is the same for all categories.

Using the Options on the Update Screens

When you select an update screen using one of the methods explained above, three standard options are available:

- Creating a new record
- Updating an existing record
- Deleting an existing record

In the sections that follow, we provide detailed instructions for creating a new record. Instructions for updating and deleting existing records are given below; they apply to all categories.

Updating an Existing Record

Follow the steps below to update an existing record.

1 From the update screen you have selected, type **2** in the *Opt* field next to the record you want to update and press Enter. The system displays the details of the record.

2 To update the record, use the information in the appropriate section in this chapter for creating a new record. For example, to update an education record, refer to the section entitled “Creating a New Education Record.”

3 When you have finished updating the record, press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the update screen. The system updates this screen to reflect the changes you have made.

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

Deleting an Existing Record

Follow the steps below to delete an existing record.

1. From the update screen you have selected, type **4** in the *Opt* field next to the record you want to delete and press Enter.

2. For most of the options, the system asks you to confirm that you want to delete the selected record. Follow the instructions on screen to provide confirmation.

3. The system deletes the record and returns you to the update screen. The system updates this screen to reflect any changes you have made.

   On most screens, the system removes the deleted record straight away. In some cases, however, the system indicates the deleted record by displaying either ***DLTD** or ***DELETED**. In these cases, the record is deleted when you exit the screen.

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

Updating an Employee’s Education Data

You use this option to record and maintain information about an employee’s education and qualifications.

Creating a New Education Record

Follow the steps below to create an education record for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Education & Training Data*.
3. Select *Update Employee Education Data* [UEED]. The system displays the Update Employee Education Data prompt screen.
4. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
5. Press Enter. The system displays the screen shown in Figure 5-3.

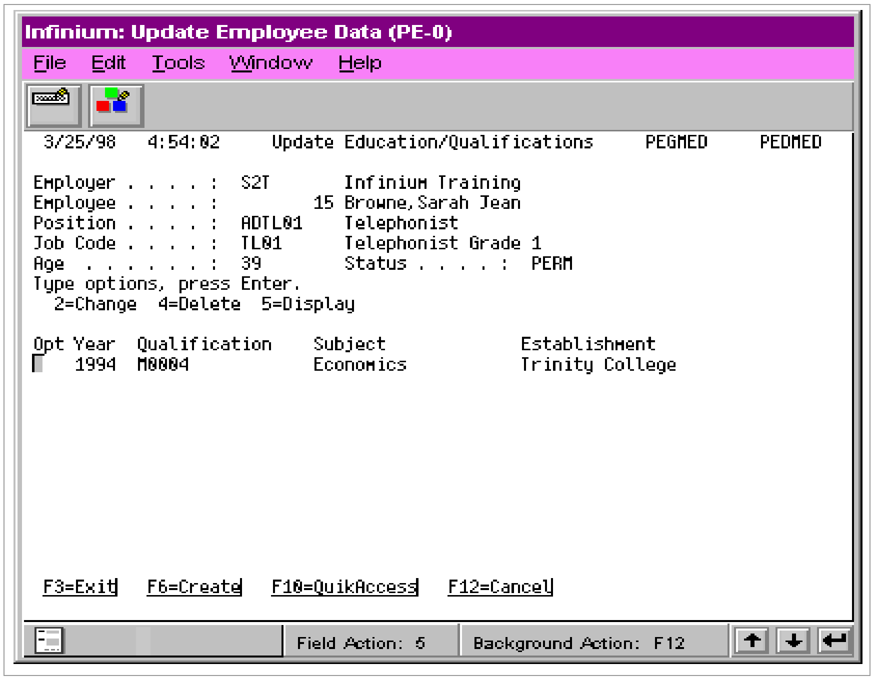


Figure 5-3: Update Education/Qualifications selection screen

If you used the *Applicant* options to enter education information for the employee when he or she was an applicant, the system displays the details on screen.

From here you can:

- Create a new education record by pressing F6
- Update an education record by typing **2** in an *Opt* field
- Delete an education record by typing **4** in an *Opt* field
- Display an education record by typing **5** in an *Opt* field

6 Press F6. The system displays the screen shown in Figure 5-4.

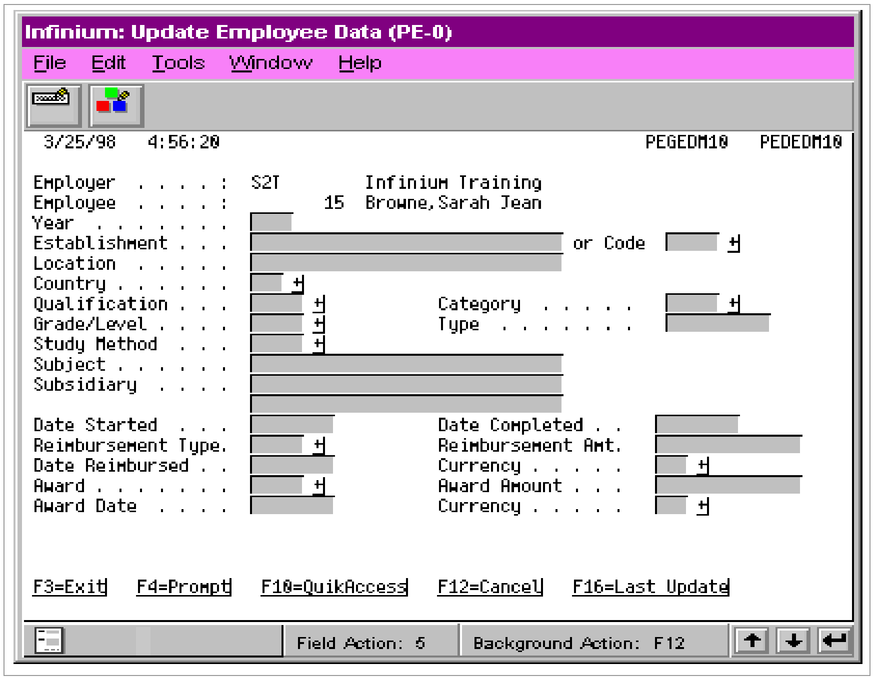


Figure 5-4: Update Education/Qualifications screen

7 Use the following information to complete the fields on this screen.

Year

Type the year in which the employee gained the qualification.

Establishment

Type the name of the establishment where the employee gained the qualification.

Note: The system completes this field automatically if you select an establishment using the *Code* field.

or Code

Type the code value that represents the education establishment where the employee gained the qualification.

You define code values for this field through the *Update Employer Codes* option, using code type **SCL**. When you enter a code, the system automatically completes the *Establishment* field.

Location

Type the town or city in which the establishment is located.

Country

Type the code value that represents the country in which the establishment is located. You define code values for countries through the *Update Employer Codes* option, using code type **CTR**.

Qualification

Type the code value that represents the qualification obtained. You define code values for this field through the *Update Employer Codes* option, using code type **QTP**.

Category

Type the code value that represents the qualification category. You might use this field to identify qualifications that are professional, managerial, technical and so on.

You define code values for this field through the *Update Employer Codes* option, using code type **EDC**.

Grade/Level

Type the code value that represents the grade or level of the qualification. You define code values for this field through the *Update Employer Codes* option, using code type **EDL**.

Type

Type any further information about the qualification, such as grades or marks attained. This is a 10-character free-form field.

Study Method

Type the code value that represents the study method the employee used to gain this qualification. You define code values for this field through the *Update Employer Codes* option, using code type **STM**.

Subject

Type the subject in which the employee gained the qualification. This is a 30-character free-form field.

Subsidiary

Type any subsidiary subjects also included in the qualification. Both lines are 30-character free-form fields.

Date Started

Type the date on which the employee started the course.

Date Completed

Type the date on which the employee completed the course.

Reimbursement Type

Type the code value that indicates the nature of the reimbursement awarded to the employee towards the cost of this course. You define code values for this field through the *Update Employer Codes* option, using code type **REI**.

Reimbursement Amt

Type the amount of reimbursement awarded to the employee.

Date Reimbursed

Type the date on which the employee was reimbursed.

Currency

Type the code value that represents the currency in which the employee was reimbursed. You define code values for this field through the *Update Employer Codes* option, using code type **CUR**.

Award

Type a code value to indicate any award earned by the employee, such as a scholarship or a bursary. You define code values for this field through the *Update Employer Codes* option, using code type **EAW**.

Award Amount

Type the amount awarded to the employee.

Award Date

Type the date on which this award was made to the employee.

Currency

Type the code value that represents the currency in which the award was made. You define code values for this field through the *Update Employer Codes* option, using code type **CUR**.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update

Education/Qualifications selection screen. The system updates this screen to include the education record you have created.

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

Maintaining Education Records

Refer to the section in this chapter entitled “Using the Options on the Update Screens” for more information about updating and deleting existing education records.

Updating an Employee's Training History

You use this option to record and maintain basic information about an employee's job-related skills and participation in company-sponsored training programs.

This option is only available if you are using Infinium Training Administration. If you do not have Infinium TR installed on your system, you cannot select this option.

You use Infinium TR to set up courses, instructors, locations, schedules, costs and to maintain complete information about employee attendance at training courses. Refer to the *Infinium Training Administration Guide to Setup and Processing* for more information.

Creating a Training Record

Follow the steps below to create a training record for an employee.

1. Follow steps 1 to 5 in the section entitled "Accessing Screens Using the *Update Employee Data* Option." The system displays the Employee Update screen.
2. Type a character in the *Opt* field next to Training History.
3. Press Enter. The system displays the screen shown in Figure 5-5.

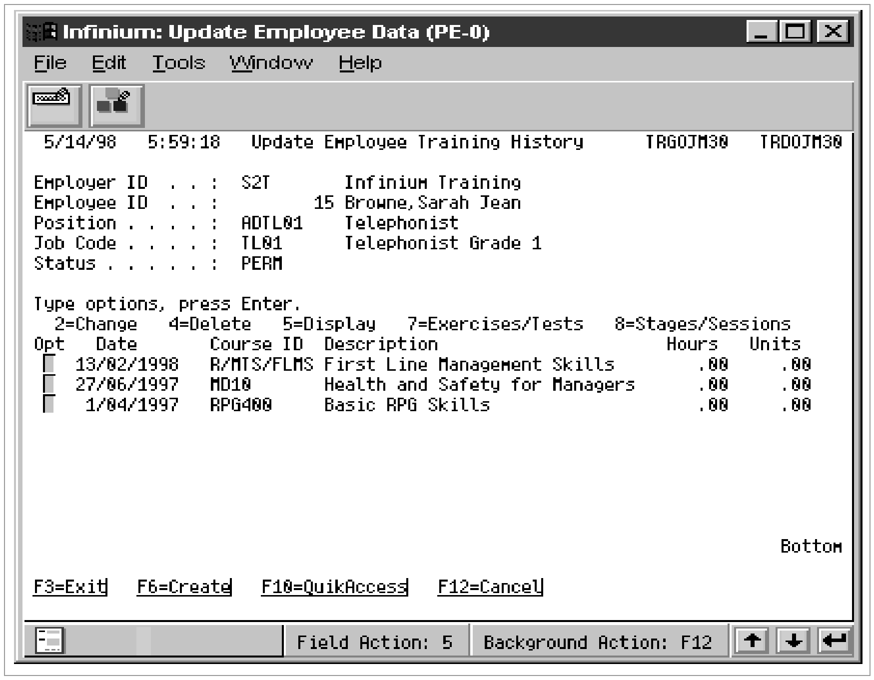


Figure 5-5: Update Employee Training History selection screen

From here you can:

- Create a new training record by pressing F6
- Change an existing training record by typing **2** in an *Opt* field
- Delete a training record by typing **4** in an *Opt* field
- Display a training record by typing **5** in an *Opt* field
- Use Infinium TR to display details of exercises or tests taken on a training course by typing **7** in an *Opt* field
- Use Infinium TR to display details of stages or sessions attended on a training course by typing **8** in an *Opt* field

4 Press F6. The system displays the screen shown in Figure 5-6.

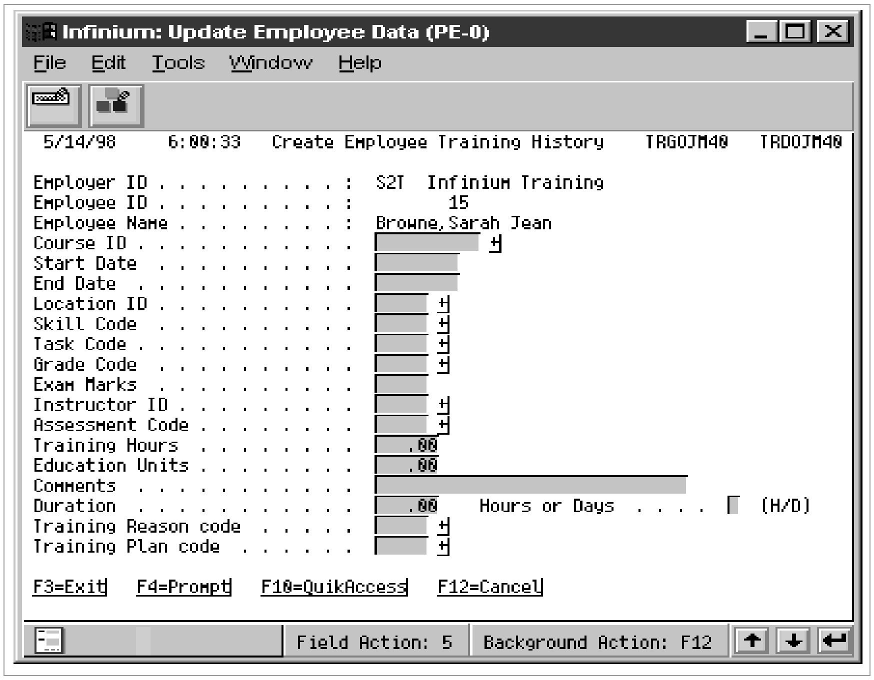


Figure 5-6: Create Employee Training History screen

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

Course ID

Type the code value that identifies the course the employee is taking. You define code values for this field through the *Update Codes* option in Infinium TR.

Start Date

Type the start date for the course.

End Date

Type the end date for the course.

Location ID

Type the code value that identifies where the course is held. You define code values for this field through the *Update Codes* option in Infinium TR.

Skill Code

Type the code value that identifies the skill the employee has gained by taking the course. You define code values for this field through the *Update Employer Codes* option, using code type **SKL**.

Task Code

Type the code value that identifies the task associated with the skill that the employee learned on this course.

For example, you might define word processing as a skill and using a particular word processor as a task.

You define code values for this field through the *Update Employer Codes* option, using code type **TSK**.

Grade Code

Type the code value that indicates the grade the employee achieved for this course. You define code values for this field through the *Update Employer Codes* field, using code type **GRA**.

Exam Marks

Type the employee's mark or grade for the course.

Instructor ID

Type the code value that identifies the course instructor. You define code values for this field through the *Update Instructors* option in Infinium TR.

Assessment Code

Type the code value that indicates the method of assessment used on this course. You define code values for this field through the *Update Employer Codes* option, using code type **ASS**.

Training Hours

Type the number of training hours to be credited to the employee.

Education Units

Type the number of education units to be credited to the employee.

Comments

Type any comments that are appropriate for this training record. This is a 30-character free-form field.

Duration

Type the duration of the course in either hours or days.

Hours or Days

Type a value to indicate whether the duration you entered in the *Duration* field is measured in hours or days. Valid values are:

H	Hours
D	Days

Training Reason code

Type the code value that identifies the reason the employee took the course. You define code values for this field through the *Update Employer Codes* option, using code type **TRS**.

Training Plan code

Type the code value that indicates the training plan of which this course is a chapter. You define code values for this field through the *Update Codes* option in Infinium TR, using code type **PLN**.

6 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the training details you have entered and returns you to the Update Employee Training History selection screen. The system updates this screen to include the training record you have created.

7 Press F3 twice to return to the Infinium HR main menu.

Maintaining Training Records

Refer to the section in this chapter entitled “Using the Options on the Update Screens” for more information about updating and deleting existing training records.

Updating an Employee’s Previous Employment History

You use this option to record and maintain a history of an employee’s previous employment prior to joining your company.

Creating a Previous Employment Record

Follow the steps below to create a previous employment record for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Previous Employment History*.
3. Select *Update Prev Employment History* [UPEH]. The system displays the Previous Employment History prompt screen.
4. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
5. Press Enter. The system displays the screen shown in Figure 5-7.

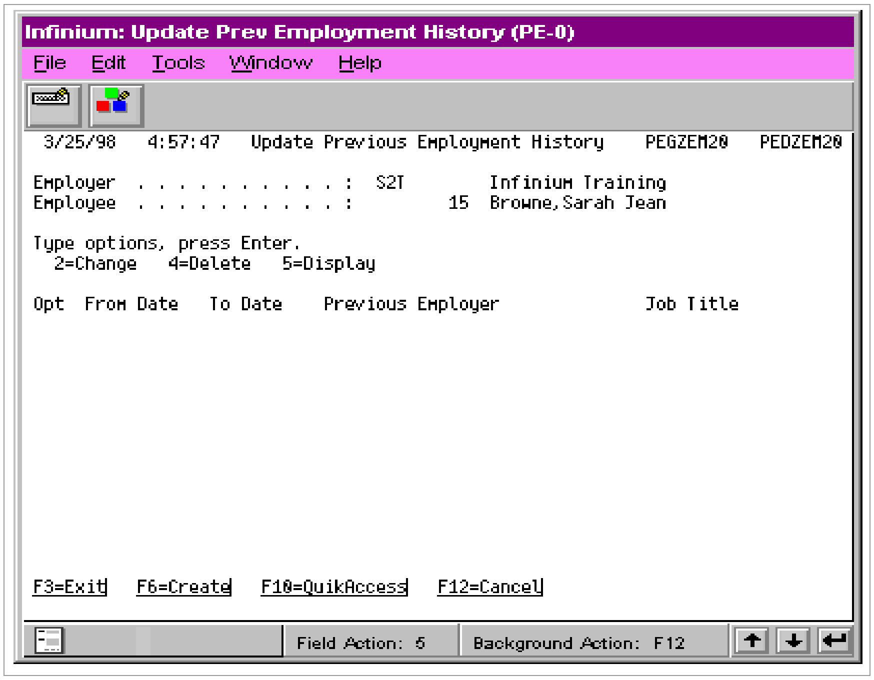


Figure 5-7: Update Previous Employment History selection screen

From here you can:

- Create a new previous employment record by pressing F6
- Update a previous employment record by typing **2** in an *Opt* field
- Delete a previous employment record by typing **4** in an *Opt* field
- Display a previous employment record by typing **5** in an *Opt* field

6 Press F6. The system displays the screen shown in Figure 5-8.

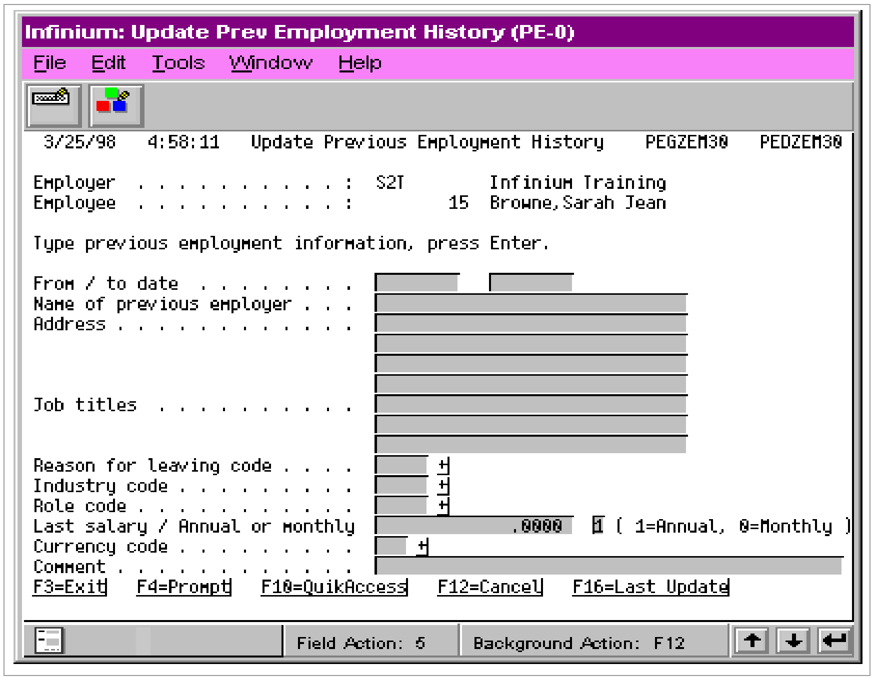


Figure 5-8: Update Previous Employment History screen

7 Use the following information to complete the fields on this screen.

From / to date

Type the dates on which the employee started and finished working at his or her previous place of employment.

Name of previous employer

Type the name of the employee's previous employer. This is a 30-character free-form field.

Address

Type the address of the employee's previous employer. Each line is a 30-character free-form field.

Job titles

Type the title(s) of the job(s) the employee held while working for this employer. Each line is a 30-character free-form field.

Reason for leaving code

Type the code value that represents the reason the employee left this employer. You define code values for this field through the *Update Employer Codes* option, using code type **TRM**.

Industry code

Type the code value that represents the industry in which the employee worked. You define code values for this field through the *Update Employer Codes* option, using code type **IND**.

Role code

Type the code value that represents the role performed by the employee for this employer. You define code values for this field through the *Update Employer Codes* option, using code type **RLE**.

Last salary

Type the employee's last salary when working for this employer.

Annual or monthly

Type a value to indicate whether the employee's last salary is recorded as a monthly or annual amount. Valid values are:

0	The employee's salary is a monthly amount
1	The employee's salary is an annual amount

Currency code

Type the code value that represents the currency in which the employee's last salary from this employer is expressed. You define code values for this field through the *Update Employer Codes* option, using code type **CUR**.

Comment

Use this field to type any comments relevant to the employee's previous employment. This is a 45-character free-form field.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the Update Previous Employment History selection screen. The system updates this screen to include the record you have created.

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

Maintaining Previous Employment Records

Refer to the section in this chapter entitled “Using the Options on the Update Screens” for more information about updating and deleting existing previous employment records.

Updating an Employee’s Vehicle Data

You use this option to record and maintain information about an employee's vehicles. You can enter details of employees' own private vehicles and of company vehicles.

Note: UK customers are advised to record details of company vehicles using the *Update Vehicle Details* option in *Taxable Benefits Maintenance*, since this option allows you to record more information.

Creating a Vehicle Record

Follow the steps below to create a vehicle record for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Vehicle & Property Data*.
3. Select *Update Employee Vehicle Data* [UEVD]. The system displays the Update Employee Vehicle Data prompt screen.
4. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
5. Press Enter. The system displays the screen shown in Figure 5-9.

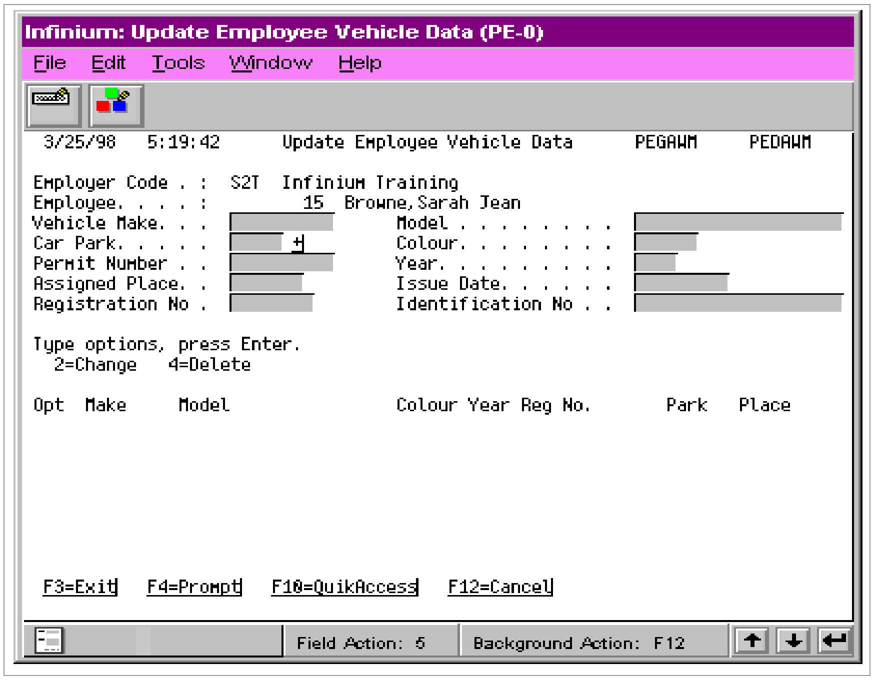


Figure 5-9: Update Employee Vehicle Data screen

From here you can:

- Add a vehicle record by typing the details of a vehicle in the top portion of the screen
- Update a vehicle record by typing **2** in an *Opt* field
- Delete a vehicle record by typing **4** in an *Opt* field

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

Vehicle Make

Type the make of the vehicle.

Model

Type the model of the vehicle.

Car Park

Type the code value that represents the car park in which the employee parks the vehicle while at work. You define code values for this field through the *Update Employer Codes* option, using code type **LOT**.

Colour

Type the colour of the vehicle.

Permit Number

Type the permit number for the vehicle if applicable.

Year

Type the year of manufacture of the vehicle.

Assigned Place

Type the place the vehicle is assigned in the car park if applicable.

Issue Date

Type the issue date of the vehicle permit if applicable.

Registration No

Type the registration number of the vehicle.

Identification No

Type the identification number of the vehicle.

7 Press Enter. The system displays the vehicle details you have typed in the bottom portion of the screen.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Employee Vehicle Data prompt screen.

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

Maintaining Vehicle Records

Refer to the section in this chapter entitled “Using the Options on the Update Screens” for more information about updating and deleting existing vehicle records.

Updating an Employee’s Property Data

You use this option to record and maintain information about company property that is issued to an employee. This information can be useful when recovering company property when an employee leaves the company.

Creating a Property Record

Follow the steps below to create a property record for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Vehicle & Property Data*.
3. Select *Update Employee Property* [UEP]. The system displays the Update Employee Property prompt screen.
4. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
5. Press Enter. The system displays the screen shown in Figure 5-10.

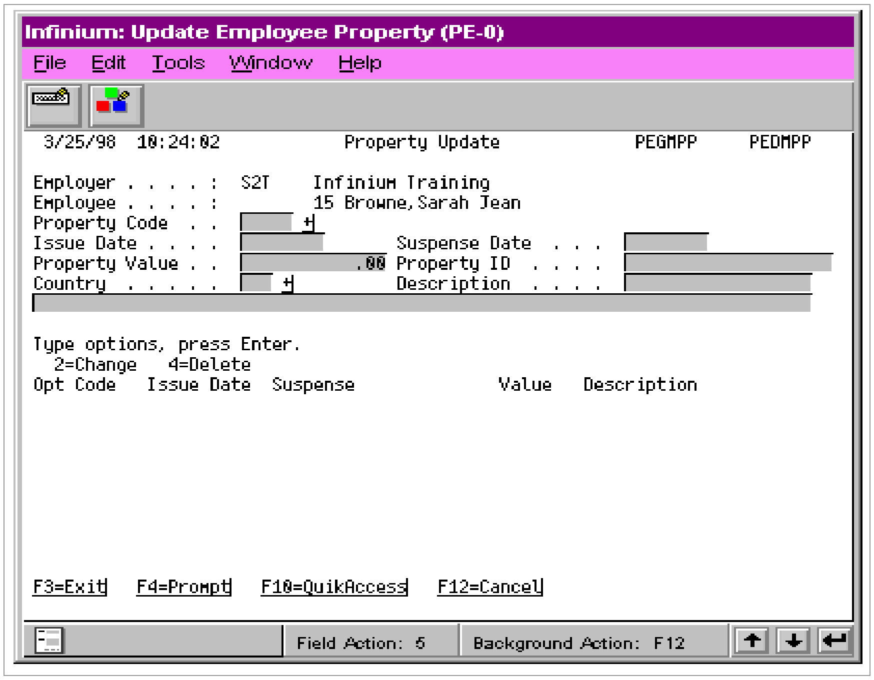


Figure 5-10: Property Update screen

From here you can:

- Create a property record by typing the details of an item in the top portion of the screen
- Update a property record by typing **2** in an *Opt* field
- Delete a property record by typing **4** in an *Opt* field

6 To create a new property record, use the following information to complete the fields on this screen.

Property Code

Type the code value that identifies the item. You define code values for this field through the *Update Employer Codes* option, using code type **PRP**.

Issue Date

Type the date on which the item was issued to the employee.

Suspense Date

Type the renewal or expiry date, such as for a credit card.

Property Value

Type the value of the item.

Property ID

Type the item's registration or identification number if applicable.

Country

Type the country in which the item was issued. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Description

Type a description for the item. This is a 93-character free-form field.

7 Press Enter. The system displays the property details you have typed in the bottom portion of the screen.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Employee Property prompt screen.

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

Maintaining Property Records

Refer to the section in this chapter entitled "Using the Options on the Update Screens" for more information about updating and deleting existing property records.

Updating an Employee’s Dependent Data

You use this option to record and maintain information about an employee’s dependents and beneficiaries, along with their relationship to the employee and other optional information.

You use this information in the *Benefit* options to identify the employee plans under which the dependent is covered or is a beneficiary.

Creating a New Dependent Record

Follow the steps below to create a dependent or beneficiary record for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Dependent Data*.
3. Select *Update Employee Dependents* [UEDP]. The system displays the Update Employee Dependents prompt screen.
4. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
5. Press Enter. The system displays the screen shown in Figure 5-11.

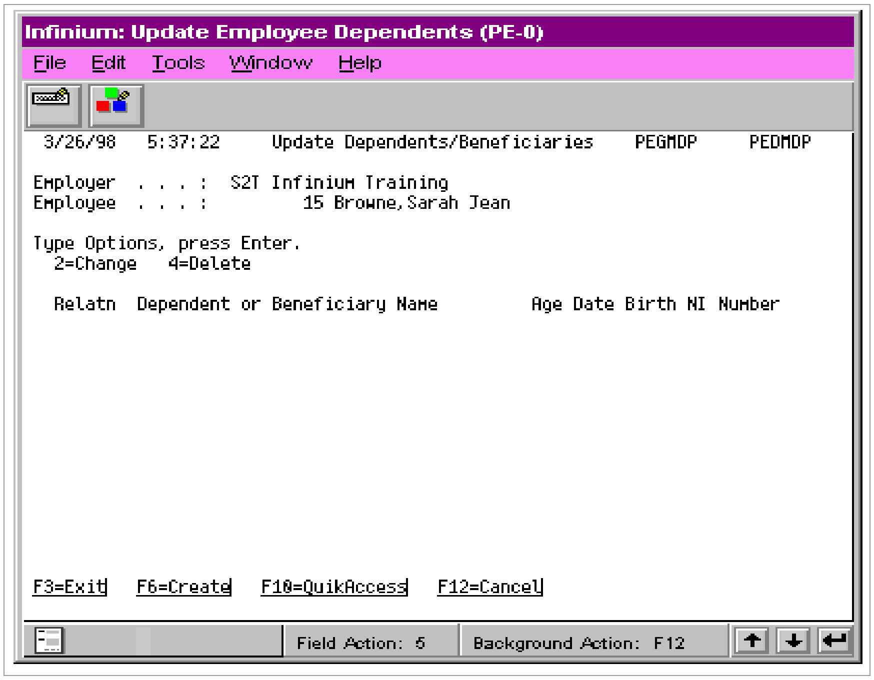


Figure 5-11: Update Dependents/Beneficiaries selection screen

The system displays details of any dependents or beneficiaries that have already been entered for this employee.

Note: The system maintains the *Age* field automatically; you cannot type anything in this field. The system calculates the dependent's age from his or her date of birth when you create the record. You can subsequently recalculate the age of a dependent using the *Mass Update Personnel Actions* option.

From here you can:

- Create a new dependent or beneficiary record by pressing F6
- Update a dependent or beneficiary record by typing **2** in an option field
- Delete a dependent or beneficiary record by typing **4** in an option field

6 Press F6. The system displays the screen shown in Figure 5-12.

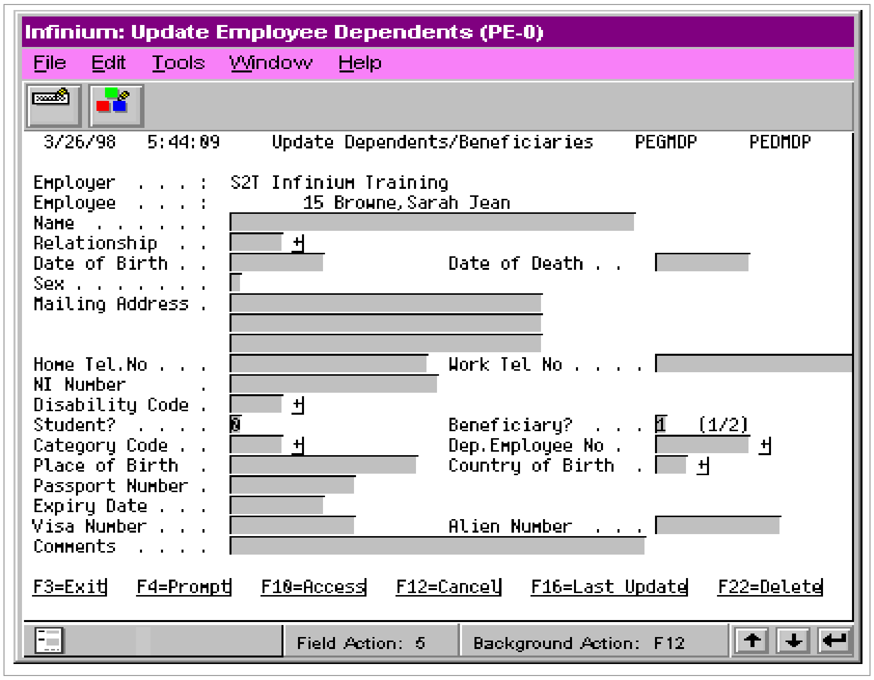


Figure 5-12: Update Dependents/Beneficiaries screen

7 Use the following information to complete the fields on this screen.

Name

Type the name of the dependent or beneficiary. This is a 39-character free-form field.

Relationship

Type the code value that represents the relationship of the dependent or beneficiary to the employee. You define code values for this field through the *Update Employer Codes* option, using code type **REL**.

Date of Birth

Type the date of birth of the dependent or beneficiary using the appropriate date format for this employer.

Date of Death

If the dependent or beneficiary is deceased, type the date of death.

Sex

Type a value that represents the sex of the dependent or beneficiary. Valid values are:

M	Male
F	Female

Mailing Address

Type the address of the dependent or beneficiary. Each line is a 30-character free-form field.

Home Tel.No

Type the home telephone number for the dependent or beneficiary.

Work Tel No

Type the work telephone number for the dependent or beneficiary.

NI Number

Note: This is a user-defined field, so the field may not show the same label as the one above. You define labels for this field through the *Update Employer Controls* option.

Type the value appropriate to the field label for the dependent or beneficiary. In the example shown, type the National Insurance number.

This field is for information only; the system does not check the validity of the number you type.

Disability Code

Type the disability code for the dependent or beneficiary if appropriate. You define code values for this field through the *Update Employer Codes* option, using code type **DIS**.

Student?

Type a value to indicate whether the dependent or beneficiary is a student. Valid values are:

0	No. The dependent or beneficiary is not a student. This is the default value.
1	Yes. The dependent or beneficiary is a student.

Beneficiary?

Type a value to indicate whether the person for whom you are creating the record is a dependent or a beneficiary.

Infinium HR uses the word “dependent” to mean a person who is related to and supported by the employee. Usually, dependents are either under a specified age or disabled, and are eligible for the employee's company-sponsored medical plans.

A “beneficiary” in Infinium HR is a person, organisation or trust fund designated by the employee as a recipient of monetary benefits from life assurance, savings or pensions in the event of the employee's death.

Valid values are:

1	Dependent
2	Beneficiary

You can leave this field blank if required.

Category Code

Type the code value that indicates the category of the dependent or beneficiary. For example, you might define dependent categories for children and others.

You define code values for this field through the *Update Employer Codes* option, using code type **CAT**.

Dep.Employee No

If the dependent or beneficiary is also an employee of the company, type his or her employee number.

Place of Birth

Type the town or city in which the dependent or beneficiary was born. This is an 18-character free-form field.

Country of Birth

Type the code value that represents the country in which the dependent or beneficiary was born. You define codes values for this field through the *Update Employer Codes* option, using code type **CTR**.

Passport Number

Type the passport number of the dependent or beneficiary. This is a 12-character free-form field.

Expiry Date

Type the date on which the passport expires.

Visa Number

Type the number assigned to the dependent or beneficiary’s visa. This is a 12-character free-form field.

Alien Number

If the dependent or beneficiary is a legal alien, type his or her registration number. This is a 12-character free-form field.

Comments

Type any additional comments required about this dependent or beneficiary. This is a 40-character free-form field.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Dependents/Beneficiaries selection screen. The system adds a summary of the details you have entered to the displayed list of dependents and beneficiaries.

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

Maintaining Dependent Records

Refer to the section in this chapter entitled “Using the Options on the Update Screens” for more information about updating and deleting existing dependent records.

Updating an Employee’s Licence Information

You use this option to record and maintain information about licences held by an employee, including the dates of issue and expiry. You can also record details of any fees payable towards the renewal of the licences.

Creating a Licence Record

Follow the steps below to create a licence record for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Employee Licences*.
3. Select *Licence Data*.
4. Select *Enter/Update Employee Licences* [EEL]. The system displays the Update Employee Licences prompt screen.
5. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
6. Press Enter. The system displays the screen shown in Figure 5-13.

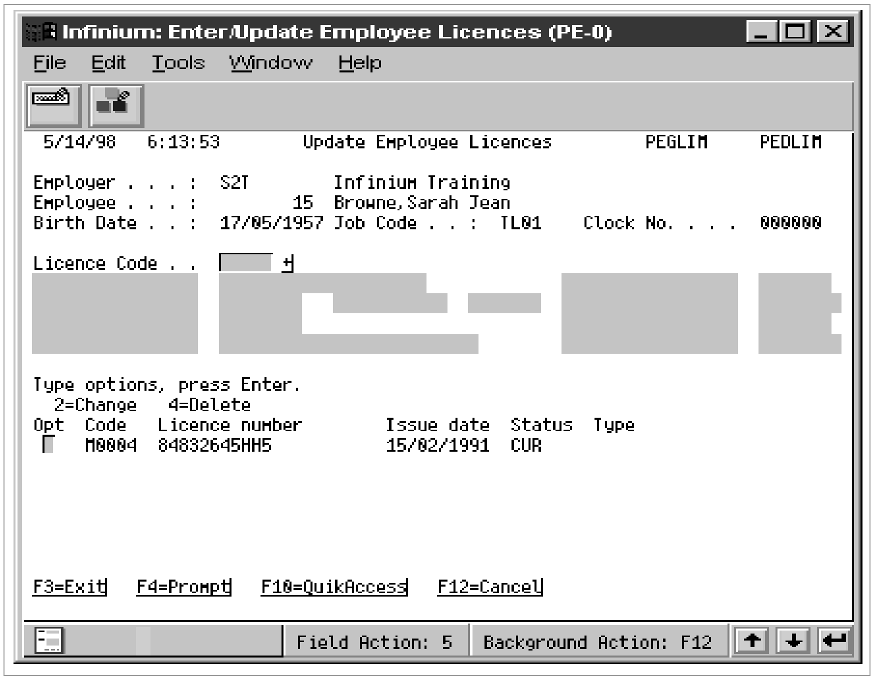


Figure 5-13: Update Employee Licences screen

The system displays details of any licences that have already been entered for this employee.

From here you can:

- Create a licence record by typing a licence code in the *Licence Code* field
- Update a licence record by typing **2** in an *Opt* field
- Delete a licence record by typing **4** in an *Opt* field

7 Type the code value that represents the licence for which you want to create an entry in the *Licence Code* field.

8 Press Enter. The system displays fields for licence information in the top portion of the screen, as shown in Figure 5-14.

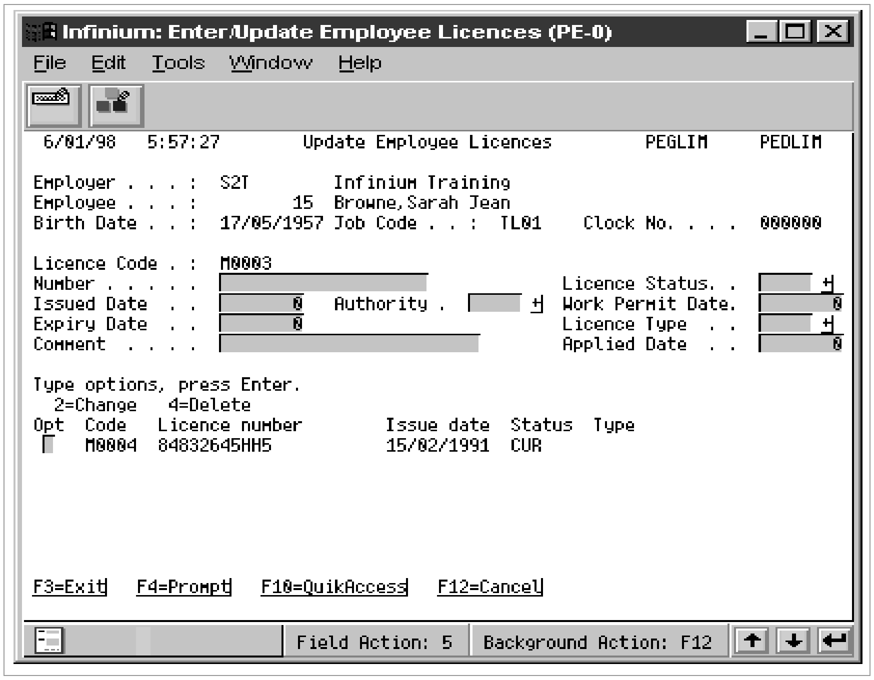


Figure 5-14: Update Employee Licences screen

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

Number

Type the licence number.

Licence Status

Type the code value that represents the status of the licence. You define code values for this field through the *Update Employer Codes* option, using code type **LST**.

Issued Date

Type the date on which the licence was issued to the employee.

Authority

Type the code value that represents the authority that issued the licence. You define code values for this field through the *Update Employer Codes* option, using code type **LAU**.

Work Permit Date

Type the date on the employee's work permit.

Expiry Date

Type the date on which the employee’s licence expires. You can generate reports to identify licences that have expired or are due to expire. Refer to the chapter in this guide entitled “Displaying and Printing Employee Information” for more information about the reports that are available in Infinium HR.

Licence Type

Type the code value that represents the licence type. You define code values for this field through the *Update Employer Codes* option, using code type **LTP**.

Comment

Type any comments that are appropriate for this licence. For example, you may want to type the name of any associated professional membership.

Applied Date

Type the date on which the employee applied for the licence.

10 Press Enter. The system displays the licence details you have entered in the bottom portion of the screen.

11 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Employee Licences prompt screen.

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

Maintaining Licence Records

Refer to the section in this chapter entitled "Using the Options on the Update Screens" for more information about updating and deleting existing licence records.

Creating a Licence Fee Record

Follow the steps below to create a licence fee record for an employee.

1 From the Infinium HR main menu select *Employees*.

2 Select *Employee Licences*.

3 Select *Licence Fees*.

4 Select *Enter/Update Licence Fee Amount* [ELFA]. The system displays the Licence Fee Update prompt screen.

5 Complete the *Employer* and *Employee* fields. Refer to the section in this chcapter entitled “Accessing Screens from the *Employee* Menu” for more information.

6 Press Enter. The system displays the screen shown in Figure 5-15.

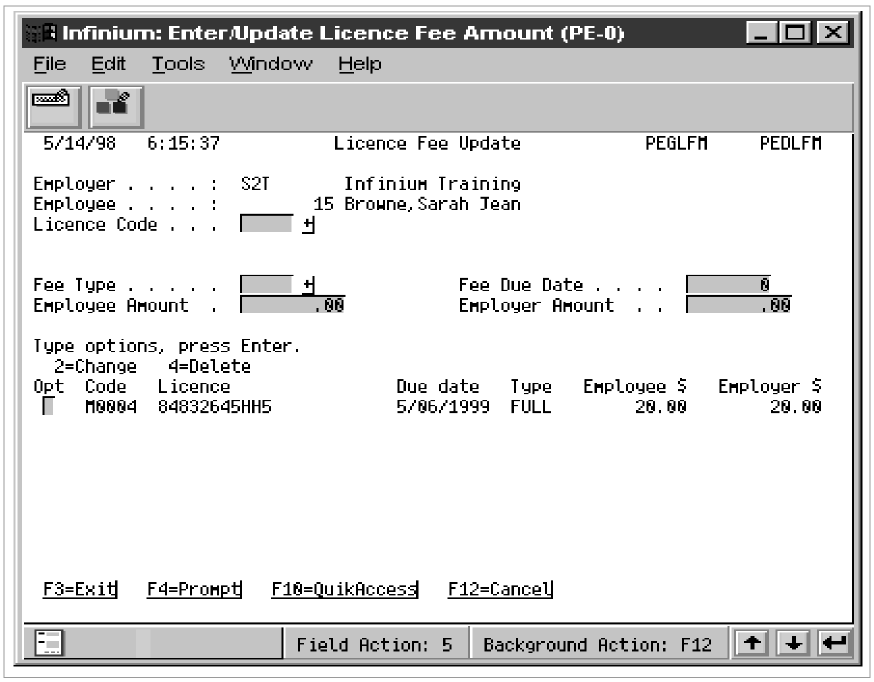


Figure 5-15: Licence Fee Update screen

From here you can:

- Create a new licence fee record by typing licence fee information in the top portion of the screen
- Update a licence fee record by typing **2** in an *Opt* field
- Delete a licence fee record by typing **4** in an *Opt* field

7 Type the code value that represents the licence for which you want to enter a fee in the *Licence Code* field.

8 Press Enter. The system displays the licence information in the top portion of the screen. You cannot update these fields; you can type information only relating to the fee for this licence.

9 Use the following information to complete the fields on this screen.

Fee Type

Type the code value that represents the fee type. You define code values for this field through the *Update Employer Codes* option, using code type **FTP**.

Fee Due Date

Type the date by which the fee must be paid.

Employee Amount

Type the amount of the fee to be paid by the employee.

Employer Amount

Type the amount of the fee to be paid by the employer.

10 Press Enter. The system displays the licence fee details you have typed in the bottom portion of the screen.

11 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Licence Fee Update prompt screen.

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

Maintaining Licence Fee Records

Refer to the section in this chapter entitled "Using the Options on the Update Screens" for more information about updating and deleting existing licence fee records.

Updating an Employee’s Scheduled Hours

You use this option to record and maintain information about an employee's scheduled working hours.

The system uses this information in absence processing as one means of determining the number of working hours/days an employee has been absent during an absence period. Refer to the chapter in this guide entitled "Processing Absences" for more information.

You can also link an employee's scheduled hours to his or her work schedule. Refer to the *Infinium HR (I) Guide to Controls* for more information.

Creating Scheduled Hours Information for an Employee

Follow the steps below to create scheduled hours information for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Scheduled Hours*.
3. Select *Update Scheduled Hours* [USCH]. The system displays the screen shown in Figure 5-16.

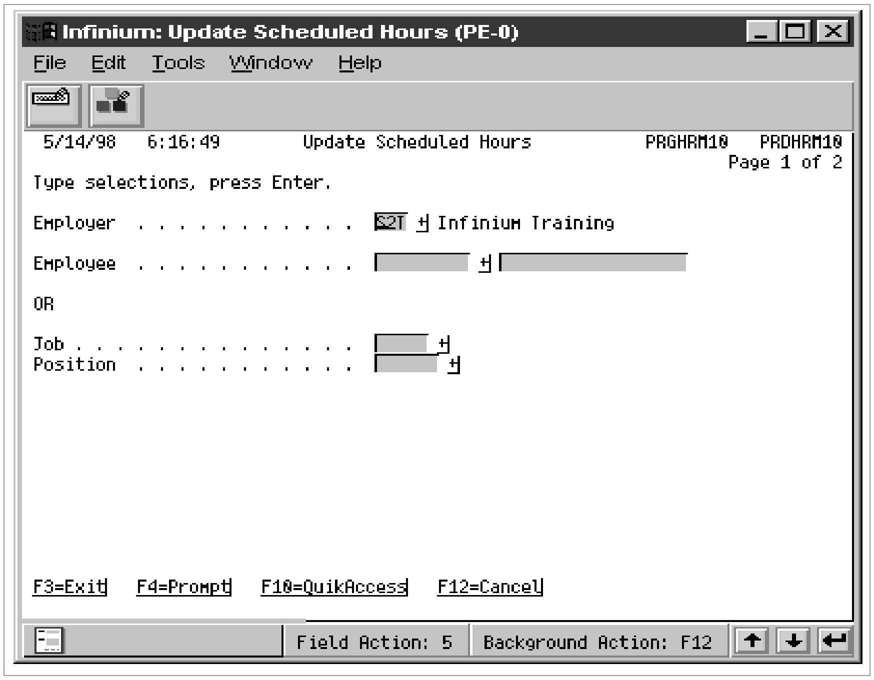


Figure 5-16: Update Scheduled Hours prompt screen

From here you can:

- Create a scheduled hours entry for an employee by completing the *Employer* and *Employee* fields
- Create a scheduled hours entry for a job by completing the *Employer* and *Job* fields
- Create a scheduled hours entry for a position by completing the *Employer*, *Job* and *Position* fields

4 Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.

5 Press Enter. The system displays the screen shown in Figure 5-17.

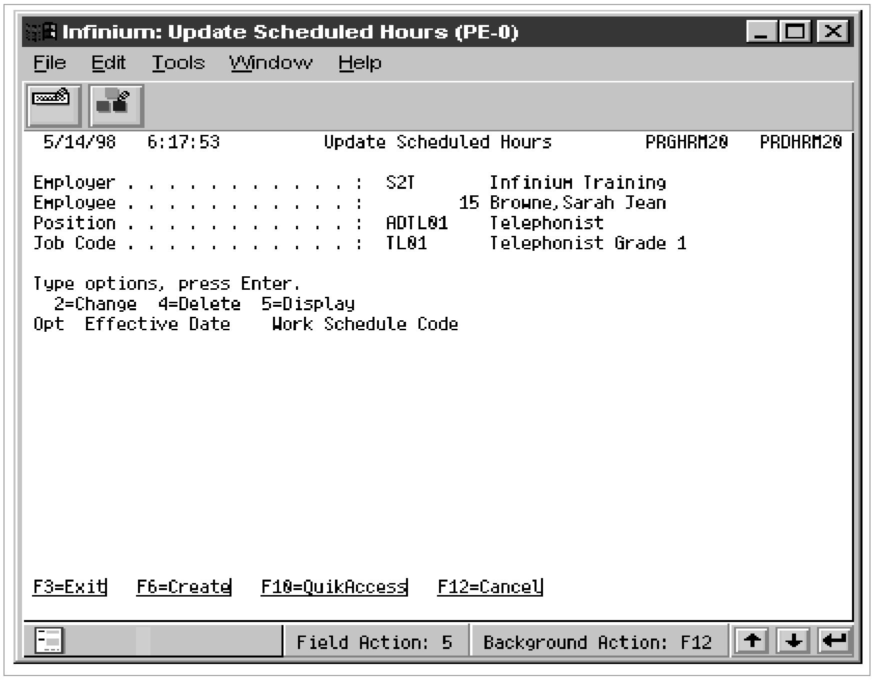


Figure 5-17: Update Scheduled Hours selection screen

From here you can:

- Create scheduled hours information by pressing F6
- Update existing scheduled hours information by typing **2** in an *Opt* field
- Delete existing scheduled hours information by typing **4** in an *Opt* field
- Display existing scheduled hours information by typing **5** in an *Opt* field

6 Press F6. The system displays the screen shown in Figure 5-18.

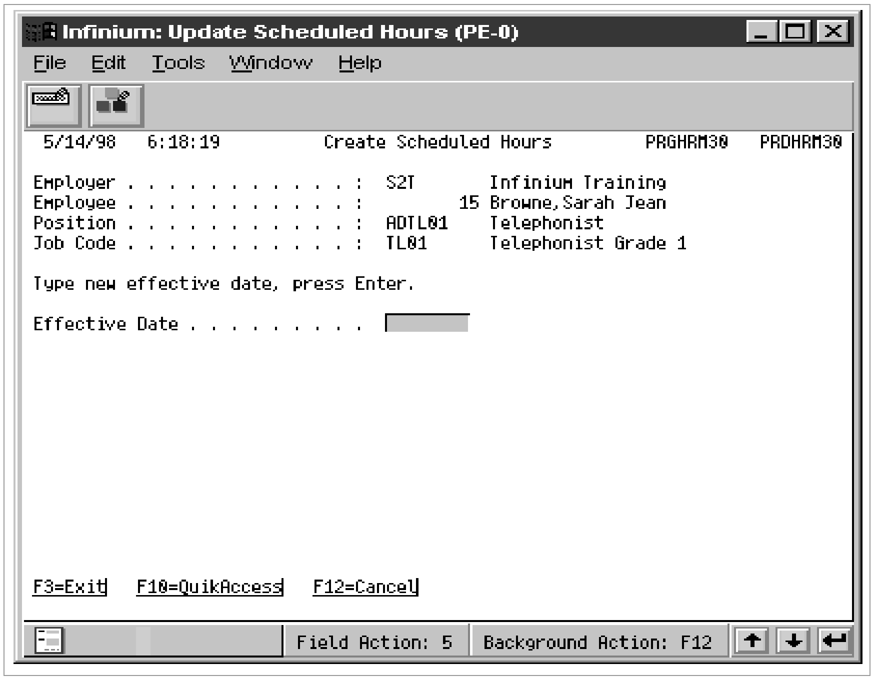


Figure 5-18: Create Scheduled Hours screen

7 Type the date on which the schedule comes into effect in the *Effective Date* field.

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

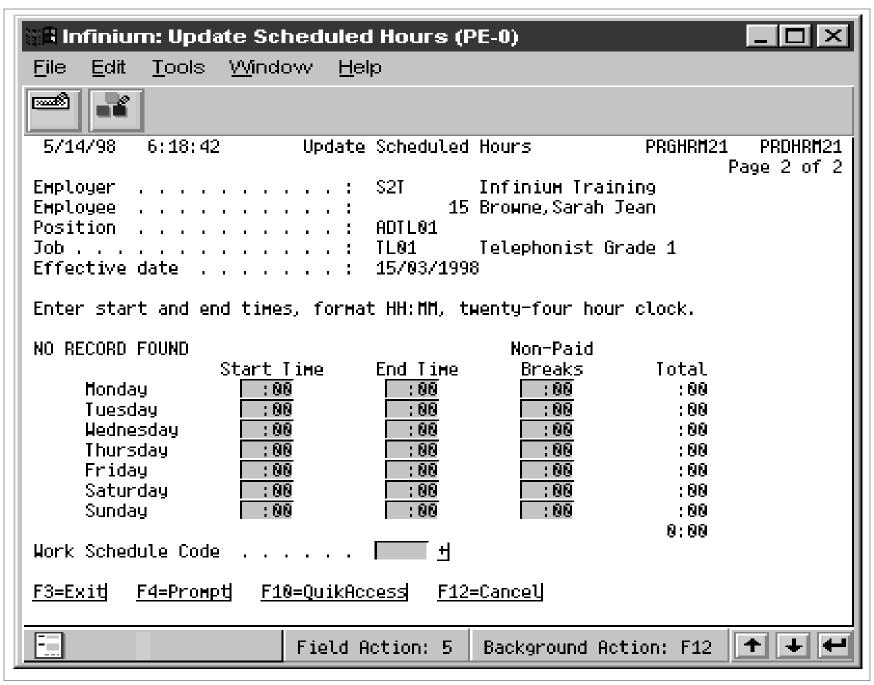


Figure 5-19: Update Scheduled Hours screen

9 For each day of the week, use the following information to complete the fields on this screen.

Start Time

Type the time of day that the employee starts work. Enter the time in 24-hour clock format.

End Time

Type the time of day that the employee finishes work. Enter the time in 24-hour clock format.

Non-Paid Breaks

Type the amount of time during the working day that the employee takes as breaks for which he or she is not paid, such as lunch breaks.

Work Schedule Code

Type the code value that represents the work schedule you want to link to these scheduled hours. You define work schedule code values through the *Update Work Schedules* option.

10 Press Enter. The system calculates the total number of working hours for the week, taking into account the unpaid time, and displays the daily and weekly totals in the *Total* fields.

11 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Scheduled Hours selection screen. The system updates this screen to include the schedule you have created.

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

Maintaining Scheduled Hours Entries

Refer to the section in this chapter entitled "Using the Options on the Update Screens" for more information about updating and deleting existing scheduled hours entries.

Updating an Employee’s Additional Position Information

You use this option to record and maintain information about other positions concurrently held by an employee.

Note: To use this option, you must set the *Multiple Positions/Employee* field on the employer control to **1**.

Creating an Additional Position for an Employee

Follow the steps below to create an additional position for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Employee Records*.
3. Select *Update Additional EE Positions* [UAEP]. The system displays the Update Additional EE Positions prompt screen.
4. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
5. Press Enter. The system displays the screen shown in Figure 5-20.

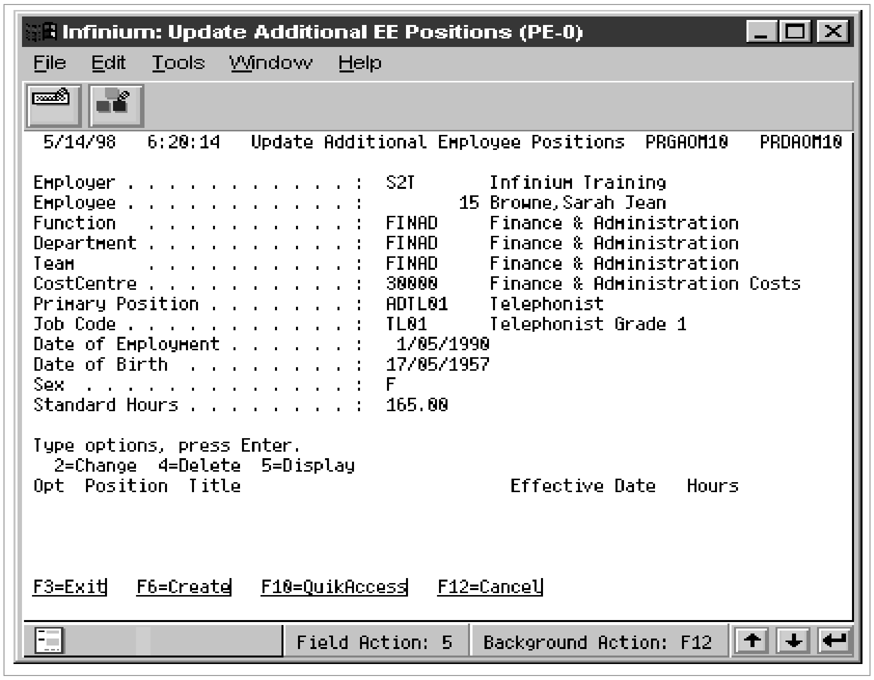


Figure 5-20: Update Additional Employee Positions selection screen

The system displays the employee’s main position in the top portion of the screen and a summary of any existing additional positions in the bottom portion.

From here you can:

- Create a new additional position by pressing F6
- Update an additional position by typing **2** in an *Opt* field
- Delete an additional position by typing **4** in an *Opt* field
- Display an additional position by typing **5** in an *Opt* field

6 Press F6. The system displays the screen shown in Figure 5-21.

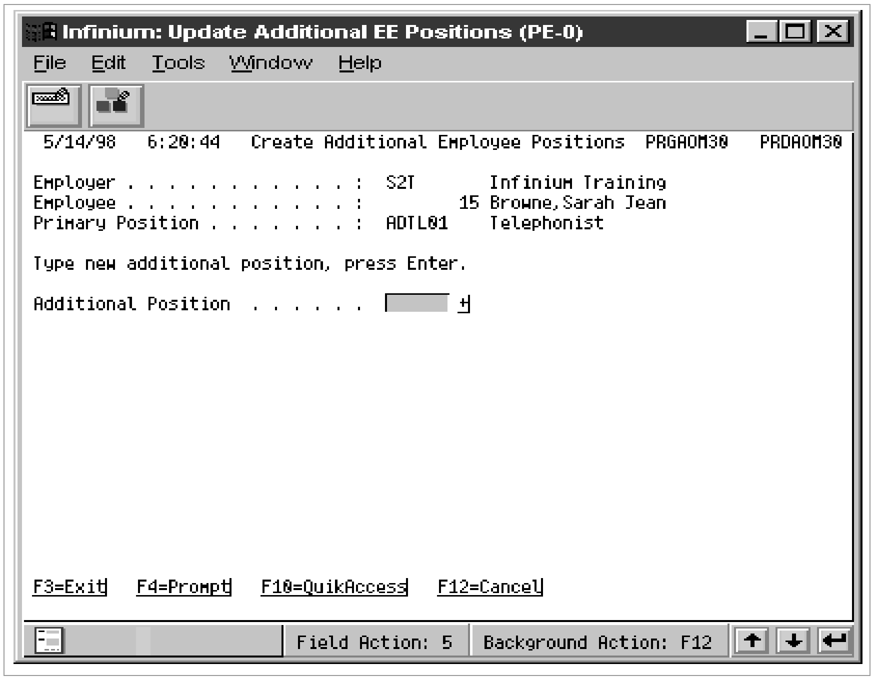


Figure 5-21: Create Additional Employee Positions screen

Type the code value that represents the position to which you want to assign the employee in the *Additional Position* field.

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

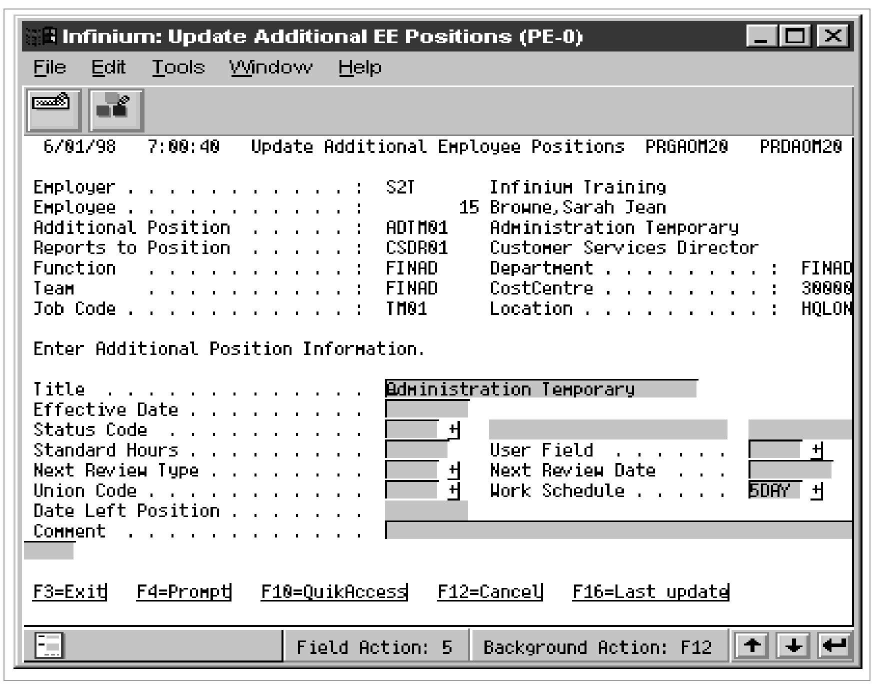


Figure 5-22: Update Additional Employee Positions screen 1 of 2

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

Title

The system displays the title for the position you selected. You can change this if required.

Effective Date

Type the date on which the employee started in this additional position.

Status Code

Type the employee’s active employment status code, such as part time or full time. You define code values for this field through the *Update Employer Codes* option, using code type **STS**.

Standard Hours

Type the standard number of hours the employee is expected to work in this position. The system adds the value you type here to the *Totl Hrs all Pos* field on the employee's basic data record.

User Field

This field allows you to enter a user-defined code value. You define code values for this field through the *Update Employer Codes* option, using code type **LAB**.

Note: This field name is a user-defined name. You define the text that you want to display here in the *Position User Defined Name* field in the *Update Employer Controls* option.

Next Review Type

Type the code value that represents the employee’s first scheduled performance review, for example 6 months. You define code values for this field through the *Update Employer Codes* option, using code type **RTP**.

If you type a value in this field, you must also enter a value in the *Next Review Date* field.

Note: You can maintain this information in the future through the *Enter Personnel Actions* option.

Next Review Date

Type the scheduled date for the employee’s performance appraisal in this field.

Note: If you type a value in this field, you must also type a value in the *Next Review Type* field.

Union Code

Type the code value that identifies the union that represents the employee. You define code values for this field through the *Update Unions* option.

Work Schedule

Type the code value that identifies the employee's usual working schedule for the specified position. You define code values for this field through the *Update Work Schedules* option.

Note: You can attach a work schedule to a position through the *Update Job Controls* option, in which case the system automatically completes this field when the employee is employed into the position.

You can override this by entering another code in its place; for example, to enter a part time work schedule. The system uses the value you type in this field in absence processing to calculate the number of workdays the employee was absent.

Comment

Type any comment appropriate to this position. This is a 50-character free-form field.

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

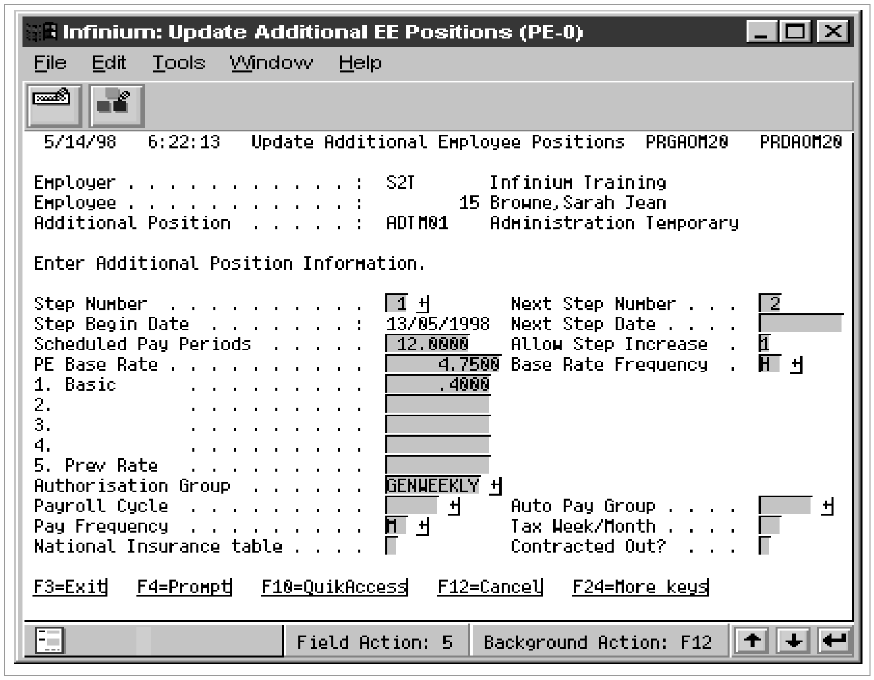


Figure 5-23: Update Additional Employee Positions screen 2 of 2

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

Step Number

If your organisation uses step-in-grade processing, type a step number in this field to assign this employee to a starting step within the pay grade. The default value is **1**.

Note: The system automatically assigns the employee to the pay grade on the job control for the position.

If you do not use step-in-grade processing, type **99** as the step number. This indicates that the employee has an individual salary level.

If you use step-in-grade processing with age and/or service related steps, the system enters the appropriate step number for the employee’s age and service.

If you use the F4 prompt to select a step, the system returns the appropriate values to the *PE Base Rate* and *Base Rate Frequency* fields.

Next Step Number

The system displays the step to which the employee is scheduled to advance when he or she has met the age and/or service criteria specified on the pay grade control record. The system uses the date in the *Next Step Date* field when you use the *Mass Update Step-In-Grade* option to move the employee to his or her next step.

To override this value, type a number in this field.

Step Begin Date

The system completes this field with the date you typed in the *Effective Date* field on the previous screen. You cannot edit this field.

Next Step Date

The system displays the date the employee is scheduled to advance to his or her next step. The system uses this date when you use the *Mass Update Step-In-Grade* option to move the employee to his or her next step.

To override this date, type a new date in this field.

Scheduled Pay Periods

The system enters a default value calculated from the employee's pay frequency code. For example, if the employee's pay frequency code is M, the system enters **12** in this field. To override, type the number of pay periods scheduled during the calendar year for this employee.

Allow Step Increase

Type a value to indicate whether the employee may progress to the next step. Valid values are:

0	No. The employee may not progress to the next step.
1	Yes. The employee may progress to the next step. This is the default value.

PE Base Rate

The system completes this field with the appropriate base rate for the pay grade and step. To change this value, type a different rate in this field. The field can contain hourly, monthly, annual or several other types of rates.

The personnel base rate you type in this field must be compatible with the value you type in the *Base Rate Frequency* field on this screen. For example, if you type a monthly salary amount for an employee in this field, you must type **M** (monthly) in the *Base Rate Frequency* field.

Infinium PY does not calculate pay directly from the information in this field; however, Infinium HR uses this base rate to calculate a value for the employee's pay rate. For example, if the base rate is an annual salary and the employee has a monthly pay frequency, the system enters one twelfth of the base rate into the first payroll rate field. The system uses the base rate in personnel reports and to calculate the employee's annualised base rate.

Note: If the personnel base rate is outside the salary range established for this job, the system displays a warning message before you exit from this screen. The message shows the salary range code and the maximum and minimum salary for the position.

If you do not want to display the salary range amounts, you can prevent the system from displaying maximum and minimum salaries. Use code type **JRP** to create a job group code *SREX. If the system finds this code, it displays zeros instead of actual values.

You can either correct the rate or press F11 to override the warning.

Base Rate Frequency

Type a frequency for the value you typed in the *PE Base Rate* field.

If you use step-in-grade processing, the system enters the frequency for the pay grade of the position.

Entering Payroll Information

If you are using Infinium PY, use the following information to complete the payroll fields on this screen.

Fields 1 to 5

Use these fields to enter payroll rates for the employee. You define the names for these fields through the Infinium PY *Update Employer Controls* option. Infinium PY refers to these fields during income calculations.

Entering the First Payroll Rate

If you are using step-in-grade processing, the system automatically calculates this value from the personnel base rate.

If you are not using step-in-grade processing, type the appropriate value in the first field. Typically, the value you type in this field is equivalent to the value you enter in the *Personnel Base Rate* field, even if the rates are stated differently. For example, you can enter the employee's personnel base rate on an annual basis but state his or her first payroll rate on a monthly, weekly or hourly basis.

If you enter **25000** as the employee's annual personnel base rate, you would enter **2083.33** as his or her first payroll rate if you pay the employee on a monthly basis using a flat amount income, or **480.77** if you pay the employee weekly.

Press F18 to have the system calculate this payroll rate from the base rate.

The value you type in the first field must be compatible with the value you type in the *Pay Type* field on the basic data record. For example, if you type an amount per hour rate in this field, you must specify **H** (hourly) in the *Pay Type* field on the following screen. If you type a flat amount in this field, you should enter **S** (salaried) or **N** (salaried non-exempt) in the *Pay Type* field.

Entering Additional Payroll Rates

If applicable, type the employee’s other payroll rates. The system uses these fields to compute incomes during cycle processing if you entered **2**, **3**, **4** or **5** in the *Income Basis* field on the associated income control record(s) and you have defined this additional position on the employee's income control. Typically, you use these fields for exceptions, previous or alternate rates.

Leave these fields blank if you have not defined any income controls whose basis is **2**, **3**, **4** or **5**.

For example, in your transportation company you pay truck drivers at their standard hourly rate when they drive alone and a lower hourly rate when they share the driving with another employee. You set up two hourly incomes. The first income for solo drivers uses the first payroll rate; the income for team drivers uses the second payroll rate.

Authorisation Group

Use this field to assign the employee to a pre-defined set of incomes and deductions. You establish authorisation groups through *Update Payroll Authorisation Groups* when you set up your system controls.

Note: If you are using Infinium HR and you specified a value in the *Standard Auth Group* field on the Organisation Update screen of the *Update Organisation Positions* option, the system uses that value as the default for this field.

This default feature saves time when you are entering employees into positions. You can override the default value in this field if necessary.

Payroll Cycle

Type the code that represents the normal payroll cycle to which you assign this employee for this position. You must assign the employee to a different pay cycle for each position that he or she holds.

You must assign each employee to one or more pay cycles for normal processing. You can also process special payslips through other cycles, such as a bonus or on-demand cycle; however, you do not need to assign the employee to a special cycle.

When you press Enter, the system checks that:

- The employee’s pay cycle and pay frequency are the same
- The employee’s pay cycle and pay type are compatible
- The employee is not assigned to a level that is restricted from this pay cycle
- The employee is not already assigned to the cycle for processing pay for another position

If any of these conditions are not met, the system displays an error message and you must correct the fault before continuing.

Auto Pay Group

You use auto pay groups during cycle processing to generate incomes automatically that are the same in each pay period for this employee. The system automatically completes this field with the autopay group for the position.

To change this, type the code that represents the auto pay group in this field. You create code values through the *Update Employer Codes* option, using code type **APG** and assign incomes to the auto pay group through the *Update Auto Pay Groups* option in Infinium PY.

Pay Frequency

The system displays a default value in this field that is taken from the employee’s levels, or, if these are blank, from the base rate frequency. If the employee’s base rate frequency and pay frequency are different, type a pay frequency that indicates how often you expect to pay this employee.

For example, if the base rate frequency for the employee is annual but the pay frequency is monthly, change the value in this field from the default **A** to **M**.

The value you type in this field must be compatible with the value you type in the *Scheduled Pay Periods* field. For example, if you type **12** in the *Scheduled Pay Periods* field, type **M** in this field.

Tax Week/Month

Type the next scheduled tax week or month number. The system performs payroll cycle processing only for those employees whose tax number is less than or equal to the tax number on the payroll cycle control.

National Insurance table

Note: This field applies to UK customers only.

Type a letter to indicate the National Insurance deduction amount. Valid values are:

A	Standard rate, not contracted out
B	Reduced rate, not contracted out
C	Employer only, whether contracted out or not
D	Standard rate, contracted out
E	Reduced rate, contracted out

Each time the employee's National Insurance indicator changes, the system records the total amount paid. These totals are used for year end reporting on the employee's P60 form.

Contracted Out?

Type a value to indicate whether or not the employee is contracted out of SERPS. Valid values are:

0	No. The employee is not contracted out. For UK customers, type **0** for National Insurance letters A and B, and for C if the employer is not contracted out.
1	Yes. The employee is contracted out. For UK customers, type **1** for National Insurance letters D and E, and for C if the employer is contracted out.

11 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made, creates an additional position transaction and returns you to the Update Additional Employee Positions selection screen. The system updates this screen to include the record you have created.

12 Press F3 twice to return to the Infinium HR main menu.

Maintaining Additional Positions

Refer to the section in this chapter entitled “Using the Options on the Update Screens” for more information about updating and deleting existing additional positions.

Updating an Employee’s Log

You use this option to enter messages concerning an employee. You can set a date on which the system is to display the message, so that it acts as a reminder. You can view these reminders using the *Display Reminders* option.

Creating a Log Entry for an Employee

Follow the steps below to create a log entry for an employee.

1. From the Infinium HR main menu select *Employees*.
2. Select *Employee Records*.
3. Select *Update Employee Log* [UEL]. The system displays the Update Employee Log prompt screen.
4. Complete the *Employer* and *Employee* fields. Refer to the section in this chapter entitled “Accessing Screens from the *Employee* Menu” for more information.
5. Press Enter. The system displays the screen shown in Figure 5-24.

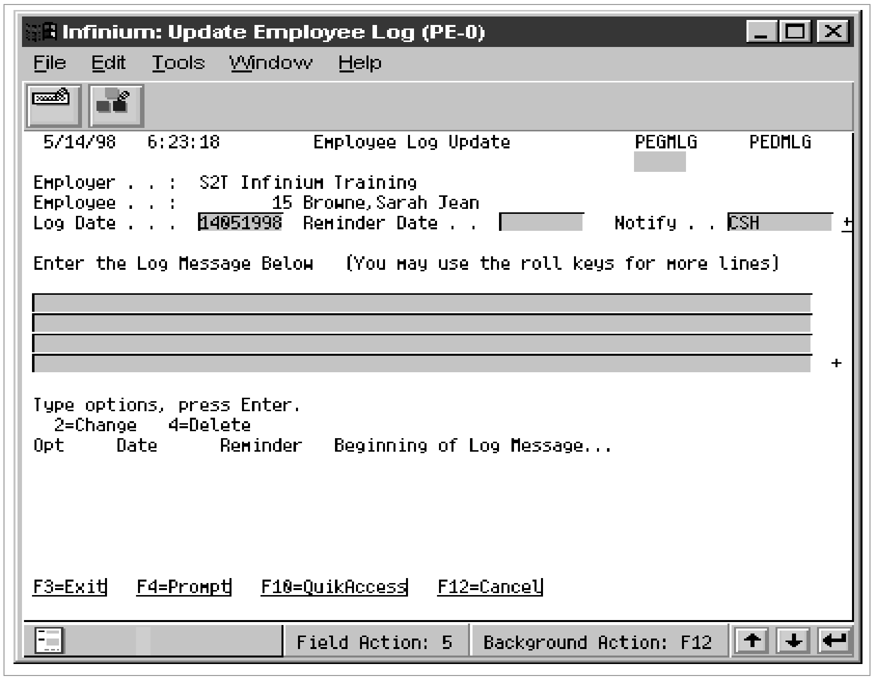


Figure 5-24: Employee Log Update screen

The system display details of any log messages that have already been entered for this employee. The messages are displayed in date order.

From here you can:

- Create a log entry by typing the required information in the fields in the top portion of the screen
- Update a log entry by typing **2** in an *Opt* field
- Delete a log entry by typing **4** in an *Opt* field

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

Log Date

The system completes this field with the date on which you create the log entry. You can change this if required.

Reminder Date

Type the date on which the system is to display the log entry. The system uses this date to determine when to display the reminder.

Notify

You can use this field in three ways:

- Type your own user ID to send the log entry to yourself as a reminder
- Type the user ID of another employee to whom you want to send the log entry
- Leave this field blank, in which case the system sends the log entry to all users

Message Lines

Type the text of your log entry in the message lines on screen. If you need more space than is displayed on screen, use the PageDown key to display more message lines.

7 Press Enter. The system displays a summary of the log entry in the bottom portion of the screen.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Employee Log prompt screen.

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

Maintaining Log Entries

Refer to the section in this chapter entitled “Using the Options on the Update Screens” for more information about updating and deleting existing log entries.

Updating Pay Components for a Group of Employees

You use this option to update pay component information for a selected group of employees or for all employees. You specify the employees you want to update and then enter the pay component changes for these employees. If an employee's salary changes as a result of his or her pay component changes, the system automatically creates a salary change personnel action transaction. The system prints a report of the changes made.

You can run the *Trial Mass Update Pay Components* option to view the effects of your changes prior to performing the update.

Using the Mass Update Pay Components Option

Follow the steps below to update pay components for a group of employees or for all employees.

1. From the Infinium HR main menu select *Employees*.
2. Select *Pay Component Data*.
3. Select *Mass Update Pay Components* [MUPC]. The system displays the screen shown in Figure 5-25.

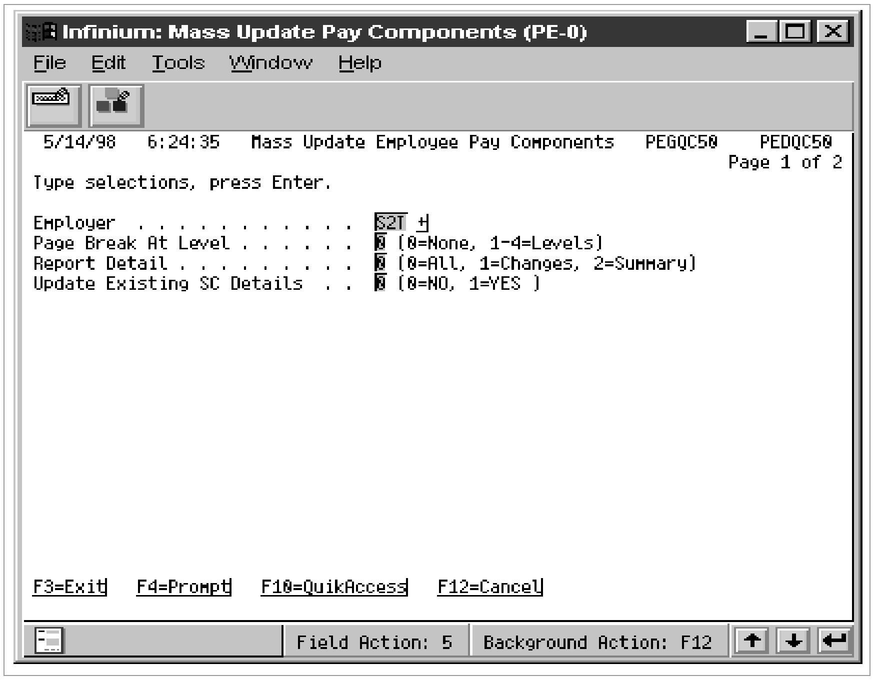


Figure 5-25: Mass Update Employee Pay Components screen 1 of 2

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

Employer

Type the value that identifies the employer for which you are updating pay components.

Page Break At Level

Type a value to indicate how you want the system to split the report. Valid values are:

0	Do not insert any page breaks; print the report continuously.
1	insert page breaks after the appropriate level when the report is printed

Report Detail

Type a value to indicate the level of detail you want to show on the report. Valid values are:

0	Print all pay component information on the report.

1 Print changes in pay component information only on the report.

2 Display a summary of the changes in pay component information only.

Update Existing SC Details

Type a value to indicate whether you want the system to update existing Salary Change records for each pay component change. Valid values are:

0 No. Do not update existing Salary Change records. The system creates new Salary Change records for the changes you enter.

Note: You must run the *Mass Update Personnel Actions* option for this change to take effect.

1 Yes. Update existing Salary Change records. The system updates the records if the effective date and reason code for the existing Salary Change record match those you enter on the following screen.

5 Press Enter. The system displays the screen shown in Figure 5-26.

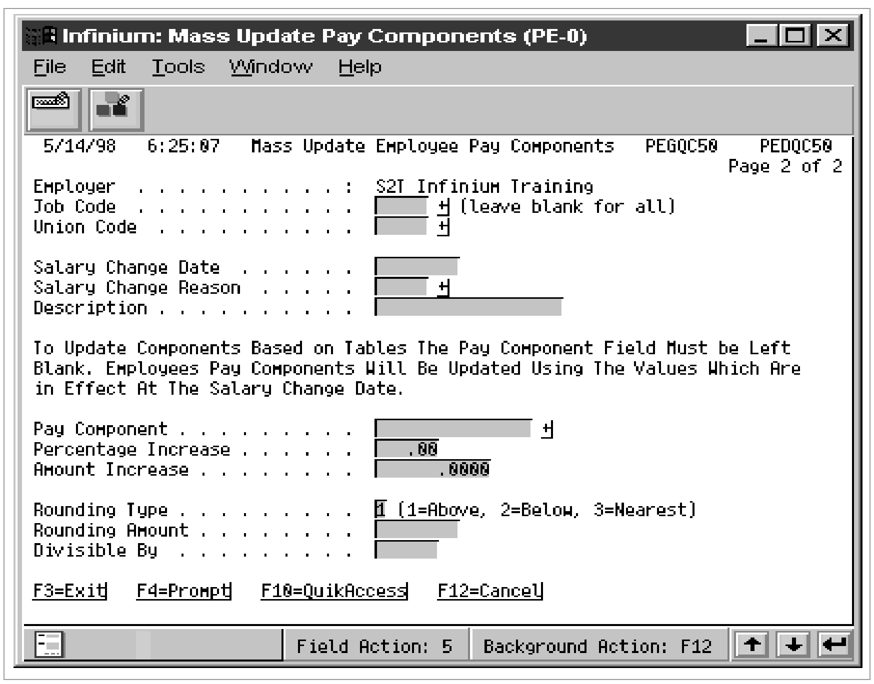


Figure 5-26: Mass Update Employee Pay Components screen 2 of 2

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

Job Code

Type the code value for a job to restrict the pay component update to employees assigned to that job. The system compares the value you type in this field with the value in each employee's *Job Code* field on the basic data record and updates pay components only for employees assigned to the specified job code.

To update pay components for employees in all jobs, leave this field blank.

Union Code

Type the code value for a union to restrict the pay component update to employees assigned to that union. The system compares the value you type in this field with the value in each employee's *Union Code* field on the basic data record and updates pay components only for employees assigned to the specified union code.

To update pay components for employees in all unions, leave this field blank.

Salary Change Date

Type the date on which the salary change is to come into effect.

Salary Change Reason

Type the code value that represents the reason for the salary change. You define code values for this field through the *Update Employer Codes* option, using code type **SAL**.

Description

Type a description for this salary change. This is an 18-character free-form field.

Pay Component

Type the code value to indicate the pay component you want to update.

To update pay components based on the pay component tables, leave this field blank. The system updates the pay components for the employees using the values that are in effect on the salary change date.

Percentage Increase

Type the percentage by which you want to increase the value of the pay component. You can only enter a value in this field if the pay component is not associated with a pay component table.

To update pay components based on the pay component tables, you must update the appropriate pay component code amount before running this mass update option.

Amount Increase

Type the monetary amount by which you want to increase the value of the pay component. You can only enter a value in this field if the pay component is not associated with a pay component table.

To update pay components based on the pay component tables, you must update the appropriate pay component code amount before running this mass update option.

Rounding Type

Specify how you want the system to apply the pay component changes that you enter. The system uses the value you enter in the *Rounding Amount* field to apply the rounding type you specify in this field.

Valid values are:

1	Above. Round to the next highest specified rounding amount.
2	Below. Round to the next lowest specified rounding amount.
3	Nearest. Round up or down to the nearest specified rounding amount.

Rounding Amount

Type the value the system should use when it rounds calculation results. The system uses the value you specify here in conjunction with the choice you specify in the *Rounding Type* field.

For example, if you type **1.00** in this field and **1** in the *Rounding Type* field, the system rounds all calculation results to the next highest 1.00.

If you leave this field blank, the system does not round the results of its calculations.

Divisible By

Type the value the system should use when it computes pay component changes. The system always adjusts calculated results to the nearest multiple of the value you specify in this field. Leave this field blank if you do not want the system to perform this final calculation.

The table that follows illustrates the results when you specify that the changed pay components should be divisible by **5.00**.

Pay Component Value	Increase Amount	Result
100	10	110.00
100	17	115.00
100	22	120.00

If you also enter a value in the *Rounding Amount* field, the system first applies the rounding rules you specify. It then adjusts the result to be divisible by the nearest multiple of the amount you specify.

For example, if you type **2** in the *Rounding Type* field and **1.00** in the *Rounding Amount* field, the system first rounds each result to the next lowest 1.00. If you also specify that the results should be divisible by 5.00, the system then adjusts each result to be divisible by the nearest multiple of 5.00.

7 Press Enter. The system displays the following messaage at the bottom of the Mass Update Employee Pay Components screen and returns you to the Infinium HR main menu:

Building submission request

The system uses batch processing to process the *Mass Update Pay Components* option and generate the Mass Update Employee Pay Components report.

8 Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen to view the status of your job. You can view and print the reports using options on these screens.

Updating an Employee's User-defined Data

You use the *User-Defined Data* options to record and maintain information about an employee that is unique to your organisation and therefore is not found in the Infinium HR database. User-defined data fields are shared by Infinium HR and Infinium PY, so both groups of users should agree on how the fields are defined.

Refer to the *Infinium HR (I) Guide to Controls* for more information on defining the user-defined fields and maintaining the information stored in them.

Summary

In summary, you have learned the following:

- How to use the *Update Employee Data* options to add, change and delete employee information
- Where to find the information you want to update

Notes

Chapter 6 Displaying and Printing Employee Information

6

This chapter contains an overview of the employee information you can view on screen using the display options in Infinium HR. These displays show the details you enter using the *Enter New Employee* option and the *Update Employee Data* options.

This chapter also provides a summary of the reports you can generate about the employees in your Infinium HR database.

You also learn how to use the *Employee Locate* option to search for a particular employee within or across employers, and how to use the *Employee Enquiry* option to search for employees across your database using a combination of search parameters.

The chapter consists of the following topics:

Overview

Objectives

When you complete this chapter, you should be familiar with:

- How to display employee information
- How to generate reports about employees
- How to use the *Employee Locate* option
- How to use the *Employee Enquiry* option

Displaying Employee Information

You use the *Display Employee Data* options listed below to view employee information on screen. You cannot use any of the display options to update these details. Refer to the chapter in this guide entitled “Updating Further Information about an Employee” for more information on updating the employee data contained in these displays.

You can access these options from the *Employees* menu in one of two ways:

- Select the appropriate sub-menu and select the display option shown. For example, to access the *Display Employee Dependents* option, select *Employees* followed by *Dependent Data*.
- Select *Employee Records* and choose the required option.

The following table describes the options you can use to display employee information.

Option	Quick Access Code	Selection Fields	Summary of Display
Display Employee Data	DED	*Employer* *Employee*	Provides options to display basic data, personnel data, education and qualifications data, benefit enrolments and compensation data
Display Education/ Qualifications	DFED	*Employer* *Employee*	Displays information about educational establishments attended and qualifications gained
Display Tuition Reimbursement	DTR	*Employer* *Employee* *Beginning Date* *Ending Date* *Reimbursement Code*	Displays the type, amount and date of each reimbursement
Display Prev Employment History	DPEH	*Employer* *Employee*	Displays previous employment information such as the company name, position held and salary earned

Option	Quick Access Code	Selection Fields	Summary of Display
Display Property Issued	DPI	*Employer* *Employee* *Property code* *From Suspense Date* *To*	Displays details of company property issued to employees
Display Employee Vehicles	DEV	*Employer* *Display Order* *Vehicle Make* *Model* *Permit No* *Car Park* *Registration* *Colour*	Displays information about vehicles owned by employees
Display Employee Dependents	DEDP	*Employer* *Employee* *Relationship code* *Born in month/year*	Displays dependent details such as name, relationship and whether the dependent is a beneficiary
Display Pay Component History	DPCH	*Employer* *Employee*	Displays pay component details such as total salary, pensionable rate and payroll rate
Display Employee Licences	DEL	*Employer* *Employee* *Licence Code* *From Expiry Date* *To Expiry Date* *Licence Type* *Status* *Authority*	Displays licences held, including the licence number, date of issue and current status
Display Scheduled Hours	DSCH	*Employer* *Employee* or *Job* and *Position*	Displays schedule of work hours for each day of the week and the date from which they are effective

Option	Quick Access Code	Selection Fields	Summary of Display
Display Work Actions	DWA	*Employer* *Level 1, 2, 3, 4* *Work Action Category* *Supervisor* *Resolution* *Contract Section* *Begin Date* *Ending Date* *Employee* *Reg.Agncy*	Displays work action information including the type, date and employee(s) concerned
Display User-Defined Emp. Data	DUED	*Employer* *Employee*	Displays user-defined data according to categories you establish through the *Maintain Employer Titles* option
Display Reminders	DR	*Employer Number* *Employee Number* *Notify* *Beginning Date* *Ending Date*	Displays employee log messages plus log date and reminder date
Display Purged Employees	DPE	*Employer* *Surname* or *From / To Leaving Date*	Displays details of purged employees including employee number, address and date purged
Additional Position Enquiry	APE	*Employer* *Position* *Pay Grade* *Cycle* *Level 1, 2, 3, 4* *Status*	Displays details of additional positions to which employees are assigned
Display Blood Types	DBT	*Employer* *Number* *Blood Type*	Displays employees by blood type plus the most recent blood donation date if relevant

Option	Quick Access Code	Selection Fields	Summary of Display
Employee Compensation Enquiry	ECE	*Employer Employee*	Displays a summary of all components of an employee's compensation package plus step details if appropriate

Printing Employee Information

Infinium HR contains many standard reports that provide you with listings of employee information. You use these reports to print the details that you entered through the *Enter New Employee* option or the *Update Employee Data* options.

You can access these options from the *Employees* menu in one of two ways:

- Select the appropriate sub-menu and select the print option shown. For example, to access the *Print Employee Dependents* option, select *Employees* followed by *Dependent Data*.
- Select *Employee Records* and choose the required option.

The following table lists the reports available and describes the selection options you can use to print the employee information you require.

Option	Quick Access Code	Selection Fields	Summary of Report
Print Employees	PE	*Employer* *Level 1, 2, 3, 4* *Include Non Actives* *Leaving Code*	Prints all employee basic and personnel data
Print Employees by EE number	PEN	*Employer* *Include Non Actives* *Leaving Code* *Employee Sex* *Print Codes*	Prints a list of the names of all employees, sorted by employee number. Also allows you to specify up to 7 employee codes to be printed on the report.
Print Employees by Surname	PES	*Employer* *Include Non Actives* *Leaving Code* *Employee Sex* *Print Codes*	Prints a list of employee names and numbers, sorted alphabetically by surname. Also allows you to specify up to 7 employee codes to be printed on the report.

Option	Quick Access Code	Selection Fields	Summary of Report
Print Employees by Level	PEL	*Employer* *Level 1, 2, 3, 4* *Include Non Actives* *Leaving Code* *Employee Sex* *Codes to Print*	Prints a list of the employee names and numbers, sorted by levels. Also allows you to specify up to 7 employee codes to be printed on the report.
Print Employees by Job Code	PEJC	*Employer* *Job Code* *Include Non Active* *Leaving Code* *Employee Sex* *Code Types*	Prints a list of employee names and numbers, sorted by job code
Print Purged Employees	PPE	*Employer* *Beginning Date* *Ending Date* *Leaving Code* *List by* user-defined label	Prints details of purged employees, including the date of employment and the date employment was terminated
Additional Positions Print	APP	*Employer* *Position* *Pay Grade* *Cycle* *Level 1, 2, 3, 4* *Status* *Summary or Detail*	Prints details of additional positions to which employees are assigned
Print Education/ Qualifications	EFER	*Employer* *Qualification Code* *Include Inactives?*	Prints information about educational establishments attended and qualifications gained, plus reimbursement details if relevant
Print Prev Employment History	PPEH	*Employer* *Employee* *Reason for leaving code* *Industry code*	Prints previous employment information such as the company name, period of employment and reason for leaving

Option	Quick Access Code	Selection Fields	Summary of Report
Print Employee Property	PEPTY	*Employer* *Levels 1, 2, 3, 4* *Property Code* *From Suspense Date* *To Suspense Data*	Prints details of company property issued to employees
Print Employee Vehicles	PEV	*Employer Group or Employer* *Report Order*	Prints information about vehicles owned by employees
Print Employees Dependents	PED	*Employer* *Report Order* *Level 1, 2, 3, 4* *Relationship Code*	Prints dependent details such as name, relationship and whether the dependent is a beneficiary
Print Pay Components	PPC	*Employer* *Level 1, 2, 3, 4* *Job Code* *Pay Component*	Prints a breakdown of pay component details including descriptions, values and effective dates
Print Employee Licences	PELC	*Employer* *Employee* *Licence Code* *From Expiry Date* *To Expiry Date* *Licence Type* *Status* *Authority*	Prints licences held, including licence number, date of issue and current status
Print Employee Licence Reports	PELR	*Employer* *Level 1, 2, 3, 4* *Licence Code* *Licence Type* *Licence Status* *Report Listing Order* *Print Descriptions*	Prints licences held and allows a sort order to be specified

Option	Quick Access Code	Selection Fields	Summary of Report
Selective Authority Reports	SAR	*Employer* *Level 1, 2, 3, 4* *Authority Code* *Licence Status* *Select Employees From Start/Leave Date* *To Start/Leave Date* *Report Listing Order* *Print Descriptions*	Allows selection of a report for a specific licensing authority. Prints a list of all employees with their licence and related data.
Employee Licence Renewal Report	ELRR	*Employer* *From Date* *To Date* *Licence Status* *Print Descriptions* *List Licence Renewal OR* *Work Permit Renewal*	Prints details of employees whose licences need to be renewed within the date range specified
Non Active Licenced Employees	NALE	*Employer* *From Date* *To Date* *Print Descriptions*	Prints details of all employees who have left the organisation and who held licences
Print Licence Analysis Reports	PLAR	*Employer* *Report Listing Order* *Print by Levels?*	Prints employee licence information by level
Print Licence Fee Amounts	PLFA	*Employer* *Licence Code* *Fee Type* *From Date* *To Date*	Prints information about licence fee transactions
Transactions By Employee - Alpha	TBEA	*Employer* *From Date* *To Date*	Prints employee transactions alphabetically by employee surname
Transactions Within Level	TWL	*Employer* *Level 1, 2, 3, 4* *From Date* *To Date*	Prints details of employees holding licences who have joined, left, re-joined or changed position within the organisation, sorted in level order

Option	Quick Access Code	Selection Fields	Summary of Report
Transactions By Transaction Type	TBTT	*Employer* *From Date* *To Date*	Prints details of employees holding licences who have joined, left, re-joined or changed position within the organisation, sorted in transaction type order

Using the *Employee Locate* Option

You use the *Employee Locate* option to identify the employer in which an employee works. When you select this option, the system presents a list of all active employees in all employers included in your Infinium HR database. For each employee, the system displays his or her employer code, last name, first name, employee number and level assignment.

You can search for employees that match specific criteria; the system displays only those employees who match the criteria you specify. Once you have done this, you can sort the search results according to a series of options to facilitate the search for the required employee.

Follow the steps below to use the *Employee Locate* option.

1 From the Infinium HR main menu select *Employees.*

2 Select *Employee Locate* [EL]. The system displays a screen of employees as shown in Figure 6-1.

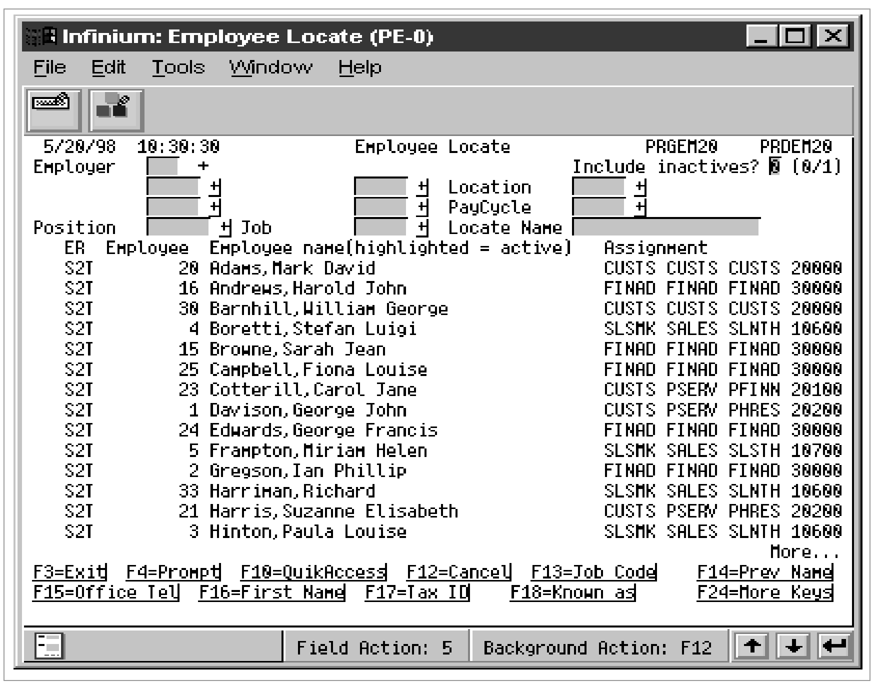


Figure 6-1: Employee Locate screen

The system initially displays only active employees. If you type `1` in the *Include Actives?* field, active employees are highlighted on the list and terminated employees are lowlighted. Purged employees are not shown.

Note: You can search for an active or terminated employee by his or her last name across all employers. However, to use the locate options at the bottom of the screen, you must specify a particular employer.

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

Employer

Leave this field blank to search for an employee by his or her last name across all employers. If you want to search for an employee using any of the other options at the bottom of the screen, you must type the code that identifies a particular employer.

If you select an employer by prompting on the *Employer* field, the levels for that employer default into the blank level description fields under the *Employer* field.

If you type the *Employer* name, the level descriptions do not default into the level description fields until you press Enter.

If you have a default employer associated with your user profile, the system automatically fills the *Employer* field with the default employer and displays the level descriptions defined for that employer.

Include inactives?

Type a value to indicate whether you want the system to display inactive employees. Valid values are:

0	No. Do not include inactive employees in the display.
1	Yes. Include inactive employees in the display.

Level 1, 2, 3, 4

When you enter a value in the *Employer* field, the system displays the level descriptions for the chosen employer. Type values to restrict the employee search to a particular level. The system compares the values you type in these fields with the values in each employee's basic data record and displays only those employees assigned to the specified levels.

Location

Type a value to restrict the employee search to a particular location. The system compares the value you type in this field with the value in each employee's basic data record and displays only those employees assigned to the specified location.

Pay Cycle

Type a value to restrict the employee search to a particular pay cycle. The system compares the value you type in this field with the value in each employee's payroll data record and displays only those employees assigned to the specified pay cycle.

Position

Type a value to restrict the employee search to a particular position. The system compares the value you type in this field with the value in each employee's basic data record and displays only those employees assigned to the specified position.

Job

Type a value to restrict the employee search to a particular job. The system compares the value you type in this field with the value in each employee's basic data record and displays only those employees assigned to the specified job.

Locate Name

To search for an employee using the criteria you specified in the above fields, type some or all of his or her last name.

4 Press Enter. The system displays all employees whose last names match the name you entered and who meet all the conditions you specified. The employees are sorted by last name and then by first name.

If you type a portion of an employee’s name in the *Locate Name* field and press F4, the system displays the first entry that matches your criteria. Press Page Up to view employee names that immediately precede your search criteria.

5 Use the following information to work with the additional sort, locate, and display features shown at the bottom of this screen.

If you entered an employer as part of your search, you can use the following function keys to perform the following actions:

- Sort and locate employees within a specified employer
- Modify the display of information

Function Key	Function Key Description	Field Used to Sort and Locate Employees or Display Modification
F13	Job Code	*Job Code* in basic data
F14	Previous Name	*Previous Name* in personnel data
F15	Office Phone	*Office Telephone No.* in basic data
F16	First Name	*First Name* in basic data
F17	Tax ID	*Tax ID* in basic data
F18	Known As	*Known as* in basic data
F19	Position Title	*Position Title* in basic data
F20	Phonetic Search	Uses the spelling you type to search for an employee with a similar sounding last name
F21	More Information	Displays for each employee a second line of information that includes the job code, status, location, and position
F23	User Preference	Displays an option window that allows the user to choose organisational level codes, lowest level description, location description, or position description for display in the Assignment column

6 Press the function key identified above to sort the list in the way that is the most helpful for you to locate a particular employee. The system displays employees assigned to the specified employer in the new sort order. Employees are sorted in Tax ID order in the screen shown in Figure 6-2.

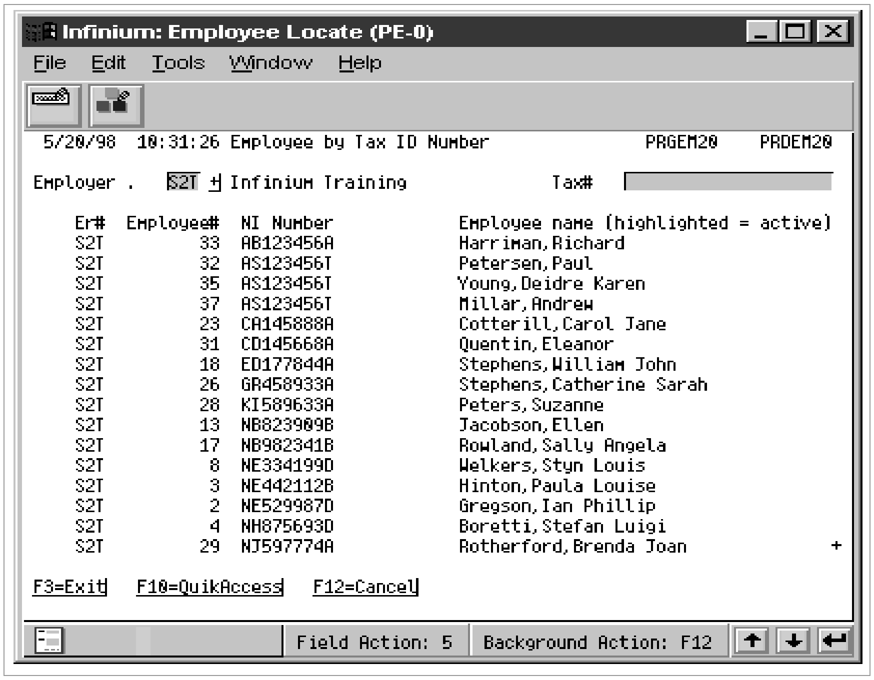


Figure 6-2: Employee by Tax ID Number screen

7 Use the following information to complete the fields on this screen.

Search field (Tax#)

You type different information in this field depending on the function key you selected. In the example shown above, you type the Tax ID of the employee you want to locate. If you pressed F13 to display employees by job code, you type a job code in this field. If you pressed F19 to display employees by position, you type a position code in this field, and so on.

Note: Press F12 to return from one of the special displays listed above to the initial employee listing.

8 After you identify the employer to which the employee is assigned, press Enter or F3 to exit from this option. You cannot use this option to display employee data.

Using the *Employee Enquiry* Option

You use the *Employee Enquiry* option to search for employees within a specified employer using up to 31 different search parameters in any combination.

After the system identifies the employees that meet your search criteria, you can display the following information for each selected employee:

- Basic data
- Personnel data
- Payroll data
- Education and qualification data
- Training data

WARNING! The *Employee Enquiry* option sorts employee records interactively. Consequently, searches done across a large employee database affect system performance by slowing down response time and processing speed for you and other users.

Follow the steps below to use the *Employee Enquiry* option.

1. From the Infinium HR main menu select *Employees.*

2. Select *Employee Enquiry* [EE]. The system displays the first Employee Enquiry screen shown in Figure 6-3.

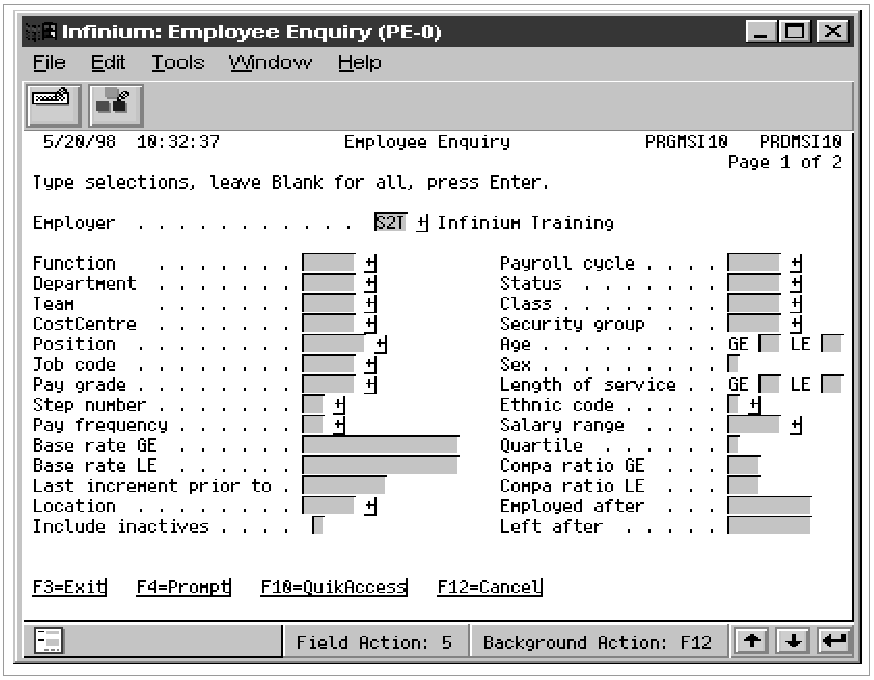


Figure 6-3: Employee Enquiry screen 1 of 2

Note: You cannot use certain fields on this screen if field level security has been established for your user profile on those fields.

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

Employer

Type the code that identifies the employer for which you want to display employees.

If you select an employer by prompting on the *Employer* field, the levels for that employer default into the blank level description fields under the *Employer* field.

If you type the *Employer* name, the level descriptions do not default into the level description fields until you press Enter.

If you have a default employer associated with your user profile, the system automatically fills the *Employer* field with the default employer and displays the level descriptions defined for that employer.

Level 1, 2, 3, 4

If you want to display employees assigned to one or more levels within the specified employer, type the codes that represent the desired levels. Each employee must be assigned to at least one level; the system compares the values in the *Level* fields in his or her basic data record to the values you specify here.

Payroll cycle

If you want to display employees assigned to a particular payroll cycle, type the code that identifies that cycle. The system compares the value in each employee's *Payroll Cycle* field in his or her payroll data record to the value you specify here and displays the matching employees on the following screen.

The system performs a special edit when you use both the *Payroll cycle* and *Pay frequency* fields on this screen. If you specify a value in the *Pay Frequency* field on the cycle control record in Infinium PY, the system compares it to the value you type in the *Pay frequency* field on this screen. If the values do not correspond, the system displays the following message when you press Enter on this screen:

Pay frequency is invalid.

Status

Type the status code value of the employees that you want to display. You define code values for this field through the *Update Employer Codes* option, using code type **STS**.

Class

Type the class code value of the employees you want to display. You define values for this field through the *Update Employer Codes* option, using code type **CLA**.

Security group

Type the security group code value of the employees you want to display. You define values for this field through the *Update Employer Codes* option, using code type **SEC**.

Note: If your user profile is restricted from seeing the records of employees assigned to a particular security group, when you specify that security group value on this screen the system displays a list containing the names of matching employees. It also displays the following comment under the *Position title* field on the screen shown in Figure 6-4:

*** NOT AUTHORISED**

You cannot display any information for employees assigned to a security group from which you are restricted.

Position

Type the position code of the employees that you want to display. Each employee is assigned to a position during the *Enter New Employee* process; you use the *Enter Personnel Actions* option to update the employee's position assignment.

Age GE

Type a value in this field to display employees who are the same age as or older than the age you specify.

Age LE

Type a value in this field to display employees who are the same age as or younger than the age you specify.

Job code

Type the job code of the employees that you want to display. The system compares this value to the value in the *Job Code* field in employee basic data.

Sex

Type a value to display employees of a particular gender. Valid values are:

M	Male
F	Female

Pay grade

Type the pay grade code of the employees you want to display. If an employee is assigned to a pay grade, he or she is also assigned to a particular step in that grade. You can use the *Step number* field below to further restrict your inquiry.

Length of service GE

Type a value in this field to display employees whose length of service in years is the same as or longer than the value you specify.

Length of service LE

Type a value in this field to display employees whose length of service in years is the same as or less than the value you specify.

Step number

Specify the step number of the employees that you want to display. If you leave the *Pay grade* field blank, the system displays all employees assigned to the specified step regardless of their assigned pay grade.

Ethnic code

Type the ethnic identification code of the employees that you want to display. You define values for this field through the *Update Employer Codes* option, using code type **`ETH`**.

Pay frequency

Type the pay frequency value of the employees that you want to display. You define code values for this field through the *Update Pay Frequencies* option.

Salary range

Type the code that identifies the salary range of the employees you want to display. You define code values for this field through the *Update Salary Ranges* option.

Base rate GE

Type a value in this field to display employees whose base rate is the same as or exceeds the rate you specify here. The system compares the value you type here to the value in the *Base Rate* field in each employee’s basic data record.

Quartile

Type the quartile value of the employees you want to display. The system compares the value you specify here to the value in the *Salary Quartile* field in each employee’s basic data record.

The *Salary Quartile* field is a protected field in the basic data record that the system maintains by comparing the employee’s base rate to the quartiles of his or her assigned salary range. The system automatically divides each salary range into four equal parts. 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.

The system also defines quartile 0 for employees whose base rate falls below the minimum of their salary range and quartile 5 for employees whose base rate exceeds the maximum of their salary range.

Base rate LE

Type a value in this field to display employees whose base rate is the same as or less than the rate you specify here. The system compares the value you type here to the value in the *Base Rate* field in each employee’s basic data record.

Compa ratio GE

Type a value in this field to display employees whose compa ratio is the same as or larger than the value you specify here. The system compares the value you type here to the value in the *Compa Ratio* field in each employee’s basic data record.

The *Compa Ratio* field is a protected numeric field in the basic data record that the system computes by dividing the employee's base rate into the midpoint of his or her assigned salary range. If the employee’s base rate is exactly equal to the midpoint of his or her assigned salary range, his or her compa ratio is 100.

Last increment prior to

Use this field to display employees whose most recent salary change effective date is the same as or precedes the date you specify here. The system compares the date you type here to the date in the *Last Increase* field in the employee basic data record. The system automatically updates the *Last Increase* field when you enter a salary change transaction through the *Enter Personnel Actions* option.

Compa ratio LE

Type a value in this field to display employees whose compa ratio is the same as or lower than the value you specify here. The system compares the value you type here to the value in the *Compa Ratio* field in each employee’s basic data record.

The *Compa Ratio* field is a protected numeric field in the basic data record that the system maintains by dividing the employee's base rate into the midpoint of his or her assigned salary range. If the employee’s base rate is exactly equal to the midpoint of his or her assigned salary range, his or her comp ratio is 100.

Location

Type the location code of the employees that you want to display. The system compares the value you type here to the value in the *Location* field in each employee’s basic data record.

You define values for this field through the *Update Employer Codes* option, using code type **LOC**.

Employed after

Use this field to display employees hired on or after the date you specify here. The system compares the date you type here to the value in the *Date of Employment* field in each employee's basic data record.

Include inactives

Type a value to indicate whether you want the system to display inactive employees. Valid values are:

0	No. Do not include inactive employees in the display.
1	Yes. Include inactive employees in the display.

Left after

Use this field to display employees terminated on or after the date you specify here. The system compares the date you type here to the value in the *Termination Date* field in employee basic data. The system fills this field for a particular employee when you enter an end employment transaction through the *Enter Personnel Actions* option and clears this field when you enter a re-employment transaction for the same employee.

4 Press Enter to display a list of matching employees as shown in Figure 6-4. The system displays the following message while it scans your Infinium HR database for employees that meet your specifications:

Building employee list, please wait...

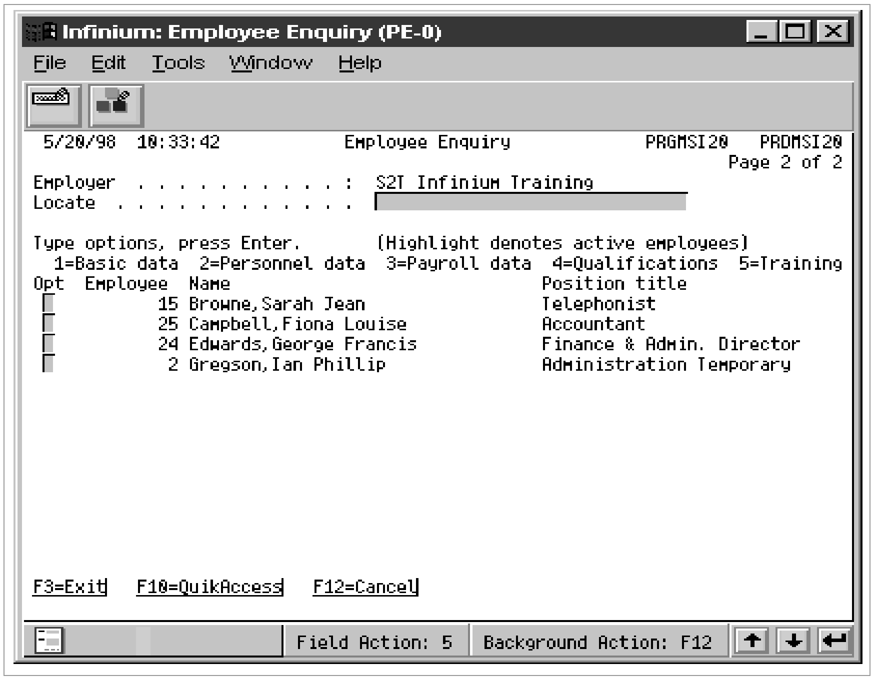


Figure 6-4: Employee Enquiry screen screen 2 of 2

5 Use the following information to view the data of employees displayed on this screen.

This screen displays an alphabetical list of employees who satisfy the search criteria you specified on the preceding screen. You can display additional information about each employee by typing one of the following values in the *Opt* field next to a particular employee.

Value	What the System Displays
1	Basic data
2	Personnel data
3	The Employee Data Display selection screen in Infinium PY. You can select options to view the employee’s basic data, payroll master data, income data, deduction data, BACS data, multiple distributions, job authorisations and user-defined data.
4	Education and qualification data, including formal education and tuition reimbursement information
5	Training data, including skills, internal and external training information

6 After you type a value in the *Opt* field, press Enter to display the specified information. Press Enter to page through the screens you selected.

7 After you view all of the selected employee information, press F3 to return to the list of matching employees shown in Figure 6-3. From here you can:

- Use the *Opt* field to display detailed information for another employee
- Press F12 to return to the intial prompt screen for the *Employee Enquiry* option
- Press F3 to return to the Infinium HR main menu

Summary

In summary, you have learned the following:

- How to display employee information
- How to generate reports about employees
- How to use the *Employee Locate* option
- How to use the *Employee Enquiry* option

Chapter 7 Entering Personnel Actions

7

You use the *Enter Personnel Actions* option to maintain a history of information about employees after you enter their new employee information into Infinium HR. This option allows you to record new employee information without losing the prior data.

The chapter consists of the following topics:

Overview

Several of the preceding chapters in this guide provide information on how to directly update employee information. You can directly update information in many of the employee's records including education data, dependents data, user-defined data and so on.

However, you cannot directly update many of the fields in the employee's basic data record; instead, you use the *Enter Personnel Actions* option. Infinium HR uses the term "personnel action" to represent key employment events such as promotions, salary changes, performance reviews and so on. It is essential to retain a history of these events, so you must enter each event separately with an effective date.

Personnel actions serve two purposes:

- They act as transactions that the system uses to update the appropriate employee information.
- After the update has taken place, they form a historical record of the update.

Note: If you are defined as a supervisor user within Infinium Application Manager, you can press F18 to directly update fields such as employee name and address from within the *Update Employee Data* options. If you do this, the system does not retain a history of your actions other than the standard audit history.

The timing of updates to employee basic data from personnel actions depends on:

- Whether your user profile is authorised to perform interactive updates. You specify this through the *Online PE Actions Update?* field in the user control.

  You may want to use this option to prevent trainees from performing certain updates, or to centralise the update process if transactions can be entered by several line managers.

- Whether the effective date you enter for the personnel action is the same as, prior to the date on which you enter the personnel action.

Updates can take place can take place in one of two ways:

- Interactively. The system processes updates interactively when both of the following conditions are met:

    - You enter a transaction with an effective date that is the same as or prior to the current date, and
    - You are authorised to perform an on-line personnel action update
- Using the *Mass Update Personnel Actions* option. You run this option if either or both of the following conditions are met:
    - You enter transactions with effective dates that are in the future, or
    - You are not authorised to perform an on-line personnel action update

You use the *Display Employee History* option to review an employee's personnel action transactions online. You can use several reports to print personnel actions history for one employee or for many employees.

Objectives

When you complete this chapter, you should be familiar with:

- How to enter and update personnel actions
- How the system uses personnel action transactions to update fields in basic and personnel data
- How to use the *Mass Update Personnel Actions* options
- The effect of personnel actions on Infinium PY

Understanding the Enter Personnel Actions Option

You use the *Enter Personnel Actions* option to record key employment events for employees. You use a unique pre-defined transaction type to enter information for each employment event listed below. Infinium HR uses the transactions you enter to build an online history for each employee and uses the information you enter in each transaction to update the appropriate fields in the employee's basic data, personnel data and payroll data records.

Transactions Available in Personnel Actions

You can use the *Enter Personnel Actions* option to enter the transactions shown below. When you do so, the system assigns the appropriate code value to the transaction.

Transaction	Code	Description
Performance Review	**RE**	Use to record an employee's performance review date and type, rating, and date and type of next scheduled review.
Position Change	**PS**	Use to record an employee's movement from one position to another within the same employer.
Salary Change	**SC**	Use to record a change in an employee's personnel base rate and payroll rate(s).
Intercompany Transfer	**TR**	Use to record an employee's movement from one employer to another.
Status Change	**ST**	Use to change an employee's assigned status code, to place an employee on a leave of absence or layoff, or to return an employee from a leave of absence or layoff.
Re-Employment	**RM**	Use to reactivate a terminated employee's record in Infinium HR.
New Employee	**NE**	Use to review or update an employee's new employee transaction, which is created by the *Enter New Employee* option. You do not use this option to hire employees.
Work Action	**WA**	Use to record miscellaneous events such as service awards, disciplinary actions, grievances and so on.
End Employment	**EE**	Use to record an employee's termination date and reason, along with re-employment eligibility.
Personal Change	**PC**	Use to record changes in an employee's name, address or marital status.

Fields Affected by Personnel Actions

When you enter transactions through the *Enter Personnel Actions* option, you generally update information in the employee's basic data record, which is shared by Infinium HR and Infinium PY users. Depending on the transaction, you can also update information in the employee's personnel data record in Infinium HR or payroll data record in Infinium PY.

The following table shows the fields in the basic data that are updated by each personnel action.

Transaction Type	Affected Fields	Location of Fields
Performance Review	*Next Review Type* *Next Review Date* *Last Rating Code* *Last Rating Score Potential* *Mobility Code*	Performance Review Data
Position Change Intercompany Transfer	*Position* *Pay Grade* *Position Title* *Alternative Title* *Date Entered Position* *Level 1, 2, 3, 4* *Job Code* *Job Seniority Date* *Location Code* *Reports to Position* *Manager's Name*	Job and Position Data **Note:** *Position Title*, *Alternative Title* and *Location Code* are also in Personal Details in basic data

Transaction Type	Affected Fields	Location of Fields
Salary Change	*Standard Hours* *Scheduled Pay Pds* *Pay Grade & Cur* *Grade Begin Date* *Step Number* *Next Step Number* *Step Begin Date* *Next Step Date* *Base Rate* *Currency* *Base Rate Freq* *Pay Type* *Pay Frequency* *Last Incr. Amt.* *Last Increase %* *Last Incr. Date* *Increase Reason* *Prev Base Rate* *Allow Increase* *Totl Hrs all Pos* *Salary Range* *Salary Quartile* *Date Last Worked* *Compa Ratio* *Payroll Rate 1* *Payroll Rates 2 to 5* (if set up for daily, weekly and hourly calculation)	Pay Related Data
Status Change	*Status Code* *Last Status Change Date*	Job and Position Data
	Leave of Absence Begin Date *Leave of Absence Reason* *Expected Date of Return* *Expected Length of Break* *Employee Laid Off?*	Employment Information
	Previous Status	Miscellaneous Data
	Standard Hours *Scheduled Pay Pds* *Allow Step Increase*	Pay Related Data
Re-Employment	*Re-employment Date*	Employment Information

Transaction Type	Affected Fields	Location of Fields
New Employee	*Position* *Job Code* *Level 1, 2, 3, 4* *Pay Grade* *Location* *Status Code*	Job and Position Data
	Step Number *Starting Base Rate* *Currency* *Base Rate Frequency* *Quartile* *Standard Hours* *Compa Ratio* *Pay Frequency* *Salary Range* *Scheduled Pay Periods*	Pay Related Data
	Date of Employment *Adjusted Date of Employment*	Employment Information
	Shift	Miscellaneous Data
Work Action	Historical only - no fields updated in basic or other data records.	Not applicable
End Employment	*Leaving Data* *Leaving Reason Code* *Keep records permanently?* *Re-employment Eligibility* *Re-employment Date*	Employment Information
Personal Change	*Last name* *First Name* *Middle Name* *Initials* *Name Title* *Known As*	Personal Details
	Address Line 1, 2, 3 *Town or City* User-Defined *Address* field *Postal Code* *Country* *Home Telephone Number*	Address and Telephone Data

Using Dates in Personnel Action Transactions

For each personnel action you enter into Infinium HR, you are required to complete an *Effective Date* field or a *Date of Change* field. The date you type in this field determines when the system performs the update and how the information is stored.

If the date you enter is prior to or equal to the current date and you are authorised to perform personnel action updates, the system updates the employee's record immediately. If the date you enter is in the future, the system displays the following message on the screen:

Future transaction - employee basic data will not be updated

The system saves the record and highlights it in personnel action displays.

If you are not authorised to perform personnel action updates, the system saves the record and highlights it. However, the system does not process the transaction and update the relevant records until you run the *Mass Update Personnel Actions* option for the appropriate date. You should therefore ensure that you regularly perform this mass update to maintain current information in your employee records. Infinium PY users should ensure that they run this option prior to starting payroll cycle processing.

When you create a personnel action, the system checks for unprocessed future transactions that may contain information that differs from the employee's current basic data record. If such transactions exist, the system prompts you to enter the date from which the new transaction is to take effect. It then determines the information that will be current on the effective date so that the correct default information is used for the new transaction.

Using Personnel Actions with Infinium PY

The following personnel action transactions affect Infinium PY data:

- Salary Change
- Status Change
- Intercompany Transfer
- Re-Employment

When you enter a Salary Change transaction for an employee, you can update his or her payroll rates in the payroll data record in Infinium PY. The payroll rates are used by Infinium PY during cycle processing to generate an employee's pay.

Transactions that you use to update an employee’s position assignment also affect payroll cycle processing. For example, when you enter a Status Change, Intercompany Transfer, or Re-Employment transaction, you can update the employee's level assignments. Infinium PY typically uses the employee's levels during cycle processing to generate General Ledger numbers for charging labour expense; later, the same levels are used to generate employee deductions and employer liabilities.

When you assign an employee to a new position, if the payroll authorisation group for the new position is different from the group for the old position, the system automatically updates the employee’s income and deduction authorisations by deactivating those in the old group and creating the appropriate new records.

Coordinating with Payroll Processing

You should coordinate with the Infinium PY users at your site to ensure that you enter and process personnel actions in advance of the payroll cycle in which the changes should appear or be used. During the Begin stage of pay cycle processing, Infinium PY uses the employee's basic data record to create a work record for each employee who is to be paid.

The work record includes the employee's name, address, and home levels. Therefore, you must enter any name, address or level changes that are to be included in a payroll cycle before the payroll processor executes the *Begin Cycle* option.

Accessing Personnel Actions

You use the Enter *Personnel Actions* option to access the following transactions:

- Performance Review
- Position Change
- Salary Change
- Intercompany Transfer
- Status Change
- Re-Employment
- New Employee
- Work Action
- End Employment
- Personal Change

The system security administrator at your site makes decisions regarding each user's access to the personnel action transactions. The administrator can restrict the number of screens or fields that you can view or update; therefore, you may not have access to all of the screens or fields shown. Refer to the *Infinium HR (I) Guide to Controls* for more information on security restrictions.

Each of the Personnel Action transactions is discussed in a separate section of this chapter. You access individual transaction screens from the Enter Personnel Actions selection screen. The following information explains how to access the Enter Personnel Actions screen; it is not repeated in the discussion of each individual transaction.

Follow the steps below to access the Enter Personnel Actions screen.

1. From the Infinium HR main menu select *Employees*.
2. Select *Employee History*.
3. Select *Enter Personnel Actions* [EPA]. The system displays the screen shown in Figure 7-1.

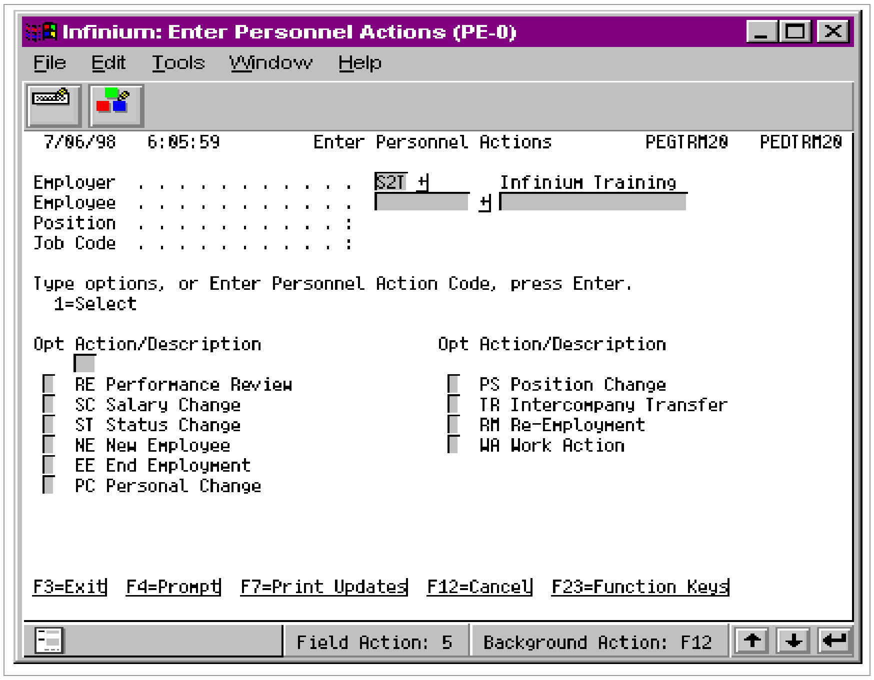


Figure 7-1: Enter Personnel Actions screen

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

Employer

Type the value that represents the employer into which you entered the employee.

Employee (Number, Name)

In the first field, type the number assigned to the employee for whom you want to enter a personnel action.

Opt

Type any character next to the personnel action you want to select.

5 Press Enter. The system displays the personnel action screen you selected for the employee you chose. Refer to the appropriate section in this chapter for more information on completing the personnel action screens.

6 When you have finished working with personnel actions, press F3 to return to the Infinium HR main menu.

Using the Options on the Transaction Screens

When you select a personnel action screen, four standard options are available:

- Creating a new personnel action
- Updating an existing personnel action
- Displaying an existing personnel action
- Deleting an existing personnel action

In the sections that follow in this chapter, we provide detailed instructions for creating a new personnel action. Instructions for updating, displaying and deleting existing personnel actions are given below; they apply to all categories.

Updating an Existing Personnel Action

Follow the steps below to update an existing personnel action.

1 Follow the steps in the section entitled "Accessing Personnel Actions" to select a personnel actions screen.

2 Type **2** in the *Opt* field next to the transaction you want to update and press Enter. The system displays the details of the transaction.

3 To update the transaction, use the information in the appropriate section in this chapter for creating a new personnel action. For example, to update a salary change transaction, refer to the section entitled "Entering a Salary Change Transaction."

Note: You cannot update the effective dates of personnel actions. If you want to change the date, you must delete the existing transaction and create a new one.

4 When you have finished updating the transaction, press F3. Then type **1** in the Exit Options window and press Enter. The system saves any changes you have made and returns you to the personnel action screen. The system updates this screen to reflect the changes you have made.

Note: If the effective date of the transaction you updated is not the most recent for the transaction type for that employee, the system updates the individual transaction record but does not update the employee's current information.

5 Press F3 to return to the Enter Personnel Actions selection screen.

Displaying a Personnel Action

Follow the steps below to display an existing personnel action.

1 Follow the steps in the section entitled "Accessing Personnel Actions" to select a personnel actions screen.

2 Type **5** in the *Opt* field next to the transaction you want to display and press Enter.

The system displays the personnel action you selected. You cannot make any changes to the information from this screen.

3 Press F3 to return to the Enter Personnel Actions selection screen.

Deleting a Personnel Action

Follow the steps below to delete an existing personnel action.

1 Follow the steps in the section entitled "Accessing Personnel Actions" to select a personnel actions screen.

2 Type **4** in the *Opt* field next to the transaction you want to delete and press Enter.

3 The system asks you to confirm that you want to delete the selected transaction. Follow the instructions on screen to provide confirmation.

4 The system deletes the transaction and returns you to the personnel action screen. The system updates this screen to reflect any changes you have made. The system also restores the employee's previous details to his or her basic data record.

Note: If you delete an end employment transaction, the system restores the employee as a current employee. Likewise, if you delete a re-employment transaction, the system returns the employee's status to inactive.

You cannot delete the last New Employment, Personal Change or Salary Change transaction, and only a supervisor can delete the last Re-Employment and Status Change transactions. This ensures that the system always maintains data from which to restore values if necessary.

If you enter a transaction with an incorrect effective date, you must enter a new transaction with the correct date before deleting the incorrect transaction.

5 Press F3 to return to the Enter Personnel Actions selection screen.

Entering a Performance Review Transaction

You use the performance review transaction to record information about an employee's performance appraisal including the date and type of the appraisal, the employee's performance rating, the type of appraisal he or she will receive next, and the date the next performance review is scheduled.

Follow the steps below to create a performance review transaction for an employee.

1 From the Enter Personnel Actions screen, type any character in the *Opt* field next to RE Performance Review.

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

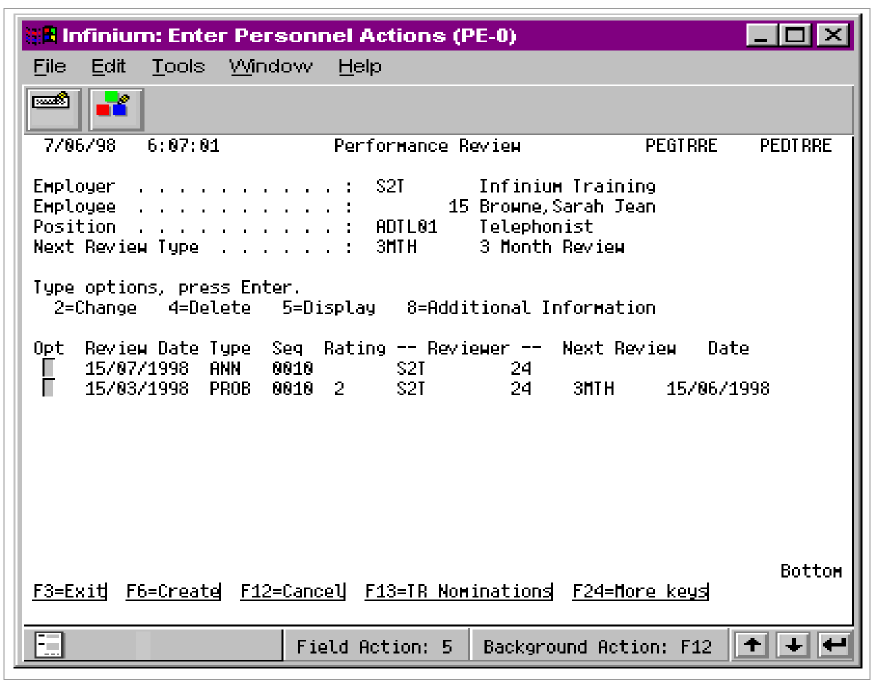


Figure 7-2: Performance Review selection screen

The system displays details of any peformance review transactions that have already been entered for this employee.

From here you can:

- Create a new performance review transaction by pressing F6

- Update an existing performance review transaction by typing **2** in an *Opt* field
- Delete an existing performance review transaction by typing **4** in an *Opt* field
- Display an existing performance review transaction by typing **5** in an *Opt* field
- Display additional information about an existing performance review transaction by typing **8** in an *Opt* field
- Work with training requests in Infinium TR by pressing F13

3 Press F6. The system displays the screen shown in Figure 7-3.

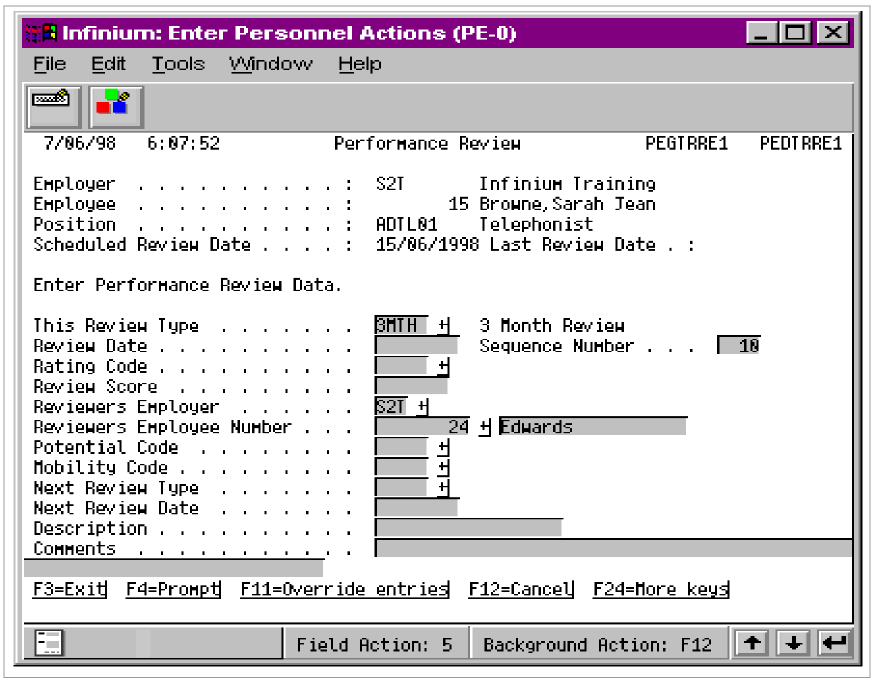


Figure 7-3: Performance Review screen

Note: If you do not require any information other than the next review date, you can press F11 to override all other fields and complete the transaction.

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

This Review Type

Type the code value that represents the type of this review. If the employee has had a previous review, the system completes this field with the value in the *Next Review Type* field on the employee's basic data record. You can override this if required.

You define code values for this field through the *Update Employer Codes* option, using code type **RTP**.

Review Date

Type the date of the employee's performance review.

Sequence Number

If the employee has more than one review taking place on the same day, type a number to indicate the order in which the reviews occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one review on this date, there is no need to change the default value of **10**.

Rating Code

Type the code value that indicates the employee's performance evaluation or appraisal rating. You define code values for this field through the *Update Employer Codes* option, using code type **RAT**.

Review Score

Type the numeric performance appraisal rating or score attained by the employee.

Reviewers Employer

Type the code value that represents the employer of the person who performed the employee's review. The reviewer can be assigned to the same or a different employer than the employee he or she reviewed.

Reviewers Employee Number

In the first field, type the employee number of the person who performed the employee's review. Generally, this is his or her supervisor.

Potential Code

Type the code value that represents the employee's potential. You define code values for this field through the *Update Employer Codes* option, using code type **PRM**.

Mobility Code

Type the code value that represents the employee's willingness and ability to travel on company business or to relocate. You define code values for this field through the *Update Employer Codes* option, using code type **MOB**.

Next Review Type

Type the code value that represents the type of the employee's next scheduled review. The system uses the value you type in this field to complete the *Next Review Type* field on the employee's basic data record.

You define code values for this field through the *Update Employer Codes* option, using code type **RTP**.

Next Review Date

Type the scheduled date for the employee's next review. The system uses the value you type in this field to complete the *Next Review Date* field on the employee's basic data record.

Description

Type a description for the next review if required. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the review details you have entered and returns you to the Performance Review selection screen. The system updates this screen to include the review transaction you have created.

6 Press F3 to return to the Enter Personnel Actions screen shown in Figure 7-1.

Entering a Position Change Transaction

You use the position change transaction to move the employee from one position to another within the same employer, and to record promotions and demotions. The system updates the employee's basic data record with new position, job, and level information, along with other related information that defaults from the new job control or position control records.

The system keeps the employee's previous position assignment in his or her online history for use in employee history displays and reports. If you type **1** in the *Create Starting PS History* field in the employer controls, the system also creates a starting position change transaction when you enter a new employee.

If the position change involves a change of pay grade, the system automatically displays the Salary Change screen when you save the changes. Refer to the section in this chapter entitled "Entering a Salary Change Transaction" for more information.

Follow the steps below to create a position change transaction for an employee.

1 From the Enter Personnel Actions screen, type any character in the *Opt* field next to PS Position Change.

2 Press Enter. The system displays the screen shown in Figure 7-4.

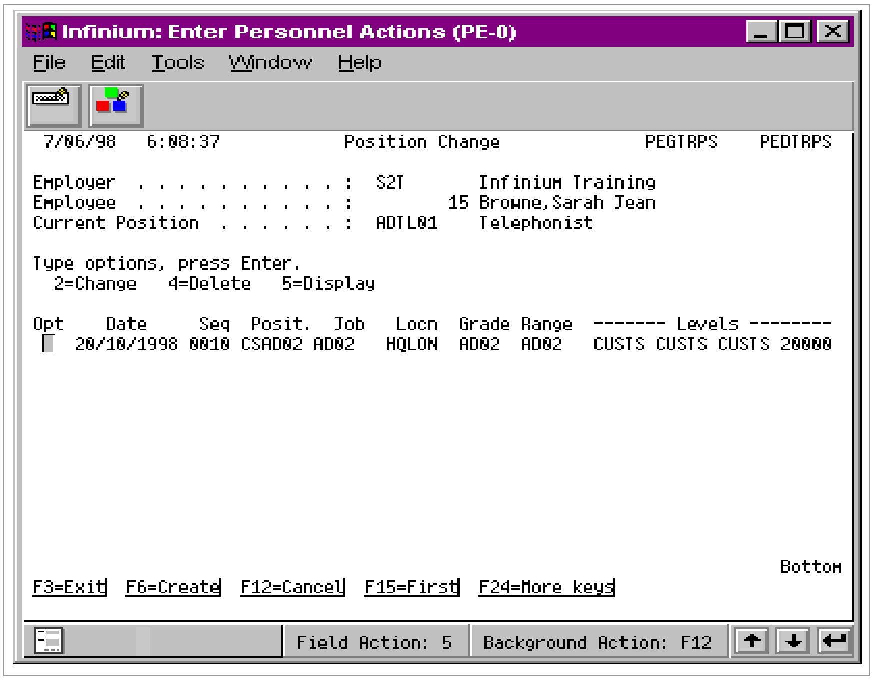


Figure 7-4: Position Change selection screen

The system displays details of any position change transactions that have already been entered for this employee.

From here you can:

- Create a new position change transaction by pressing F6
- Update an existing position change transaction by typing **2** in an *Opt* field
- Delete an existing position change transaction by typing **4** in an *Opt* field
- Display an existing position change transaction by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-5.

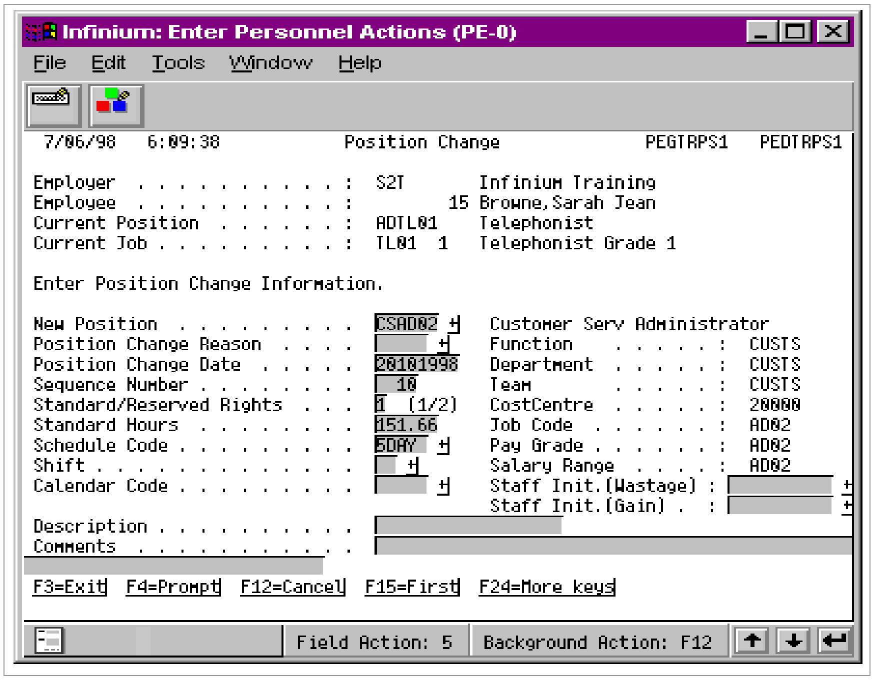


Figure 7-5: Position Change screen

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

New Position

Type the code value that represents the employee's new position. If you use the F4 prompt key to select a position code, the system enters defaults in the *Standard Hours* and *Schedule Code* fields based on the job code for the position you selected.

The system completes the *Level*, *Job Code*, *Pay Grade* and *Salary Range* fields with the values associated with the position you select.

Position Change Reason

Type the code value that represents the reason for the employee's position change. You define code values for this field through the *Update Employer Codes* option, using code type **PRR**.

Position Change Date

Type the date on which the employee's position change came or is to come into effect. If you type a future date, the system does not update the employee's basic data record; use the *Mass Update Personnel Actions* option to update the record.

Sequence Number

If the employee has more than one position change taking place on the same day, type a number to indicate the order in which the changes occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one position change on this date, there is no need to change the default value of **10**.

Standard/Reserved Rights

Type a value to indicate whether the employee receives standard or reserved rights regarding job code and authorisation group.

Valid values are:

1	The employee receives the standard rights for the normal job code and authorisation group for this position. This is the default value.
2	The employee receives reserved rights.This allows the employee to retain the reserved rights job code and corresponding pay grade and authorisation group of the new position.

Note: You can also use this option to indicate that the employee's position has not changed but his or her rights are now different. To do this, enter the new rights status in this field and enter the employee's current position code in the *New Position* field.

Standard Hours

Use one of the following methods to complete this field:

- If you used the F4 prompt key to select a position code, the system enters a default value in this field based on the job code for the position you selected
- Press F18 to complete the field with the employee's current standard hours
- Type in a different value

Schedule Code

Use one of the following methods to complete this field:

- If you used the F4 prompt key to select a position code, the system enters a default value in this field based on the job code for the position you selected
- Press F18 to complete the field with the employee's current schedule code
- Type a different code value

Shift

If the employee's new position is associated with a particular shift, either type the appropriate shift code in this field, or press F18 to allow the system to enter the employee’s current shift code. You define code values for this field through the *Update Employer Codes* option, using code type **SHF**.

If you specified a shift code on the position control record to which this employee is assigned, the system uses that value as the default for this field.

Calendar Code

Type the code value that represents the employer calendar that applies to the employee. You define code values for this field through the *Update Employer Codes* option, using code type **CAL**.

Alternatively, you can press F18, in which case the system completes this field with the employee's current calendar code.

Staff Init.(Wastage)

Type the code value that represents the staffing initiative under which the employee vacated his or her old position. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

Staff Init.(Gain)

Type the code value that represents the staffing initiative under which the employee started in his or her new position. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

Description

Type any additional information about this position change. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system performs the following checks:

- That the position is valid
- That the authorised workforce level for the position is not exceeded on the date entered
- Whether there is an employee already assigned to the position

If any of these conditions are not met, the system displays an error message and you must correct the fault before continuing.

The system then saves the transaction you have created and displays the following screens:

- Update Employee Income Codes screen
- Update Employee Deduction Codes screen
- Salary Change personnel action screen
- Update Employee Pay Components screen (if you have defined pay components for this employer)

6 Press F3 to return to the Enter Personnel Actions selection screen.

Entering a Salary Change Transaction

You use the Salary Change transaction to increase or decrease an employee's base rate of pay. The base pay rate is stored in the *Base Rate* field in the basic data record.

You can also use this option to update the employee's payroll rates in Infinium PY. To do this, you must type **1** in the *PE User to update Pay Rates?* field in the *Update Employer Controls* option in Infinium PY.

If the employee's salary change is the result of a change of position, such as a promotion, you should enter the Position Change transaction first to ensure that the salary record is created for the correct pay grade. The system automatically displays the Salary Change screen if you have entered a position change that requires a different pay grade.

Refer to the previous section for more information about using the *Enter Personnel Actions* option to enter a Position Change transaction.

If you are using pay components, you use this option to make changes to an employee's pay component details.

Note: To enter salary changes for a group of employees, use the *Mass Update Step-in-Grade* and *Mass Salary Change* or *Mass Enter Salary Changes* options. Use *Mass Salary Change* to enter salary changes for all employees who share the same salary change reason, such as an annual increase or a cost-of-living pay raise. Use *Mass Enter Salary Changes* to enter changes for selected employees with salary changes that may have different new base rates, effective dates, or salary change reasons.

Follow the steps below to create a salary change transaction for an employee.

1 From the Enter Personnel Actions screen, type any character in the *Opt* field next to SC Salary Change.

2 Press Enter. The system displays the screen shown in Figure 7-6.

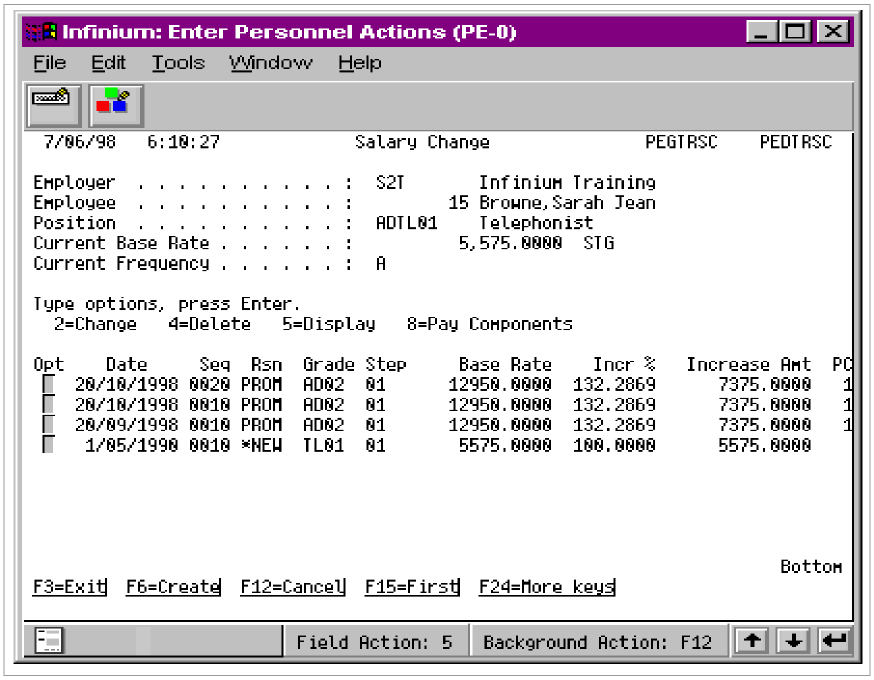


Figure 7-6: Salary Change selection screen

The system displays details of the employee's starting salary, indicated by ***NEW** in the *Rsn* field. It also displays any salary changes that the employee has already received.

From here you can:

- Create a new salary change transaction by pressing F6
- Update an existing salary change transaction by typing **2** in an *Opt* field
- Delete an existing salary change transaction by typing **4** in an *Opt* field
- Display an existing salary change transaction by typing **5** in an *Opt* field
- Display the pay components for a salary by typing **8** in an *Opt* field
- View the employee's scheduled hours by pressing F19

3 Press F6. The system displays the screen shown in Figure 7-7.

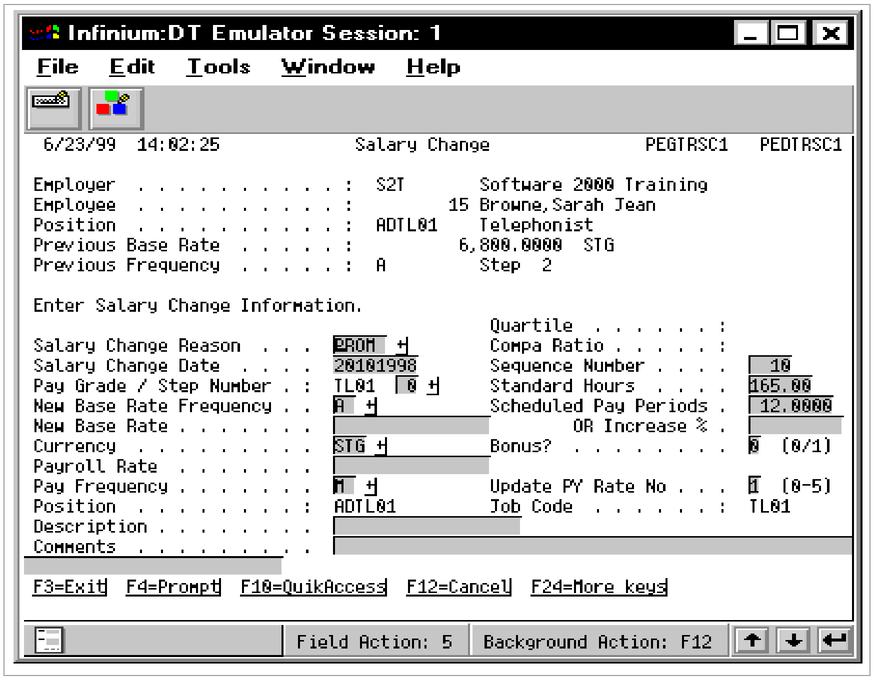


Figure 7-7: Salary Change screen

The system completes many of the fields on this screen with the employee's current salary information.

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

Salary Change Reason

Type the code value that represents the reason for the employee's salary change. You define code values for this field through the *Update Employer Codes* option, using code type **SAL**.

Salary Change Date

Type the date on which the employee's salary change came or is to come into effect. If you type a future date, the system does not update the employee's basic data record; use the *Mass Update Personnel Actions* option to update the record.

Sequence Number

If the employee has more than one salary change taking place on the same day, type a number to indicate the order in which the changes occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one salary change on this date, there is no need to change the default value of **10**.

Pay Grade/Step Number

Type the step within the employee's current pay grade to which he or she is assigned. The system uses the value you enter here to calculate the employee's new base rate.

You use the *Update Pay Grades and Steps* option to define steps.

If you do not use step-in-grade processing, type **99** in this field.

Standard Hours

The system completes this field with the employee's current standard hours. You can change this value if necessary.

New Base Rate Frequency

The system displays the frequency with which the employee is currently scheduled to be paid. This is the value in the *Pay Frequency* field on the employee's basic data record.

If the employee's pay grade has changed due to a position change, and the new pay grade has a different pay frequency, the system completes this field with the new frequency. You can change this value if necessary.

Scheduled Pay Periods

The system completes this field with the value in the *Scheduled Pay Periods* field on the employee's basic data record. You can change this value if necessary.

New Base Rate

Type the employee's new personnel base rate. The system uses the value in this field to update the *Base Rate* field on the employee's basic data record. You must enter a value in either this field or the *Increase %* field. If you use the latter, the system automatically calculates the employee's new base rate and completes this field with the calculated rate.

You must ensure that the new base rate you enter is consistent with the value displayed in the *New Base Rate Frequency* field. For example, if the value in the *New Base Rate Frequency* field is **M**, you must type the new base rate as a monthly amount.

The system automatically calculates values for the *Quartile* and *Compa Ratio* fields based on the value you type here.

Increase %

Type the percentage increase or decrease in the employee's salary. This is a 7-character numeric field with four decimal places. The maximum percentage you can specify is 999.9999. If you are entering a decrease percentage, type the number followed by the minus sign.

You must enter a value in either this field or the *New Base Rate* field. If you use the latter, the system automatically calculates the percentage change and completes this field with the calculated rate.

The system automatically calculates values for the *Quartile* and *Compa Ratio* fields based on the value you type here.

Currency

The system completes this field with the employee’s current base rate currency code. To change this, type the code value that represents the currency in which the new base rate is calculated. You define code values for this field through the *Update Employer Codes* option, using code type **CUR**.

Bonus?

Type a value to indicate whether the salary change is a bonus amount. If you indicate that the salary change is a bonus, the system does not update the employee's basic data or payroll data records. Instead, the system uses the Salary Change transaction for information only when you display or print the employee's salary history.

Valid values are:

0	No. The salary change is not a bonus amount.
1	Yes. The salary change is a bonus amount.

Payroll Rate

The system completes this field automatically when it saves the transaction.

Pay Frequency

The system completes this field with the appropriate pay frequency for the pay grade.

Update PY Rate No

Type a number to indicate which payroll rate you want to update with the salary change information. The system enters a default value of **1** in this field. To override it, type another number.

Valid values are:

0	Do not update payroll rates; only update the *Base Rate* field on the employee's basic data record.
1	Update the appropriate *Base Rate* field on the employee's basic data record.

Note: The system also updates the employee's payroll rates in Infinium PY if you have typed **1** in the *PE User to update Pay Rates?* field in the *Update Employer Controls* option in Infinium PY.

Description

Type any additional information about this salary change. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

5 Press Enter. The system automatically calculates values for the *Quartile* and *Compa Ratio* fields based on the value you entered.

6 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the Salary Change transaction you have entered. If you are using pay components, the system automatically displays the Update Employee Pay Components screen.

7 Update the information on this screen as required and press F3. Then type **1** in the Exit Options window and press Enter. The system returns you to the Salary Change selection screen. The system updates this screen to include the transaction you have created.

8 Press F3 to return to the Enter Personnel Actions screen.

Uploading Salary Changes from the System i

This section describes how to upload salary changes for groups of employees into Infinium HR from an import file on the System i. This file on the System i has a simplified format and is specifically designed to receive data transferred from a salary planning spreadsheet on a PC.

This function validates the uploaded data and creates detailed unprocessed salary change transactions. You use the *Mass Update Personnel Actions* option to process the changes; the system applies the salary updates to the basic data records of the employees concerned.

Note: You need to use a macro or similar custom program to convert the PC spreadsheet data into a format that can be transferred to the AS/400.

This section describes the following information:

- Using the *Load Salary Change Transactions* Option
- Viewing System Generated Reports

To format the file for storing salary change information, refer to the *Infinium Human Resources/Payroll International Technical Guide*.

Using the *Load Salary Change Transactions* Option

You use the *Load Salary Change Transactions* option to upload salary changes from the file PEPSU on the AS/400 onto Infinium HR. You can run the *Trial Load Salary Changes* option to simulate the changes that the system will make when you upload the changes.

Note: You should use this option only for employees whose step number is 99, which indicates that step-in-grade processing is not used.

Follow the steps below to upload salary changes onto Infinium HR.

1. From the Infinium HR main menu select *Salary Planning*.
2. Select *Mass Wage Changes*.
3. Select *Load Salary Change Transactions* [ULSC]. The system displays the screen shown in Figure 7-8.

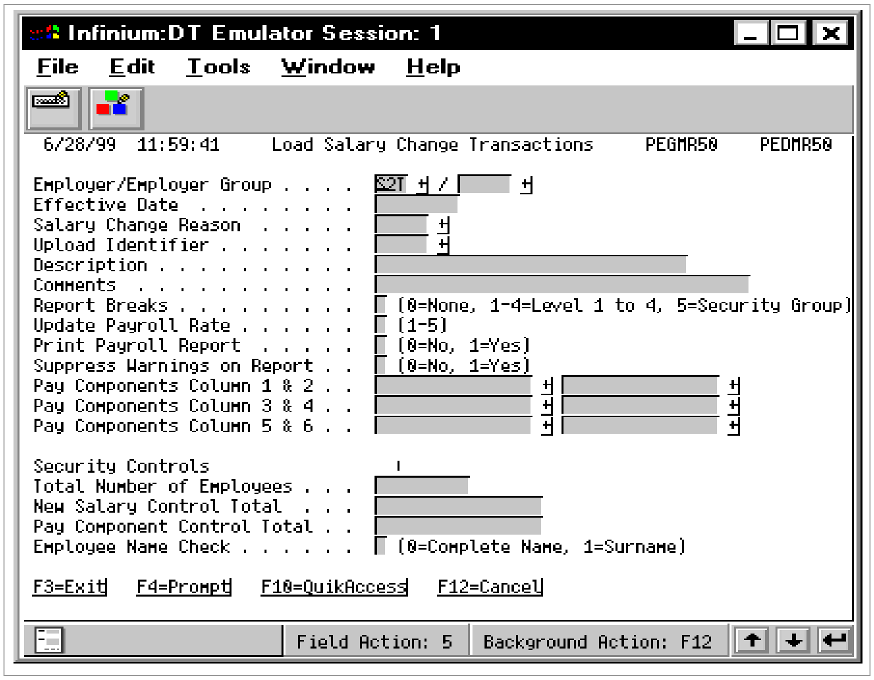


Figure 7-8: Load Salary Change Transactions screen

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

Employer/Employer Group

Type the code value that identifies the employer or employer group into which you are uploading the salary changes.

Effective Date

Type the date on which the changes are to become effective. The system uses this date if the *Salary Change Effective Date* field on the upload file is blank.

Salary Change Reason

Type the code value that represents the reason for the salary change. The system uses this reason if the *Salary Change Reason* field on the upload file is blank.

Upload Identifier

Type the code value that represents the upload identifier. You use this identifier to keep track of the changes and avoid duplication. You define code values for this field through the *Update Employer Codes* option using code type **SUI**.

Description

Type a description of the salary change. This is a 30-character free-form field.

Comments

Type any comments required. This is a 36-character free-form field.

Report Breaks

Type a value to indicate the way you want to group employees on the report. Valid values are:

0	Do not group employees
1	Group employees by the corresponding level
2	Group employees by security group

Within your grouping selection, employees are sorted by employee number.

Update Payroll Rate

Type a value to indicate which payroll rate you want to update.

Print Payroll Report

Indicate whether you want to print the payroll report. Valid values are:

0	No. Do not print the payroll report.
1	Yes. Print the payroll report.

Suppress Warnings on Report

Indicate whether you want to suppress warnings on the payroll report. Valid values are:

0	No. Do not suppress warnings on the payroll report.
1	Yes. Suppress warnings on the payroll report.

Pay Components Column 1, 2, 3, 4, 5, 6

Type the code value that represents the pay components to be created.

Entering Security Controls

You can also use the security controls listed below to ensure that the changes are applied to the correct employees.

Total Number of Employees

Type the total number of employees that you expect to upload.

New Salary Control Total

Use this field to prevent any changes from being made to the import document before it is uploaded onto Infinium HR.

To use this field, the spreadsheet from which you are uploading must be able to perform the following calculation:

Employee Number / 100,000 * New Salary Amount

The total gained from this calculation is the new salary control total.

Pay Component Control Total

Type the total number of bonus pay components to process. If you type a value in this field, the system checks it against the bonus total in the upload file. If the numbers do not match, the system does not process the records. Instead, the system produces an error report.

Employee Name Check

To ensure that the salary changes are processed for the correct employees, the system compares the employee name on the upload file with the name on the employee's basic data record. If the names do not match, Infinium HR does not process the change.

Use this field to indicate how the system checks the employee's name. Valid values are:

0	Check the employee's complete name
1	Check the employee's surname only

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system creates future dates for any changes you import, prints a report of all the changes made, and returns you to the Infinium HR main menu.

Viewing System Generated Reports

Access the Work with All Spooled Files screen or the Work with Printer Output screen to view the report. The report shows the following information:

- Employee number and name
- Current and proposed ratio
- Current and proposed personnel rate
- Amount and percentage increase for the personnel rate
- Current and proposed payroll rates
- Amount and percentage increases for the payroll rates

Note: The information shown in the report varies according to the upload criteria you specify.

The system also prints an exceptions report when any of the following errors occur during the upload:

- A base rate increase is not allowed for an employee
- An employee is not on step 99
- An employee's base rate is outside the allowed range
- A processed transaction exists for a date after the mass update effective date
- A future dated transaction exists for a date after the mass update effective date

Entering an Intercompany Transfer

You use the Intercompany Transfer transaction to transfer an employee from one employer to another. The system transfers the employee's details to the new employer and retains details of the employee in the old employer.

The system also completes the *To Employer* and *To Employee* fields on the old employee record. If you subsequently use the *Enter Personnel Actions* option and type the number of an employee who has been transferred, the system displays the new location of the employee and allows you to retrieve this record instead.

Follow the steps below to create an Intercompany Transfer transaction for an employee.

1 From the Enter Personnel Actions screen, type any character in the *Opt* field next to TR Intercompany Transfer.

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

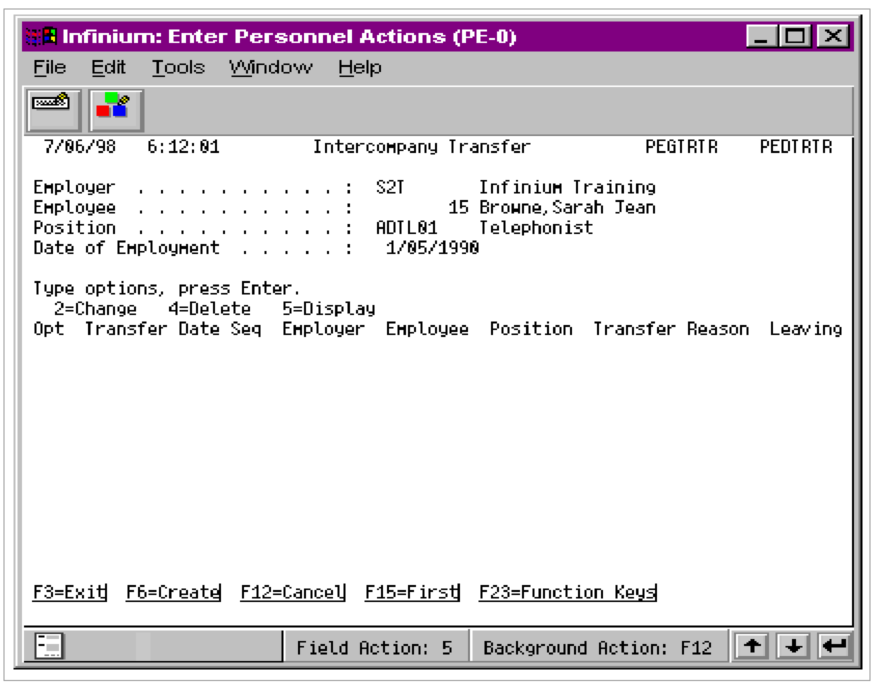


Figure 7-9: Intercompany Transfer selection screen

The system displays details of any intercompany transfers that have already been entered for this employee.

From here you can:

- Create a new intercompany transfer by pressing F6
- Update an existing intercompany transfer by typing **2** in an *Opt* field
- Delete an existing intercompany transfer by typing **4** in an *Opt* field
- Display an existing intercompany transfer by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-10.

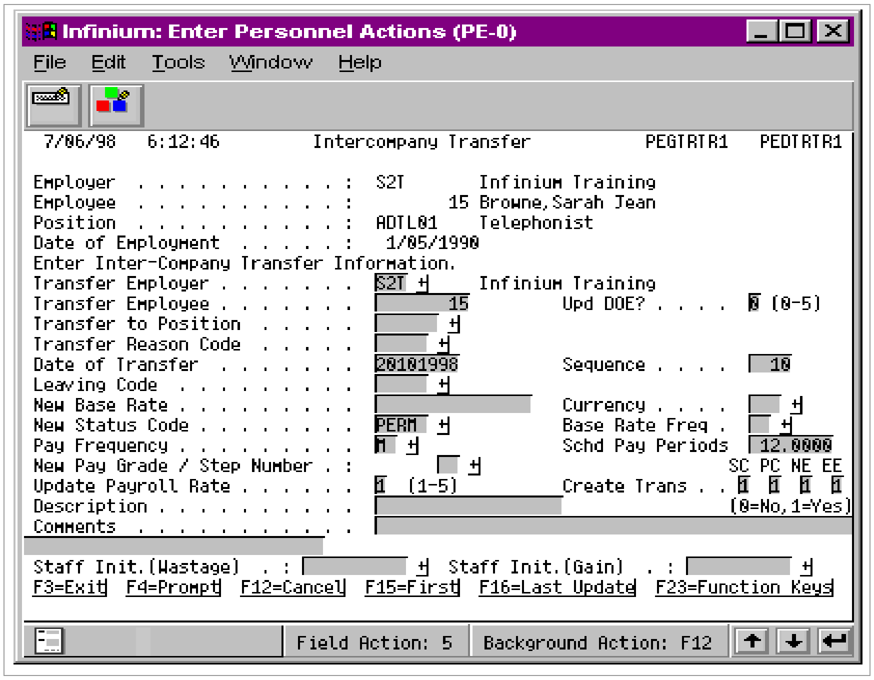


Figure 7-10: Intercompany Transfer screen

The system completes some of the fields on this screen with the employee's current information.

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

Transfer Employer

Type the code value that represents the employer into which the employee is to be transferred.

Transfer Employee

The system completes this field with the employee’s current employee number. You can change this if required.

Note: You can transfer an employee back to his or her original employee using his or her original employee number. If you do so, the system displays a warning message but allows you to continue.

Upd DOE?

Type a value to indicate the dates you want the system to use for the employment date and adjusted employment date in the new company. Valid values are:

Value	Field in new company	Date entered into field
0	*Employment Date*	Date from *Adjusted Date* field in old company
	Adjusted Date	Date of transfer
1	*Employment Date*	Date of transfer
	Adjusted Date	Date of employment at old company
2	*Employment Date*	Date of employment at old company
	Adjusted Date	Blank
3	*Employment Date*	Date of employment at old company
	Adjusted Date	Date from *Adjusted Date* field in old company
4	*Employment Date*	Date of transfer
	Adjusted Date	Date in *Adjusted Date* field in old company
5	*Employment Date*	Date of employment at old company
	Adjusted Date	Date of transfer

Transfer to Position

Type the code value that represents the position in the new company to which the employee is being transferred.

The system checks that the authorised workforce level for the position into which you have hired the employee is not exceeded due to this change. If it is, the system displays a warning message. You can override this if required.

Transfer Reason Code

Type the code value that represents the reason for the employee's transfer. You define code values for this field through the *Update Employer Codes* option, using code type **TRR**.

Date of Transfer

Type the date of the employee's transfer. If you type a future date, the system does not update the employee's basic data record; use the *Mass Update Personnel Actions* option to update the record.

Sequence

If the employee has more than one transfer taking place on the same day, type a number to indicate the order in which the changes occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one transfer on this date, there is no need to change the default value of **10**.

Leaving Code

Type the code value that represents the reason the employee left his or her employer. You define code values for this field through the *Update Employer Codes* option, using code type **TRM**.

New Base Rate

Type the employee's new personnel base rate. The system uses the value in this field to update the *Base Rate* field on the employee's basic data record.

You must ensure that the new base rate you enter is consistent with the value displayed in the *Base Rate Freq* field. For example, if the value in the *Base Rate Freq* field is **M**, you must type the new base rate as a monthly amount.

Currency

Type the code value that represents the currency in which the new base rate is calculated. You define code values for this field through the *Update Employer Codes* option, using code type **CUR**.

New Status Code

Type the employee's new active employment status code, such as part time or full time. The system uses the value you type here to complete the *Status* field on the employee's basic data record.

You define code values for this field through the *Update Employer Codes* option, using code type **STS**.

Base Rate Freq

Type the code value that represents the frequency with which the employee is to be paid. You define code values for this field through the *Update Base Rate Frequencies* option.

Pay Frequency

The system completes this field with the appropriate pay frequency for the pay grade.

Schd Pay Periods

The system completes this field with the value in the *Scheduled Pay Periods* field on the employee's basic data record. You can change this value if necessary.

Step Number

Type the step within the employee's current pay grade to which he or she is assigned. The system uses the value you enter here to calculate the employee's new base rate.

You use the *Update Pay Grades and Steps* option to define steps.

If you do not use step-in-grade processing, type **99** in this field.

Update Payroll Rate

Type a number to indicate which payroll rate you want to update with the salary change information. The system enters a default value of **1** in this field. To override it, type another number.

Valid values are:

0	Do not update payroll rates; only update the *Base Rate* field on the employee's basic data record.
1 to **5**	Update the appropriate *Base Rate* field on the employee's basic data record.

Note: The system also update the employee's payroll rates in Infinium PY if you have typed **1** in the *PE User to update Pay Rates?* field in the *Update Employer Controls* option in Infinium PY.

Create Trans

The system displays a *Create Trans* field for each of the following personnel action transactions.

Field Name	Transaction Type
SC	Salary Change
PC	Personal Change
NE	New Employment
EE	End Employment

In each field, type a value to indicate whether you want to create a personnel transaction of that type. Valid values are:

0	No. Do not create a personnel transaction for this type.
1	Yes. Create a personnel transaction for this type.

Description

Type any additional information about this salary change. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

Staff Init.(Wastage)

Type the code value that represents the staffing initiative under which the employee vacated his or her old position. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

Staff Init.(Gain)

Type the code value that represents the staffing initiative under which the employee started in his or her new position. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system performs the following checks:

- That the position into which the employee is being transferred is valid in the new employer
- That the authorised workforce level for the position is not exceeded on the date entered
- Whether there is an employee already assigned to the position

If any of these conditions are not met, the system displays an error message and you must correct the fault before continuing.

The system saves the changes you have made and returns you to the Intercompany Transfer selection screen. The system updates this screen to include the transaction you have created.

6 Press F3 to return to the Enter Personnel Actions selection screen.

Entering a Status Change Transaction

You use the status change transaction to record changes to an employee's employment status, such as part time, full time, student and so on.

You can also use this option to record details of a special leave of absence, including the start and return dates and whether the employee has been laid off.

Follow the steps below to create a status change transaction for an employee.

1 From the Enter Personnel Actions screen, type any character in the *Opt* field next to ST Status Change.

2 Press Enter. The system displays the screen shown in Figure 7-11.

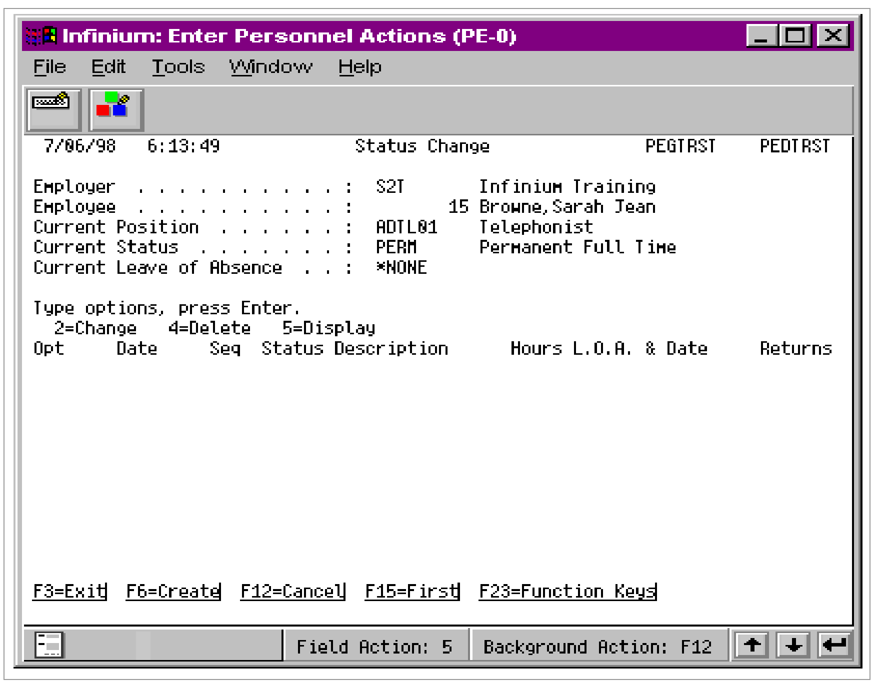


Figure 7-11: Status Change selection screen

The system displays details of any status change transactions that have already been entered for this employee.

From here you can:

- Create a new status change transaction by pressing F6

- Update an existing status change transaction by typing **2** in an *Opt* field
- Delete an existing status change transaction by typing **4** in an *Opt* field
- Display an existing status change transaction by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-12.

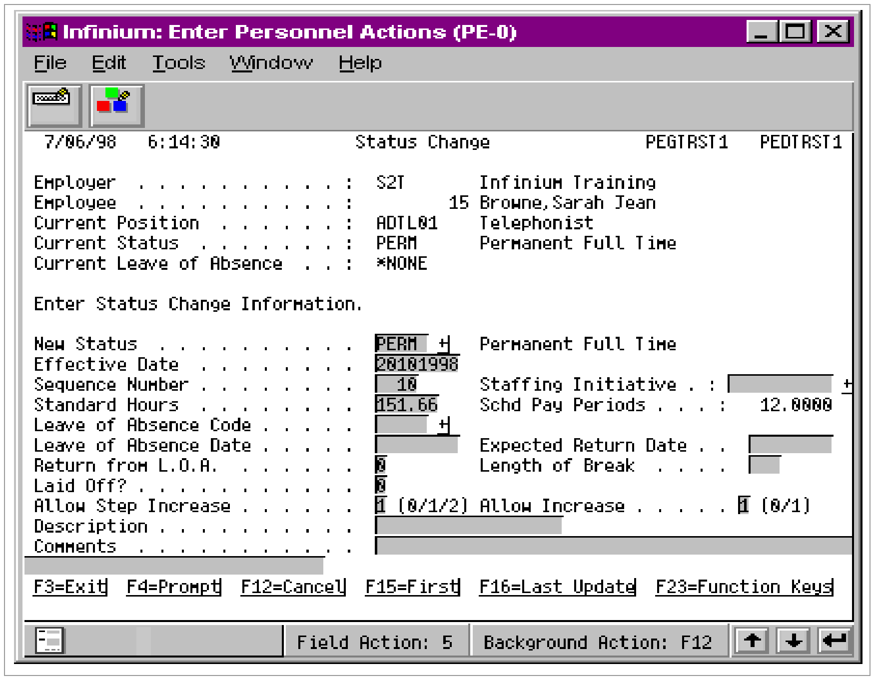


Figure 7-12: Status Change screen

The system completes some of the fields on this screen with the employee's current information.

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

New Status

Type the code value that represents the employee's new status. You define code values for this field through the *Update Employer Codes* option, using code type **STS**.

Effective Date

Type the date of the employee's change in status. If you type a future date, the system does not update the employee's basic data record; use the *Mass Update Personnel Actions* option to update the record.

Sequence Number

If the employee has more than one status change taking place on the same day, type a number to indicate the order in which the changes occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one status change on this date, there is no need to change the default value of **10**.

Staffing Initiative

Type the code value that represents the staffing initiative under which the employee's status changed. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

Standard Hours

The system completes this field with the employee's current standard hours. You can change this value if necessary.

Schd Pay Periods

The system completes this field with the value in the *Scheduled Pay Periods* field on the employee's basic data record. You can change this value if necessary.

Leave of Absence Code

If the employee is on leave of absence, type the code value that represents the type of leave taken. You define code values for this field through the *Update Employer Codes* option, using code type **LVC**.

Note: You use this field to provide information about employees who have been granted long term leave of absence. It is not related to information you enter through the *Update Employee Absences* option.

Leave of Absence Date

Type the date on which the employee started his or her leave of absence period.

Expected Return Date

Type the date on which the employee is expected to return from leave of absence.

Note: This date is for information only. To return an employee from leave of absence, you must enter another status change transaction.

Return from L.O.A.

Type a value to indicate whether you want to maintain leave details on the system once the employee has returned from leave. Valid values are:

0	Maintain all leave of absence information in the employee's basic data record.
1	Do not maintain leave of absence data. When you enter a status change transaction to indicate that the employee has returned from leave, the system clears the leave of absence fields on the employee’s basic data record.

Length of Break

Type the length of the leave period in days.

Laid Off?

Type a value to indicate whether the employee has been laid off. Valid values are:

0	No. The employee has not been laid off.
1	Yes. The employee has been laid off.

Allow Step Increase

Type a value to indicate whether the employee is entitled to step increases. Valid values are:

0	The employee is not eligible for a step increase, but may receive a pay increase if the rate for the employee's current step is increased
1	The employee is eligible for a step increase and any step-related pay increases.
2	The employee is not eligible for a step increase and may not receive a pay increase.

Allow Increase

Type a value to indicate whether to apply a salary change during mass salary changes. Valid values are:

0	No. Do not apply a salary change during a mass wage change or mass salary change transaction.
1	Yes. Apply a salary change during a mass wage change or mass salary change transaction.

Description

Type any additional information about this status change. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have entered and returns you to the Status Change selection screen. The system updates this screen to include the status change transaction you have entered.

6 Press F3 to return to the Enter Personnel Actions screen.

Entering a Re-employment Transaction

You use the re-employment transaction to re-employ an individual who has previously left your organisation.

Note: An end employment transaction must already exist for the person before he or she can be re-employed; you cannot re-employ a current employee.

If you type **0** (no) in the *Keep Records permanently?* field, enter an end employment transaction and run the *Purge Non Active Employees* option, the system purges the employee's details. In this case, you cannot use the re-employment transaction; you must use the *Enter New Employee* option to create the employee record.

However, if you choose to keep employee records, you can use the re-employment transaction. When you enter the re-employment transaction, the system re-activates the employee's details as they were at the time of leaving. If any of the employee's details have changed since then, such as position, salary or personal details, you will need to use the appropriate personnel action(s) to update the employee's record.

Follow the steps below to create a re-employment transaction for an employee.

1. From the Enter Personnel Actions screen, type any character in the *Opt* field next to RM Re-Employment.
2. Press Enter. The system displays the screen shown in Figure 7-13.

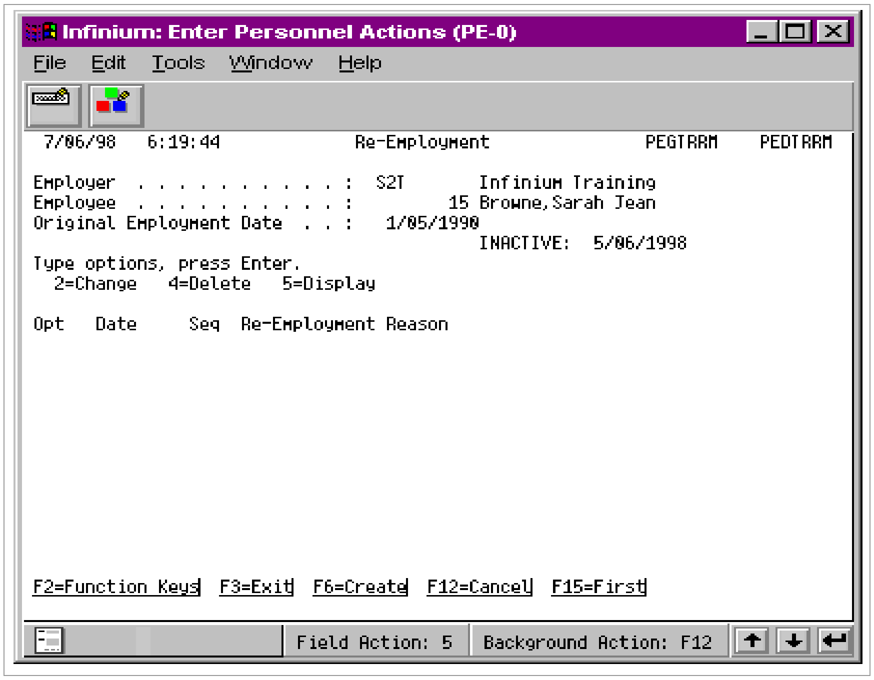


Figure 7-13: Re-Employment selection screen

The system displays details of any re-employment transactions that have already been entered for this employee.

From here you can:

- Create a new re-employment transaction by pressing F6
- Update an existing re-employment transaction by typing **2** in an *Opt* field
- Delete an existing re-employment transaction by typing **4** in an *Opt* field
- Display an existing re-employment transaction by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-14.

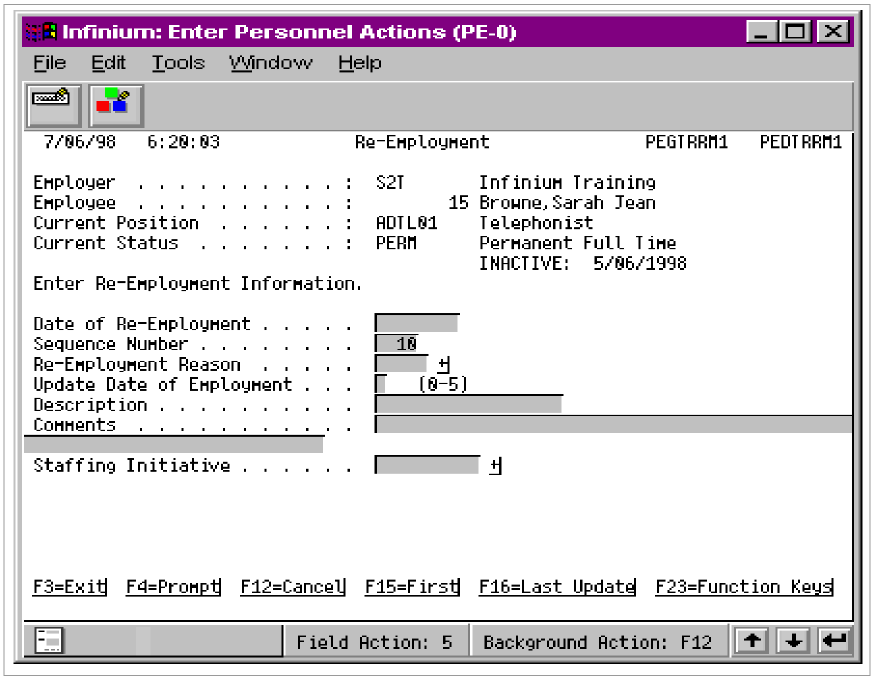


Figure 7-14: Re-Employment screen

The system completes some of the fields on this screen with the employee's current information.

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

Date of Re-Employment

Type the date on which the employee was re-employed.

Sequence Number

If the employee has more than one re-employment transaction taking place on the same day, type a number to indicate the order in which the changes occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one re-employment transaction on this date, there is no need to change the default value of **10**.

Re-Employment Reason

Type the code value that indicates the reason the employee was re-employed. You define code values for this field through the *Update Employer Codes*, using code type **RHC**.

Update Date of Employment

Type a value to indicate the dates you want the system to use for the employment date and adjusted employment date in the new company. Valid values are are listed in the table below.

Value	Field in new company	Date entered into field
0	*Employment Date*	Date from *Adjusted Date* field in old company
	Adjusted Date	Date of transfer
1	*Employment Date*	Date of transfer
	Adjusted Date	Date of employment at old company
2	*Employment Date*	Date of employment at old company
	Adjusted Date	Blank
3	*Employment Date*	Date of employment at old company
	Adjusted Date	Date from *Adjusted Date* field in old company
4	*Employment Date*	Date of transfer
	Adjusted Date	Date in *Adjusted Date* field in old company
5	*Employment Date*	Date of employment at old company
	Adjusted Date	Date of transfer

Description

Type any additional information about this re-employment transaction. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

Staffing Initiative

Type the code value that represents the staffing initiative under which the employee is re-employed. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system performs the following checks:

- That the position is valid
- That the authorised workforce level for the position is not exceeded on the date entered
- Whether there is an employee already assigned to the position

6 Press F3 to return to the Enter Personnel Actions screen.

Updating a New Employee Transaction

You use the New Employee transaction to review the new employee record created during the *Enter New Employee* process. If any of the information about the employee’s position, date of employment, salary or status details were entered incorrectly through the *Enter New Employee* option, use the New Employee transaction to correct the details.

Note: You cannot use this option to create a record for a new employee. In addition, you should not use it to re-employ a former employee who has left the company; you should use the re-employment transaction. Refer to the section in this chapter entitled "Entering a Re-employment Transaction" for more information.

If any of the employee's personal details were entered incorrectly, such as address and title, use the personal change transaction to amend this information. Refer to the section in this chapter entitled "Entering a Personal Change Transaction" for more information.

Follow the steps below to update a new employment transaction for an employee.

1. From the Enter Personnel Actions screen, type any character in the *Opt* field next to NE New Employment.
2. Press Enter. The system displays the screen shown in Figure 7-15.

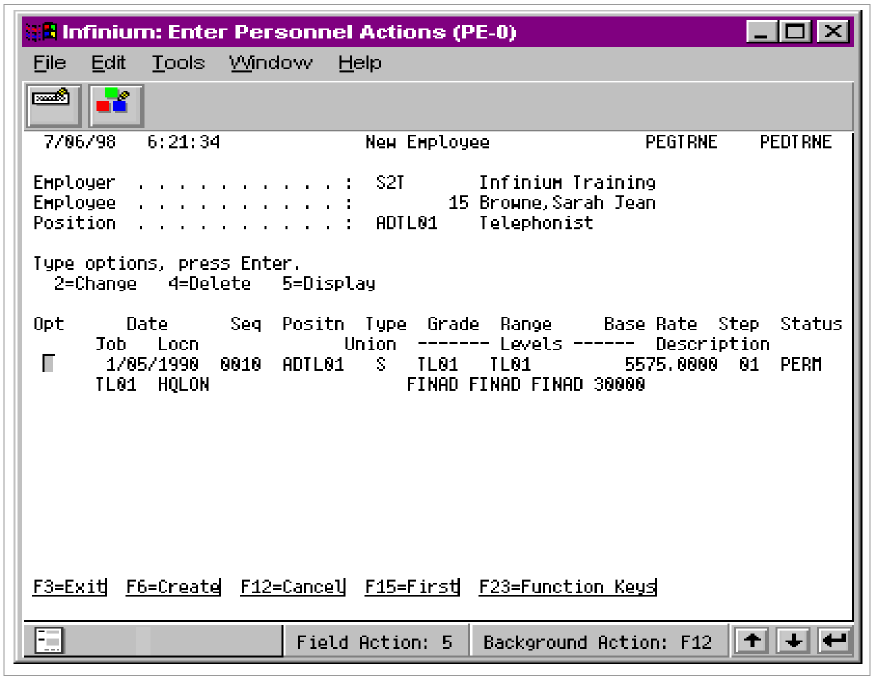


Figure 7-15: New Employee selection screen

From here you can:

- Create a new employment transaction by pressing F6
- Update an existing new employment transaction by typing **2** in an *Opt* field
- Delete an existing new employment transaction by typing **4** in an *Opt* field
- Display an existing new employment transaction by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-16.

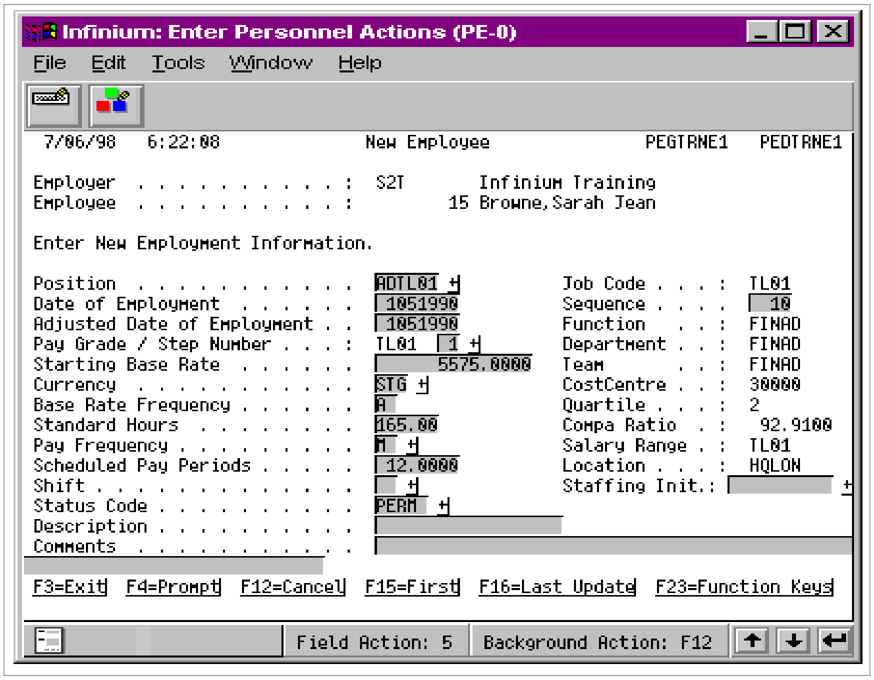


Figure 7-16: New Employee screen

The system displays the employee's position information that you entered through the *Enter New Employee* option.

4 Use the following information to update the fields on this screen.

Position

Type the code value that represents the position into which you hired the employee. The system displays the levels, job code, pay grade and location for the position.

The system checks that the authorised workforce level for the position into which you have hired the employee is not exceeded due to this change. If it is, the system displays a warning message. You can override this if required.

Date of Employment

Type the date of employment for the employee.

Sequence

The system enters a default value of **10** into this field.

Adjusted Date of Employment

Type the adjusted date of employment for the employee. You may want to use this field when the system creates a New Employment transaction following an intercompany transfer.

Pay Grade/Step Number

If your organisation uses step-in-grade processing, type a step number to assign the employee to a starting step.

If you do not use step-in-grade processing, type **99** in this field. This indicates that the employee has an individual salary level.

Starting Base Rate

Type the base rate on which the employee started. This field can contain hourly, monthly, annual or several other types of rates.

The base rate you type in this field must be compatible with the value you type in the *Base Rate Frequency* field on this screen. For example, if you type a monthly salary amount in this field, you must type **M** (monthly) in the *Base Rate Frequency* field.

Infinium PY does not calculate pay directly from the information in this field; however, Infinium HR can use this base rate to calculate a value for the employee's pay rate.

For example, if the base rate is an annual salary and the employee has a monthly pay frequency, the system enters one twelfth of the base rate into the first payroll field on the employee's payroll data record. The system uses this rate in personnel reports and to calculate the employee's annualised base rate.

Currency

Type the code value that represents the currency in which the base rate is calculated. You define code values for this field through the *Update Employer Codes* option, using code type **CUR**.

Base Rate Frequency

Type a frequency for the value you typed in the *Starting Base Rate* field.

If you use step-in-grade processing, the system enters the frequency for the pay grade of the position.

Standard Hours

Type the number of hours per pay period that the employee is expected to work. The value you type in this field must be compatible with the amount you type in the *Scheduled Pay Periods* field.

For example, if you type **40** hours in this field, you would probably type **52** in the *Scheduled Pay Periods* field. The system can enter these standard hours on auto pay entries for the employee during cycle processing. The information is also used for PTO accrual calculation.

Pay Frequency

The system displays a default value in this field that is taken from the employee's base rate frequency. If the employee's base rate frequency and pay frequency are different, type a pay frequency that indicates how often you expect to pay this employee.

For example, if the base rate frequency for the employee is annual but the pay frequency is monthly, change the value in this field to **M**.

The value you type in this field must be compatible with the value you type in the *Scheduled Pay Periods* field. For example, if you type **12** in the *Scheduled Pay Periods* field, type **M** in this field.

Scheduled Pay Periods

The system enters a default value calculated from the employee's pay frequency code. For example, if the employee's pay frequency code is M, the system enters **12** in this field. To override, type the number of pay periods scheduled during the calendar year for this employee.

Shift

If the employee's position is associated with a particular shift, type the appropriate shift code in this field. You define code values for this field through the *Update Employer Codes* option, using code type **SHF**.

Staffing Init.

Type the code value that represents the staffing initiative under which the employee has been hired. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

Status Code

Type the employee's active employment status code, such as part time or full time. You define code values for this field through the *Update Employer Codes* option, using code type **STS**.

Description

Type any additional information about this new employment transaction. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made to the new employment transaction.

If you have changed the employee's position to one that requires a different payroll authorisation group, the system displays the Update Employee Incomes and Update Employee Deductions screens and updates the employee's incomes and deductions as appropriate.

6 Press F3 to return to the Enter Personnel Actions screen.

Entering a Work Action

You use the work actions transaction to record details of discussions between an employee and his or her manager that are relevant to the employee's employment. For example, you might record details of disciplinary meetings, warnings, commendations, awards and so on.

Follow the steps below to create a work action transaction for an employee.

1. From the Enter Personnel Actions screen, type any character in the *Opt* field next to WA Work Action.

2. Press Enter. The system displays the screen shown in Figure 7-17.

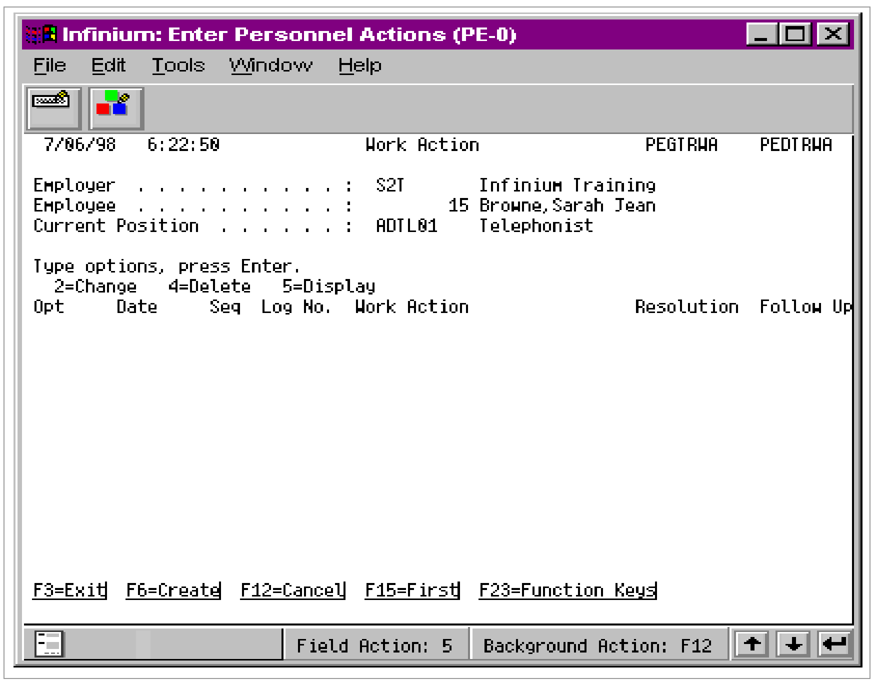


Figure 7-17: Work Action selection screen

The system displays details of any work action transactions that have already been entered for this employee.

From here you can:

- Create a new work action transaction by pressing F6
- Update an existing work action transaction by typing **2** in an *Opt* field
- Delete an existing work action transaction by typing **4** in an *Opt* field

- Display an existing work action transaction by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-18.

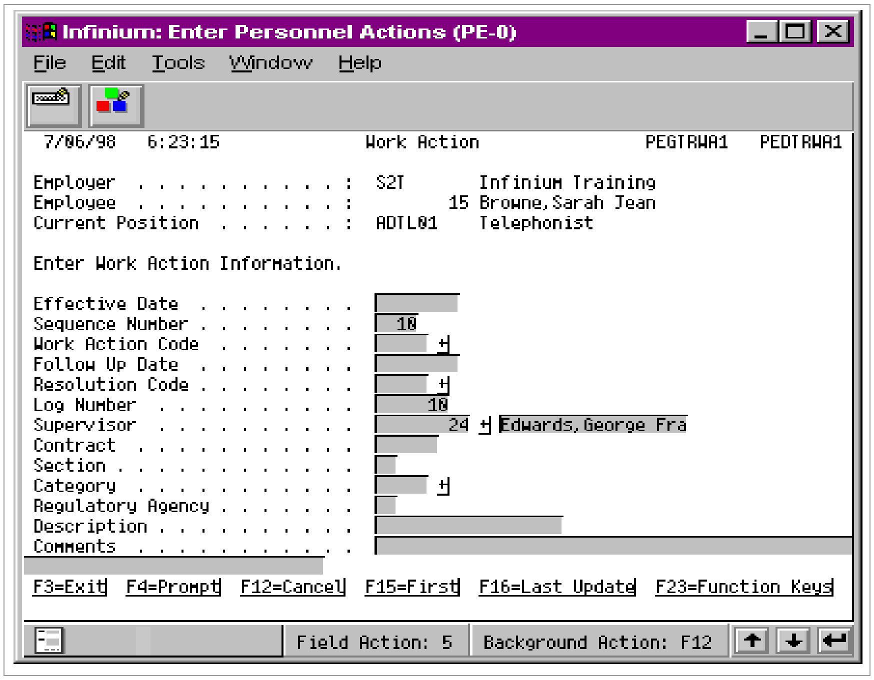


Figure 7-18: Work Action screen

The system completes some of the fields on this screen with the employee's current information.

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

Effective Date

Type the effective date for the work action transaction.

Sequence Number

If the employee has more than one work action transaction taking place on the same day, type a number to indicate the order in which the changes occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one work action transaction on this date, there is no need to change the default value of **10**.

Work Action Code

Type the code value that represents the work action being recorded. You define code values for this field through the *Update Employer Codes* option, using code type **GRV**.

Follow Up Date

Type a date for any follow-up meeting. This date must be after the date you type in the *Effective Date* field.

Resolution Code

Type the code value that represents the resolution reached, if appropriate. You define code values for this field through the *Update Employer Codes* option, using code type **RES**.

Log Number

The system completes this field with the next work action log number.

Supervisor

The system displays the name and employee number of the employee's supervisor. You can override this if required.

Contract

Type the contract number if appropriate.

Section

Type the section number within the contract if appropriate.

Category

Type the code value that represents the category of the work action taken. You define code values for this field through the *Update Employer Codes* option, using code type **GTV**.

Regulatory Agency

Type the government agency involved in the work action if appropriate.

Description

Type any additional information about this work action transaction. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

5 Press F3. Then type **1** in the Exit options window and press Enter. The system saves the work action details you have entered and returns you to the Work Actions selection screen. The system updates this screen to include the work action transaction you have created.

6 Press F3 to return to the Enter Personnel Actions screen.

Entering an End Employment Transaction

You use the end employment transaction to record details of employees leaving your organisation. You also record their reason for leaving and whether or not they are eligible for re-employment.

When you enter an end employment transaction, the system sets the employee's employment status to inactive, deletes any training requests held in Infinium TR and cancels any benefit enrolments for the employee.

Follow the steps below to create an end employment transaction for an employee.

1 From the Enter Personnel Actions screen, type any character in the *Opt* field next to EE End Employment.

2 Press Enter. The system displays the screen shown in Figure 7-19.

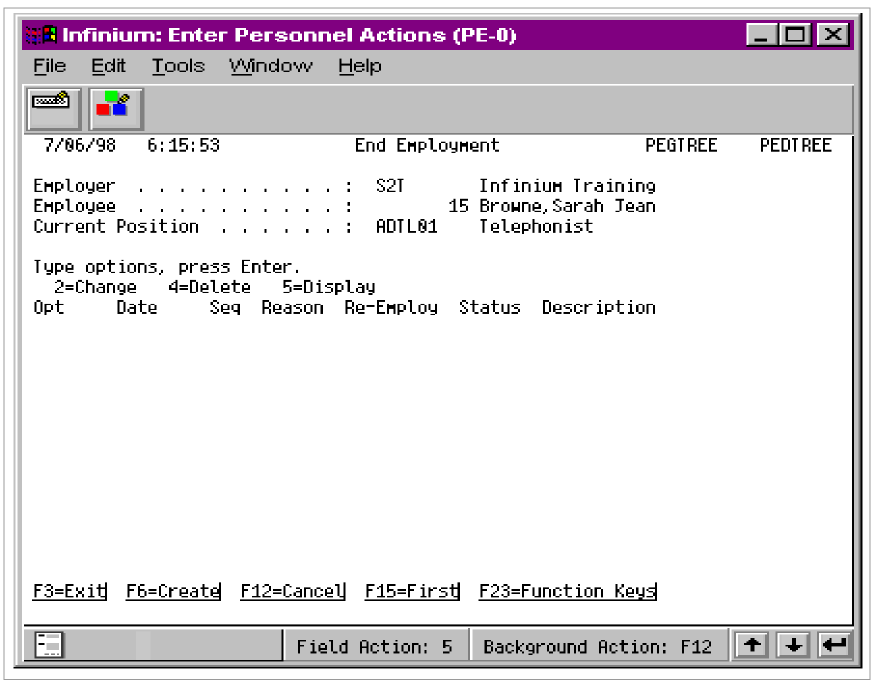


Figure 7-19: End Employment selection screen

The system displays details of any end employment transactions that have already been entered for this employee.

From here you can:

- Create a new end employment transaction by pressing F6
- Update an existing end employment transaction by typing **2** in an *Opt* field
- Delete an existing end employment transaction by typing **4** in an *Opt* field
- Display an existing end employment transaction by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-20.

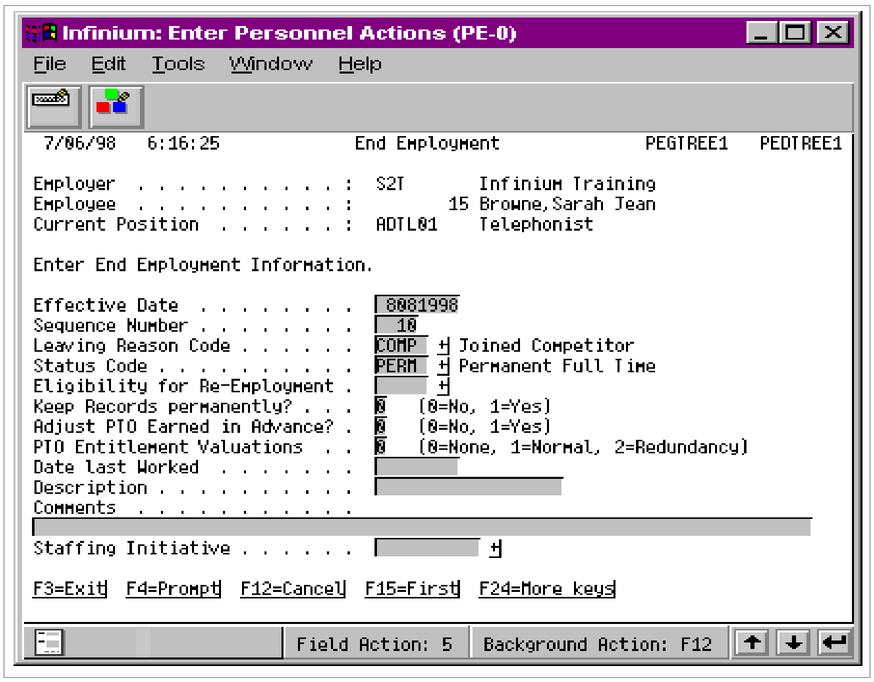


Figure 7-20: End Employment screen

The system completes some of the fields on this screen with the employee's current information.

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

Effective Date

Type the date on which the end employment transaction comes into effect. This is the last day for which the employee is paid.

Sequence Number

The system enters a default value of **10** into this field.

Leaving Reason Code

Type the code value that represents the reason the employee left your organisation. The system uses the value you enter in this field to update the *Leaving Reason Code* field on the employee's basic data record.

You define code values for this field through the *Update Employer Codes* option, using code type **TRM**.

Status Code

Type the code value that represents the employee's status in this field. You define code values for this field through the *Update Employer Codes* option, using code type **STS**. You usually define a code value to indicate that an employee has left the company.

Eligibility for Re-Employment

Type the code value that represents the employee's eligibility for re-employment. You define code values for this field through the *Update Employer Codes* option, using code type **REC**.

Keep Records permanently?

Type a value to indicate whether to keep the employee's records permanently on your system. If you choose not to keep the records permanently, the system deletes the employee's records when you run the *Purge Non Active Employees* option.

Valid values are:

0	No. Do not keep the employee's records permanently.
1	Yes. Keep the employee's records permanently.

Adjust PTO Earned in Advance?

For PTO schemes in which the employee's entitlement is calculated annually in advance of the leave year, the system can adjust the entitlement to reflect the actual period of employment up to the date on which the employee leaves the organisation. This allows you to gain a correct valuation of outstanding entitlement due to the employee.

For example, if the employee has been allocated 30 days of annual leave on January 1st and leaves the company on April 30th, the system creates an earned PTO transaction of -20 days to adjust the earned PTO balance to 10 days.

The system uses the leave proration table on the PTO accrual control to determine the amount by which to adjust the PTO balance.

Type a value in this field to indicate whether you want the system to perform this adjustment. Valid values are:

0	No. Do not adjust PTO earned in advance.
1	Yes. Adjust PTO earned in advance.

PTO Entitlement Valuations

Type a value to indicate whether the system calculates the value of PTO entitlements for terminated employees. Valid values are:

0	No. Do not value PTO entitlements.
1	Value PTO entitlements as normal.
2	Value PTO entitlements at the rate specified in the redundancy controls

If you type **1** or **2**, the system displays the *Update Employee PTO Accruals* option. This allows you to review the employee's current PTO balances and make any adjustments. Refer to the chapter in this guide entitled "Processing Paid Time Off (PTO) Accruals" for more information.

Date last Worked

Type the last date on which the employee worked for the company. The system uses the date you enter in this field to update the *Leaving Date* field on the employee's basic data record.

Description

Type any additional information about this end employment transaction. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

Staffing Initiative

Type the code value that represents the staffing initiative under which the employee left the company. You use staffing initiatives to monitor changes in workforce levels. You define code values for this field through the *Staffing Initiative M/F Maint* option.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the transaction details you have entered and returns you to the End Employment selection screen. The system updates this screen to include the transaction you have created.

The system also sets the employee's employment status to inactive, deletes any training requests held in Infinium TR and cancels any benefit enrolments for the employee.

If you typed **1** or **2** in the *PTO Entitlement Valuations* field, the system then displays the PTO Entitlement Payments screen. From here you can update or delete entitlements as required, update the employee's PTO accruals and recalculate after any adjustments made. Refer to the section below for more information.

6 Press F3 to return to the Enter Personnel Actions screen.

Generating PTO Entitlement Payments

Follow the steps below to generate PTO entitlement payments for the terminated employee.

1 From the End Employment screen, type **1** or **2** in the *PTO Entitlement Valuations* field.

2 Press F3. The system displays the screen shown in Figure 7-21.

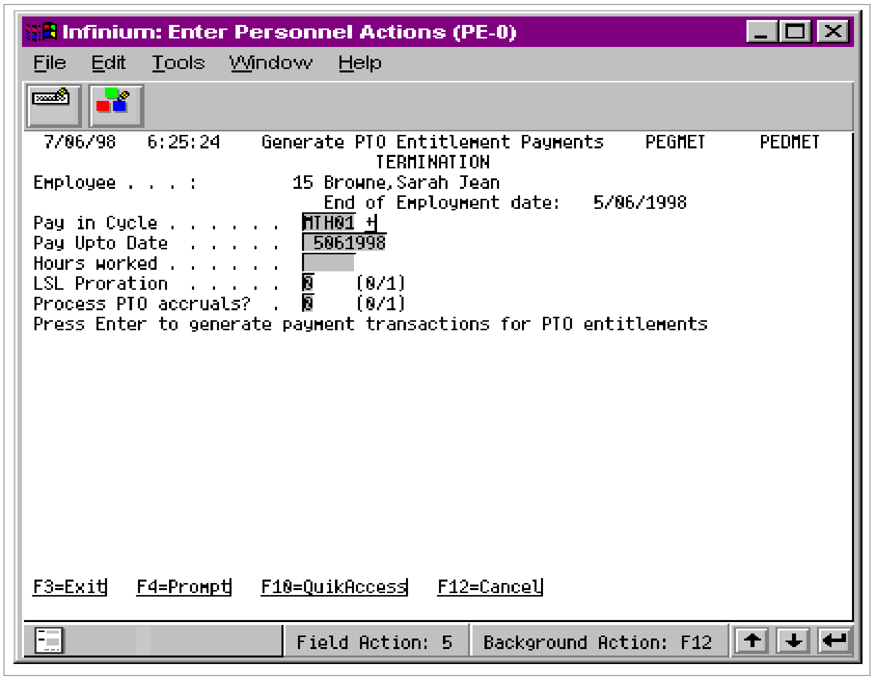


Figure 7-21: Generate PTO Entitlement Payments screen

You use this screen to specify how the system calculates the value of the employee's remaining PTO entitlements and generates termination payment transactions.

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

Pay in Cycle

Type the code value that represents the pay cycle in which the employee is to be paid his or her outstanding entitlement.

Pay upto Date

Type the date up to which the employee is to be paid.

Hours worked

Type the number of hours the employee worked, for which he or she is to be paid.

LSL Proration

Type a value to indicate whether you want prorating to be applied for this employee. Valid values are:

0	No

1	Yes

Process PTO accruals?

Type a value to indicate whether you want an additional PTO calculation for this employee. Valid values are:

0	No. Do not perform an additional PTO calculation
1	Yes. Perform an additional PTO calculation.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system calculates the entitlements and returns you to the Enter Personnel Actions selection screen.

Entering a Personal Change Transaction

You use the personnel change transaction to record changes to an empoyee's personal details, such as surname, address, marital status and spouse's name.

If you do not want to maintain a record of the employee's previous information, you can update these fields using the *Update Employee Basic Data* and *Update Employee Personnel Data* options.

Follow the steps below to create a personal change transaction for an employee.

1 From the Enter Personnel Actions screen, type any character in the *Opt* field next to PC Personal Change.

2 Press Enter. The system displays the screen shown in Figure 7-22.

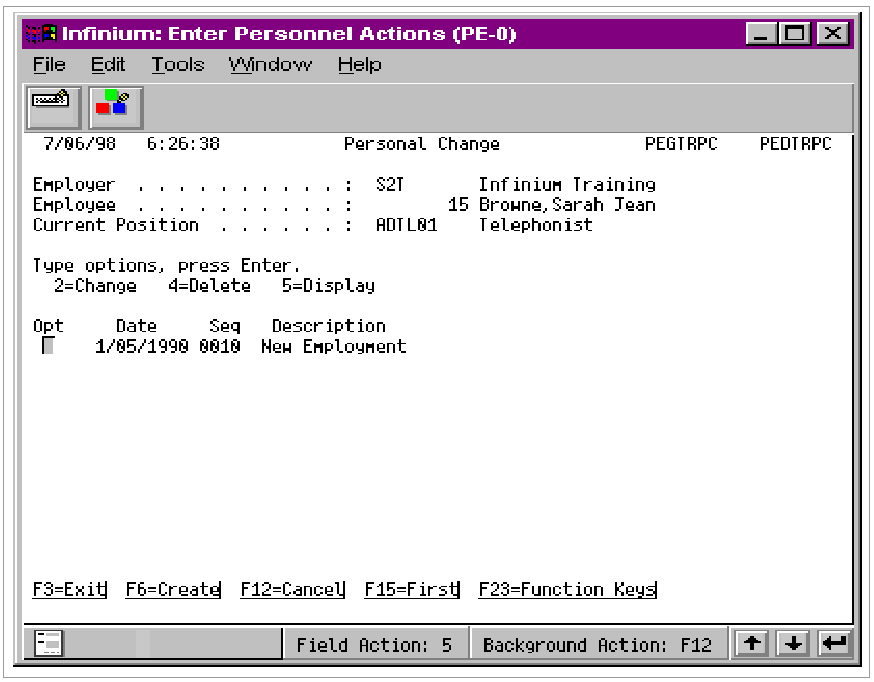


Figure 7-22: Personal Change selection screen

The system displays details of any personal change transactions that have already been entered for this employee.

From here you can:

- Create a new personal change transaction by pressing F6
- Update an existing personal change transaction by typing **2** in an *Opt* field
- Delete an existing personal change transaction by typing **4** in an *Opt* field
- Display an existing personal change transaction by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 7-23.

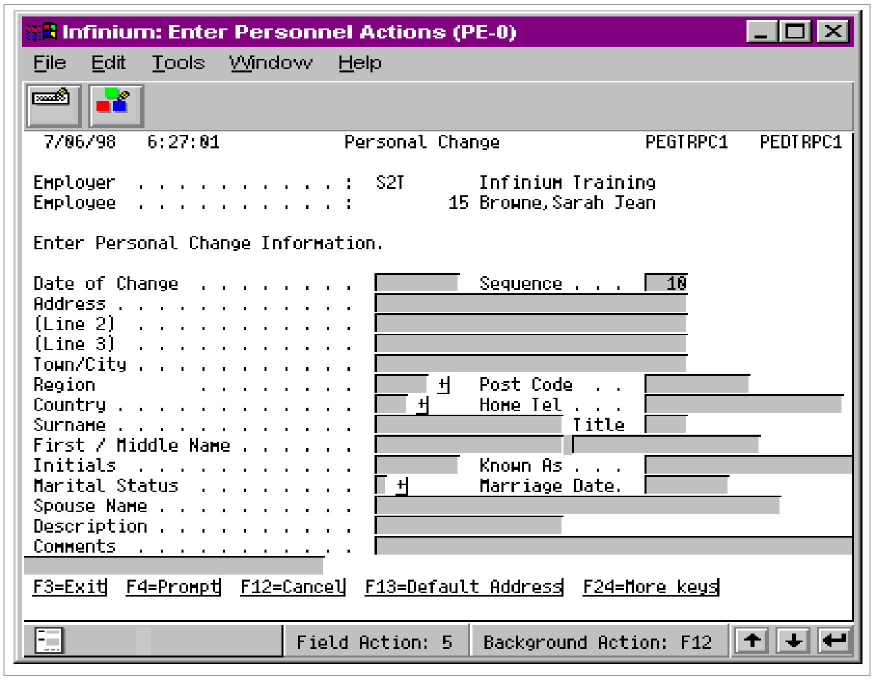


Figure 7-23: Personal Change screen

The system completes some of the fields on this screen with the employee's current information.

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

Date of Change

Type the date on which the personal change transaction comes into effect.

Sequence

If the employee has more than one personal change transaction taking place on the same day, type a number to indicate the order in which the changes occur. The system uses the transaction with the highest sequence number to update the basic data master record.

The system enters a default value of **10** into this field. This allows you to enter values that are either higher or lower than the current entry. You should enter non-consecutive numbers for further sequence numbers to allow for later insertions. For example, you might use **10**, **20**, **30** and so on.

If the employee has only one personal change transaction on this date, there is no need to change the default value of **10**.

Updating the Address Fields

If the employee's address has not changed much, you can press F13 to complete the following fields with the address details in the employee's basic data record:

- Address
- (Line 2)
- (Line 3)
- Town/City
- County
- Post Code
- Country
- Home Tel

You can then update the fields as appropriate using the information below.

Alternatively, do not press F13; instead, type the required information into the blank fields.

Address

Type the employee's street address. Each line is a 30-character field.

The system uses the *Address*, *(Line 2)*, *(Line 3)*, *Town/City*, *County* and *Post Code* fields in all options that need employee addresses, including payroll processing, payslip printing and generation of year-end tax forms.

Town/City

Type the name of the town or city in which the employee lives.

County

Type the code value that represents the county in which the employee lives. You define code values for this field through the *Update Employer Codes* option, using code type **CNT**.

Note: This field name is a user-defined name, so your system may display a different description. You define the text that you want to display here in the *Address Field Text* field in the *Update Employer Controls* option.

Post Code

Type the employee's postcode.

Country

Type the code value that represents the country in which the employee lives. You define code values for this field through the *Update Employer Codes* option, using code type **CTR**.

Note: For UK users of Infinium PY, when you type **UK** in this field, the system sets the correct length for the employee's National Insurance number and enables validation of this number.

Home Tel

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

Users should agree on a consistent format for this field to ensure compatible data for displays and reports.

Updating the Name Fields

If the employee's name has not changed much, you can press F14 to complete the following fields with the name details in the employee's basic data record:

- Surname
- Title
- First / Middle Name
- Initials
- Known As

You can then update the fields as appropriate using the information below.

Alternatively, do not press F14; instead, type the required information into the blank fields.

Surname

Type the employee's surname.

Title

Type the employee's title.

First / Middle Name

Type the employee's first name and, if appropriate, middle name.

Initials

Type the employee's middle initials.

If you leave this field blank, the system enters the initials of the first and middle names.

Known As

Type the employee's preferred name or nickname if it is different from the employee's first name.

If you leave this field blank, the system defaults the employee's first name into this field when you save the transaction.

Marital Status

Type the employee's marital status. This field is for information only. You define code values for this field through the *Update Employer Codes* option, using code type **MAR**.

Marriage Date

If the employee is married, type his or her wedding date. Leave this field blank if the employee is not married.

Spouse Name

If the employee is married, type the name of the employee's spouse. Leave this field blank if the employee is not married.

Description

Type any additional information about this personal change transaction. This is an 18-character free-form field.

Comments

Type any additional comments. This is a 75-character free-form field.

5 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the personal change transaction you have entered and returns you to the Personal Change selection screen. The system updates this screen to include the transaction you have created.

6 Press F3 to return to the Enter Personnel Actions screen.

Using the Mass Update Personnel Actions Options

You use the *Trial Mass Update PE Actions* option to verify in advance which transactions will be processed when you run the *Mass Update PE Actions* option. You can run the *Trial Mass Update PE Actions* option for a specified date as many times as needed.

The system generates a report that indicates the pending future-dated transactions that it will process when you run the *Mass Update PE Actions* option for the same date. You can use this report to make corrections to any pending transactions before they are processed and used to update the employee's basic, personnel and payroll data records.

The system does not generate the Payroll Authorization Group Changes to Incomes and Deductions report until you run the *Mass Update PE Actions* option.

When you are satisfied that the information shown on the *Trial Mass Update PE Actions* report is correct, use the *Mass Update PE Actions* option to process the transactions and update employee basic, personnel and payroll data with the new information. As the system processes each transaction, it removes its future-dated indicator so that the same transactions are not re-processed the next time you use the *Trial* or *Mass Update PE Actions* options.

Performing the Mass Update

Follow the steps below to run the *Mass Update Personnel Actions* option.

1. From the Infinium HR main menu select *Employees*.
2. Select *Employee History*.
3. Select *Mass Update Personnel Actions* [MUPA]. The system displays the screen shown in Figure 7-24.

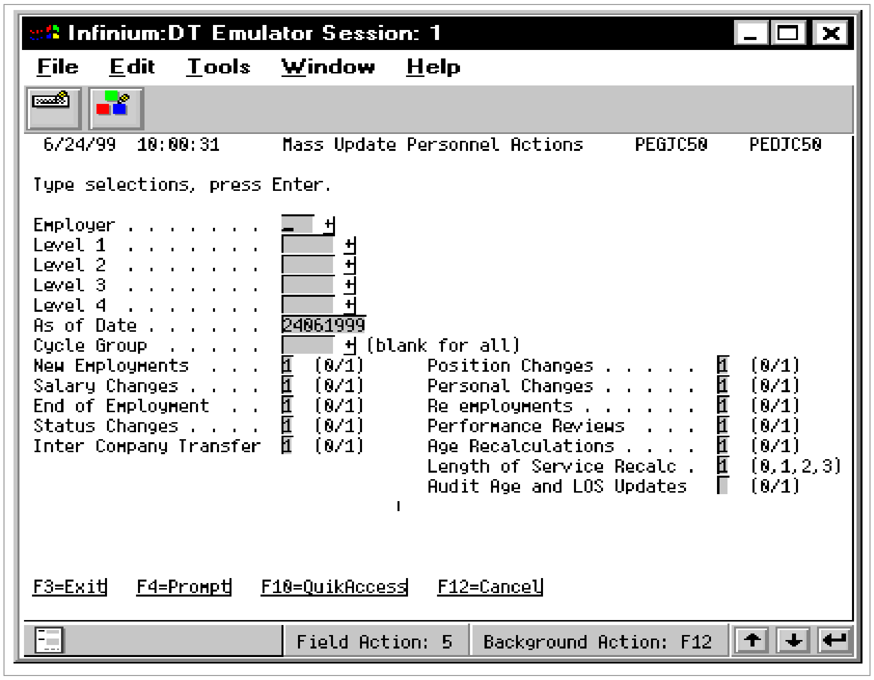


Figure 7-24: Mass Update Personnel Actions screen

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

Employer

Type the code value that represents the employer for which you want to update future-dated transactions.

Level 1, 2, 3, 4

Type values in these fields to restrict the update of future-dated transactions to a particular level. The system compares the values you type in these fields with the values in the level fields on each employee's basic data record and updates transactions only for employees assigned to the specified levels.

If you want to complete a particular level, you must complete all the fields above that level. For example, if you want to enter a value in the *Level 4* field, you must complete levels 1, 2 and 3.

Leave fields blank to update transactions for all employees in a particular level.

As of Date

Specify the date the system should use to select pending future-dated transactions for processing. The system compares this date to the effective date of each pending future-dated transaction and selects those whose effective date is the same as or earlier than the specified *As of Date*.

When you display this screen, the system defaults the current date in this field. You can replace it with any date prior to or after the system date, or you can use the system date. You should coordinate the date you use with payroll processing dates, such as the pay period ending date.

For example, if you have a pending future-dated salary change transaction with an effective date of 09011998 and you want the system to use the new rate in the payroll period ending 09051998, you should type an *As of Date* of at least 09011998. If you have other pending future-dated salary change transactions with effective dates between 09021998 and 09051998, you should type an *As of Date* of 09051998 to ensure that Infinium PY uses the most current rate for payroll computations.

However, if you have pending salary changes that are effective 09101998 you do not want to specify 09101998 as the *As of Date* in this example because the payroll rates for those employees will be updated by the *Mass Update Personnel Actions* option and will be used in the next payroll cycle in advance of their true effective date.

Cycle Group

Type the code value that represents a particular pay cycle group. A cycle group defines a set of pay cycle codes. The system processes only those employees whose pay cycle code matches one of the cycles in this group. This allows you to select only employees who are paid in monthly cycles, for example.

Leave this field blank if you want to generate transactions for all employees regardless of pay cycle group.

New Employments
Position Changes
Salary Changes
Personal Changes
End of Employment
Re employments
Status Changes
Performance Reviews
Inter Company Transfer

Type a value next to each personnel action transaction to indicate those you want the system to process. Valid values are:

0	No. Do not process transactions of this type.
1	Yes. Process transactions of this type.

Age Recalculations

Type a value to indicate whether you want the system to recalculate the ages of all employees. Valid values are:

0	No. Do not recalculate employees' ages.
1	Yes. Recalculate employees' ages.

Length of Service Recalc

Type a value to indicate whether you want the system to recalculate employees' lengths of service. Valid values are:

0	No. Do not recalculate lengths of service.
1	Recalculate the lengths of service based on the date of employment.
2	Recalculate the lengths of service based on the date of employment, les any breaks in service.
3	Recalculate the length of service using the adjusted date of employment. For employees with no adjusted date, the system uses the normal date of employment.

Audit Age and LOS Updates

Use this field to specify whether the system should audit updates to the employee's age or length of service. Because the system records length of service both in years and in months, performing the *Mass Update Personnel Actions* function may update a large number of employee records, and therefore, produce a large number of audit records. Valid values are:

0	No. Do not audit age and length of service updates
1	Yes. Audit age and length of service updates.

5 Press Enter to submit the *Mass Update Personnel Actions* option for processing. The system generates the following message at the bottom of the Mass Update Personnel Actions selection screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system generates the Mass Update Personnel Actions report using batch processing. Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen. You can view or print this report using options on these screens.

You can use this report to confirm which pending future-dated transactions were processed when you ran the *Mass Update Personnel Actions* option. The system updates employee records when you run the *Mass Update Personnel Actions* option.

7 If as a result of the future-dated transactions the employee should be assigned to a new payroll authorisation group and Infinium HR users are allowed to update this information, the system automatically updates the value in the *PY Auth Group* field in the employee's payroll data record when you use the *Mass Update Personnel Actions* option.

It also updates the employee’s income and deduction authorisations.

Summary

In summary, you have learned the following:

- How to enter and update personnel actions
- How the system uses personnel action transactions to update fields in basic and personnel data
- How to use the *Mass Update Personnel Actions* options
- The effect of personnel actions on Infinium PY

Notes

Chapter 8 Using Step-in-Grade Processing

8

You use step-in-grade processing to manage salary administration for employees who are paid standard rates that increase based on their length of service, age, day/month, or a combination of factors. To implement step-in-grade processing, you define pay grades and establish steps within each pay grade; for each step, you specify the number of months, age and/or the day/month before an employee can move to the next step.

Refer to the chapter entitled “Establishing Pay Grades” in the *Infinium HR Guide to Controls* for more information.

You typically use step-in-grade processing for those employees whose rate progression is based on a fixed schedule regardless of job performance considerations. You can, however, freeze employees who should not progress for a particular reason.

You use the *Mass Update Step-in-Grade* option to automate the employee’s movement through steps in his or her assigned pay grade. The system uses the next step and next step date on the employee’s basic data record to advance the employee to the next step in his or her assigned pay grade.

The system automatically updates the employee’s personnel and payroll pay rates with the rates associated with the new step and records the rate changes in the employee’s salary history. It then calculates the next step and next step date.

You can use options within step-in-grade processing to mass change step rates on pay grade controls and apply the rate changes to step-in-grade employees. The system creates Salary Change transactions in the *Enter Personnel Actions* option for all rate changes generated through step-in-grade processing enabling you to generate reports of employee salary history and to display history information.

The chapter consists of the following topics:

Overview

Objectives

When you complete this chapter you should be able to do the following:

- Understand step-in-grade processing
- Define pay grade controls
- Update job controls
- Assign new employees to pay grades
- Work with pay grade information in the employee basic data record
- Use personnel action transactions with step-in-grade employees
- Enter salary changes for step-in-grade employees
- Begin step-in-grade processing for an existing employer
- Use the *Mass Update EE Position Data* option
- Convert step-in-grade information during implementation
- Automatically advance employees through steps in their pay grades and update their pay rates accordingly
- Update step rates on pay grade controls
- Update employee step rates

Understanding Step-in-Grade Processing

You use step-in-grade processing to automate the rate progression of selected employees. You can use step-in-grade processing to manage compensation for some of your workforce and use other methods of salary administration, such as a merit program, for other employees.

To implement step-in-grade processing, you first establish pay grade controls that define how many steps are in each pay grade. You can define up to 99 steps per pay grade. You associate rates with each step. You can use these rates to update the employee’s base rate in his or her basic data record as well as his or her rates in the payroll data record.

You specify the conditions employees must meet before they can progress to the next step; for example, an employee's age, length of service, the day/month or a combination of these conditions.

Note: You assign employees who are paid unique salaries and whose salary progression is discretionary to step 99 of their pay grade. The system does not update pay grade information for these employees during step-in-grade mass update options.

When you use the *Mass Update Step-in-Grade* option, the system uses criteria on the pay grade controls and information in the employee's basic data record to advance employees to their next step and update their personnel and payroll rates.

Pay grades are linked to jobs, and jobs are associated with positions. Employees are initially assigned to positions when you use the *Enter New Employee* option. You use the Position Change transaction in the *Enter Personnel Actions* option to move employees to new positions.

When you assign the employee to a position associated with a step-in-grade job, you place the employee on a starting step in the pay grade. The system calculates the first step based on criteria you define in the pay grade controls.

The system also calculates the next step number and the date on which the employee is to advance to the next step; you can override these if required. You use the *Mass Update Step-in-Grade* option to move the employee from the starting step to the next step and so on.

When you run the *Mass Update Step-in-Grade* option for a specified pay grade, the system uses the values in the *Next Step Date* and *Allow Step Increase* fields of each employee's basic data record to determine which employees are to advance to their next step. It then updates all step-in-grade related fields and creates an unprocessed Salary Change transaction for each updated employee.

Use the *Mass Update Personnel Actions* option to process the Salary Change transaction and update pay rates in the basic and payroll data records for these employees.

Refer to the *Infinium HR Guide to Personnel Actions* for more information.

Implementing Step-in-Grade Processing

This section discusses how to implement step-in-grade processing. You can use step-in-grade processing for some or all current employees in a particular employer. You must assign all employees to a pay grade, but you can choose to enter individual pay rates for employees by assigning them to step 99 on their pay grade.

Follow the steps below to begin step-in-grade processing.

1 Define pay grade controls. Refer to the *Infinium HR Guide to Controls* for more information.

2 Update job controls with pay grade information. Refer to the section entitled “Updating Job Controls” for more information.

3 Assign each employee whose compensation you will administer through step-in-grade processing to a position associated with a step-in-grade job. You can use the Position Change transaction in the *Enter Personnel Actions* option to move employees to step-in-grade jobs if their current job is not associated with a pay grade. Refer to the following sections for more information:

   - “Assigning New Employees to Pay Grades”
   - “Updating Pay Grade Information in the Basic Data Record”
   - “Using Personnel Actions with Step-in-Grade Employees”

4 Complete the step-in-grade fields in each step-in-grade employee’s basic data record.

   You can only update the following fields in the basic data records of employees assigned to step-in-grade jobs:

   - *Next Step Number*
   - *Next Step Date*

   The system maintains the following step-in-grade fields in the basic data record:

   - *Pay Grade*
   - *Grade Begin Date*
   - *Step Number*

- *Step Begin Date*
- *Allow Step Increase*

You cannot manually type information in these fields, although you can override the *Allow Step Increase* field using a Status Change transaction. You can use the Salary Change transaction to ensure that each step-in-grade employee is assigned to the correct step. Refer to the section entitled “Entering Salary Change Transactions for Step-in-Grade Employees” for more information.

5 Use the *Mass Update EE Step Rates* option to update the pay rates of step-in-grade employees using the rates established on their assigned pay grade control. Refer to the section entitled “Using the *Mass Update EE Step Rates* Options” for more information.

6 Use the *Mass Update Step-in-Grade* option to maintain the step assignment and pay rate(s) of employees other than those assigned to step 99. Refer to the section entitled “Using the *Mass Update Step-in-Grade Options*” for more information.

Defining Pay Grade Controls

You must define pay grade controls before you can use step-in-grade processing. You can define as many pay grades as you need. Each employee is assigned to one pay grade at a time.

Refer to the *Infinium HR Guide to Controls* for more information.

Updating Job Controls

After you establish the pay grade control, you link it to the jobs to which it applies. When you assign the employee to a position, he or she is also automatically assigned to a job. If the job is associated with a pay grade, the system uses the information on the job control to assign the employee to the pay grade and appropriate step within the grade. You can override the default step if required.

This section assumes that you have already established job controls and only addresses how to associate a pay grade with an established job control. Refer to the *Infinium HR Guide to Controls* for more information on defining job controls.

Follow the steps below to update a job control record.

1 From the Infinium HR main menu select *Controls.*

2 Select *Job Controls.*

3 Select Update Job Controls [UJC]. The system displays the screen shown in Figure 8-1.

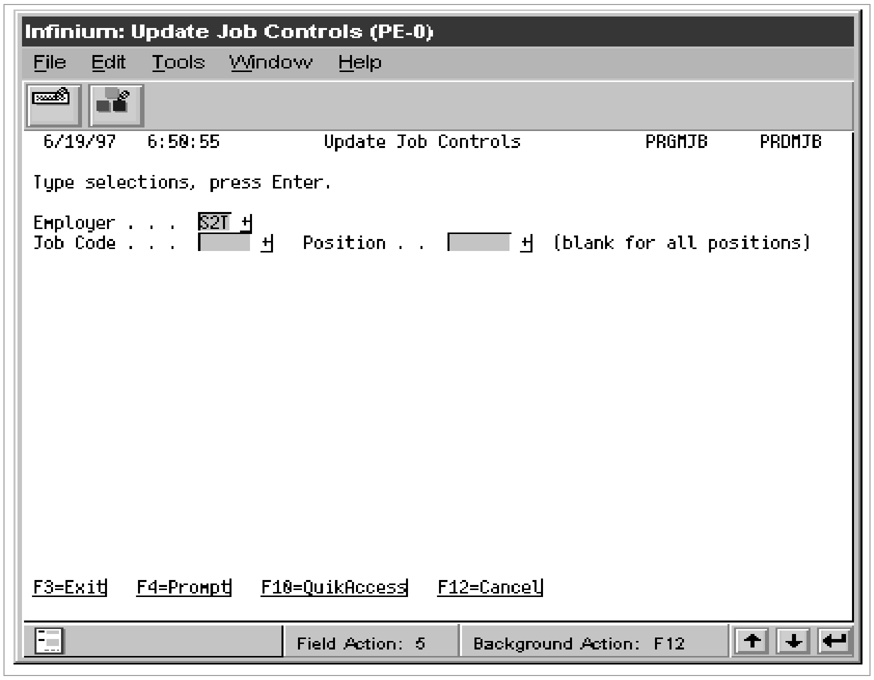


Figure 8-1: Update Job Controls prompt screen

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

Employer

Type the code value that identifies the employer within which you want to link pay grades to job controls.

Job Code

Type the code value that represents the job control to which you want to link a pay grade. Refer to the *Infinium HR Guide to Controls* for more information on establishing job controls.

Position

If you have defined unique job and position combinations, type the code value that identifies the position that is associated with the specified job code. Otherwise leave this field blank.

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

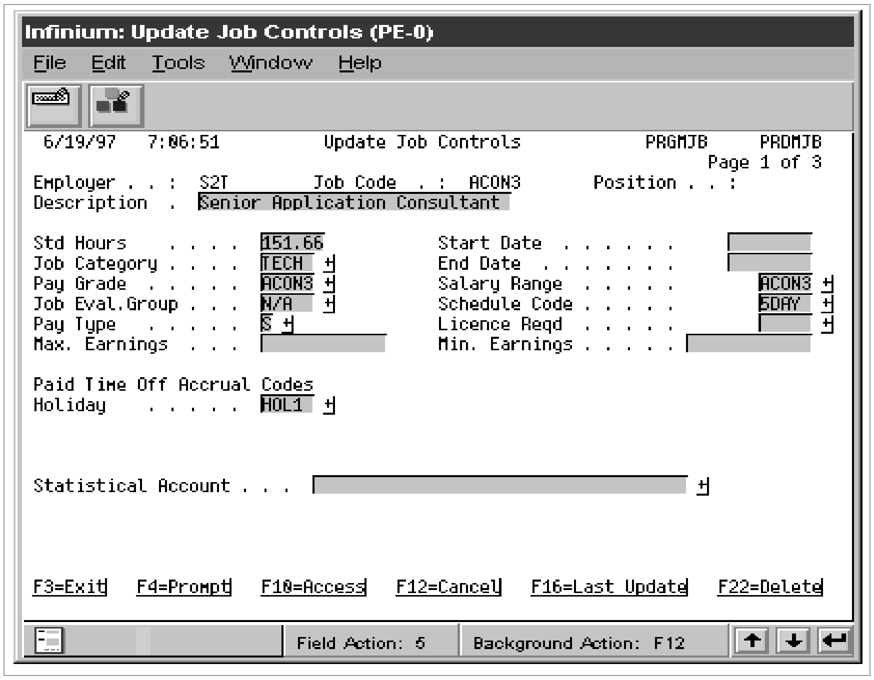


Figure 8-2: Update Job Controls screen 1 of 3

The only field that you must complete on this screen is the *Pay Grade* field; the others do not affect step-in-grade processing. Refer to the *Infinium HR Guide to Controls* for information on how to complete the other fields on this screen.

6 Use the following information to complete the field related to step-in-grade processing on this screen

Pay Grade

Type the code value that identifies the pay grade that is associated with this job. Refer to the *Infinium HR Guide to Controls* for more information on establishing pay grade codes.

When you assign employees to a position associated with this job, the system automatically assigns the employee to the pay grade you enter here.

7 Press Enter to progress through the second and third screens of the *Update Job Control* option.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves your changes to the job control and returns you to the Update Job Control prompt screen.

9 Type the code value of another job with which you want to associate a pay grade or press F3 to return to the Infinium HR main menu.

Assigning New Employees to Pay Grades

You use the *Enter New Employee* option to assign new employees to step-in-grade processing. When you enter the employee into a position that is linked to a job associated with a pay grade, the employee is automatically assigned to a step number according to the conditions you have defined for the pay grade.

After the employee is hired, you use the *Mass Update Step-in-Grade* option to advance the employee from his or her starting step to the higher steps in the pay grade.

In this section you only learn about the fields in the *Enter New Employee* option that affect step-in-grade processing. Refer to the chapter entitled "Entering New Employees" for more information on how to use the *Enter New Employee* option.

Follow the steps below to assign a new employee to a pay grade.

1 From the Infinium HR main menu select *Employees.*

2 Select *Create New Employee Records.*

3 Select *Enter New Employee* [ENE]. The system displays the screen shown in Figure 8-3.

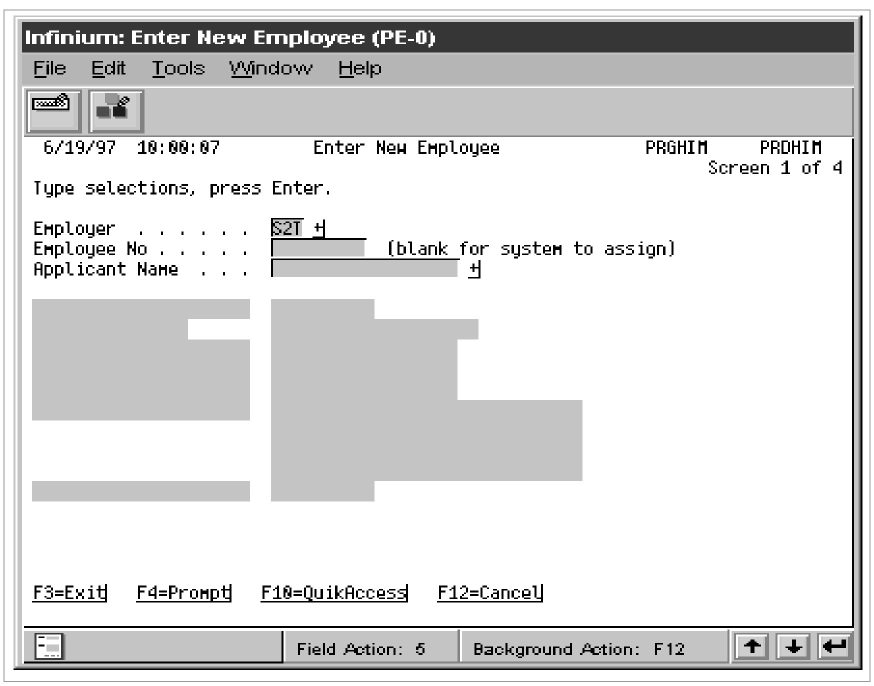


Figure 8-3: Enter New Employee prompt screen (1 of 4)

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

   Employer

   Type the code value that identifies the employer into which you are hiring the employee.

   Employee No

   Type the appropriate employee number or leave the field blank to have the system assign an employee number.

   Applicant Name

   If you are using the *Applicant* options, type the new employee's name in this field to enter information from his or her applicant data record into his or her new employee record.

5. Press Enter. The system displays the second Enter New Employee screen.

6. Use the *Position* field to type the code value that identifies the position into which you are hiring the employee. The system uses information on the job code associated with this position to fill in the step-in-grade processing fields on the next screen.

7. After you complete the rest of the fields you use on this screen, press Enter. The system displays the third Enter New Employee screen.

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

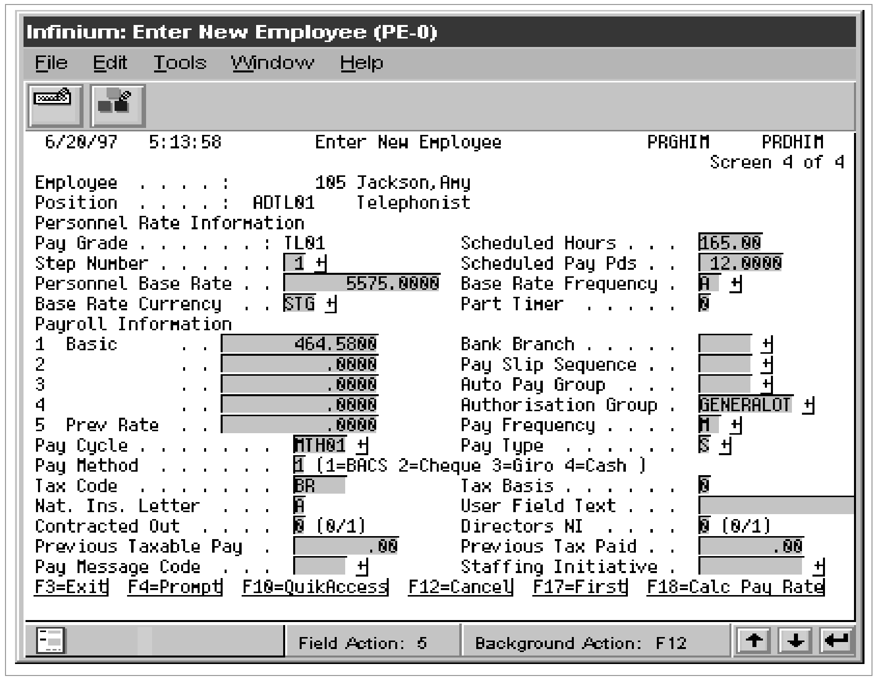


Figure 8-4: Enter New Employee screen 4 of 4

When you assign the new employee to a position associated with a step-in-grade job, the system uses information on the job control and pay grade control associated with the position to complete the following fields on this screen related to step-in-grade processing:

- *Pay Grade*
- *Step Number*
- *Personnel Base Rate*
- *Base Rate Frequency*
- *Base Rate Currency*
- *Payroll Information* field(s)

With the exception of the *Pay Grade* field, you can override the default information in these fields if necessary. However, the pay rates you specify for the employee must match the pay rate defined for the employee’s assigned step.

9 Use the following information to complete the fields related to step-in-grade processing on this screen. Only the step-in-grade processing fields are discussed here. Refer to the chapter entitled “Entering New Employees” for information on how to complete the rest of the fields on this screen.

Step Number

The system displays the employee's starting step in his or her assigned pay grade. The system calculates the appropriate step using the controls defined for the pay grade and the employee's details such as age and date of employment.

To override it, type a step number in this field to assign this employee to a starting step. Do not use step **99,** as this indicates that the employee has an individual salary level.

If you use the F4 prompt to select a step, the system returns the appropriate values to the *Personnel Base Rate*, *Base Rate Frequency*, *Payroll* field 1 and other payroll rate fields as appropriate.

Personnel Base Rate

The system completes this field with the base rate for the step number you typed.

Base Rate Frequency

The system enters the frequency for the pay grade of the position.

Base Rate Currency

The system enters the currency code for the pay grade of the position.

10 After you complete the necessary fields on this screen, press Enter to continue. The system creates the new employee record and either returns you to the Enter New Employee prompt screen, or displays any additional screens you have set up for the *Enter New Employee* process. Refer to the chapter entitled "Entering New Employees" for more information on how to complete these screens.

Updating Pay Grade Information in the Basic Data Record

After you enter a new employee, the system displays pay grade-related information in his or her basic data record. You fill these fields initially during the *Enter New Employee* process and use the *Mass Update Step-in-Grade* option to maintain most of them. The fields are:

Field Name	Updated By
Step Number *Step Begin Date*	The *Enter New Employee*; *Enter Personnel Actions,* and *Mass Update Step-in-Grade* options.

Field Name	Updated By
Next Step Number *Next Step Date*	The *Enter New Employee*; *Enter Personnel Actions,* and *Mass Update Step-in-Grade* options; you can also maintain these fields manually.
Allow Step Increase?	The *Mass Update Step-in-Grade* option when employees reach the top regular step in their pay grade. You can also maintain this field manually.

Maintaining Employee Step Data

You use the *Mass Update Step-in-Grade* option to move the employee from his or her current step, which the system displays in the *Step Number* field, to his or her next step, which the system displays in the *Next Step Number* field.

The system updates the employee's current step number with the value from the *Next Step Number* field, and uses the age, length of service and date requirements you establish on the pay grade control to determine the next value for the *Next Step Number* and *Next Step Date* fields. As these values are calculated in advance, you can override them if required.

When you use the *Mass Update Step-in-Grade* option, the system updates the *Base Rate* field in each employee's basic data record with the rate associated with his or her next step. The *Mass Update Step-in-Grade* option also updates rates in the payroll data record.

You should run the *Mass Update Step-in-Grade* option on a regular basis to keep the employee's step information and pay rates current.

Changing An Employee's Pay Grade Assignment

You can use the Position Change transaction in the *Enter Personnel Actions* option to change an employee's assigned pay grade. If you change the pay grade, the system displays the Salary Change screen, from which you can update the employee's step information. Refer to the section entitled "Entering Position Change Transactions for Step-in-Grade Employees" for more information.

The system calculates the appropriate step in the new pay grade for the employee based on the controls defined in the new pay grade for the employee. Refer to the *Infinium HR Guide to Controls* for more information.

Maintaining Step Rates

If you need to change the step rates on the pay grade control record, you can change them manually through the *Update Pay Grade and Steps* option. However, if you use this option, the system does not maintain a history of the step rate values since pay grades and step controls are effective dated. To maintain a history of these values, use the *Mass Increase Pay Grade Steps* option or the *Copy Pay Grades and Steps* option to create a set of step rates with a new effective date.

You use the *Mass Update EE Step Rates* option to apply the changed rates to employees.

Note: The system only updates base and pay rates when you use this option; employee step numbers do not change.

Refer to the section entitled “Using Step-in-Grade Mass Update Options” for details on how to use the mass update options associated with step-in-grade processing.

Using Personnel Actions with Step-in-Grade Employees

You use the *Mass Update Step-in-Grade* option to automate the step progression of employees assigned to pay grades and to update their pay grade-related information including pay rate(s). You can use the Salary Change transaction in the *Enter Personnel Actions* option to change an employee’s current step in his or her assigned pay grade.

You can use the Position Change transaction in the *Enter Personnel Actions* option to move an employee from one position to another. If the employee’s new position is associated with a different pay grade from his or her prior position, the system uses the pay grade data on the new job control to update the employee’s pay grade-related information. The system also presents the Salary Change screen for you to confirm pay rate changes based on the employee’s new pay grade and step.

In this section you learn about only the following transactions in the *Enter Personnel Actions* option that affect step-in-grade processing:

- Position Change
- Salary Change

Follow the steps below to update personnel actions for step-in-grade employees.

1 From the Infinium HR main menu select *Employees.*

2 Select *Employee History.*

3 Select *Enter Personnel Actions* [EPA]. The system displays the screen shown in Figure 8-5.

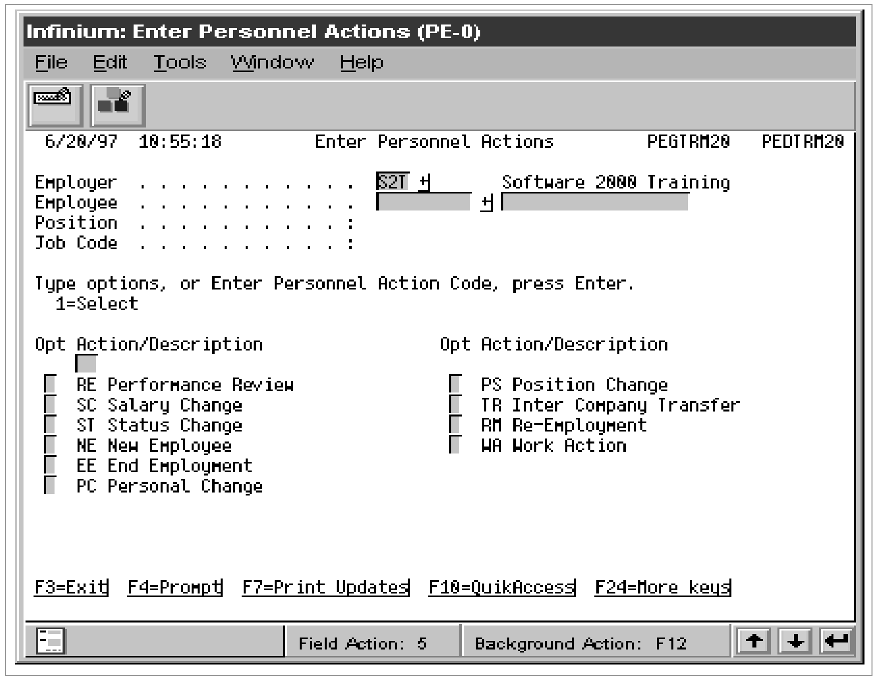


Figure 8-5: Enter Personnel Actions menu screen

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

Employer

Type the code value that identifies the employer into which you entered the employee.

Employee (Number, Name)

Type the number assigned to the employee in the first field. If you do not know the employee's number, press F4 to display the Employee Locate screen. When you select the employee you require, the system displays the employee's number and surname in the *Employee* fields.

Opt

Type **1** in the *Opt* field next to the transaction you want to process. Refer to the appropriate section below for more information about using a particular transaction.

Entering Position Change Transactions for Step-in-Grade Employees

You use the Position Change transaction to move an employee to a new position within his or her current employer. The system updates the employee's pay grade and pay rate information in different ways depending on whether the new position is associated with the same or a different job and pay grade.

This section presents information on the Position Change screen that relates to step-in-grade processing.

New Position Associated with New Job and Pay Grade

If the new position is associated with a new job and pay grade in the same employer, the system updates the employee's pay grade and rate information. If you are authorised to update salaries, the system automatically displays the Salary Change transaction screen after you exit from the Position Change screen under the following conditions:

- If the pay grade changes
- If you are using pay components and the employee's hours change

The system uses the *Rounding Type* field on the new pay grade control to select a step for the employee on the new pay grade.

New Position Associated with Same Pay Grade

If the new position is associated with the same job or a new job with the same pay grade, the system does not change the employee's assigned pay grade or step. It does not display the Salary Change transaction screen after you exit from the Position Change transaction screen.

Use the following information to complete the step-in-grade information related to the Position Change transaction.

1. From the Enter Personnel Actions menu screen, select the *Position Change* transaction and press Enter. The system displays the screen shown in Figure 8-6.

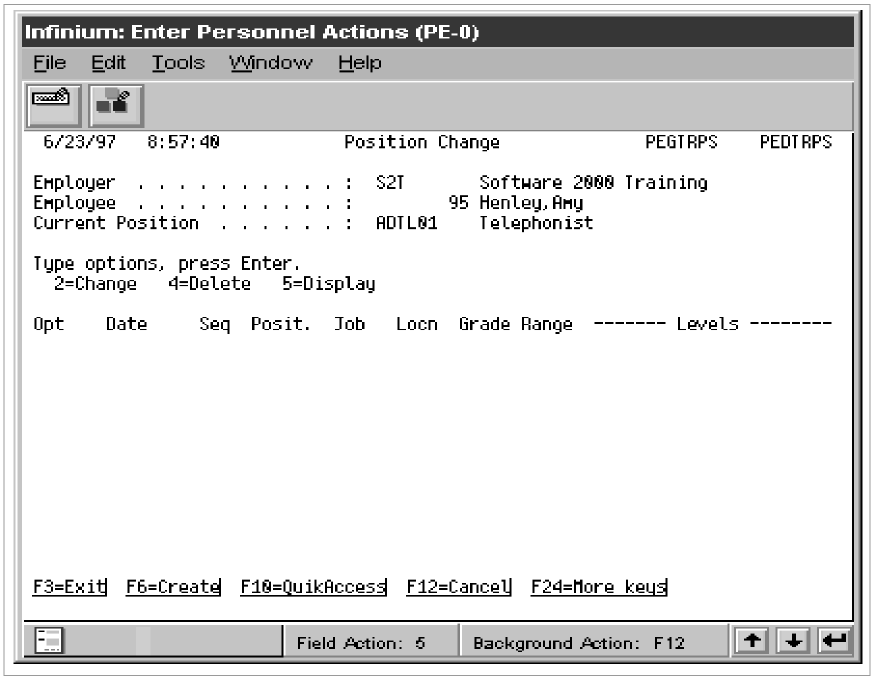


Figure 8-6: Enter Personnel Actions - Position Change selection screen

2 Press F6 to create a new transaction. The system displays the screen shown in Figure 8-7.

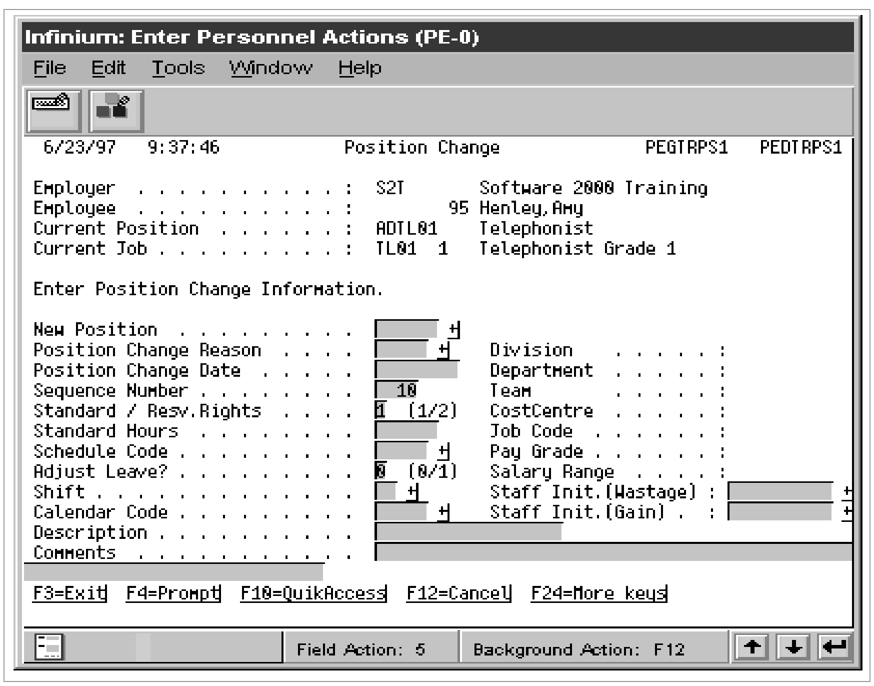


Figure 8-7: Enter Personnel Actions - Position Change screen

The new position is associated with a job control. If the job control is different from the one to which the employee is currently assigned, and if the new job control is linked to a pay grade that is different from the one to which the employee is currently assigned, the system uses the *Rounding Type* field on the new pay grade control to select a step in the new pay grade for the employee.

If a step-in-grade employee moves to a new position that is not associated with a step-in-grade job, the system enters **99** in the *Step Number* field on his or her basic data record and he or she is no longer affected by the *Mass Update Step-in-Grade* processing.

If a non-step-in-grade employee moves to a step-in-grade position, the system updates the pay grade-related fields in his or her basic data record and thereafter maintains them through the *Mass Update Step-in-Grade* option.

For employees who change position to one associated with a step-in-grade job, the system uses the information on the new pay grade control to determine the new step number and rate.

If the employee’s position change involves a change of pay grade and a projected new step number and rate, the system automatically displays the Salary Change screen when you exit and save from the Position Change screen. The system displays a default salary change appropriate to the pay grade change.

You do not have to create this salary change; you can press F12 to cancel if a salary change is not applicable. You can also change the step number on the Salary Change screen. You use the Salary Change transaction to update pay rate information for employees whose pay rates change due to their change in pay grade.

For sequential step processing, the system determines whether the employee’s pay rates change due to a pay grade change as follows:

- If you entered **1** or **2** in the *Rounding Type* field on the new pay grade control, the employee’s pay rates can change because of his or her new pay grade assignment. The only time the employee’s rates do not change is when the system finds a value in the employee’s first payroll rate field that is associated with a step on the new pay grade that matches the employee’s current base pay rate.

  If the system cannot find a matching rate for the employee on his or her new pay grade, it uses the *Rounding Type* field to select the employee’s step on the new pay grade. It automatically displays the Salary Change screen when you exit from the Position Change screen and fills in the *Pay Grade* and *Step Number* fields.

After you confirm the information and exit from the Salary Change screen, the system updates the employee's basic data and payroll data records with the new pay grade and rate information.

- If you entered **3** in the *Rounding Type* field on the new pay grade control, the employee's rates do not change until he or she progresses to the next step in his or her new pay grade. The system does not present the Salary Change screen when you exit from the Position Change screen.

3 Use the following information to complete the pay grade related fields on this screen.

New Position

Type the code value that identifies the new position to which the employee is assigned. When you select a position, the system uses information from the new position and pay grade controls to immediately update fields on the Position Change screen including the *Pay Grade* field.

Position Change Date

Type the date on which the employee's position change takes place. If necessary, the system automatically displays the Salary Change transaction screen for you to update the employee's pay rate(s) as a result of his or her position change. The system uses the date you type in this field to complete the *Salary Change Date* field on the Salary Change transaction screen.

If the date you type in this field is a future date, the system treats the position change as a future-dated transaction and does not update the employee's basic data record with information from the employee's new position assignment until you run the *Mass Update Personnel Actions* option. The corresponding salary change, if any, is also future-dated and does not take effect until you run the *Mass Update Personnel Actions* option.

Pay Grade

The system displays the value that identifies the pay grade associated with the job linked to the employee's new position. You cannot change this field on this screen. If the system displays an incorrect pay grade, you must use the *Update Job Controls* option to change the pay grade associated with the specified job.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and exits from this screen. If you did not enter a future-dated transaction, the system updates the employee's basic data record with information from the new position assignment.

5 If you are authorised to update salaries and the position change transaction meets the following conditions, the system displays the Salary Change transaction screen:

- The pay grade changes
- You are using pay components and the employee's hours change

If the system displays the Salary Change screen, it uses information from the position change transaction to complete all of the necessary fields except the following:

- *New Base Rate*
- *Payroll Rate*

If the system finds a salary change reason that matches the position change reason, it completes the *Salary Change Reason* field. If not, it leaves the field blank; type the appropriate code value in the *Salary Change Reason* field. Verify that all of the other information on the screen is correct. Pay particular attention to the *Salary Change Date*, *Pay Grade*, *Step Number*, *New Base Rate* and *Update PY Rate No* fields.

The system also calculates the pay rate and updates the appropriate *Payroll Rate* field; you can override this if required. The system uses the value in this field to update the *Pay Rate* field in the employee's payroll data record.

6 Press F3. Then type **1** in the Exit options window and press Enter. The system saves any changes you have made and returns you to the Personnel Actions Update selection screen.

Entering Salary Change Transactions for Step-in-Grade Employees

You use the Salary Change transaction to change the value in the employee's *Step Number* field in his or her basic data record along with the rates in his or her basic data and payroll data records. You normally do not need to use the Salary Change transaction to increase the pay rates of step-in-grade employees since the system does this automatically when you run the *Mass Update Step-in-Grade* option.

The base pay rate is stored in the *Base Rate* field in the basic data record. If Infinium HR users at your location are authorised to update payroll rates, you can also update the employee's payroll rates which are stored in the *Update Payroll Data* option on Infinium Payroll.

Follow the steps below to enter a Salary Change transaction for a step-in-grade employee.

1 From the Enter Personnel Actions menu screen, select the *Salary Change* transaction and press Enter. The system displays the screen shown in Figure 8-8.

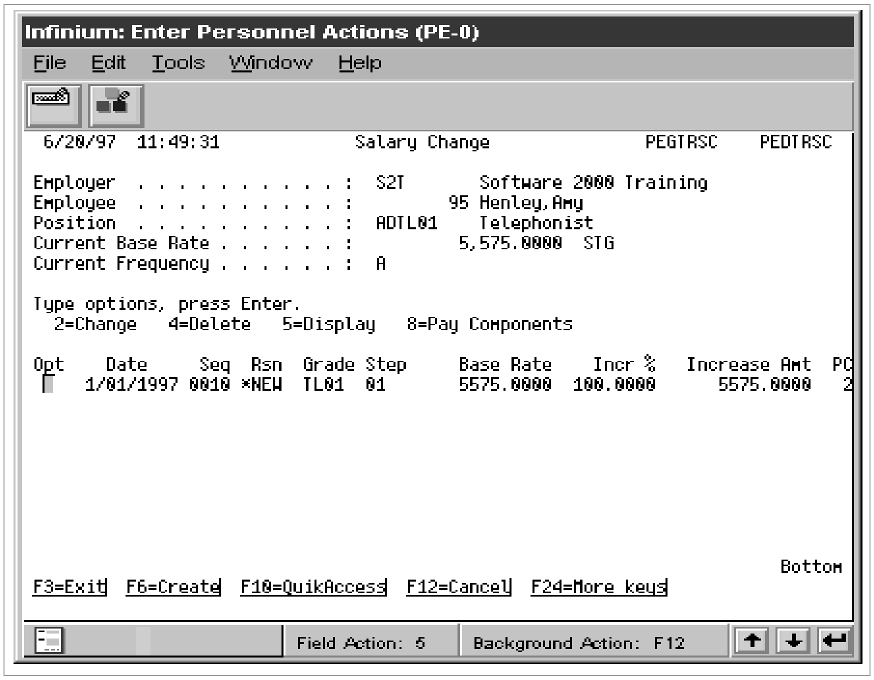


Figure 8-8: Enter Personnel Actions - Salary Change selection screen

2 Press F6 to create a new salary change. The system displays the screen shown in Figure 8-9.

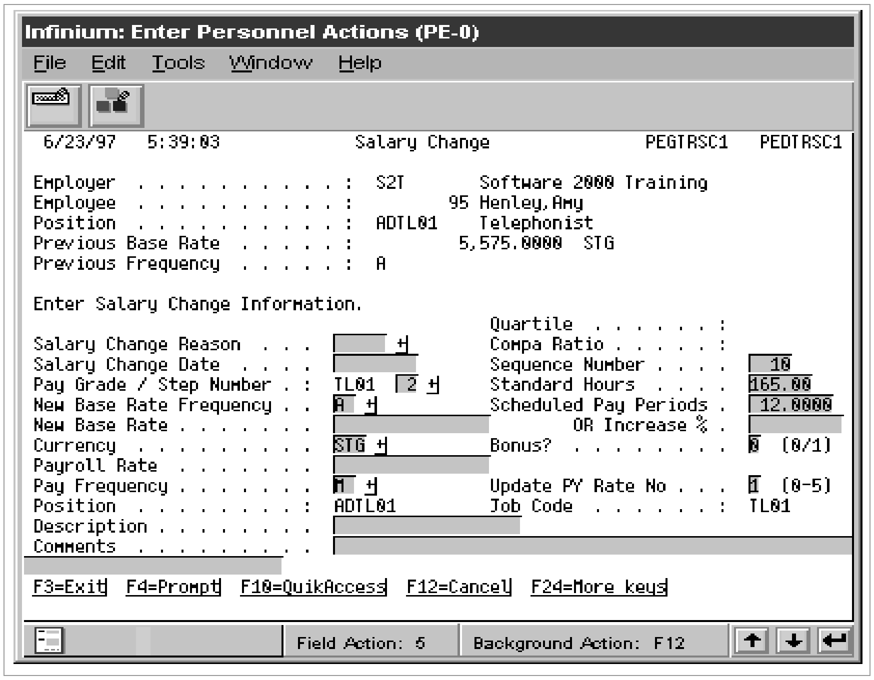


Figure 8-9: Enter Personnel Actions - Salary Change screen

You can make changes to the employee's current step in his or her assigned pay grade. You cannot use the Salary Change transaction to change the pay grade to which the employee is assigned. The system requires that the employee be assigned to the pay grade associated with the employee's job control.

3 Use the following information to complete the pay grade related fields on this screen.

Salary Change Reason

Type the code value that identifies why the employee is assigned to a new step. You define values for this field through the *Update Employer Codes* option, using code type **SAL**.

Salary Change Date

Type the date on which the employee is assigned to a new step in his or her current pay grade. The system uses this date to update the *Step Begin Date* field in the employee's basic data record.

Step Number

Type the new step within the employee's current pay grade to which the he or she is assigned. You use the *Update Pay Grade and Steps* option to define steps.

Update PY Rate No

Type the value that indicates which payroll rate you want to update. If the step to which you are assigning the employee has more than one payroll rate, you must create a salary change transaction for each rate. You can use the same effective date and reason code for each transaction.

The system enters a default value of **1** in this field. To override it, type another number. Valid values are:

0	Do not update payroll rates; only update the *Base Rate* field in the basic data record
1	Update the *Pay Rate* field in the payroll data record and the *Base Rate* field in the basic data record
2 to **5**	Update only the appropriate field in the payroll data record

When you use the Salary Change transaction to update the employee's current step, the system creates a salary change history record and automatically updates the following fields in the employee's basic data record:

Salary Change Transaction Field	Field Updated in Basic or Payroll Data	Comments
Salary Change Date	*Step Begin Date* - Basic Data	
Step Number	*Step Number* - Basic Data	
	Next Step Number - Basic Data *Next Step Date* - Basic Data	The system uses the updated step number and the pay grade control to update the *Next Step Number* and *Next Step Date* fields.
New Base Rate	*Base Rate* - Basic Data	The system updates this rate if you type **0** or **1** in the *Update PY Rate No* field.
Payroll Rate	*Pay Rate* field 1 - Payroll Data	The system updates this rate if you type **1** in the *Update PY Rate No* field.

Salary Change Transaction Field	Field Updated in Basic or Payroll Data	Comments
	Pay Rate fields 2 to 5 - Payroll Data	The system updates the appropriate rate if you type **2**, **3**, **4** or **5** in the *Update PY Rate No* field.

4 Press F3. Then type **1** in the Exit Options window and press Enter. The system updates the step-in-grade and compensation-related fields in the employee's basic data and payroll data records, saves the Salary Change transaction in the employee's history and returns you to the Salary Change selection screen.

5 Repeat steps 2 to 4 to update any additional payroll rates for the employee.

6 When you have updated all of the employee's rates to match his or her new step assignment, press F3 to return to the Enter Personnel Actions menu screen.

Entering Intercompany Transfer Transactions for Step-in-Grade Employees

Infinium HR treats intercompany transfers for step-in-grade employees in the same way as position/salary change transactions. Refer to the following sections for more information:

- "Entering Position Change Transactions for Step-in-Grade Employees"
- "Entering Salary Change Transactions for Step-in-Grade Employees"

Using Step-in-Grade Mass Update Options

The *Mass Update Step-in-Grade* option allows you to automate the employee's movement through the steps in his or her assigned pay grade. The system uses the age, length of service and day/month requirements on the pay grade control to advance the employee from one step to the next in his or her assigned pay grade. Employees can advance using a sequential progression or they can skip steps depending on the processing type you select and the step parameters you define.

It automatically updates the employee's personnel and payroll pay rates with the rates associated with the new step and records the rate changes in the employee's salary history.

The *Mass Increase Pay Grade Steps* option allows you to automatically update the rates associated with steps on the pay grade control. You can specify amount or percent increases to some or all of the steps and rates. You can also specify a new effective date, which means you can use the option to copy updates as well as perform the increases.

The *Mass Update EE Step Rates* option updates employee records using the most up to date rates on each employee's assigned pay grade control. It does not change the employee's step assignment; it only updates his or her rates with the most recent standard rates on the pay grade control.

The system uses the rates with an effective date equal to or prior to the 'as of' date. This allows you to create a new set of pay rates for all employees in the pay grade(s) and create a history of individual salary changes at the same time.

The system creates unprocessed salary change transactions within the *Enter Personnel Actions* option for all rate changes generated through the *Mass Update Step-in-Grade* and *Mass Update EE Step Rates* options for reporting and history displays. You use the *Mass Update Personnel Actions* option to process the salary changes.

Many standard reports include salary change history including *Print Personnel Actions, Print Personnel Action Details*, and *Print Personnel Actions by Level*.

Updating Employee Steps

You use the *Mass Update Step-in-Grade* option to maintain the employee's step information after he or she has been entered on the system. When you run the *Mass Update Step-in-Grade* option, the system uses information on the pay grade control to advance the employee from his or her current step to the next step in his or her assigned pay grade.

The system updates the employee's current step number with the value from the *Next Step Number* field, and uses the age, length of service and date requirements you establish on the pay grade control to determine the next value for the *Next Step Number* and *Next Step Date* fields. As these values are calculated in advance, you can override them if required.

You can use the *Trial Mass Update Step-In-Grade* option to preview the changes the system will make when you run the *Mass Update Step-in-Grade* option. The *Trial Mass Update Step-In-Grade* option produces reports that you review and use to make any necessary changes to employee information before you run the *Mass Update Step-in-Grade* option.

The system also generates a report for payroll and a report for human resources when you run the *Mass Update Step-in-Grade* option. The reports identify the employees who advanced to their next step along with their personnel and payroll rate changes, their next step and next step date.

The system generates an error and warning report that identifies employees who reach the top regular step in their pay grade; these messages are also shown on the reports from both the *Trial* and *Mass Update Step-in-Grade* options. When you run the *Mass Update Step-in-Grade* option, the system performs the following actions on fields in the basic data records of employees who reach the top regular step in their pay grade:

- Enters the current step number in the *Next Step Number* field
- Leaves the *Next Step Date* field blank

In both the *Trial* and *Mass Update Step-in-Grade* options, the system skips those employees whose basic date record contains a **0** in the *Allow Step Increase* field. This field indicates that the employee should not move or cannot move from his or her current step. When you type **1** in this field, the system begins to include the employee in the *Trial* and *Mass Update Step-in-Grade* processing.

You use the *Effective Date* field on the selection screen for the *Trial* and *Mass Update Step-in-Grade* options to identify which employees the system should advance to the next step. The system compares the effective date you specify to each employee's next step date in basic data and moves those employees whose next step date is the same as or earlier than the effective date.

For example, if you type **01061997** in the *Effective Date* field, the system moves all employees whose *Next Step Date* is 01061997 or earlier, unless their individual *Allow step Increase* fields are **0**.

When you use the *Mass Update Step-in-Grade* option, the system makes salary changes based on the employee's progression to his or her next step and creates Salary Change transactions in the employee's history. You use the *Mass Update Personnel Actions* option to update the employee's basic data and payroll data records, and you can use the *Enter Personnel Actions* option to view the Salary Change transactions.

As with any Salary Change transactions you enter manually, the system uses the Salary Change transactions created by the system when you run the *Mass Update Step-in-Grade* option to build a history of salary information for the employee. You can use the *Display Salary Changes* option to view salary change history information for many employees, or the *Display Employee History* option to review an individual employee's salary change history.

Using the *Mass Update Step-in-Grade* Options

The steps below apply to both the *Trial Mass Update Step-In-Grade* and the *Mass Update Step-in-Grade* options. The trial update provides reports that allow you to verify that the system is advancing employees correctly to their next steps. If you find errors, make any necessary changes to employee basic data and then rerun the *Trial Mass Update Step-In-Grade* option as many times as necessary to obtain the correct results.

After you obtain accurate results from the *Trial Mass Update Step-In-Grade* option, run the *Mass Update Step-in-Grade* option. The *Mass Update Step-in-Grade* option creates unprocessed Salary Change transactions. When you process them using the *Mass Update Personnel Actions* option, the system updates the employee's pay rates in basic data and payroll data records and writes Salary Change history transactions.

Follow the steps below to run the *Mass Update Step-in-Grade* option.

1 From the Infinium HR main menu select *Step-in-Grade.*

2 Select *Maintenance Functions.*

3 Select *Mass Update Step-in-Grade* [MSU]. The system displays the screen shown in Figure 8-10.

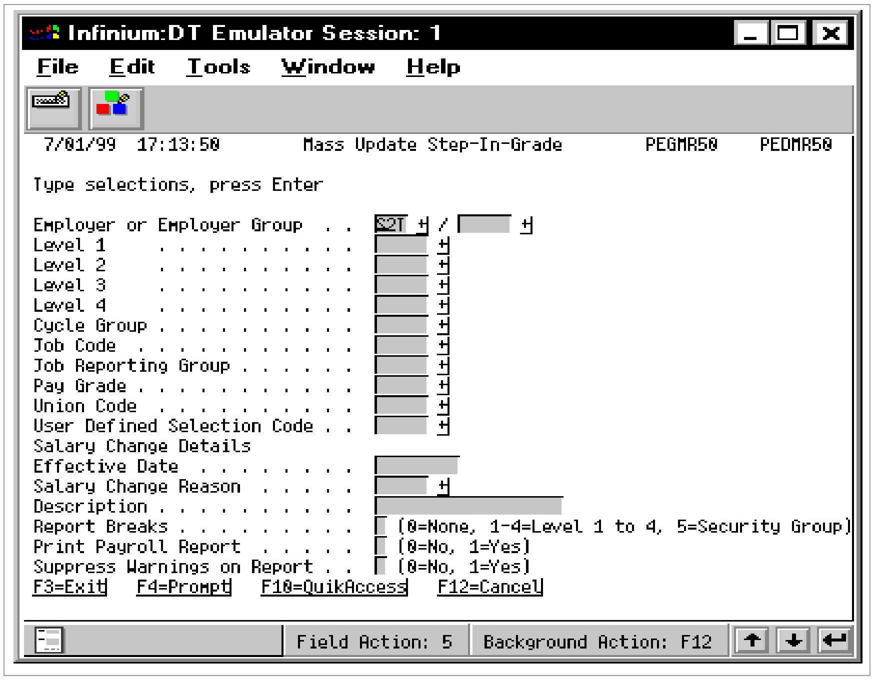


Figure 8-10: Mass Update Step-In-Grade screen

Note: If you select *Trial Mass Update Step-In-Grade* [TSU], the system displays the Trial Mass Update Step-In-Grade screen. This is identical to the screen displayed above apart from the title.

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

Use this screen to specify how the system advances step-in-grade employees. The system updates the employee's *Base Rate* field in his or her salary change record with the rate in the *Base Rate* field associated with his or her new step on the pay grade control. When you use the *Mass Update Personnel Actions* option, the system also updates the *Base Rate* field in the employee’s basic data record.

The system uses the payroll rates to calculate the employee's pay during payroll cycle processing. You should coordinate with Infinium Payroll users at your site to ensure that you make payroll rate changes in advance of the appropriate pay cycle.

The system automatically prorates salary changes that occur in the middle of a pay period. For example, you run the *Mass Update Step-in-Grade* option with an effective date of 05061997 in advance of the pay period that runs from 01061997 to 08061997. The system creates the appropriate transactions for updating the employee's payroll rates when you run the *Mass Update Personnel Actions* option.

During part pay period processing, the system prorates the part period for the new payroll rate(s) to calculate all of the employee's earnings in that pay period.

Payroll processors can use the *Retrospective Pay Awards* options in Infinium Payroll to compute adjustments that are due when you enter employee rate changes after their effective date. For example, if an employee receives a rate increase effective 01021997 but you do not update it in Infinium HR until 01061997, you owe the employee a retrospective pay award for the four months that he or she was paid at a lower rate.

Employer or Employer Group

Type the code value that identifies the employer or employer group within which you use step-in-grade processing.

Level 1

Type a code value to restrict step-in-grade processing to employees assigned to a particular Level 1. The system compares the value you type in this field with the value in each employee's Level 1 field in basic data and processes step movement only for employees assigned to the specified Level 1.

Leave this field blank if you want step-in-grade processing to apply to employees in all levels.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict step-in-grade processing to employees assigned to particular levels within the specified level 1. The system compares the values you type in these fields with the values in each employee's level fields in basic data and processes step movement only for employees within the specified levels.

If you want to complete a particular level, you must complete all the fields above that level. For example, if you want to enter a value in a the *Level 4* field, you must complete levels 1, 2 and 3.

Leave fields blank if you want step-in-grade processing to apply to all employees in a particular level.

Cycle Group

Type a code value to restrict step-in-grade processing to employees assigned to a particular pay cycle group. The system compares the cycles in this group with the value in the *Cycle* field on each employee’s payroll data record. It processes the step movement only for employees whose cycle matches one of the cycles in this group.

Leave this field blank if you want step-in-grade processing to apply to employees in all cycle groups.

Job Code

Type a job code to restrict step-in-grade processing to employees assigned to that job. The system compares the value you type in this field with the value in each employee's *Job Code* field in basic data and processes step movement only for employees assigned to the specified job code.

Leave this field blank if you want step-in-grade processing to apply to employees in all jobs.

Job Reporting Group

Type a code value to restrict step-in-grade processing to employees assigned to a job that is included in a particular job reporting group. Leave this field blank if you want step-in-grade processing to apply to employees in all job reporting groups.

Pay Grade

Type the code value that identifies the pay grade for which you want to process step progression. Leave this field blank if you want step-in-grade processing to apply to employees in all pay grades.

Union Code

Type a code value to restrict step-in-grade processing to employees assigned to a particular union code. The system compares the value you type in this field with the value in each employee's *Union* field in basic data and processes step movement only for employees assigned to the specified union code.

You define codes for this field through the *Update Unions* option. Leave this field blank if you want step-in-grade processing to apply to employees regardless of union affiliation.

User Defined Selection Code

This field enables you to attach a custom program that you have developed to apply extra selection parameters to the selection process. Type a code value to restrict step-in-grade processing to a group of employees that you have defined using this custom program. You define code values for this field through the *Update Employer Codes* option, using code type **UDS**.

The system converts the code value that you define into a program name by adding the letters CUG to the start of the code value. For example, if you define a code value of MNGR, the system calls the program CUGMNGR.

Leave this field blank if you want step-in-grade processing to apply to employees regardless of selection code criteria.

Effective Date

Type the date the system should use to advance employees to their next step.

In addition to advancing employees to their next step, the system creates a Salary Change transaction within the *Enter Personnel Actions* option for each employee to record the rate change(s) associated with the move to his or her next step.

The system compares the date in the *Effective Date* field to the date in each employee's *Next Step Date* field in the basic data record. The system advances employees whose next step date is on or before the effective date.

Salary Change Reason

Type the code value that identifies the reason for the employee's rate change. The system uses this code value to fill the *Salary Change Reason* field when it generates Salary Change transactions within the *Enter Personnel Actions* option for affected employees. For example, you can define a value of **STEP** to differentiate salary changes produced by the *Mass Update Step-in-Grade* option from those you enter manually.

You define values for this field through the *Update Employer Codes* option, using code type **SAL**.

Description

Type a description you want to associate with the Salary Change transactions that the system generates when you run the *Mass Update Step-in-Grade* option. The system transfers this information to the *Description* field in the Salary Change transaction created for each employee affected by the *Mass Update Step-in-Grade* option.

Report Breaks

Type a value to indicate the way you want to group employees on the report. Valid values are:

0	Do not group employees
1 to **4**	Group employees by the corresponding level
5	Group employees by security group

Within your grouping selection, employees are sorted by employee number.

Print Payroll Report

Indicate whether you want to print the payroll report. Valid values are:

0	No. Do not print the payroll report.
1	Yes. Print the payroll report.

Suppress Warnings on Report

Indicate whether you want to suppress system warnings from the payroll report. Valid values are:

0	No. Do not suppress system warnings from the payroll report.
1	Yes. Suppress system warnings from the payroll report.

5 After you type information in the selection field(s) you require, press Enter. Then type **1** in the Confirm Request window and press Enter. The system displays the following message at the bottom of the Mass Update Step-In-Grade screen and returns you to the Infinium HR main menu.

Building submission request...

6 The system uses batch processing to process the *Mass Update Step-in-Grade* option and generate the Update Step-In-Grade report(s). Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the report(s) using options on these screens.

7 Examine the report(s) generated. They include the following information for each affected employee:

- Current pay grade
- New step
- New personnel base rate
- Personnel base rate increase amount
- Effective date of new step
- New payroll rate(s)
- Next step
- Next step date

8 You can use the following options to process and view the Salary Change transactions the system generated when you ran the *Mass Update Step-in-Grade* option:

- Use the *Enter Personnel Actions* option to view unprocessed individual salary transactions for an employee
- Use the *Mass Update Personnel Actions* option to process the Salary Change transactions
- Use the *Display Employee History* option to view an individual employee's salary change history
- Use the *Display Salary Changes* option to view salary change history information for many employees

Updating Step Rates Associated with a Pay Grade

If you need to change the step rates on the pay grade control record, you can change them manually through the *Update Pay Grade and Steps* option. However, if you use this option, the system does not maintain a history of the step rate values since pay grades and step controls are effective dated.

To maintain a history of these values, use the *Mass Increase Pay Grade Steps* option to create a set of step rates with a new effective date. You can apply the same monetary amount or percentage change to all of the step rates, or to specified portions of the step rates.

For example, you want to increase the first 10.00 of all steps by a monetary amount of 1.00, the next 5.00 of each step by 0.50 and the next 1.00 of applicable steps by 0.10. You do not want to apply an increase to step rates that exceed the first 16.00. The table that follows illustrates this example.

Pay Grade Step	Step Rate	Increase Amount	Result
Step 1	10.00	1.00	11.00
Step 2	12.50	1.50	14.00
Step 3	15.00	1.50	16.50
Step 4	17.50	1.60	19.10
Step 5	20.00	1.60	21.60

Regardless of whether you update step rates manually or through the *Mass Increase Pay Grade Steps* option, the system does not apply the new rates to step-in-grade employees until you use the *Mass Update EE Step Rates* option.

You can use the F21 key to print a preview of the changes the system will make when you run the *Mass Increase Pay Grade Steps* option. This option produces a report that you review and use to verify the changes the system will make when you run the *Mass Increase Pay Grade Steps* option.

The system also generates a report when you run the *Mass Increase Pay Grade Steps* option to verify the changes that you made.

Using the *Mass Increase Pay Grade Steps* Option

Follow these steps to run the *Mass Increase Pay Grade Steps* option.

1 From the Infinium HR main menu select *Step-in-Grade.*

2 Select *Maintenance Functions.*

3 Select *Mass Increase Pay Grade Steps* [MIGS]. The system displays the screen shown in Figure 8-11.

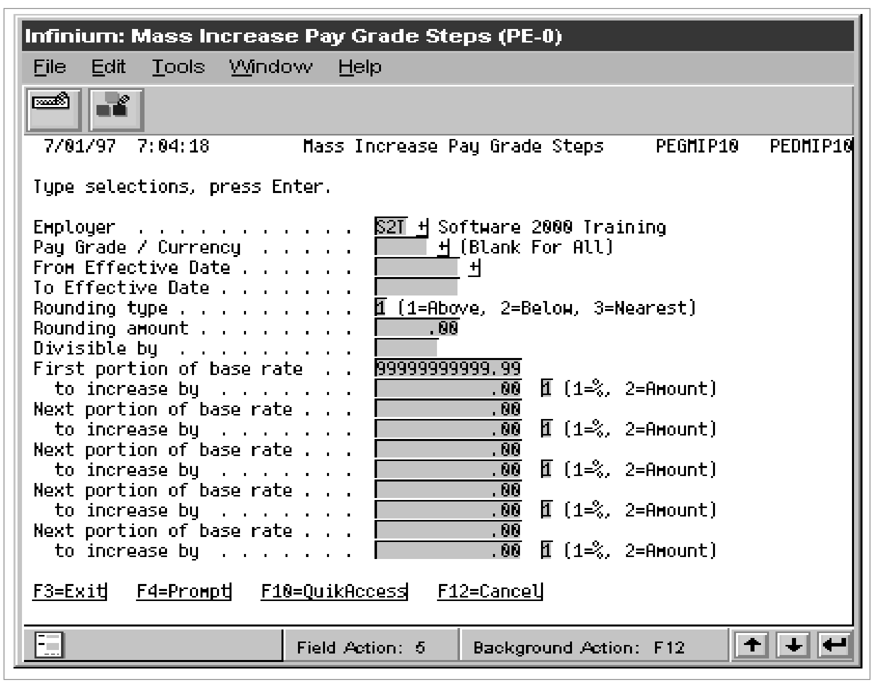


Figure 8-11: Mass Increase Pay Grade Steps screen 1 of 2

You use this screen to specify the pay grades within which you want to increase step rates.

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

Employer

Type the code value that identifies the employer within which you want to update step rates.

Pay Grade

Type the code value that identifies the pay grade you want to update with new step rates. Leave this field blank if you want to update all pay grades that meet the other specifications on this screen.

Currency

The system displays the currency associated with the pay grade you select. This field is for information only.

From Effective Date

Type the date that corresponds to the effective date of pay grades from which you want to copy and update step rates.

To Effective Date

Type the new effective date for the resulting pay grade and steps containing the increases. This date must be in the future of the date you type in the *From Effective Date* field.

Rounding type

Specify how you want the system to apply the step rate changes that you type. The system uses the value you enter in the *Rounding amount* field to apply the rounding type you specify in this field.

Valid values are:

1	Above. Round to the next highest specified rounding amount.
2	Below. Round to the next lowest specified rounding amount.
3	Nearest. Round up or down to the nearest specified rounding amount.

If you leave the *Rounding amount* field blank, the system does not round the results of its calculations regardless of the value you specify in this field.

Rounding amount

Type the value the system should use when it rounds calculation results. The system uses the value you specify here in conjunction with the choice you specify in the *Rounding type* field.

For example, if you type **1.00** in this field and **1** in the *Rounding type* field, the system rounds all calculation results to the next highest 1.00.

If you leave this field blank, the system does not round the results of its calculations.

Divisible by

Type the value the system should use when it computes step rate changes. The system always adjusts calculated results to the nearest multiple of the value you specify in this field. Leave this field blank if you do not want the system to perform this final calculation.

The table that follows illustrates the results when you specify that the changed step rates should be divisible by **2.00**.

Pay Grade Step	Step Rate	Increase Amount	Result
Step 1	9.00	1.00	10.00
Step 2	12.00	1.00	12.00
Step 3	14.50	1.00	14.00
Step 4	17.10	1.00	18.00
Step 5	19.60	1.00	20.00

If you also enter a value in the *Rounding amount* field, the system first applies the rounding rules you specify. It then adjusts the result to be divisible by the nearest multiple of the amount you specify.

For example, if you type **2** in the *Rounding type* field and **1.00** in the *Rounding amount* field, the system first rounds each result to the next lowest 1.00 If you also specify that the results should be divisible by 5.00, the system then adjusts each result to be divisible by the nearest multiple of 5.00.

First portion of base rate

Specify the lowest monetary value to which you want the system to apply your changes. The system compares the value you enter in this field to the monetary amounts of the steps associated with the specified pay grade(s)

Employer

Type the code value that identifies the employer within which you want to update step rates.

Pay Grade

Type the code value that identifies the pay grade you want to update with new step rates. Leave this field blank if you want to update all pay grades that meet the other specifications on this screen.

Currency

The system displays the currency associated with the pay grade you select. This field is for information only.

From Effective Date

Type the date that corresponds to the effective date of pay grades from which you want to copy and update step rates.

To Effective Date

Type the new effective date for the resulting pay grade and steps containing the increases. This date must be in the future of the date you type in the *From Effective Date* field.

Rounding type

Specify how you want the system to apply the step rate changes that you type. The system uses the value you enter in the *Rounding amount* field to apply the rounding type you specify in this field.

Valid values are:

1	Above. Round to the next highest specified rounding amount.
2	Below. Round to the next lowest specified rounding amount.
3	Nearest. Round up or down to the nearest specified rounding amount.

If you leave the *Rounding amount* field blank, the system does not round the results of its calculations regardless of the value you specify in this field.

1 Apply a percent change

2 Apply a monetary unit change in the currency for which your system is configured

Next portion of base rate

Type the incremental part of the specified step rate(s) to which the system should apply the next change you type. You can use one or more of the *Next portion of base rate* fields, depending on how many layers of increases or decreases you want to make to existing step rate(s).

Leave these fields blank if the value you typed in the *First portion of base rate* field exceeds the highest step rate of the pay grade.

5 After you type information in the selection field(s) you require, press Enter. The system displays the screen shown in Figure 8-12.

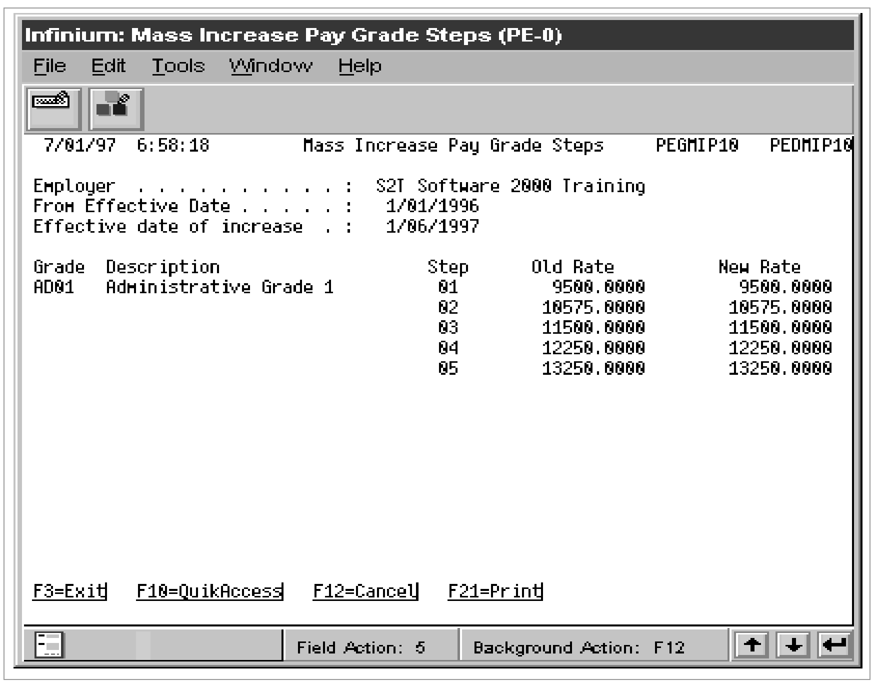


Figure 8-12: Mass Increase Pay Grade Steps screen 2 of 2

The screen displays all the pay grades and associated steps that match the criteria you specified on the previous screen.

6 Use the following information to work with this screen.

Verifying Step Rate Changes

The system uses the information you entered on the preceding screen to display current and projected step rates on this screen. Use this screen to verify that the criteria you entered on the preceding screen produce the correct results before you apply the changes to the specified pay grade(s) in your Infinium HR database. Use PageDown to view more information.

Printing Step Rate Change Results

Press F21 to generate a report of the projected step rate changes. The system displays the following message at the bottom of the screen after it generates the report:

Report Printed

Access the Work with All Spooled Files screen or the Work with Printer Output screen. You can view or print the Mass Increase Pay Grade Steps Trial Run report using options on these screens. The printer file name for this report is **PETMIP10**. The system displays this name in the File column on the screens referenced above.

The system generates the final version of this report when you press F3 to apply your projected step rate changes to pay grades in your database.

WARNING! When you press F3 to exit from this screen and type **1** in the Exit Options window, the system uses interactive processing to apply your step rate changes immediately. You do not receive a confirming message or any other indication on this screen that the system has updated the step rates of the specified pay grades.

7 Take one of the following actions:

- If you do not obtain the expected results, press F12 to return to the previous screen. You can modify your criteria and press Enter to re-display the screen shown in Figure 8-11.
- If you obtain the correct results and want to proceed with updating step rates using the specified criteria, press F3. Then type **1** in the Exit Options window and press Enter.

8 After you press Enter, the system immediately applies your step rate changes to the specified pay grade(s) and generates the Mass Increase Step Rates report. The system then displays the first Mass Increase Pay Grade Steps screen.

9 You can enter additional criteria for other changes or press F3 to exit from this option. Type **1** in the Exit Options window and press Enter. The system displays the Infinium HR main menu.

10 Access the Work with All Spooled Files screen or the Work with Printer Output screen to view or print the Mass Increase Pay Grade Steps report. You can view or print this report using options on these screens. The printer file name for this report is **PETMIP10**. The system displays this name in the File column on the screens referenced above.

After you complete this option, you use the *Mass Update EE Step Rates* option to update the basic data and payroll data records of employees with the new rates.

Updating Employee Step Rates

After you create new step rates for the grade for the new effective date, you can use the *Mass Update EE Step Rates* option to pass the step rate increases along to employees assigned to the affected pay grades and steps. You do not have to do this immediately; you can use this option once the new effective date has arrived, which allows you to enter future dated pay grade and step rates

The *Mass Update EE Step Rates* option does not change the step to which an employee is assigned, it only updates the rate(s) associated with the employee's current step.

When you use the *Mass Update EE Step Rates* option to update an employee's rates, the system automatically creates an unprocessed Salary Change transaction in the employee's personnel actions records. You use the *Effective Date* field on the selection screen of the *Mass Update EE Step Rates* option to specify the Salary Change transaction effective date for historical purposes.

You use the *Mass Update Personnel Actions* option to process the transaction and update the employee's base pay rate in the basic data and payroll date records.

You can use the *Trial Mass Update EE Step Rates* option to preview the changes the system will make when you run the *Mass Update EE Step Rates* option. The *Trial Mass Update EE Step Rates* option produces a report that you review and use to make any necessary changes to employee information or the criteria you specify on the selection screen when you run the *Mass Update EE Step Rates* option. The trial does not make any changes to employee data.

The trial report lists the employee's anticipated new rate(s) and also lists employees who will not receive the updated rates because the new rate(s) on the pay grade control are lower than the employee's current rate(s).

The system generates a similar report when you run the *Mass Update EE Step Rates* option. The report identifies the employees whose step rates changed and those for whom rate changes were not applied and the reasons why they were not applied. If necessary, you can use the Salary Change transaction in the *Enter Personnel Actions* option to make manual changes to these employees' rates.

The system applies step rate changes to all employees in the specified pay grade, unless the *Allow Step Increase* field on an employee's basic data record is **2**, indicating that the employee is not eligible to receive step rate changes.

Using the *Mass Update EE Step Rates* Options

The steps below apply to both the *Trial Mass Update EE Step Rates* and the *Mass Update EE Step Rates* options. The trial update provides reports that allow you to verify that the system is correctly updating employee step rates.

The system also generates a Trial Update Emp. Step Rate Exceptions report for employees whose current rates will not be updated by the *Mass Update EE Step Rates* option. For each employee, a reason is given why their rate will not be updated.

If you find errors, make any necessary changes to employee basic data and then rerun the *Trial Mass Update EE Step Rates* option as many times as necessary to obtain the correct results.

After you obtain accurate results from the *Trial Mass Update EE Step Rates* option, run the *Mass Update EE Step Rates* option. The *Mass Update EE Step Rates* option creates unprocessed Salary Change transactions. When you process them using the *Mass Update Personnel Actions* option, the system updates the employee's pay rates in basic data and payroll data records and writes Salary Change history transactions.

Follow the steps below to run the *Mass Update EE Step Rates* option.

1. From the Infinium HR main menu select *Step-in-Grade.*
2. Select *Maintenance Functions.*
3. Select *Mass Update EE Step Rates* [MUESRI]. The system displays the screen shown in Figure 8-13.

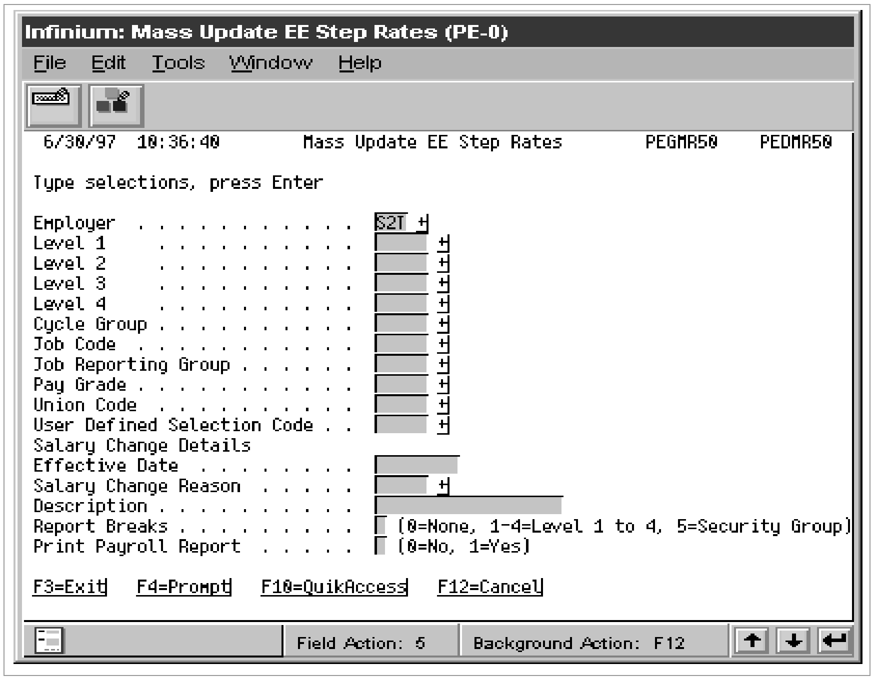


Figure 8-13: Mass Update EE Step Rates screen

Note: If you select *Trial Mass Update EE Step Rates* [TESRI], the system displays the Trial Mass Update EE Step Rates screen. This is identical to the screen displayed above apart from the title.

You use this option to create Salary Change transactions, and then use the *Mass Update Personnel Actions* to perform the following actions:

- Update the employee’s *Base Rate* field in basic data with the new rate associated with his or her step on the pay grade control.
- If you are authorised to update payroll rates, you can update the employee’s payroll rate(s) in payroll data based on the new rate(s) on the pay grade control.

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

Employer

Type the code value that identifies the employer within which you want to update employee step rates.

Level 1

Type a value to restrict the update of step rates to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's *Level 1* field in basic data and updates step rates only for employees assigned to the specified level 1.

Leave this field blank if you want to apply updated step rates to employees in all levels.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict the update of step rates to employees assigned to particular levels within the specified Level 1. The system compares the values you type in these fields with the values in each employee's level fields in basic data and updates step rates only for employees within the specified levels.

If you want to complete a particular level, you must complete all the fields above that level. For example, if you want to enter a value in a the *Level 4* field, you must complete levels 1, 2 and 3.

Leave fields blank if you want to apply updated step rates to all employees in a particular level.

Cycle Group

Type a code value to restrict step-in-grade processing to employees assigned to a particular pay cycle group. The system compares the cycles in this group with the value in the *Cycle* field on each employee’s payroll data record. It processes the step movement only for employees whose cycle matches one of the cycles in this group.

Leave this field blank if you want step-in-grade processing to apply to employees in all cycle groups.

Job Code

Type the code value that identifies a job to restrict the update of step rates to employees assigned to that job. The system compares the value you type in this field with the value in each employee's *Job Code* field in basic data and updates step rates only for employees assigned to the specified job code.

Leave this field blank if you want to update step rates for employees in all jobs.

Job Reporting Group

Type a code value to restrict step-in-grade processing to employees assigned to a job that is included in a particular job reporting group. Leave this field blank if you want step-in-grade processing to apply to employees in all job reporting groups.

Pay Grade

Type the code value that identifies the pay grade for which you want to update step rates. The system matches this value to that in the *Pay Grade* field in each employee’s basic data record and only updates the step rates of employees assigned to the specified pay grade.

Leave this field blank if you want to update step rates for employees in all pay grades.

Union Code

Type a code value to restrict step-in-grade processing to employees assigned to a particular union code. The system compares the value you type in this field with the value in each employee's *Union* field in basic data and only updates step rates for employees assigned to the specified union code.

You define code values for this field through the *Update Unions* option. Leave this field blank if you want step-in-grade processing to apply to employees regardless of union affiliation.

User Defined Selection Code

This field enables you to attach a custom program that you have developed to apply extra selection parameters to the selection process. Type a code value to restrict step-in-grade processing to a group of employees that you have defined using this custom program. You define code values for this field through the *Update Employer Codes* option, using code type **UDS**.

The system converts the code value that you define into a program name by adding the letters CUG to the start of the code value. For example, if you define a code value of MNGR, the system calls the program CUGMNGR.

Leave this field blank if you want step-in-grade processing to apply to employees regardless of selection code criteria.

Effective Date

Type the date the system uses to determine the pay grade and step rates that are in effect. For example, if you type **01041997** and you have defined pay grades and steps with effective dates of 01011997 and 01011998, the system will use the pay grade and step rates dated 01011997.

The system also uses this date as the effective date when it creates the Salary Change transaction in the *Enter Personnel Actions* option to record the employee’s step rate change in history. The system uses the *Effective Date* as the *Salary Change Date.* In the above example the salary change date is 01041997. The system updates the step rates of employees if their current rate is different from the selected step rates.

When you run the *Mass Update EE Step Rates* option, the system creates an unprocessed Salary Change transaction with the new base rate. The effective date you enter determines whether this is a future dated salary change. When you run the *Mass Update Personnel Actions* option, the system updates the employee's basic data and his or her payroll rates in payroll data.

Salary Change Reason

Type the code value that identifies the reason for the employee's step rate change. The system uses this code value to fill the *Salary Change Reason* field when it generates Salary Change transactions within the *Enter Personnel Actions* option for affected employees. For example, you can define a value of **STEPR** to differentiate salary changes produced by the *Mass Update EE Step Rates* option from those you enter manually.

You define values through the *Update Employer Codes* option, using code type **SAL**.

Description

Type a description you want to associate with the Salary Change transactions the system generates when you run the *Mass Update EE Step Rates* option. The system transfers this information to the *Description* field in the Salary Change transaction created for each employee affected by the *Mass Update EE Step Rates* option.

Report Breaks

Type a value to indicate the way you want to group employees on the report. Valid values are:

0	Do not group employees
1 to **4**	Group employees by the corresponding level
5	Group employees by security group

Within your grouping selection, employees are sorted by employee number.

Print Payroll Report

Indicate whether you want to print the payroll report. Valid values are:

0	No. Do not print the payroll report.
1	Yes. Print the payroll report.

5 After you type information in the selection field(s) you require, press Enter. Then type **1** in the Confirm Request window and press Enter. The system produces the following message at the bottom of the Trial Mass Update EE Step Rates screen and returns you to the Infinium HR main menu.

Building submission request...

6 The system uses batch processing to process the *Mass Update EE Step Rates* option and generate the Update Employee Step Rate reports. The reports list all employees in the specified pay grades and indicate if their rates will be updated.

Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the reports using options on these screens.

7 Examine the reports generated. They include the following information for each affected employee:

- Current pay grade
- Current step
- New personnel base rate
- Personnel base rate increase amount
- New payroll rate(s)

8 You can use the following options to process and view the salary change transactions the system generated when you ran the *Mass Update EE Step Rates* option:

- Use the *Enter Personnel Actions* option to view unprocessed individual salary transactions for an employee
- Use the *Mass Update Personnel Actions* option to process the Salary Change transactions
- Use the *Display Employee History* option to view an individual employee’s salary change history
- Use the *Display Salary Changes* option to view salary change history information for many employees

Hands-on Workshop

Exercise 8-1

Define a Pay Grade

Establish a pay grade control with several steps. Follow the steps below to define a pay grade control.

1. From the Infinium HR main menu select *Step-in-Grade.*
2. Select *Maintenance Functions.*
3. Select *Update Pay Grade and Steps* [UPGS].

Specify a pay grade effective date that is not in the future. Do not specify hours criteria for your example.

Exercise 8-2

Attach the Pay Grade Control to a Job Control

After you define a new pay grade, attach it to an existing job control. Follow the steps below to update a job control record in your sample employer.

1. From the Infinium HR main menu select *Controls.*
2. Select *Job Controls.*
3. Select *Update Job Controls* [UJC].

Select an existing job and complete the *Pay Grade* field on the first screen of the job control. Press Enter to proceed through the rest of the screens of the job control record.

Exercise 8-3

Enter a Step-in-Grade Employee

Follow the steps below to enter a new employee.

1 From the Infinium HR main menu select *Employees.*

2 Select *Create New Employee Records.*

3 Select *Enter New Employee* [ENE].

Make sure that you do the following:

- Specify an employment date for the employee that is on or after the effective date of the pay grade you defined in Exercise 8-1.
- Assign the new employee to a position associated with the job you updated in Exercise 8-2.

Note the information that the system completes for the new employee on screen 4 of the *Enter New Employee* option. Refer to the chapter entitled “Entering New Employees” for more information on completing the screens in the *Enter New Employee* option.

Exercise 8-4

Review the Employee’s Basic Data Record

Review the step-in-grade information on the Pay Related Data screen of the new employee’s basic data record. Follow the steps below to view the step-in-grade information.

1 From the Infinium HR main menu select *Employees.*

2 Select *Employee Records*

3 Select *Update Employee Basic Data* [UEBD].

4 Specify the employer and employee number of the new employee. Type a character in the *Opt* field next to the Pay Related Data section. The system displays the step-in-grade information near the top of the screen.

Exercise 8-5

Run the Trial Mass Update Step-In-Grade option

Use the sample employer and pay grade you established in Exercise 8-1. Review the basic data record of the sample employee you associated with a step-in-grade position. Make note of the date in the *Next Step Date* field for this employee.

Follow the steps below to run the *Trial Mass Update Step-In-Grade* option.

1 From the Infinium HR main menu select *Step-in-Grade.*

2 Select *Maintenance Functions.*

3 Select *Trial Mass Update Step-In-Grade* [TSU].

4 On the selection screen, specify the codes that represent your sample employer and pay grade. Type the sample employee's *Next Step Date* in the *Effective Date* field on the selection screen for this option.

Review the report the system generates and ensure that the sample employee is included in it. After you obtain the correct results on the *Trial Mass Update Step-In-Grade* option, run the *Mass Update Step-in-Grade* option.

Exercise 8-6

Follow the steps below to run the *Mass Update Step-in-Grade* option:

1 From the Infinium HR main menu select *Step-in-Grade.*

2 Select *Maintenance Functions.*

3 Select *Mass Update Step-in-Grade* [MSU].

Use the same selection criteria as you entered in the *Trial Mass Update Step-In-Grade* option. Review the report the system generates.

4 Run the *Mass Update Personnel Actions* option.

Exercise 8-7

Review the Employee’s Basic Data Record

Review the updated step-in-grade information on the Pay Related Data screen of the sample employee’s basic data record.

Follow the steps below to view the step-in-grade information:

1. From the Infinium HR main menu select *Employees.*
2. Select *Employee Records.*
3. Select *Update Employee Basic Data* [UEBD].
4. Specify the employer and employee number of the sample employee. Type a character in the *Opt* field next to the Pay Related Data section. The system displays the updated step-in-grade information near the top of the screen. The updated information should match the data on the report generated by the *Mass Update Step-in-Grade* option.

Chapter 9 Processing Paid Time Off (PTO) Accruals

9

This chapter explains how you use Infinium HR options to calculate and maintain an employee's paid time off entitlement. It also explains how you can report on the entitlement available to an employee and the value of this entitlement.

The chapter consists of the following topics:

Overview

Infinium Software uses the term “paid time off” (PTO) to refer to annual leave and any other form of absence from the workplace for which the employee earns an entitlement and is paid when the entitlement is taken. Sick leave is another common PTO leave.

You use PTO controls to establish the rules under which Infinium HR calculates and processes an employee’s entitlement to paid time off leave. Refer to the *Infinium HR (I) Guide to Controls* for more information.

Infinium HR calculates the paid time off to which each employee is entitled based on these rules. The system also tracks the amount of time off the employee has taken and calculates the time remaining.

Objectives

When you complete this chapter, you should be familiar with:

- The terminology used for PTO accrual processing
- The different ways in which you can use PTO accrual options to maintain PTO entitlements
- The relationship between paid time off entitlement and absences
- How Infinium HR calculates PTO entitlement and updates PTO balances
- How to use Infinium PY to calculate employee PTO entitlement
- How to pay employees for outstanding PTO entitlements during termination processing
- How to produce reports on the PTO entitlement available to an employee

Understanding PTO Terminology

You use PTO accrual processing to calculate and process an employee’s PTO leave entitlement for each type of PTO. Infinium HR uses the terminology described below.

Accrued Leave Entitlement

An employee may accrue entitlement over a period but may not be permitted to take the entitlement until certain criteria are met. For example, an employee may accrue entitlement during a leave year, but not be eligible to take the leave until the leave year is completed.

Accrual

The rate at which an employee accrues entitlement can vary according to service. The accrual rules define the rate of accrual.

Earned Leave Entitlement

When accrued entitlement is eligible to be taken, it becomes “earned.” “Accrued” leave is potential, or prorated leave; “earned” leave is the actual leave that the employee is entitled to take.

Earn Basis

This determines when an employee earns his or her accrued entitlement.

Leave Entitlement Carried Forward

You can define whether an employee may carry forward entitlement from one leave period to another. For example, at the end of a leave year, you decide whether to carry forward an employee’s entitlement into the next leave year. You can also limit the amount that an employee can carry forward.

Taken Leave Entitlement

You can also choose to link PTO to absence processing and use the absence processing options in Infinium HR to record leave taken. You can record a period of absence that relates to a PTO entitlement and the system updates the employee’s taken leave total and automatically adjusts the employee’s outstanding balance of entitlement. If you are using Infinium PY, you can also generate timesheet transactions to pay the employee for the taken leave.

Balance of Entitlement

This is the employee’s earned leave entitlement minus any leave the employee has taken.

Accrual Sub-Categories

You can subdivide entitlement and record it in accrual sub-categories. This allows you to define different methods of payment for different levels of entitlement for a PTO accrual.

Understanding PTO Processing

You can use the *Paid Time Off* options in Infinium HR and Infinium PY in several ways, depending on the requirements of your company and whether or not you are using Infinium PY.

PTO Processing in Infinium HR

The following options are available in Infinium HR:

- Updating an Employee’s PTO Entitlement

  You use the *Update Employee PTO Accruals* option to maintain an employee’s PTO entitlement. You can enter transactions to adjust an employee’s balance of entitlement, for any of the accrual categories, by creating positive or negative accrual transactions.

  You use the *Update Employee PTO Accruals* option to adjust carried forward, accrued, earned and taken entitlement balances.

- Displaying an Employee’s PTO Entitlement

  You use the *Display Employee PTO Accruals* option to display an employee’s PTO entitlement. You can view current accrual balances, sub-balances and accrual transactions for any of the accrual categories. You can also display the value of the employee’s current entitlement using F15 from the Display Employee PTO Accruals screen.

- Reporting Employee PTO Entitlement and Liability

  Infinium HR includes two reports which show employee PTO entitlements. The *Print Available PTO Accruals* option prints a report that shows an employee’s accrued, earned, taken and balance of entitlement. The *Print PTO Liability Amounts* option prints a report that shows the current outstanding entitlement. It also values that entitlement using pay rates that you define, to show the liability to the company.

- Calculating PTO Entitlements for Employees

  The *Mass Update PTO Entitlements* option allows you to update the entitlement of selected employees. You can calculate entitlement in days or hours, but only based on employee scheduled hours. You can only use actual hours worked if you are using Infinium PY.

You use this option periodically, depending on how often you require an entitlement update. For example, for calculating annual leave in advance you need to use this option only once a year.

You can run the *Trial Mass Update PTO Entitlements* option to view the effects of your changes prior to performing the update.

- Mass Creating Employee PTO Accruals

  The *Mass Create PTO Accruals* option enables you to create an accrual transaction, earned or taken, for a group of employees. For example, you use this option to update employee PTO records to give leave credit for time off in lieu of public holidays worked, or to mass create leave taken for a temporary factory closure.

  You can select the employees to update using a combination of levels, job code, location, status and work schedule.

  In addition, you can use this option to create absence records to correspond with the taken leave if you use this option to mass create taken PTO transactions. You can run the *Trial Mass Create PTO Accruals* option to view the effects of your changes prior to performing the update.

- Using PTO Accruals with Absence Processing

  You can choose to link paid time off to absences. Absence processing allows you to define absence types which are linked to PTO accruals. When you enter an absence period for one of these absence types, the system updates the appropriate taken PTO accrual value for the employee and automatically adjusts his or her outstanding balance of entitlement.

- Using PTO Accruals with Termination Processing

  Infinium HR displays the *Generate PTO Entitlement Payment* option as part of the end employment process. The system calculates the value of the employee’s remaining PTO entitlement and generates termination payment transactions for inclusion in payroll processing, based on the information you enter.

  The system calculates the entitlements using the values in the termination controls and displays them on the PTO Entitlement Payments screen. You can update or delete entitlements, update the employee’s PTO accruals, and recalculate after making adjustments.

The generated termination payment transactions are passed to Infinium PY for pay cycle processing using the *Close Termination to PY* option in Infinium PY.

PTO Processing in Infinium Payroll

If you are using Infinium PY, you can choose to automatically update an employee's PTO entitlement when you run your payroll processing cycle. In this case, the entitlement can be based on the number of actual hours that the employee has worked.

When you use the *Update Cycle Controls* option to establish pay cycles, you can specify a program, PYGCPTO, to be executed during pay cycle processing to calculate an employee's PTO entitlement. Refer to the *Infinium HR (I) Guide to Controls* for more information.

System-Generated PTO Entries

Many employee PTO accrual entries are automatically created by the system. These provide a record or history of adjustments or changes made by the system to employee PTO balances. The comments field on the Update Employee PTO Accruals screen describes the types of entries created.

The table below provides a description of the comments that can be displayed on screen.

Comment Field Entry	Description
Accrued	The amount entered in the PTO accrued balance.
Earned	The amount entered in the PTO earned balance.
Accrued to Earned	The accrued balance is reduced by the amount transferred to the earned balance.
Calc accrued foregone	The calculated new accrued balance exceeded the allowed maximum PTO accrued amount, so the excess amount was forfeited.
Earned INXS of Max-F/Gone	The new calculated earned PTO amount exceeded the maximum allowed earned amount, so the excess earned amount was forfeited.
Reduced earned by taken	To calculate the remaining earned balance for potential carry over during end of year processing, the earned balance is first reduced by the taken amount.

Comment Field Entry	Description
Carried forward on C/Over	The amount of the prior year's earned balance that was carried over during end of year processing.
Taken on CarryOver	The amount by which the taken balance was reduced to reset it to zero during end of year processing, when carry over of outstanding entitlement is allowed.
Earned INXS of Max-lost	The earned amount that is lost when the calculated earned amount exceeds the maximum earned amount allowed for the "length of service" earn basis.
Carried Forward-no C/Over	The amount (a negative value) that was not carried over to the carried forward balance during end of year processing, when carry over is not allowed.
Carried forward zeroised	The amount of earned balance that was forfeited during end of year processing when entitlement cannot be carried forward.
Taken-no CarryOver	A type "T" entry: the amount by which the taken balance was reduced to reset it to zero during end of year processing, when carry over is not allowed.
Accrued-no CarryOver	The entry to reduce the accrued balance to zero during end of year processing, when carry over is not allowed.
Accrued-no zeroised	The amount of accrued PTO forfeited during end of year processing, when carry over is not allowed.
Earned-no Carryover	The entry to reduce the earned balance to zero during end of year processing, when carry over is not allowed.
Earned-no zeroised	The amount of earned PTO forfeited during end of year processing, when carry over is not allowed.
Taken-no zeroised	A type "F" entry: the amount by which the taken balance was reduced to reset it to zero during end of year processing, when carry over is not allowed.
Accrued>Earned, F17	The reduction in accrued amount if you press F17 to convert all accrued to earned.
Earned<Accrued, F17	The earned amount if you press F17 to convert all accrued to earned.

Many of these are auditing type entries. To make the display of these PTO entries more comprehensible, the system's default display shows only the main entries. However, if you use F21 you can display all of the detailed entries

Entering Paid Time Off for an Employee

Follow the steps below to enter paid time off for an employee.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Update Employee PTO Accruals* [UEPA]. The system displays the screen shown in Figure 9-1.

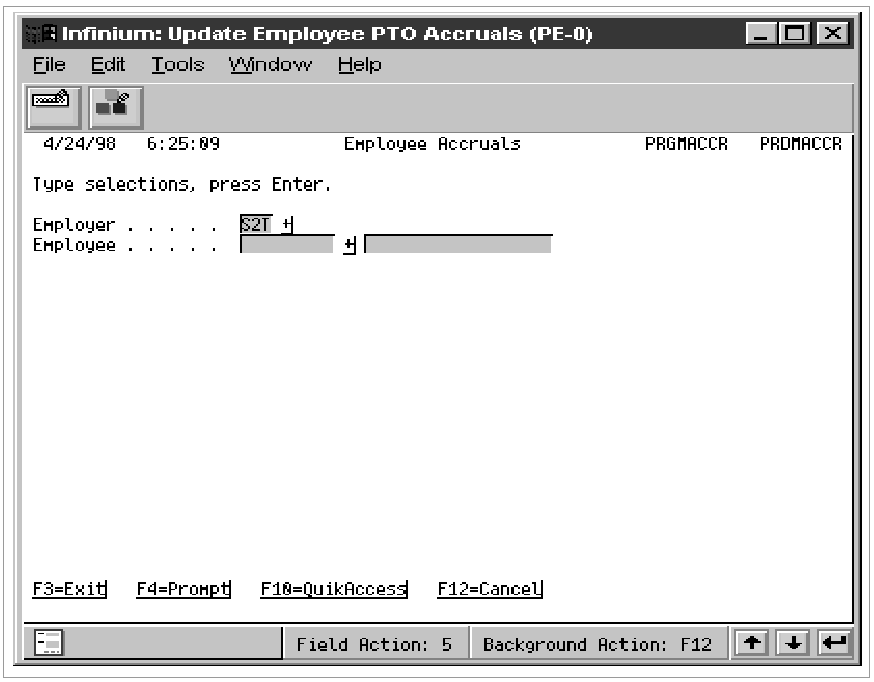


Figure 9-1: Employee Accruals prompt screen

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

Employer

Type the code value that represents the employer for which you are creating a paid time off entry.

Employee (Name, Number)

In the first field, type the number assigned to the employee for whom you are creating a paid time off entry.

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

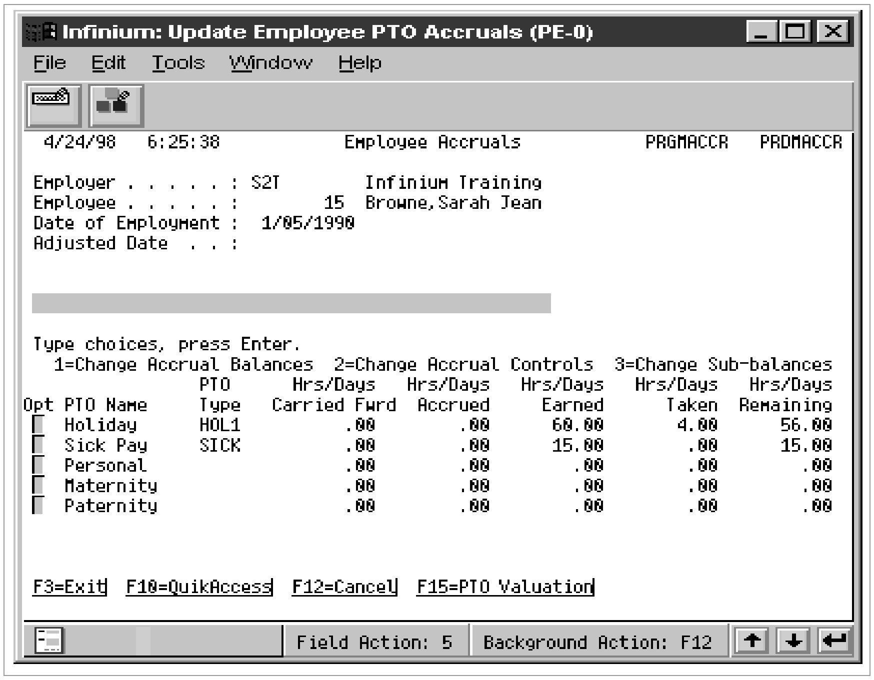


Figure 9-2: Employee Accruals screen

The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

From this screen you can:

- Change the balances for an accrual by typing **1** in an *Opt* field
- Change the accrual controls for an accrual by typing **2** in an *Opt* field
- Change the sub-balances for an accrual by typing **3** in an *Opt* field

7 Type **1** to select the accrual balance that you want to update and press Enter. The system displays the screen shown in Figure 9-3.

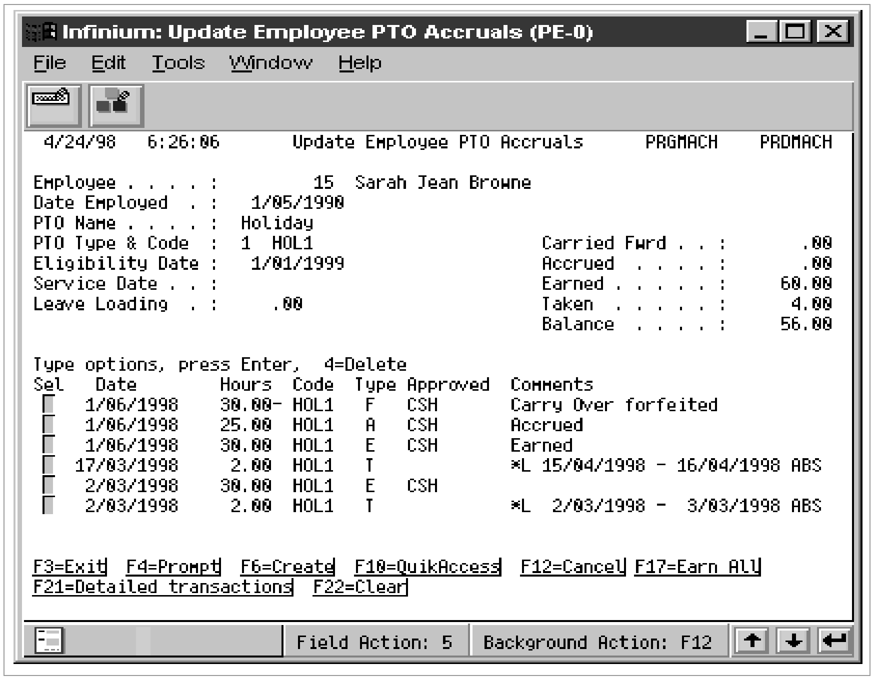


Figure 9-3: Update Employee PTO Accruals selection screen

The system displays a summary of the PTO transactions for the accrual code and employee you selected.

From here you can:

- Delete an existing PTO entry by typing **4** in the appropriate *Sel* field
- Press F6 to create a new PTO entry
- Press F17 to update all accrued entitlement to earned
- Press F21 to display a detailed history of the transactions on screen
- Press F22 to clear all the balance fields

8 Press F6. The system displays the screen shown in Figure 9-4.

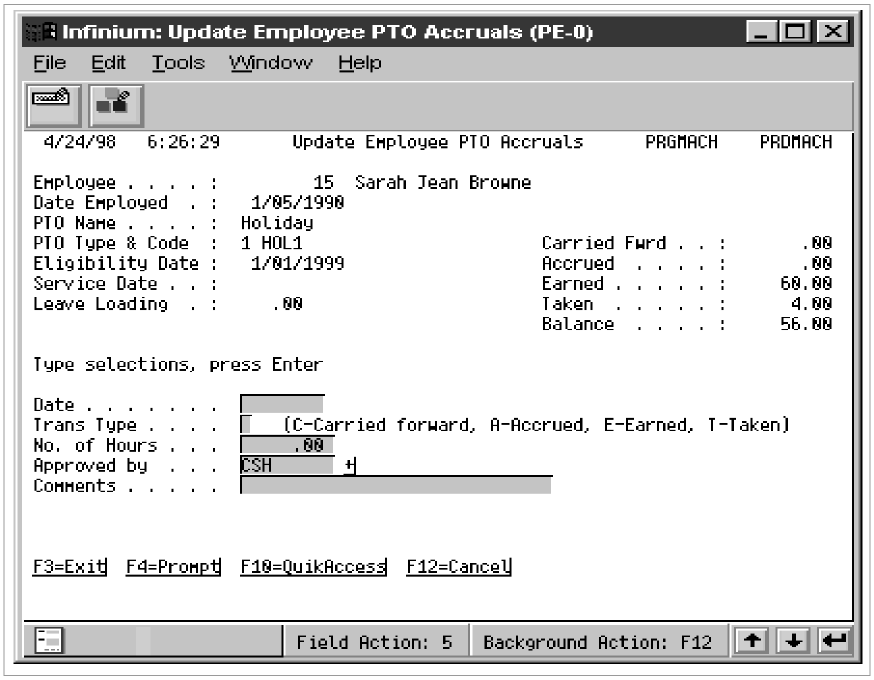


Figure 9-4: Update Employee PTO Accruals screen

In the top half of the screen the system displays a balance summary for the accrual type you have chosen.

9 Use the following information to complete the fields on this screen.

Date

Type the date on which the transaction takes effect. The date can be before or after the current date. When the system processes an End Employment transaction, it uses this date to determine the entitlement balances for the employee within the date boundaries specified in the termination controls.

Trans Type

Type a letter to indicate the transaction for which you want to adjust the PTO balance. Valid values are:

C	Carried forward
A	Accrued
E	Earned
T	Taken

No. of Days / No. of Hours

Type the length of time, in hours or days according to your setup, for which this accrual applies. The system adjusts the balance on the appropriate accrual. You can enter a positive or negative value.

If you enter a period of time for an accrual code with a prefix ***LS**, type the value in weeks for a carried forward, earned or accrued transaction and in hours for a taken balance.

Approved by

Type a code value that represents the user approving the transaction. This is a 9-character free-form field. You can also use the F4 prompt key to select the name of a user. The field is used for reporting purposes only.

Comments

Type any comments you want to include with this transaction.

10 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves your entry and returns you to the Update Employee PTO Accruals screen.

The system updates this screen to include the new PTO entry and also updates the balances summary.

11 To create another PTO entry for this accrual type, repeat steps 8 to 10. Otherwise, press F3 to return to the Employee Accruals screen.

12 To create an entry for another PTO accrual type, repeat steps 7 to 10. Otherwise, press F3 to return to the Infinium HR main menu.

Deleting a PTO Entry for an Employee

If you delete a PTO entry, the system removes the transaction from the paid time off history and adjusts the balance of entitlements accordingly. However, if the number of adjustments involved means that the calculations become very complicated, you can press F22 to clear the balance fields. You can then enter the correct PTO entries and update the balances correctly.

Note: You can delete a PTO entry only if you have supervisor access to Infinium HR.

Follow the steps below to delete a PTO entry for an employee.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Update Employee PTO Accruals* [UEPA]. The system displays the Employee Accruals prompt screen shown in Figure 9-1.

5 Use the information in the section in this chapter entitled “Entering Paid Time Off for an Employee” to complete the fields on this screen.

6 Press Enter. The system displays the Employee Accruals screen shown in Figure 9-2. The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

7 Type **1** to select the accrual balance you want to delete and press Enter. The system displays the Update Employee PTO Accruals screen shown in Figure 9-3. The screen shows a summary of the PTO transactions for the accrual code and employee you selected.

8 Type **4** in the *Sel* field next to an existing PTO entry to delete it.

9 Press F3 to return through the Employee Accruals screens to the Infinium HR main menu.

Changing the Accrual Controls for an Accrual

Follow the steps below to change the accrual controls for an accrual.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Update Employee PTO Accruals* [UEPA]. The system displays the Employee Accruals prompt screen shown in Figure 9-1.

5 Use the information in the section in this chapter entitled “Entering Paid Time Off for an Employee” to complete the fields on this screen.

6 Press Enter. The system displays the screen shown in Figure 9-2. The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

7 Type **2** to select the accrual that you want to update and press Enter. The system displays the screen shown in Figure 9-5.

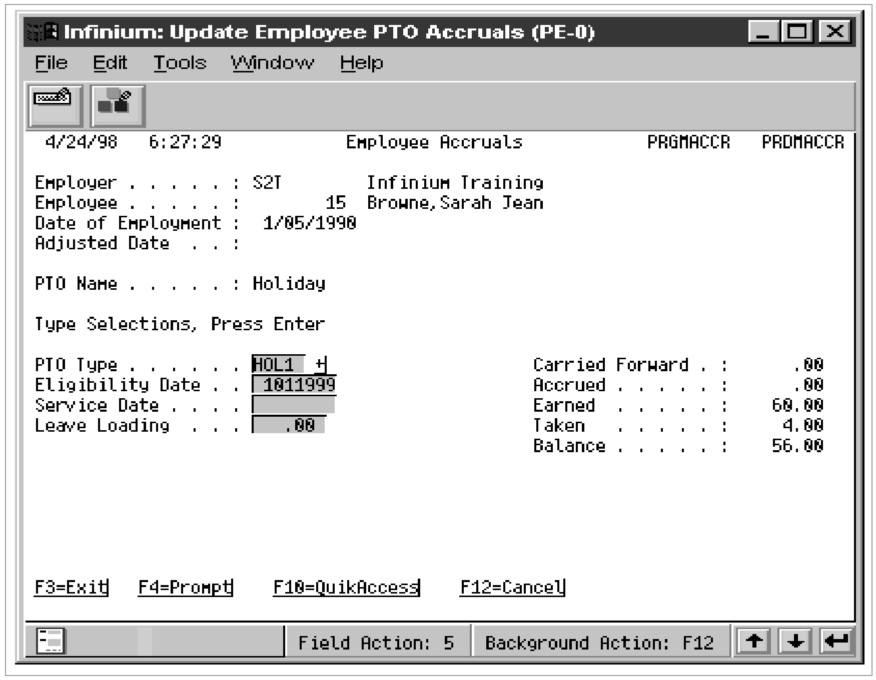


Figure 9-5: Employee Accruals controls screen

The system displays the current controls for the accrual and a summary of the accrual balances for the accrual code and employee you selected.

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

PTO Type

This represents the PTO accrual code assigned to the employee. The accrual code determines the rules by which the system calculates an employee's PTO entitlement.

To change the employee's accrual code, type the new code in the *PTO Type* field.

Eligibility Date

The system uses the date you type in this field to control the timing of PTO entitlement processing for the employee. The system only calculates and allocates entitlements if the date in this field is prior to the date in the *To Date* field when you run the *Mass Update PTO Entitlements* option.

The system can also maintain this field automatically to prevent duplicate entitlement processing. For example, for earn basis 4 and earn basis 6, the system increments the employee’s eligibility date by one year after allocating the year’s entitlement.

Service Date

You use the *Service Date* field to define the date from which the system calculates the employee’s length of service.

For PTO accrual processing, an employee’s length of service can be based on:

- The employee’s date of employment
- The employee’s adjusted date of employment
- The service date on the employee’s PTO accrual record

To use the service date, you must establish the PTO control for the accrual code with a *Months of Employment Based on* value of **4**.

When the system calculates the employee’s length of service, it checks the employee’s service date for the accrual. If this is blank, the system then checks the adjusted date of employment followed by the date of employment.

The service date can be prior to or after the employee’s date of employment.

Leave Loading

Type a value that represents a percentage loading to be applied to the value of an employee’s entitlement on the PTO Liabilities report.

9 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves your entry and returns you to the Update Employee PTO Accruals screen.

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

Prorated PTO Entitlement for New Employees

For PTOs that are annual in advance, which is earn basis 4, the new employee processing uses the leave proration table defined in the PTO control to calculate and allocate a prorated amount of PTO entitlement, based on the date of employment. For example, an employee joining halfway through the leave year may be entitled to only 50% of the normal annual entitlement. This proration and allocation of PTO entitlement is based on the PTO accrual code in the new employee’s job code.

Recalculating the Prorated PTO Entitlement for New Employees

If the new employee requires a different PTO accrual code to the one defaulted from the job code, you can change the employee's PTO type as described above in "Prorated PTO Entitlement for New Employees". If the PTO is annual in advance, earn basis 4, you can also press F14 on the Update Employee PTO screen to recalculate the prorated entitlement so that it is based on the updated PTO type.

Follow the steps below to override the default PTO control values for a new employee.

1 After you enter user-defined data during the *Enter New Hire* function, the system displays an Update Employee PTO Data screen similar to the screen show in Figure 9-6.

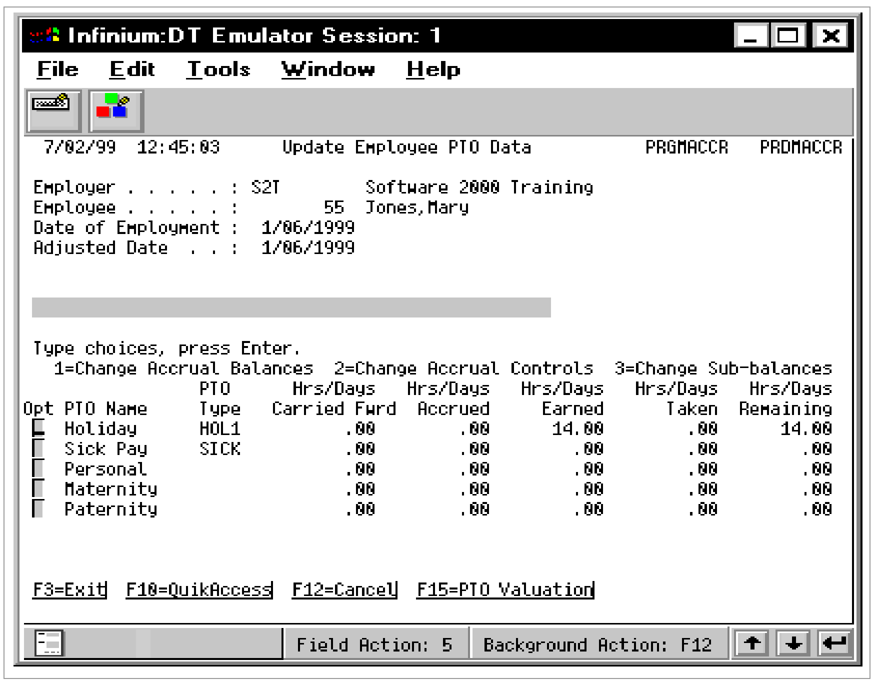


Figure 9-6: Update Employee PTO Data screen

2 Type **2** in the *Opt* field next to the PTO name whose default values you want to override. The system displays an Update Employee PTO Control screen similar to the screen shown in Figure 9-7.

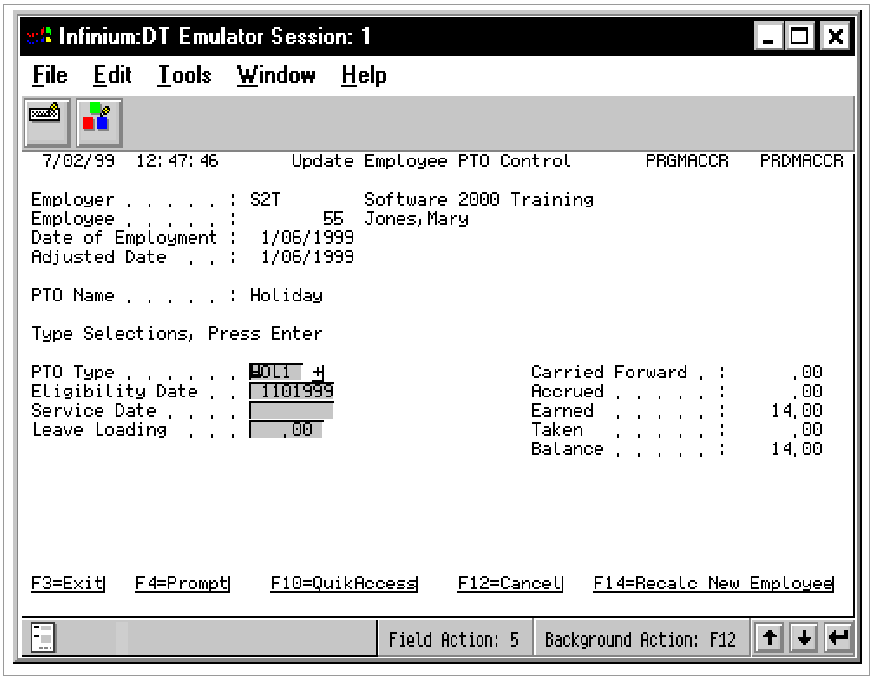


Figure 9-7: Update Employee PTO Control screen

3 Type values in the fields on this screen to override the default values set up in the job code.

4 Press F14 to recalculate the PTO entitlements and return to the Update Employee PTO Data screen.

5 Press F3 to exit from the Update Employee PTO Data screen.

Changing the Sub-Balances for an Accrual

When you change the sub-balances of a PTO accrual, the system ensures that the total of the values on each of the sub-balances matches the overall PTO value.

You use sub-balances to track different types of an entitlement. For example, an employee may have a total sick pay entitlement of 30 days; 20 at full pay and 10 at half pay.

Follow the steps below to change the sub-balances for an accrual.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Update Employee PTO Accruals* [UEPA]. The system displays the Employee Accruals prompt screen shown in Figure 9-1.

5 Use the information in the section in this chapter entitled “Entering Paid Time Off for an Employee” to complete the fields on this screen.

6 Press Enter. The system displays the Employee Accruals screen shown in Figure 9-2. The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

7 Type **3** to select the accrual balance that you want to update and press Enter. The system displays the screen shown in Figure 9-8.

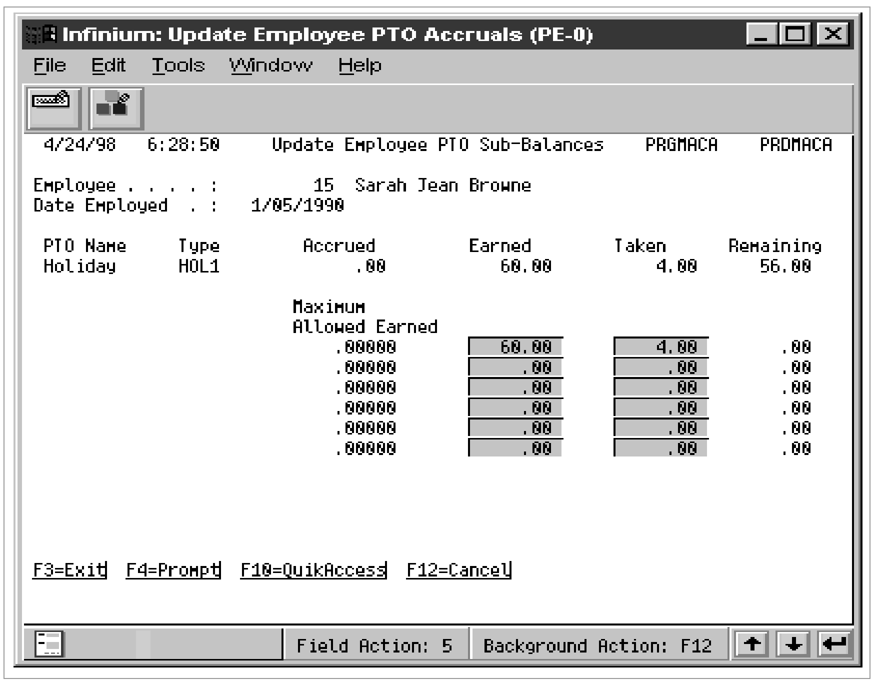


Figure 9-8: Update Employee PTO Sub Balances screen

The system displays a summary of the accrual sub-balances for the accrual code and employee you selected.

You can adjust the way that the total PTO earned and taken amounts are distributed among the 6 sub-balances. To change the way in which earned entitlement is distributed, update the values in the *Earned* fields. To change the way taken entitlement is distributed, update the values in the *Taken* fields.

Note: The total of all values in the sub-balances must equal the overall balance.

8 Press Enter. The system checks that the sub-balances match the total balances. A warning message is displayed if the amounts do not balance.

9 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves your entry and returns you to the Update Employee PTO Accruals screen.

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

Displaying Employee PTO Entitlement

Follow the steps below to display the accrued balances for an employee.

1. From the Infinium HR main menu select *Absences*.
2. Select *Paid Time Off (PTO) Accruals*.
3. Select *Employee PTO Accruals*.
4. Select *Display Employee PTO Accruals* [DEPTO]. The system displays the Employee Accruals prompt screen shown in Figure 9-1.
5. Use the information in the section in this chapter entitled “Entering Paid Time Off for an Employee” to complete the fields on this screen.
6. Press Enter. The system displays the screen shown in Figure 9-9.

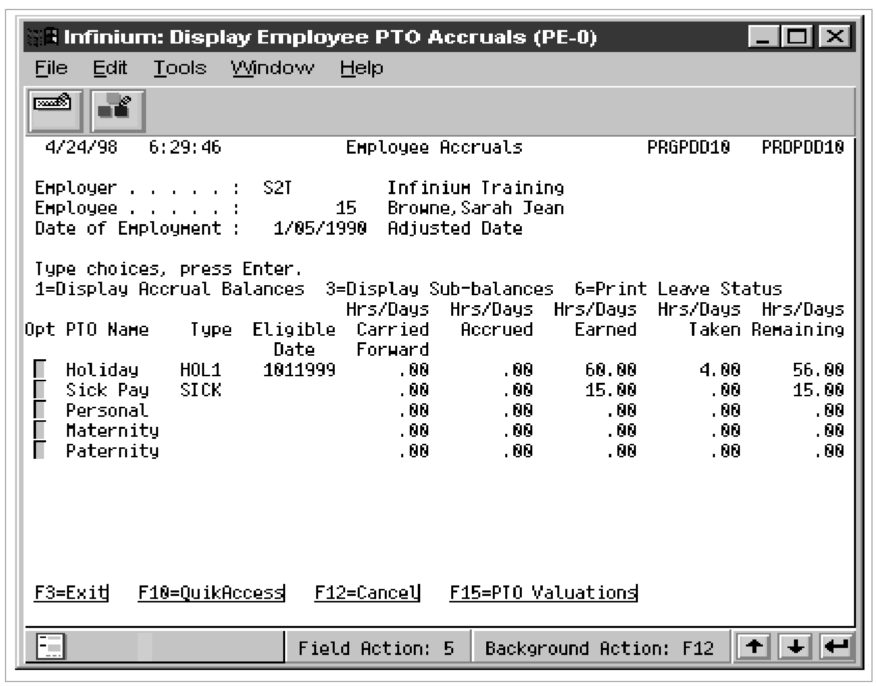


Figure 9-9: Employee Accruals screen

The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

From this screen you can:

- Display the accrued balances for an accrual by typing **1** in an *Opt* field
- Display the sub-balances for an accrual by typing **3** in an *Opt* field
- Print the leave status for an accrual by typing **6** in an *Opt* field

7 Type **1** to select the accrual balance that you want to display and press Enter. The system displays the screen shown in Figure 9-10.

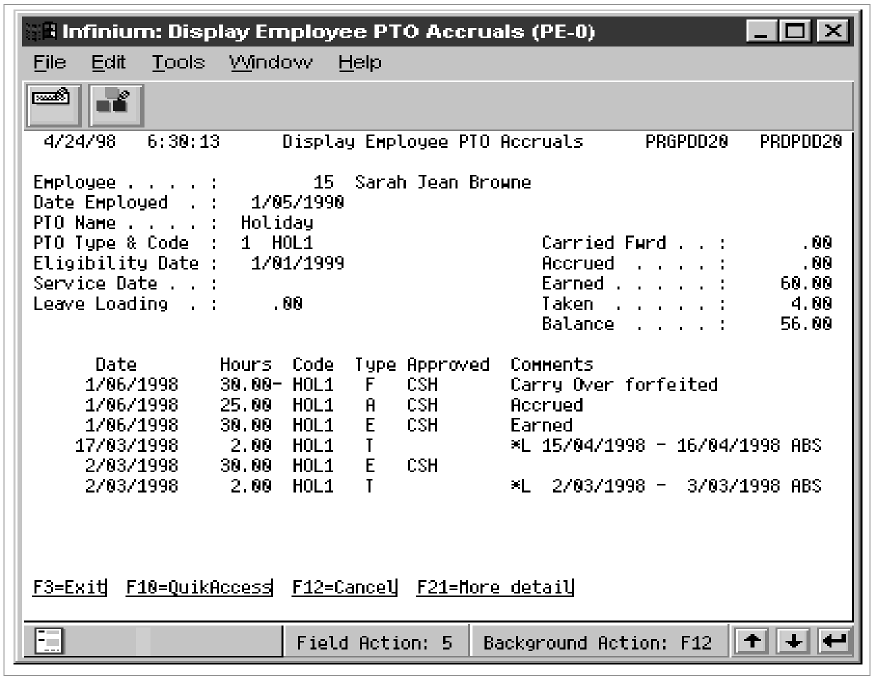


Figure 9-10: Display Employee PTO Accruals screen

The system displays a summary of the PTO transactions for the accrual code and employee you selected. To view this information in more details, press F21.

8 Press F3 to return through the screens to the Infinium HR main menu.

Displaying Accrued Sub-Balances for an Employee

Follow the steps below to display the accrued sub-balances for an accrual.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Display Employee PTO Accruals* [DEPTO]. The system displays the Employee Accruals prompt screen shown in Figure 9-1.

5 Use the information in the section in this chapter entitled “Entering Paid Time Off for an Employee” to complete the fields on this screen.

6 Press Enter. The system displays the Employee Accruals screen shown in Figure 9-9. The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

7 Type **3** to select the accrual sub-balance that you want to display and press Enter. The system displays the screen shown in Figure 9-11.

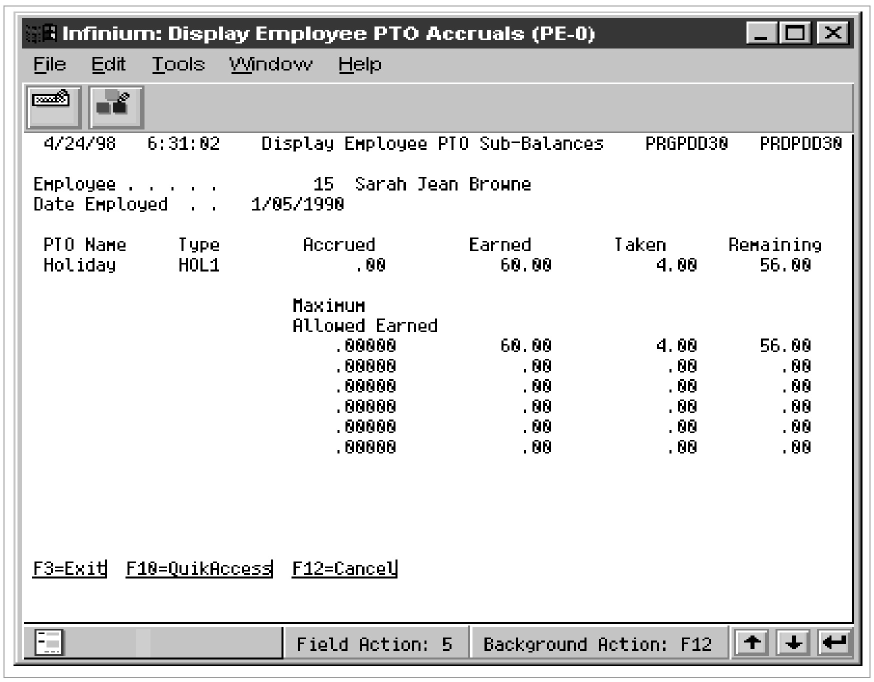


Figure 9-11: Display Employee PTO Sub-Balances screen

The system displays the earned and taken values for each of the PTO accrual sub-balances, for the accrual code you selected. Total balances for accrued, earned, taken and remaining PTO are displayed at the top of the screen.

8 Press F3 to return through the screens to the Infinium HR main menu.

Printing the Leave Status for an Employee

This option allows you to print interactively a report that shows the status of an employee’s PTO accrual balances, including a summary of the leave periods taken during the leave year.

Follow the steps below to print the leave status for an employee’s accrual.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Display Employee PTO Accruals* [DEPTO]. The system displays the Employee Accruals prompt screen shown in Figure 9-1.

5 Use the information in the section in this chcapter entitled “Entering Paid Time Off for an Employee” to complete the fields on this screen.

6 Press Enter. The system displays the Employee Accruals screen shown in Figure 9-9. The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

7 Type **6** to select the accrual code for which you want to print the leave status and press Enter.

The system prints the report interactively and displays the following message at the bottom of the screen:

Printing Leave Status Report . . .

8 Access the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your report. You can view or print the reports using options on these screens.

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

Displaying the Value of Employee Entitlement

This option provides a summary of the current accrued and earned entitlement for an employee and the value of that entitlement. To value current entitlements, you must first establish the relevant controls using the *Update Termination Controls* option. Refer to the *Infinium HR (I) Guide to Controls* for more information.

Follow the steps below to display the value of an employee's PTO entitlement.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Display Employee PTO Accruals* [DEPTO]. The system displays the Employee Accruals prompt screen shown in Figure 9-1.

5 Use the information in the section in this chapter entitled "Entering Paid Time Off for an Employee" to complete the fields on this screen.

6 Press Enter. The system displays the Employee Accrual screen shown in Figure 9-9. The system displays a list of all the PTO accrual codes you have defined for this employer, plus the accrual balances for this employee.

7 Press F15 to calculate PTO valuations. The system displays the screen shown in Figure 9-12.

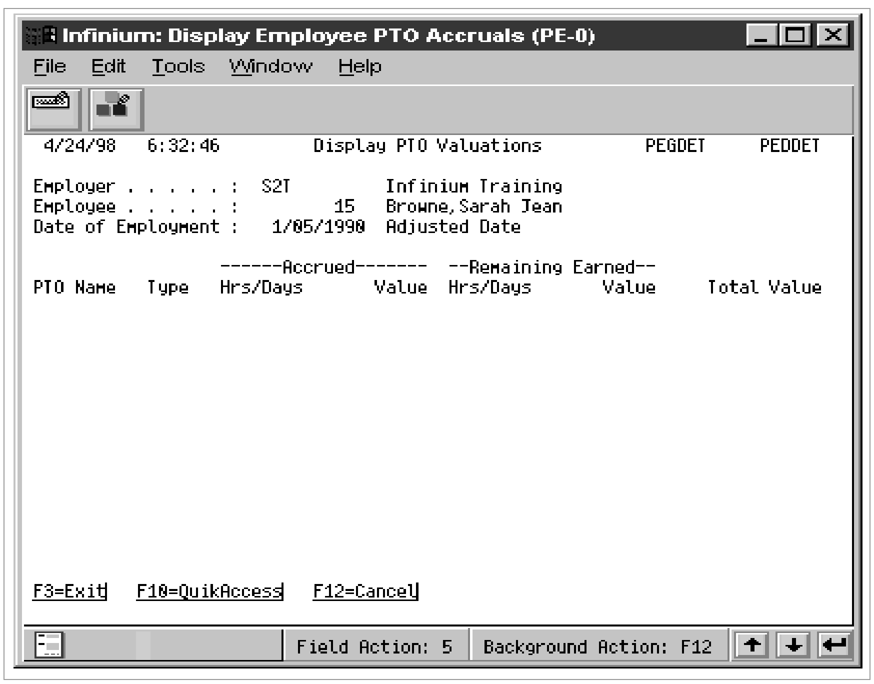


Figure 9-12: Display PTO Valuations screen

The system displays the current balance of accrued and earned entitlement for the employee and the value of that entitlement based on the termination entitlement controls established for each of the PTO accrual categories.

Note: The system does not display details of PTO accrual categories for which termination controls have not been established.

8 Press F3 three times to return through the screens to the Infinium HR main menu.

Reporting Employee PTO Entitlement

Infinium HR provides two reports that give details of current employee PTO accrued entitlements:

- Available PTO Accruals report

  This shows the current balances for carried forward, accrued, earned, taken and entitlement remaining for the selected employees.

- PTO Liabilities report

  This determines the values of the current balance of entitlement, using the defined rate of pay, for the selected employees.

Both reports allow you to select employees by levels and to include or exclude terminated employees.

Printing Available PTO Accruals

Follow the steps below to print a report on available PTO accruals.

1. From the Infinium HR main menu select *Absences*.
2. Select *Paid Time Off (PTO) Accruals*.
3. Select *Employee PTO Accruals*.
4. Select *Print Available PTO Accruals* [PAPA]. The system displays the screen shown in Figure 9-13.

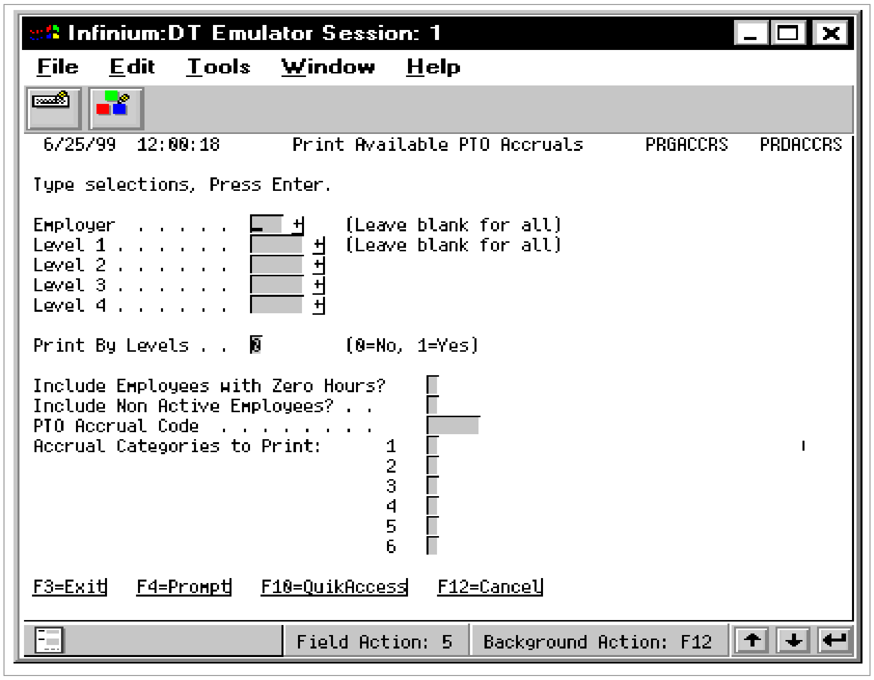


Figure 9-13: Print Available PTO Accruals screen

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

Employer

Type the code value that identifies the employer for which you want to print available PTO accruals.

Level 1

Type a value to restrict the printing of available PTO accruals to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's *Level 1* field on the basic data record and prints available PTO accruals only for employees assigned to the specified level 1.

To print available PTO accruals for employees in all levels, leave this field blank.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict the printing of available PTO accruals to employees assigned to particular levels within the specified level 1. The system compares the values you type in these fields with the values in each employee's level fields on the basic data record and prints available PTO accruals only for employees within the specified levels.

To complete a particular level, you must complete all the fields above that level. For example, to enter a value in the *Level 4* field, you must complete levels 1, 2 and 3.

To print available PTO accruals for all employees in a particular level, leave these fields blank.

Print By Levels

Type a value to indicate whether you want the system to print the report by levels. Valid values are:

0	No. The system prints the report by employee number. This is the default value.
1	Yes. The system prints the report in level order.

Include Employees with Zero Hours?

Type a value to indicate whether you want the system to include employees with no accrued or earned hours or days on this report. Valid values are:

0	Yes. Include all employees in the report.
1	No. Only include those employees with accrued or earned hours/days in the report.

Include Non Active Employees?

Type a value to indicate whether you want the system to include employees whose employment has been ended in the report. Valid values are:

0	No. Only include current employees in the report.
1	Yes. Include employees whose employment has been ended in the report.

PTO Accrual Code

Type a value that represents the PTO accrual code for which you want to print a report. Leave this field blank to print data relating to all PTO accrual codes.

Accrual Categories to Print: 1, 2, 3, 4, 5, 6

For each accrual category, type a value to indicate whether you want to include information about this category in the report. Valid values are:

0	No. Do not include information about this accrual category in the report
1	Yes. Include information about this accrual category in the report

6 Press Enter. Then type **1** in the Confirm Request window and press Enter. The system displays the following message at the bottom of the Print Available PTO Accruals screen and returns you to the Infinium HR main menu:

Building submission request...

The system uses batch processing to process the *Print Available PTO Accruals* option and generate the Available PTO Accruals reports.

7 Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen to view the status of your job. You can view or print the reports using options on these screens.

Printing PTO Liability Amounts

Follow the steps below to print a report on PTO liability amounts.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Employee PTO Accruals*.

4 Select *Print P.T.O. Liability Amounts* [PPTOLA]. The system displays the screen shown in Figure 9-14.

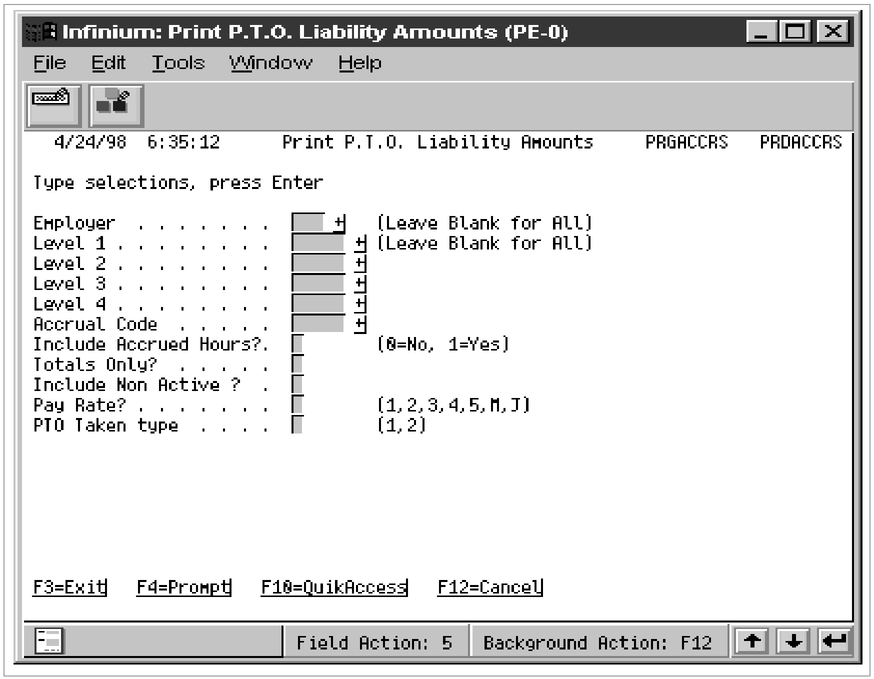


Figure 9-14: Print P.T.O. Liability Amounts screen

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

Employer

Type the code value that identifies the employer for which you want to print PTO liability amounts.

Level 1

Type a value to restrict the printing of PTO liability amounts to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's *Level 1* field on the basic data record and prints PTO liability amounts only for employees assigned to the specified level 1.

To print PTO liability amounts for employees in all levels, leave this field blank.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict the printing of PTO liability amounts to employees assigned to particular levels within the specified level 1. The system compares the values you type in these fields with the values in each employee's level fields on the basic data record and prints PTO liability amounts only for employees within the specified levels.

To complete a particular level, you must complete all the fields above that level. For example, to enter a value in a the *Level 4* field, you must complete levels 1, 2 and 3.

To print PTO liability amounts for all employees in a particular level, leave these fields blank.

Include Accrued Hours?

Type a value to indicate whether you want the system to include accrued hours in this report. Valid values are:

0	No. Ignore any accrued hours in the report and calculate the liability amount based only on earned entitlement.
1	Yes. Calculate the liability amount based on the sum of the accrued and earned hours.

Totals Only?

Type a value to indicate whether you want the system to print the report showing totals only. Valid values are:

0	No. Print the report showing employee details as well as totals
1	Yes. Print the report showing totals only.

Include Non Active?

Type a value to indicate whether you want the system to include employees whose employment has been ended in the report. Valid values are:

0	No. Only include current employees in the report.
1	Yes. Include employees whose employment has been ended in the report.

Pay Rate?

Type a value to indicate which pay rate to use to calculate the value of the entitlement. Valid values are:

1	Use pay rate 1 on the employee’s payroll data record.
2	Use pay rate 2 on the employee’s payroll data record.
3	Use pay rate 3 on the employee’s payroll data record.

4	Use pay rate 4 on the employee's payroll data record.
5	Use pay rate 5 on the employee's payroll data record.
M	Use the pay rate from the row/column of the matrix defined on the employee's payroll data record.
J	Use the job pay rate that is related to the job on the employee's basic data record.

PTO Taken Type

Type a value to indicate which PTO taken balance to use to calculate the liability. Valid values are:

1	Use the taken PTO balance from the employee's PTO accrual balances.
2	Use the calculated actual taken balance. The system adjusts the current entitlement remaining to take account of any absences that have been recorded for future dates.

6 Press Enter. Then type **1** in the Confirm Request window and press Enter. The system displays the following message at the bottom of the Print P.T.O. Liability Amounts screen and returns you to the Infinium HR main menu:

Building submission request...

The system uses batch processing to process the *Print P.T.O. Liability Amounts* option and generate the PTO Liabilities reports.

7 Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen to view the status of your job. You can view or print the reports using options on these screens.

Calculating Employee PTO Entitlement

Infinium HR provides two options for calculating and updating employee PTO entitlement. You can use both options in trial mode to view the effects of the calculation prior to performing the update.

The *Mass Update PTO Entitlements* option allows you to update the entitlement of selected employees. You can calculate entitlement in days or hours, but only based on employee scheduled hours. You can only use actual hours if you are using Infinium PY.

The frequency with which you use this option depends on how often you require an entitlement update. For example, for calculating annual leave in advance you need to use this option only once a year.

The *Mass Create PTO Accruals* option enables you to create an accrual transaction, earned or taken, for a group of employees. For example, you would use this option to update employee PTO records to give leave credit for time off in lieu of public holidays worked, or to mass create leave taken for a temporary factory closure.

You can select the employees to update using a combination of levels, job code, location, status and work schedule.

If you use this option to mass create taken leave, you can also choose to create absence records to correspond with the taken leave. You can run the *Trial Mass Create PTO Accruals* option to view the effects of your changes prior to performing the update.

Using the Mass Update PTO Entitlements Option

Follow the steps below to use the *Mass Update PTO Entitlements* option.

1. From the Infinium HR main menu select *Absences*.
2. Select *Paid Time Off (PTO) Accruals*.
3. Select *Process PTO Accruals*.
4. Select *Mass Update PTO Entitlements* [MASSUPDPTO]. The system displays the screen shown in Figure 9-15.

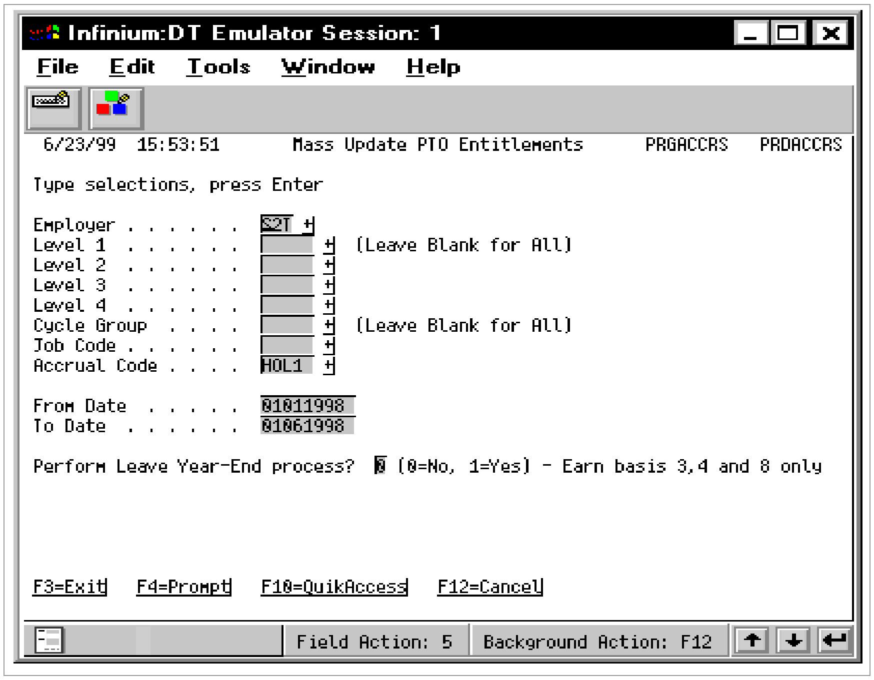


Figure 9-15: Mass Update PTO Entitlements screen

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

Employer

Type the code value that identifies the employer within which you want to update employee PTO entitlements.

Level 1

Type a value to restrict the update of PTO entitlements to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's *Level 1* field on the basic data record and updates PTO entitlements only for employees assigned to the specified level 1.

To apply updated PTO entitlements to employees in all levels, leave this field blank.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict the update of PTO entitlements to employees assigned to particular levels within the specified level 1. The system compares the values you type in these fields with the values in each employee's level fields on the basic data record and updates PTO entitlements only for employees within the specified levels.

To complete a particular level, you must complete all the fields above that level. For example, to enter a value in a the *Level 4* field, you must complete levels 1, 2 and 3.

To apply updated PTO entitlements to all employees in a particular level, leave these fields blank.

Cycle Group

Type a code value to restrict PTO entitlement updates to employees assigned to a particular pay cycle group. The system compares the cycles in this group with the value in the *Cycle* field on each employee's payroll data record. It processes the PTO entitlement updates only for employees whose cycle matches one of the cycles in this group.

To apply PTO entitlement updates to employees in all cycle groups, leave this field blank.

Job Code

Type the code value that identifies a job to restrict the update of PTO entitlements to employees assigned to that job. The system compares the value you type in this field with the value in each employee's *Job Code* field on the basic data record and updates PTO entitlements only for employees assigned to the specified job code.

To update PTO entitlements for employees in all jobs, leave this field blank.

Accrual Code

Type the code value that identifies an accrual code to restrict the update of PTO entitlements to employees assigned to that accrual code. The system compares the value you type in this field with the accrual code in each accrual category of each employee's accrual data and updates PTO entitlements only for employees assigned to the specified accrual code.

To update PTO entitlements for employees regardless of accrual code, leave this field blank.

From Date / To Date

You use these fields to define the start and end of the period for which you want to perform accrual processing. You perform accrual processing based on a pre-defined schedule, using consecutive from/to date ranges. The system uses these dates as follows:

Compares the *To Date* to the employee's date of employment. The system does not perform accrual processing for the employee if he or she was employed after the *To Date.*

Compares the *To Date* to the eligibility date of the accrual code on the employee's accrual data record. The system does not perform accrual processing for the employee if his or her eligibility date is less than the *To Date.*

Checks whether an employee's anniversary or the leave year begin date falls within the selected date range. If so, the system performs year end processing for PTOs with an earn basis of 1,2,5,6.

Sets the transaction date for PTO transactions written for an employee.

Prevents the system from performing accrual processing more than once for the same date period.

Perform Leave Year-End process?

Use this field to perform leave year-end processing for PTOs with an earn basis of 3, 4, or 8, prior to the mass update of employee PTO entitlements. Valid values are:

0	No. Do not perform Leave Year-End processing.
1	Yes. Perform Leave Year-End processing.

When performing leave year-end processing, the system:

Calculates unused earned entitlements, or the number of earned entitlements minus entitlements taken, for carryover to the new earned balance. If an employer does not allow carryover, the system resets the earned balance to zero.

Resets the balance taken to zero.

Note: For other earn bases, year-end processing occurs automatically when the relevant year-end date falls between the selected *from* and *to* dates. For example, for earn basis 2, the system automatically year-end processes employees whose anniversaries fall between the selected *from* and *to* dates.

6 Press Enter. Then type **1** in the Confirm Request window and press Enter. The system displays the following message at the bottom of the Mass Update PTO Entitlements screen and returns you to the Infinium HR main menu:

Building submission request...

The system uses batch processing to process the *Mass Update PTO Entitlements* option and generate the Mass Update PTO Entitlements reports.

7 Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen to view the status of your job. You can view or print the reports using options on these screens.

Prorated PTO Entitlement for New Employees

If you operate annual in advance PTOs, which are earn basis 4, run the *Mass Update PTO Entitlements* function once a year. The system processes only the selected active employees at the time you run the function. To calculate the appropriate PTO entitlement for new employees joining through the year, you must set up the leave proration table within PTO controls. See “Setting Up Prorated Leave for Advance Entitlements” in the “Defining Paid Time Off (PTO) Accrual Controls” chapter in the *Infinium Human Resources (I) Guide to Controls*. The system automatically allocates the prorated PTO entitlement during the new employee process.

Reduced PTO Entitlement at End of Employment

If you operate annual in advance PTOs, which are earn basis 4, you may need to adjust the annual PTO entitlement of employees who leave during the year to reflect the period they actually worked. This adjustment is required so that any unused PTO entitlement is valued correctly. The system automatically adjusts the entitlement during the end of employment processing based on the values set up in the leave proration table within PTO controls. See “Setting Up Prorated Leave for Advance Entitlements” in the “Defining Paid Time Off (PTO) Accrual Controls” chapter in the *Infinium Human Resources (I) Guide to Controls*.

Using the Mass Create PTO Accruals Options

Follow the steps below to use the *Mass Create PTO Accruals* option.

1 From the Infinium HR main menu select *Absences*.

2 Select *Paid Time Off (PTO) Accruals*.

3 Select *Process PTO Accruals*.

4 Select *Mass Create PTO Accruals* [MASSPTO]. The system displays the screen shown in Figure 9-16.

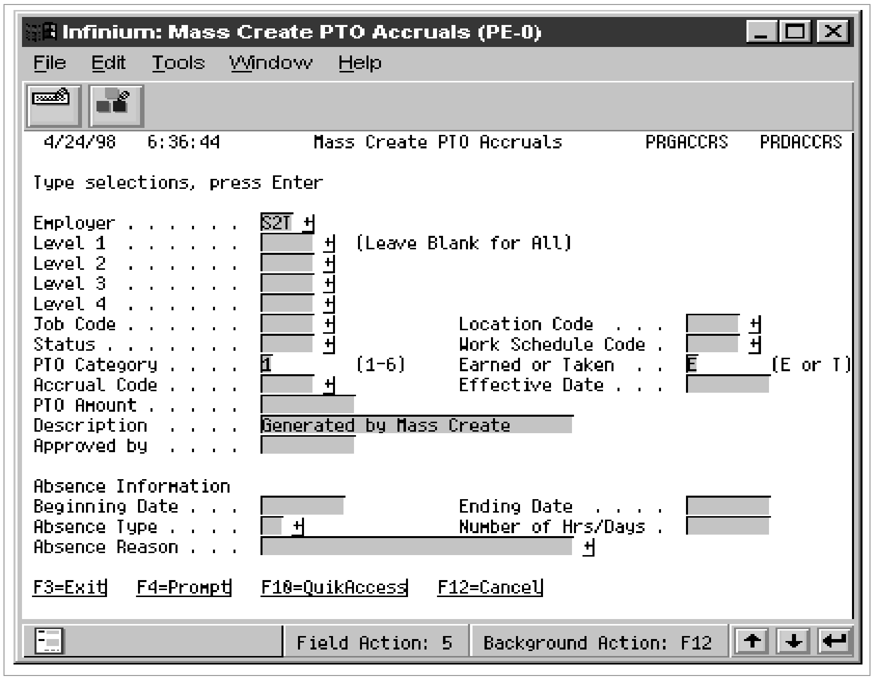


Figure 9-16: Mass Create PTO Accruals screen

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

Employer

Type the code value that identifies the employer within which you want to create PTO accruals.

Level 1

Type a value to restrict the creation of PTO accruals to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's *Level 1* field on the basic data record and creates PTO accruals only for employees assigned to the specified level 1.

To create PTO accruals for employees in all levels, leave this field blank.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict the creation of PTO accruals to employees assigned to particular levels within the specified level 1. The system compares the values you type in these fields with the values in each employee's level fields on the basic data record and creates PTO accruals only for employees within the specified levels.

To complete a particular level, you must complete all the fields above that level. For example, to enter a value in the *Level 4* field, you must complete levels 1, 2 and 3.

To create PTO accruals for all employees in a particular level, leave these fields blank.

Job Code

Type the code value that identifies a job to restrict the creation of PTO accruals to employees assigned to that job. The system compares the value you type in this field with the value in each employee's *Job Code* field on the basic data record and creates PTO accruals only for employees assigned to the specified job code.

To create PTO accruals for employees in all jobs, leave this field blank.

Location Code

Type the code value that identifies a location to restrict the creation of PTO accruals to employees assigned to that location. The system compares the value you type in this field with the value in each employee's *Location* field on the basic data record and creates PTO accruals only for employees assigned to the specified location code.

To create PTO accruals for employees in all locations, leave this field blank.

Status

Type the code value that identifies a status to restrict the creation of PTO accruals to employees assigned to that status. For example, you may want to create PTO accruals only for full time employees.

The system compares the value you type in this field with the value in each employee's *Status* field on the basic data record and creates PTO accruals only for employees assigned to the specified status code.

To create PTO accruals for employees regardless of status, leave this field blank.

Work Schedule Code

Type the code value that identifies a work schedule to restrict the creation of PTO accruals to employees assigned to that work schedule. The system compares the value you type in this field with the value in each employee's *Work Schedule* field on the basic data record and creates PTO accruals only for employees assigned to the specified work schedule code.

To create PTO accruals for employees in all work schedules, leave this field blank.

PTO Category

Type a value between 1 and 6 to indicate the PTO category to which you want to apply the PTO accrual amount.

Earned or Taken

Type a value to indicate whether the PTO accruals you are creating are to be recorded as earned or taken. Valid values are:

E	Earned
T	Taken

Accrual Code

Type the code value that identifies the accrual code to restrict the creation of PTO accruals to employees assigned to that accrual code. The system compares the value you type in this field with the value in the *Accrual Code* field in the employee's accrual data for the PTO category specified and creates PTO accruals only for employees assigned to the specified accrual code.

Effective Date

Type the date that you want to use as the transaction date for the PTO accrual transactions created.

PTO Amount

Type the PTO accrual amount that you want to create. The system records this amount on the PTO accrual transaction history and adjusts the balances of entitlement. You can enter a positive or a negative value in hours or days, depending on how the accrual code to which it relates is defined.

Description

Type a description for the action. This is a 30-character free-form field.

Approved by

Type a code value that represents the user approving the transaction. This is a 9-character free-form field. You can also use the F4 prompt key to select the name of a user. The field is used for reporting purposes only.

Entering Absence Information

If you mass create taken PTO accrual transactions, you can also enter absence information that relates to the taken entitlement you create. To enter absence information, complete the fields below.

Beginning Date / Ending Date

If you want to record a period of absence that relates to a taken accrual transaction you are creating, type the dates on which the transaction begins and ends.

Absence Type

Type the code value that represents the absence type for which the absence is to be recorded.

Number of Hrs/Days

Type the period of absence in either hours or days.

Absence Reason

Type the code value that represents the reason for the absence. This is a 30-character free-form field. You can also press the F4 prompt key to select from a list of absence reason codes.

6 Press Enter. Then type **1** in the Confirm Request window and press Enter. The system displays the following message at the bottom of the Mass Create PTO Accruals screen and returns you to the Infinium HR main menu:

Building submission request...

The system uses batch processing to process the *Mass Create PTO Accruals* option and generate the Mass Create PTO Accruals reports.

7 Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen to view the status of your job. You can view or print the reports using options on these screens.

Using Infinium PY to Calculate PTO Entitlement

If you are using Infinium PY, you can choose to automatically update an employee's PTO entitlement when you run your payroll processing cycle. You can base entitlement on the number of actual hours that the employee has worked, as well as days or scheduled hours.

When you establish pay cycles using the *Update Cycle Controls* option, you can specify a program to be executed during pay cycle processing to calculate an employee's PTO entitlement. The program you specify is PYGCPTO. This is the same program that is used for the *Mass Update PTO Entitlements* option. However, the following differences apply when you use this option for a payroll cycle:

- PTO accrual processing occurs as chapter of the *Post Cycles & Print Cheques* stage of cycle processing.
- Accruals can be based on actual hours worked.
- For normal cycles, the system processes all employees whose cycle code matches the cycle being processed. This means that an employee may be processed even though he or she is not included in the current cycle.

If an employee's accrual is based on actual hours worked and he or she is not included in the current cycle, the system does not calculate accrued entitlement, but performs all other accrual processing.

- For special cycles, the system processes all employees in the current payroll cycle. As employees cannot be attached to special cycles, the system processes only those employees in the current cycle. This is relevant for employees for whom accrual controls are based on actual hours worked and you want pay adjustments to be considered for PTO accrual processing.

  Note: If you do not want accrual processing to occur, do not include the PTO accruals program PYGCPTO in the cycle control for special cycles.

- The system uses the pay cycle period begin and end dates as follows:
  - Accrual processing occurs for an employee only when the employee's date of employment is prior to the period end date or when the employee's accrual eligibility date is prior to or equal to the period end date.
  - Anniversary and carryover processing occurs if the relevant dates fall within the period begin and end dates.

- The period end date is used as the transaction date for any accrued, earned or other transactions generated during PTO accrual processing.

Note: For all transactions generated as a result of the occurrence of an employee's anniversary, the system uses the employee's anniversary date as the transaction date.

Refer to the *Infinium HR (I) Guide to Controls* for more information on establishing cycle controls to process PTO accruals during pay cycle processing.

Using PTO Accruals with Termination Processing

When you use the End Employment process within the *Enter Personnel Actions* option, the system presents the *Generate PTO Entitlement Payment* option. This allows you to value the employee's outstanding PTO entitlements. The system uses the controls you establish through the *Update Termination Controls* option to calculate the value of the employee's remaining PTO entitlement. It then generates termination payment transactions based on the information you enter.

The system calculates the entitlement payments using the values in the termination controls and displays them on the PTO Entitlement Payments screen. You can update or delete entitlements as required, update the employee's PTO accruals, and recalculate after making adjustments.

You use the *Close Terminations to PY* option to pass calculated payment transactions to payroll for inclusion in pay cycle processing.

Refer to the *Infinium HR (I) Guide to Controls* for more information on termination entitlement controls.

Summary

In summary, you have learned the following:

- The terminology used for PTO accruals
- The different ways in which you can use PTO accrual options to maintain employee PTO entitlement
- The relationship between paid time off entitlement and absences
- How Infinium HR calculates PTO entitlement and updates PTO balances
- How Infinium PY can be used to calculate employee PTO entitlement
- How outstanding PTO entitlement can be paid to employees during termination processing
- How you can report on the PTO entitlement available to an employee

Notes

Chapter 10 Processing Absences

10

This chapter explains how you use Infinium HR options to record employees' absences from the workplace. It also explains how to use the mass update options to create absences for groups of employees, and how to link absences to paid time off entitlement.

The chapter consists of the following topics:

Overview

Infinium Software uses the term “absence” to refer to any working hours in which an employee is absent from the workplace. Annual leave and sick leave are two common examples.

You use absence types to define the reasons for an employee’s absence from the workplace. For example, you might define the following types listed below.

Absence Type	Description
AL	Annual Leave
LWOP	Leave Without Pay
SL	Sick Leave
SWOP	Sick Leave Without Pay

When you enter an absence for an employee, if the absence type is linked to an accrual category, the system automatically adjusts the employee’s paid time off (PTO) balances.

You can also use absence payment controls to specify whether the absence is one for which the employee is to be paid. You use this to generate payment transactions for payroll processing. Refer to the *Infinium HR (I) Guide to Controls* for more information on setting up absence payment controls.

You use absence groups to track absence information for employees who are assigned to the absence types that are associated with a specific group.

Objectives

When you complete this chapter, you should be familiar with:

- How to record an absence for an employee
- How to record absences for a group of employees
- How to display absence details
- How to produce reports on absence information

- The relationship between absences and paid time off entitlement

Understanding Absences

You can use the absence processing options in Infinium HR and Infinium PY in several ways, depending on the requirements of your company and whether or not you are using Infinium PY.

Absence Processing in Infinium HR

The following options are available in Infinium HR:

- Recording and updating absences

  You use the *Update Employee Absences* option to maintain a detailed history of an employee's absences. You enter information such as the duration of the absence, the reason for the absence, and whether the employee is to be paid for the absence. You can enter absences in advance or retrospectively.

  When you enter an absence into Infinium HR, the system performs the following processing:

  - Calculates the total number of days in the absence
  - Calculates the working days lost in the absence, i.e. excluding non-workdays such as weekends and public holidays
  - For absence types linked to PTOs, calculates the number of days or hours for PTO purposes
  - Adds the absence to the employee's absence record

- Using absence processing with PTO accruals

  You can link absences to paid time off accruals. To do this, you define absence types that are linked to PTO categories. When you enter an absence period for one of these absence types, the system updates the appropriate taken PTO accrual value for the employee, automatically adjusting his or her outstanding balance of entitlement.

- Tracking short term absences with Bradford points

  You can use the *Bradford Points Absence Analysis* function to view Bradford points calculations for specified criteria including absence groups. You can also view the detailed absence history for a specified employee.

You can use the *Bradford Points Absence Report* to print the results of the Bradford points calculations.

Absence Processing in Infinium PY

You can use the *Close Absences to Payroll* option in Infinium PY to close all the employee absence payment transactions into the payroll cycle as employee incomes, and to adjust basic pay and auto pay incomes as appropriate. The system prints a report of the transactions.

You can run the *Trial Close Absences to Payroll* option prior to performing the update. The system prints the same report that it prints for the *Close Absences to Payroll* option.

Mass Update Options

The mass update options allow you to create and update absences for a group of employees together, rather than typing in absences on an individual basis.

You use the *Mass Enter Employee Absences* option to create an absence for more than one employee at the same time.

You use the *Mass Update Current Absences* option to update open-ended absence details for SSP purposes.

You use the *Mass Create Employee Absences* option to create an absence for employees who match certain conditions that you specify.

Maintaining Security for Absence Processing

You use the *User Controls* option to restrict a user to one or more absence types. During any processing involving absence types, the system checks that the user is authorised to use the absence type before proceeding with the update.

If the user has no absence security defined, the system checks whether the user belongs to a group profile within Infinium Application Manager. If so, the system uses any absence security that has been set up for the group profile. If not, the system allows the user to work with all absence types.

Refer to the *Infinium HR (I) Guide to Controls* for more information.

Creating and Maintaining Absences for an Employee

Creating an Absence

Follow the steps below to enter an absence for an employee.

1. From the Infinium HR main menu select *Absences*.

2. Select *Employee Absences*.

3. Select *Update Employee Absences* [UEA1]. The system displays the screen shown in Figure 10-1.

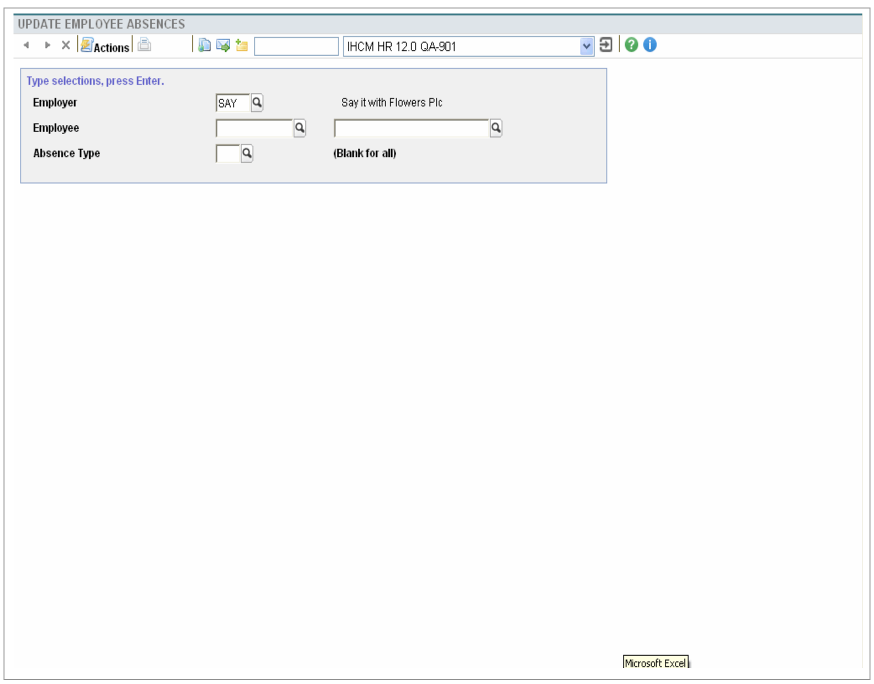


Figure 10-1: Update Employee Absences prompt screen

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

Employer

Type the code value that represents the employer for which you are creating an absence.

Employee (Number, Name)

In the first field, type the number assigned to the employee for whom you are creating an absence.

Absence Type

Type a code value to indicate the absence type you are creating for this employee. If you enter a value, the system displays absence periods only for this absence type on the next screen.

To display absence periods for all absence types, leave this field blank.

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

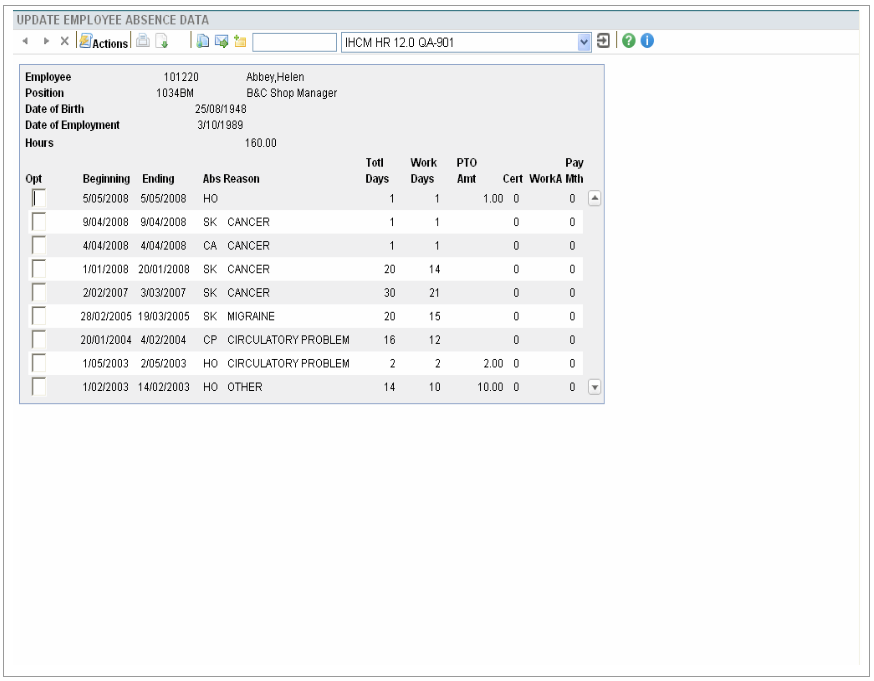


Figure 10-2: Update Employee Absence Data selection screen

The system displays a list of the employee's absences of the type you selected. If you did not select an absence type, the system displays all absences for the employee.

If you selected an absence type that is linked to a PTO, the system also displays the employee's accrued, earned, taken and remaining balances for that PTO category.

Note: If the employee has payments calculated at the end of employment for outstanding PTO entitlements, the system displays the following warning message:

This employee has either future dated or open termination entitlement transactions. Leave balances do not take into account these transactions until the termination is posted and closed into payroll. As such, please check the hours that have been booked for termination payout and subtract this from the leave balance to get the correct balance available, prior to entering any leave.

6 Press Enter to continue.

From this screen you can:

- Type **2** in the appropriate *Opt* field to update an existing absence
- Type **4** in the appropriate *Opt* field to delete an absence
- Type **5** in the appropriate *Opt* field to update the hours of absence for individual days within an existing absence
- Press F6 to create a new absence
- Press F13 to display the employee’s basic data
- Press F14 to use the *Work Action* options
- For UK customers, press F15 to display the employee’s SSP history
- Press F17 to display the employee’s accident and illness information
- Press F18 to display the employee’s accruals
- Press F20 to display the date up to which the absence certificate is valid

7 Press F6 to create a new absence entry. The system displays the screen shown in Figure 10-3.

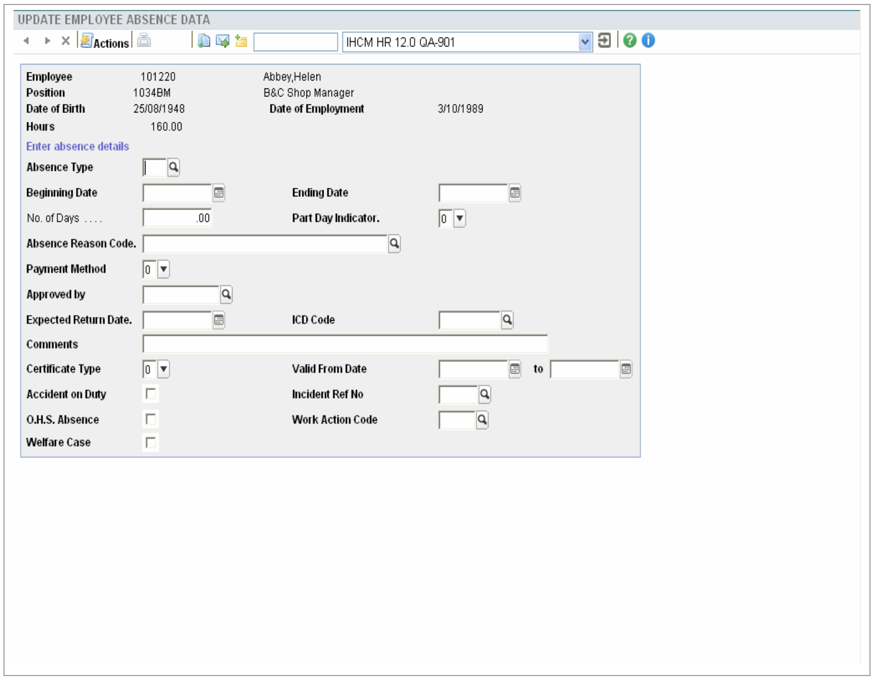


Figure 10-3: Update Employee Absence Data screen 1 of 2

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

Absence Type

Type the code value that represents the type of absence for which you are creating a record for this employee.

If you selected an absence type on the Update Employee Absences prompt screen, the system displays your selection in this field. To override this selection, type a different value in this field.

Beginning Date

Type the date on which the absence begins.

For an absence that is linked to an accrual type, if you enter a date that is not within the current leave year or the employee's leave year, the system displays a warning message. You can then choose whether to update the leave PTO totals at the time of the transaction. Press F16 to prevent the PTO balance from being updated.

Ending Date

Type the date on which the absence ends. If you do not know when the employee is due to return, leave this field blank. However, if the absence is linked to an accrual type, you must type a value in this field.

For an absence that is linked to an accrual type, if you enter a date range that is not within the current leave year or the employee's leave year, the system displays a warning message. You can then choose whether to update the current taken PTO balance at the time of the transaction. Press F16 to prevent the balance from being updated.

If you prevent the balances from being updated for dates in the following leave year, the system records the PTO entry as “Scheduled to be taken.” The system displays this on the employee's PTO Accruals screens as a type “S” transaction.

During processing at the end of the leave year, the system searches for transactions scheduled for the new leave year and brings them into the taken balance for the new leave year. It also changes the transaction type from scheduled to taken.

If an absence is linked to a PTO accrual, you cannot enter an end date that is beyond:

- The end of the current leave year for earn bases 3 and 4
- The end of the employee leave year for all other earn bases

You must enter two separate absence periods, one in the current leave year and the other in the next leave year.

Leave this field blank if the absence is not linked to an accrual type.

No. of Days / Hours

For an absence type that is associated with a PTO accrual, type the number of working days or hours for which the employee is absent. If you leave this field blank, when you press Enter the system calculates the length of the absence from the dates you typed in the *Beginning Date* and *End Date* fields.

The system refers to the daily hours calculation method you specified for this absence type through the *Update Absence Types* option to determine how to convert the absence days to hours. Refer to the *Infinium HR (I) Guide to Controls* for more information.

Note: If you have set the employee's work schedule code to ***SHFT** and you have selected daily hours calculation method **2**, based on work pattern, for the absence type, you must enter the number of working days or hours. The system does not calculate this value.

The system displays the Update Absence Details screen for you to complete the number of hours of absence for each day of the absence period. Refer to the section in this chapter entitled “Updating the Details of an Absence” for more information.

Note: If the employee works a variable shift pattern and the hours calculated by the system are incorrect, you can manually enter a value for the number of hours by setting the *Part Day Indicator* to **4**.

Part Day Indicator

Type a value to indicate whether the employee was absent for part of the day at the start or the end of the absence period. Valid values are:

0	The employee was absent for the entire absence period.
1	The employee was absent for part of the day at the start of the absence period.
2	The employee was absent for part of the day at the end of the absence period.
3	The employee was absent for part of the days at both the start and the end of the absence period.
4	Use this value to enter a PTO taken value of 0 days/hours. You may want to do this if an employee has no remaining entitlement, but you want to record an absence without recording it as taken PTO. You can also use this value to manually enter a value for the number of hours, such as when the system calculated value is incorrect.

Absence Reason Code

Type the reason code for the absence. You define absence reason codes through the *Update Absence Reason Code* option. You can use this option to define whether the International Classification of Diseases (ICD) code associated with the absence reason constitutes:

- A risk condition
- A notifiable and contagious disease
- An Occupational Health and Safety (OHS) referrable condition

If any of these are indicated on the absence reason, the system displays a highlighted warning message when you select the code.

You must enter an absence reason code if the absence type is an SSP absence and if you have not entered an ICD code.

Payment Method

Type a value to indicate whether to pay the employee for the absence. Valid values are:

0	Do not pay the employee and do not process the absence during payroll processing. The system generates an absence record but does not pay the employee for the absence. This is the default value.
1	Process the absence during payroll processing and pay the employee for the absence. The system displays an additional screen with the income codes set up in the absence payment control. You can edit or override these allocations if required.
2	Process the absence during payroll processing and pay the employee in advance for the absence. The system displays an additional screen with income codes set up in the absence payment control. You must enter the period and date for the cycle in which the employee is to be paid.

Note: If the absence period entered is prior to the next cycle period end date for the employee, the absence is not paid during payroll processing. However, if you select payment method **1** or **2**, the system highlights the absence on an exception report which is printed when you select the *Close Absences to Payroll* option in Infinium PY.

Approved By

Type the employee code of the employee approving the absence.

Expected Return Date

Type the date on which the employee is expected to return from the absence. This field is for information only; you can use it when recording an absence for which you do not know the end date.

ICD Code

The system completes this field with the International Classification of Diseases (ICD) code attached to the absence reason you selected in the *Absence Reason Code* field.

Comments

Type any comments relating to the absence. This is a 50-character free-form field.

Certificate Type

If the employee is sick, type a value to indicate the type of sickness certificate. If the employee's absence is not due to sickness, keep the default value of **0**, no certificate.

Valid values are:

0	No certificate
1	Self certified
2	Private doctor
3	National Health doctor
4	Hospital
5	Another type of certificate

You must type an expiry date for all certificates in the valid *to* date field. If you type **0** in this field and the absence type you selected has an absence class of **S**, the system calculates an expiry date of seven days from the start of the absence period. You can override this date if required.

Valid From Date

Type the date from which the absence certificate is valid. For employees with country code UK, if you leave this field blank and the class of the absence type you selected is **S**, the system completes this field with the date in the *Beginning Date* field.

to

If the class of the absence type you selected is **S**, type the date to which the absence certificate is valid. For employees with country code UK, if you leave this field blank, the system calculates an expiry date of seven days from the date in the *Valid From Date* field. If the class of the absence type is not **S**, leave this field blank.

Accident on Duty

If the absence is due to an accident, type a value to indicate whether the accident occurred while the employee was on duty. Valid values are:

0	No. The employee was not on duty when the accident occurred.

1	Yes. The employee was on duty when the accident occurred.

Incident Ref No

If the absence is due to an incident that has been logged using the *Health & Safety* options and you have typed **1** in the *Accident on Duty* field, type the reference number assigned to the incident.

O.H.S. Absence

Type a value to indicate whether the employee's OHS (Occupational Health and Safety) section is to be notified of the absence. Valid values are:

0	No. The OHS section is not to be notified.
1	Yes. The OHS section is to be notified.

Work Action Code

Type a work action code for the absence if required. You define work action codes through the *Update Employer Codes* option using code type **GRV**.

Note: Typing a value in this field does not create a work action; it is for information only. To access the *Update Work Actions* option, press F14 from the list of absences.

Welfare Case

Type a value to indicate whether the absence is to be referred as a welfare case. This field is for information only. Valid values are:

0	No. The absence is not be to referred as a welfare case. This is the default value.
1	Yes. The absence is to be referred as a welfare case.

9. Press Enter. The system calculates the length of the absence and verifies that the employee is entitled to the absence you have entered.

   The system performs the following additional checks for absences linked to PTOs:

   - That the employee has sufficient entitlement remaining for the absence entered. If the absence causes the leave balance to become negative, the system displays a warning that can be overridden if required.
   - That there are sufficient working days/hours between the beginning and ending dates of the absence for the number of days/hours entered.

- That the absence period does not overlap an existing absence period.
- If the absence entered is linked to an accrual, that the employee has a PTO accrual code for the appropriate PTO category.

If the absence you have entered is of a type for which the employee accrues paid time off, the system displays a window with the employee's current accrual balances, as shown in Figure 10-4.

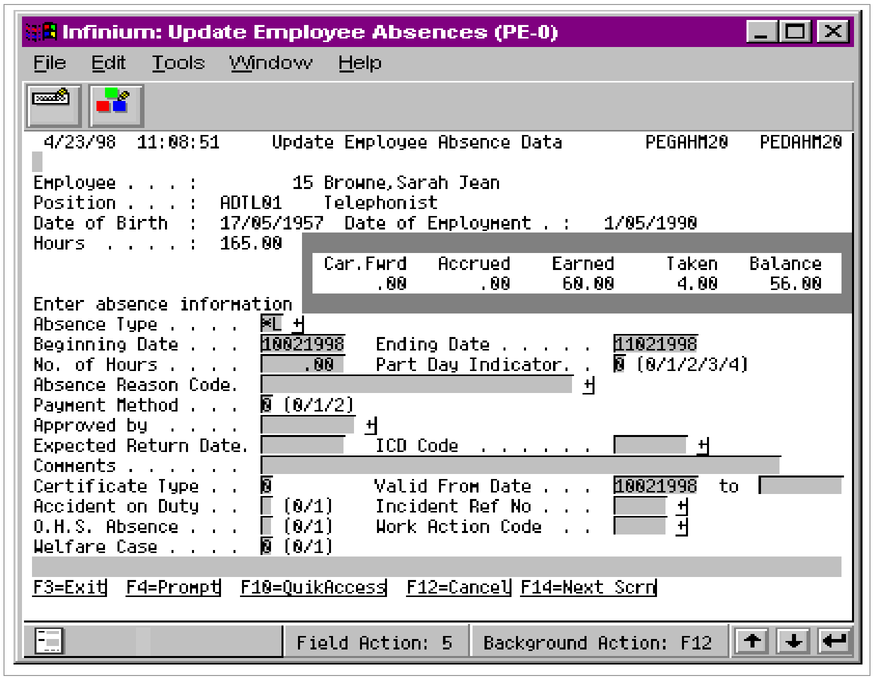


Figure 10-4: Update Employee Absence Data screen 1 of 2

These balances are shown for information only; you cannot edit the display.

10 If the payment method is 1 or 2, the system automatically displays the screen shown in Figure 10-5. If not, press F14 to display the screen.

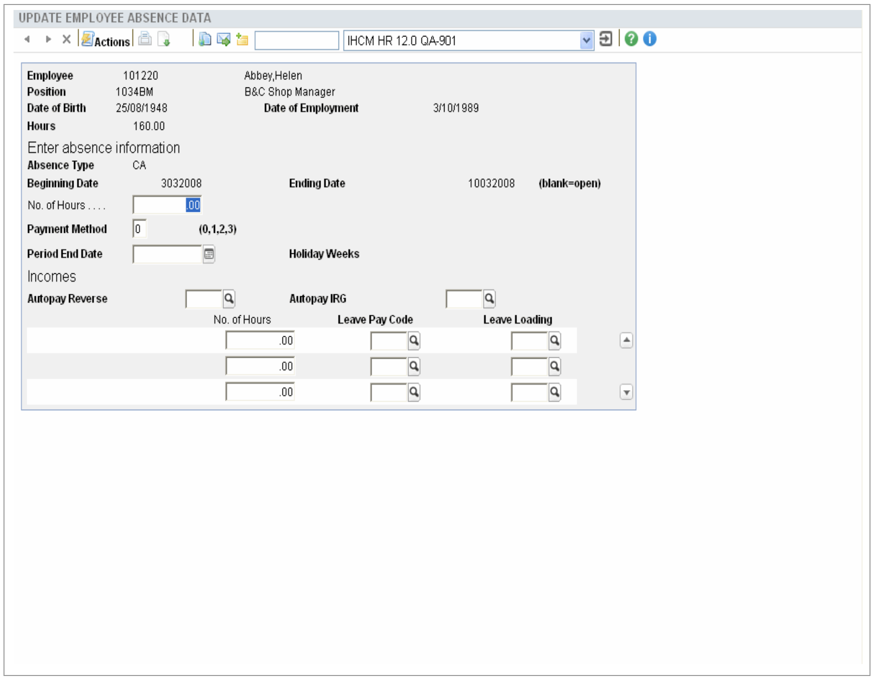


Figure 10-5: Update Employee Absence Data screen 2 of 2

The system displays details of the absence you have entered. If the absence you have entered is of a type for which the employee accrues paid time off, the system also displays the employee’s current paid time off accrual balances.

11 Use the following information to complete the fields on this screen.

Note: You only use this screen for absences for which you want to create payroll payment transactions.

No. of Days / Hours

The system completes this field with the length of absence calculated on the previous screen. You can change the value if required.

Payment Method

The system completes this field with the value you typed on the previous screen. You can change the value if required.

Period End Date

If you typed **2** in the *Payment Method* field to pay the employee in a pay cycle in advance of the period of absence, type the period end date of the cycle in which you want to pay the employee for this absence.

The system checks that a future cycle exists for the employee's cycle within this period end date. You define future cycles through the *Update Future Cycles Schedule* option in Infinium PY.

Holiday Weeks

If the incomes for this absence are to be taxed over additional holiday weeks, type the number of additional weeks to be applied during payroll cycle processing.

Note: When you use the *Close Absences to Payroll* option in Infinium PY, the system calculates the total number of holiday weeks for all the employee's absence transactions closed to the cycle.

For example, if you enter two periods of absence, each with 1 holiday week, and pay them in the same cycle, the system adds 2 weeks to the employee's holiday weeks when the absences are closed to payroll.

Autopay Reverse

If the employee receives autopay incomes, type the income code that the system is to use to reverse any autopay incomes already generated for the absence period. You define income codes through the *Update Income Controls* option.

Autopay IRG

If the employee receives autopay incomes during normal cycle processing, type the IRG (income reporting group) code that contains the income codes that are to be reversed for the absence period. You use this IRG to define autopay incomes/allowances that are to be reversed when the employee is on a period of absence. If you want to continue to pay an income to an employee, do not define it in the autopay group.

If you typed **2** in the *Payment Method* field to process and pay the absence in advance, the system does not use either this field or the *Autopay Reverse* field. Instead, the system performs the following actions:

- Suspends the employee's incomes for the advance period
- Calculates any applicable part pay
- Re-instates the incomes when the absence period ends and the employee returns to cycle processing

If you do not want to pay incomes in advance for a period of absence, you must manually adjust the employee's income begin and end dates.

Entering Absence Income Information

You can complete up to six rows of absence information. The total number of hours or days that you type in these fields must match the value in the *No. of Hours / Days* field in the Absence section of the screen.

Use the information below to complete the fields on this screen for each different income that the system is to pay the employee for the absence period.

No. of Hours / Days

Type the number of hours or days absent.

Leave Pay Code

Type the income code that the system is to use to calculate payment for the absence period. The system defaults the code from the absence payment control that is linked to this absence type.

Leave Loading

Type the income code that the system is to use to calculate payment of leave loading to be paid above the normal payment for the absence period. The system enters the code from the absence payment control that is linked to this absence type.

12 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves your changes and returns you to the Update Employee Absence Data screen. The system adds the absence that you entered to the absences display.

Updating an Absence

Follow the steps below to update an absence for an employee.

1 From the Infinium HR main menu select *Absences*.

2 Select *Employee Absences*.

3 Select *Update Employee Absences* [UEA1]. The system displays the Update Employee Absences prompt screen shown in Figure 10-1.

4 Use the information in the section in this chapter entitled “Creating an Absence” to complete the fields on this screen.

5 Press Enter. The system displays the Update Employee Absence Data selection screen shown in Figure 10-2. The screen displays the employee's absence history.

6 Type **2** in the *Opt* field next to the absence you want to update and press Enter. The system checks the absence and displays the following warning message if payment transactions have already been processed in payroll for the absence period:

All or some of the absence days for the period of absence you wish to change have already been taken across into the Payroll system. Manual adjustments in the Payroll system may be required to reflect the change of this absence.

7 You can select option **2** to abort the transaction you are processing. If the system does not display a warning, or if you select option **1** to continue, the system displays the screen shown in Figure 10-6.

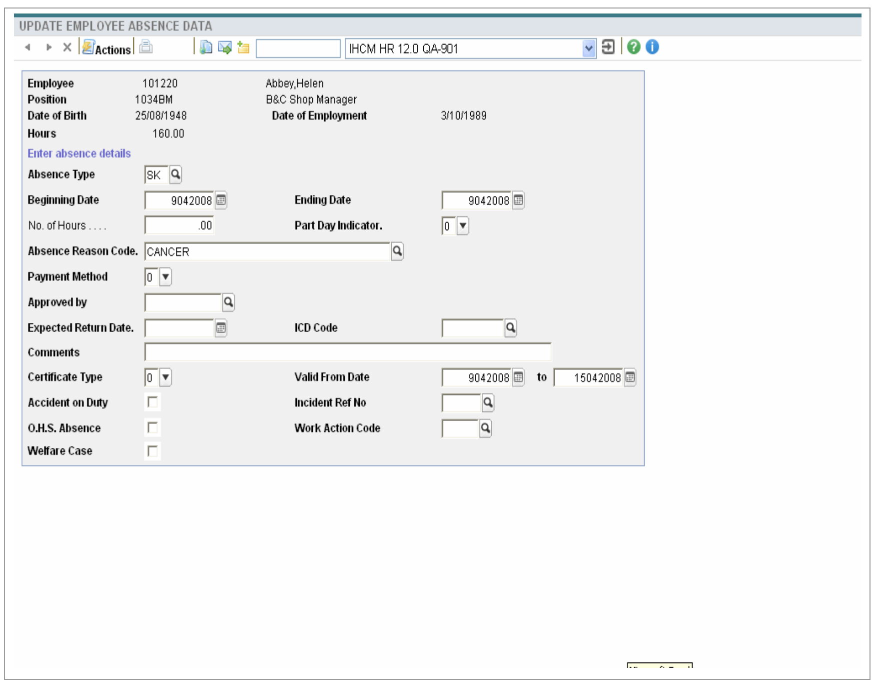


Figure 10-6: Update Employee Absence Data screen 1 of 2

8 Use the information in the previous section to update the fields on this and the next screen as required.

9 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves your changes and returns you to the Update Employee Absence Data screen. The system updates the absence information on this screen with the new information that you entered.

Updating the Details of an Absence

Follow the steps below to update the absence details for an employee's absence.

1. From the Infinium HR main menu select *Absences*.
2. Select *Employee Absences*.
3. Select *Update Employee Absences* [UEA1]. The system displays the Update Employee Absences prompt screen shown in Figure 10-1.
4. Use the information in the section entitled "Creating an Absence" to complete the fields on this screen.
5. Press Enter. The system displays the Update Employee Absence Data selection screen shown in Figure 10-2.
6. Type **5** in the *Opt* field next to the absence for which you want to update details.
7. Press Enter. The system displays the screen shown in Figure 10-7.

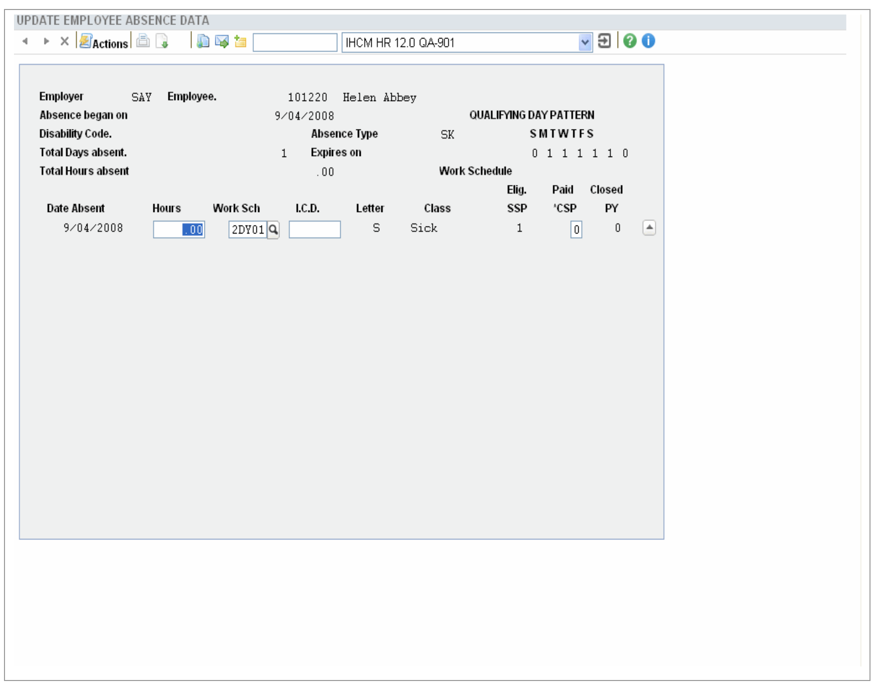


Figure 10-7: Update Employee Absence Data screen

The Qualifying Day Pattern section of the screen shows the days in the employee's work schedule that qualify as working days. The system also displays information relating to each date within the chosen absence. Some of these fields are for information only. The system displays one line per day of the absence.

The Work Schedule section of the screen shows the work-schedule code for the employee.

Note: The *Eligible SSP* field is for UK customers only.

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

Hours

The system enters the hours calculated from the daily hour calculation method defined in the absence type as a default for this field. Type the number of hours for which the employee was absent for each of the dates in the absence period. You must complete this field if the absence is associated with an accrual. The total hours of all dates must match the total hours absent for the absence.

For non-work days, type **0** in this field.

Work Sch

The employee's default work schedule code, which the system records when you create the basic absence record, is shown at the top of the screen. The system uses the work schedule code to derive the workday pattern during the absence, which is then used to calculate the SSP rate if the absence qualifies for SSP.

If an employee's workday pattern changes from week to week during the course of the absence, you can specify a different work schedule code in this field from the specific date in the absence. Use this field only if you need to change the default work schedule code.

When the system processes the absence details for SSP, it uses any work schedule code you enter here, effective from its absence date, instead of the default. You do not need to enter a work schedule code for each absence date. The system uses the last work schedule code entry. You normally need to enter only a work schedule code for the week beginning date.

I.C.D.

The system completes this field with the ICD code attached to the absence reason associated with the absence.

*Paid *CSP*

Note: This field is for UK customers only.

Type a value to indicate whether company sick pay ***CSP** has been paid for this absence. Valid values are:

0	No ***CSP** has been paid and the absence has not been processed.
1	***CSP** has been paid and the absence has been processed.
2	The absence has been processed for ***CSP** but has not been paid. This might happen if the employee has used all his or her sick pay entitlement.

Note: If you type **4** in this field, the system deletes the ***CSP** payment history records for the absence. You use this when ***CSP** has been paid in error and you need to make adjustments to the history.

9 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves your changes and returns you to the Update Employee Absence Data screen. The system updates the absence information on this screen with the new information that you entered.

Deleting an Absence

Follow the steps below to delete an absence for an employee.

1 From the Infinium HR main menu select *Absences*.

2 Select *Employee Absences*.

3 Select *Update Employee Absences* [UEA1]. The system displays the Update Employee Absences prompt screen shown in Figure 10-1.

4 Use the information in the section entitled “Creating an Absence” to complete the fields on this screen.

5 Press Enter. The system displays the Update Employee Absence Data selection screen shown in Figure 10-2.

6 Type **4** in the *Opt* field next to the absence you want to delete.

7 Press Enter. Then type **1** in the Confirmation Window and press Enter. If absence payments have already been generated in payroll for this absence, the system displays the following warning message:

All or some of the absence days for the period of absence you wish to delete have already been taken across into the Payroll system. Manual adjustments in the Payroll system may be required to reflect the delete of this absence.

You can select option 2 to cancel the deletion of the selected absence.

8 Type **1** to continue. The system deletes the absence, updates the employee's absence balances and returns you to the Update Employee Absence Data selection screen. If the absence was linked to a PTO accrual, the system adjusts the employee's entitlement by creating a reversing PTO entry.

Displaying an Employee’s Absence Information

Displaying an Absence

Follow the steps below to display an employee’s absence history.

1 From the Infinium HR main menu select *Absences*.

2 Select *Employee Absences*.

3 Select *Display Employee Absences* [DEA]. The system displays the Display Employee Absences prompt screen similar to the one shown in Figure 10-1.

4 Use the information in the section entitled “Creating an Absence” to complete the fields on this screen.

5 Press Enter. The system displays the screen shown in Figure 10-8.

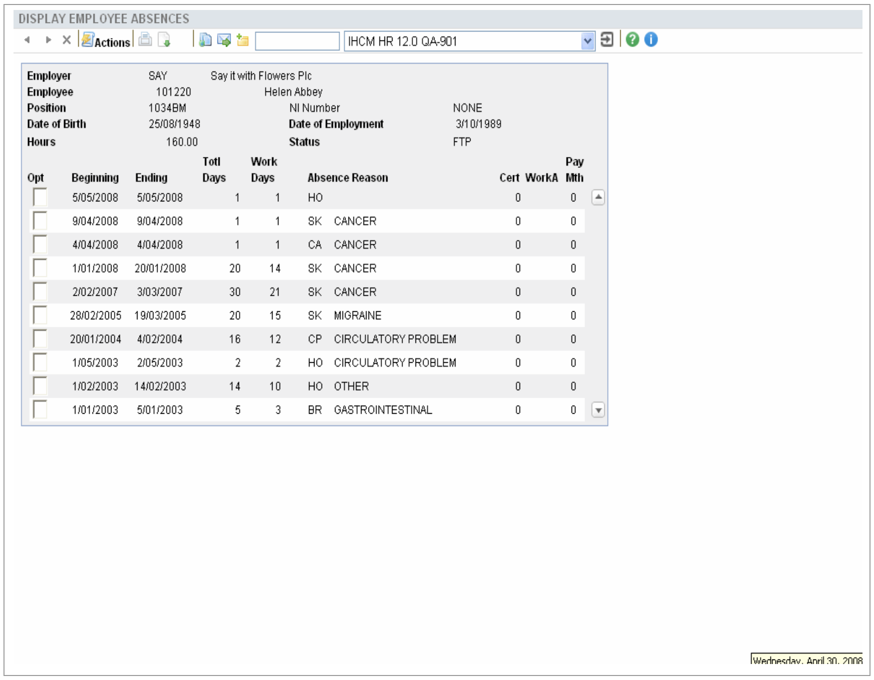


Figure 10-8: Display Employee Absences selection screen

The system displays a history of the employee’s absences. From here you can:

- Type **5** in the *Opt* field next to the absence you want to display
- Type **8** in the *Opt* field next to the absence for which you want to display details
- Press F17 to display the absence history for a range of dates

6 If you want to display selected absences only from the history on the screen, press F17. Otherwise skip to step 9.

The system displays the Select Absence Type/Date Ranges window.

7 Complete the *Absence Type*, *Beginning Date*, *Ending Date* and *Total Days >* fields as required to limit the absence history display.

8 Press Enter. The system updates the Display Employee Absences screen to display only those absences that meet the conditions you specified.

9 Type **5** in the *Opt* field next to the absence you want to display and press Enter. The system displays the screen shown in Figure 10-9.

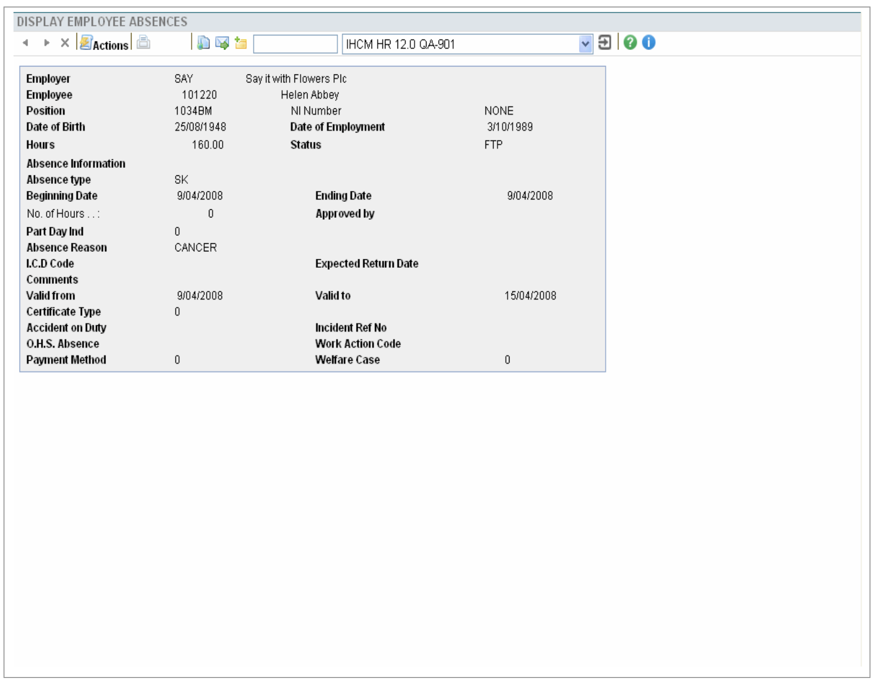


Figure 10-9: Display Employee Absences screen 1 of 2

The system displays details of the absence you selected.

10 Press F14 to display the next screen of information. The system displays the screen shown in Figure 10-10.

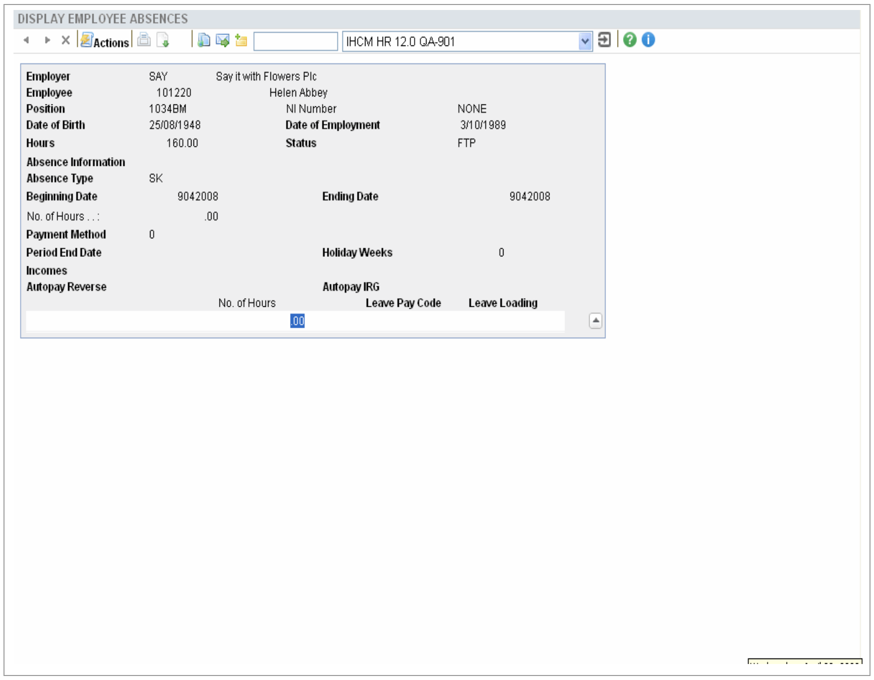


Figure 10-10: Display Employee Absences screen 2 of 2

11 Press F3. The system returns you to the Infinium HR main menu.

Displaying the Details of an Absence

Follow the steps below to display details of an absence for an employee.

1 Follow steps 1 to 8 in the previous section.

2 Type **8** in the *Opt* field next to the absence for which you want to display details. The system displays the screen shown in Figure 10-11.

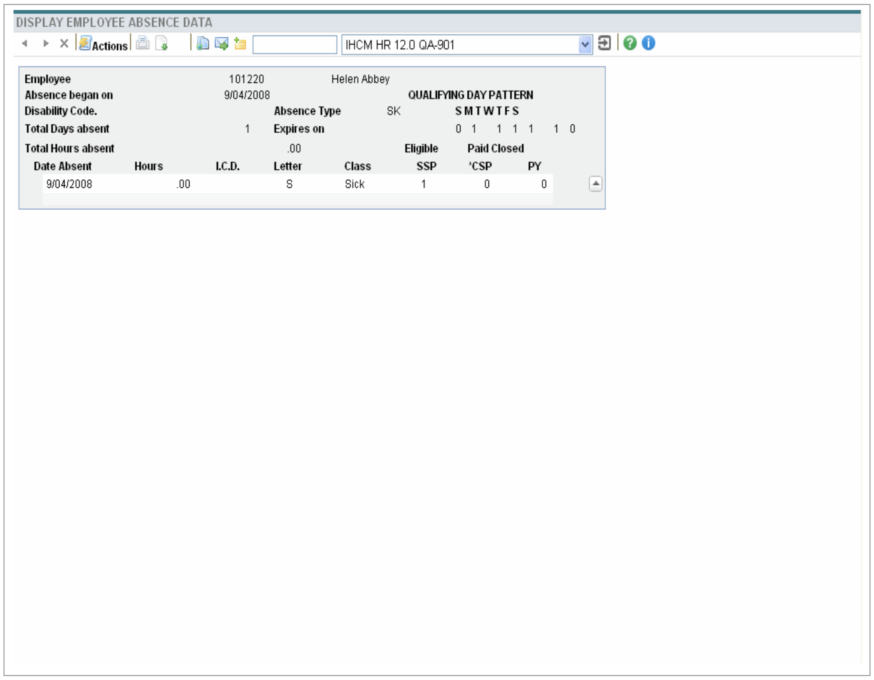


Figure 10-11: Display Employee Absence Data screen

The system displays the details for each of the days within the absence period.

3 Press F3. The system returns you to the Display Employee Absences screen.

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

Listing Employee Absences

You use the *List Employee Absences* option to produce a report of absences for a group of employees selected by organisation level or for individual employees selected by employee number.

- For a group of employees, the report shows each employee’s absence periods that fall within the selected date range, together with the employee’s position, job, absence reason, certificate due date and so on. The report groups the absences by absence type and shows the total days and hours of absence for each absence type and for the employer.
- For individual employees, the report shows the absence periods, absence type, absence reason, days and hours absent, certificate type and so on for the absence date range selected.

You can choose to print a summary or a detailed report. In summary form, the system prints only totals.

Listing Absences for a Group of Employees

Follow the steps below to print a list of employee absences.

1. From the Infinium HR main menu select *Absences*.
2. Select *Employee Absences*.
3. Select *List Employee Absences* [LEA]. The system displays the screen shown in Figure 10-12.

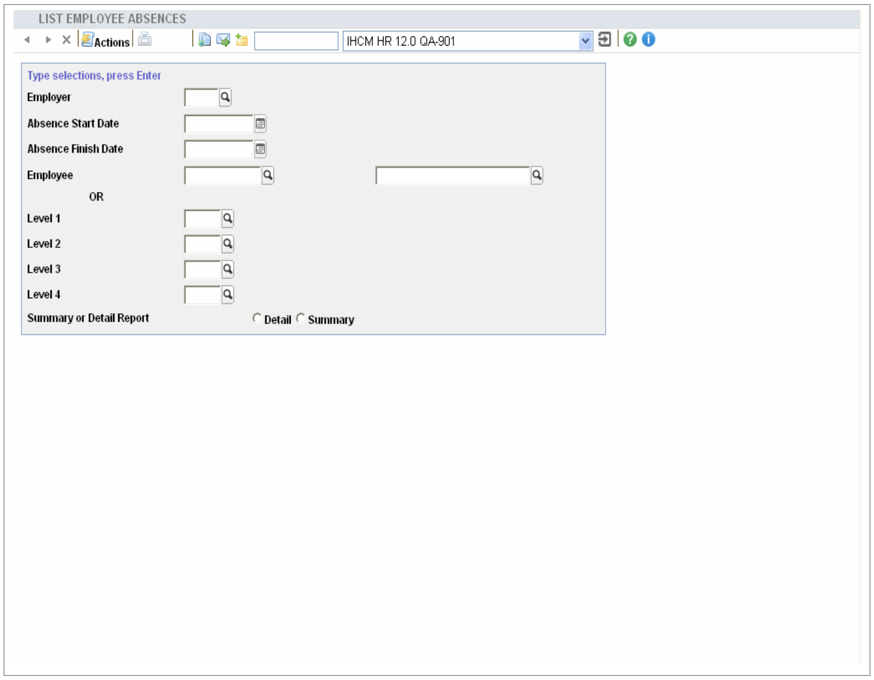


Figure 10-12: List Employee Absences screen

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

Employer

Type the employer code for which you want to list employee absences. Leave this field blank to list details for all employers.

Absence Start Date

Type the date from which you want to list employee absences.

Absence Finish Date

Type the date up to which you want to list all employee absences.

Employee (Number, Name)

Leave these fields blank.

Level 1

Type a value to restrict the listing of employee absences to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's *Level 1* field on the basic data record and lists absences only for employees assigned to the specified level 1.

To list absences for employees in all levels, leave this field blank.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict the listing of employee absences to employees assigned to particular levels within the specified level 1. The system compares the values you type in these fields with the values in each employee's level fields on the basic data record and lists absences only for employees within the specified levels.

To complete a particular level, you must complete all the fields above that level. For example, to enter a value in the *Level 4* field, you must complete levels 1, 2 and 3.

To list absences for all employees in a particular level, leave these fields blank.

Summary or Detail Report

Type a letter to indicate whether you want a summary report or a detailed report. Valid values are:

S	Summary report
D	Detail report

5 Press F13 to submit the report. The system prints a report containing details of the employee absences that meet the criteria you specified. Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen to view the status of your job. You can view or print the report using options on these screens.

Listing Absences for Selected Employees

Follow the steps below to print a list of employee absences.

1. Follow steps 1 to 3 from the previous section. The system displays the List Employee Absences screen shown in Figure 10-12.

2. Use the following information to complete the fields on this screen.

   Employer

   Type the employer code for which you want to list employee absences. To list details for all employers, leave this field blank.

Absence Start Date

Type the date from which you want to list employee absences.

Absence Finish Date

Type the date up to which you want to list all employee absences.

Employee (Number, Name)

In the first field, type the number assigned to the employee for whom you are updating an absence.

Levels 1, 2, 3, 4
Summary or Detail Report

Leave these fields blank.

3 Press Enter. The system displays the screen shown in Figure 10-13.

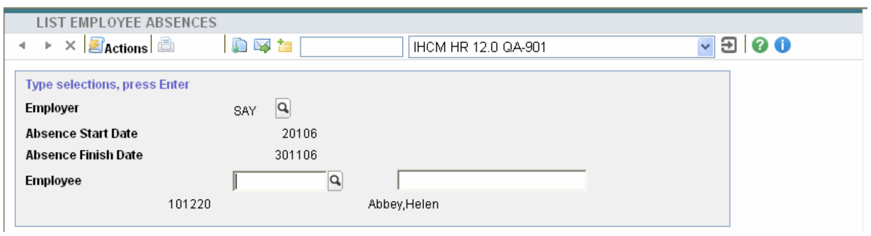


Figure 10-13: List Employee Absences selection screen

The system displays the employee number and name of the employee you have selected.

4 To add another employee to the list, type the number assigned to the employee for whom you are updating an absence in the first *Employee* field and press Enter. The system adds the employee to the list displayed on the screen.

5 When you have selected all the required employees, press F13. The system prints a report containing details of the absences that fall within the selected date range for each of the employees selected. The system prints each employee on a separate page.

6 Access the Work with Submitted Jobs screen or the Work with All Spooled Files screen to view the status of your job. You can view or print the report using options on these screens.

Mass Entering Employee Absences

The *Mass Enter Employee Absences* option allows you to enter an absence for more than one employee at a time. You use it to record absences when a number of employees are affected by the same absence, such as a company closure.

Do not use this option for entering absences in any of the following cases:

- If you need to record more detailed information
- If the absence is to be paid through the payroll interface
- If the absence details vary from employee to employee

In these cases, either enter the absences individually or use the *Mass Create Employee Absences* option.

Follow the steps below to mass enter employee absences.

1 From the Infinium HR main menu select *Absences*.

2 Select *Employee Absences*.

3 Select *Mass Enter Employee Absences* [MEEA]. The system displays the screen shown in Figure 10-14.

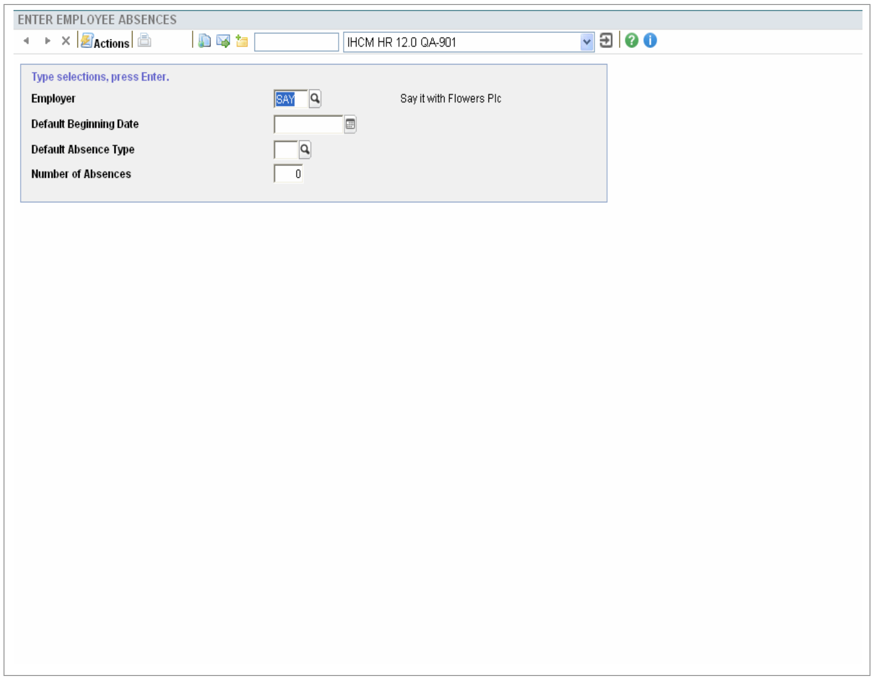


Figure 10-14: Enter Employee Absences screen 1 of 2

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

Employer

Type the employer for which you want to enter employee absences.

Default Beginning Date

Type the date for the system to use as a default beginning date on the next screen. Leave this field blank if the absences you want to enter do not have the same beginning date.

Default Absence Type

Type an absence reason code for the system to use as a default on the next screen. Leave this field blank if the absences you want to enter do not have the same absence reason code.

Number of Absences

Type the number of absence records that you want the system to generate. If you leave this field blank, the system generates 16 blank entries.

5 Press Enter. The system displays the screen shown in Figure 10-15.

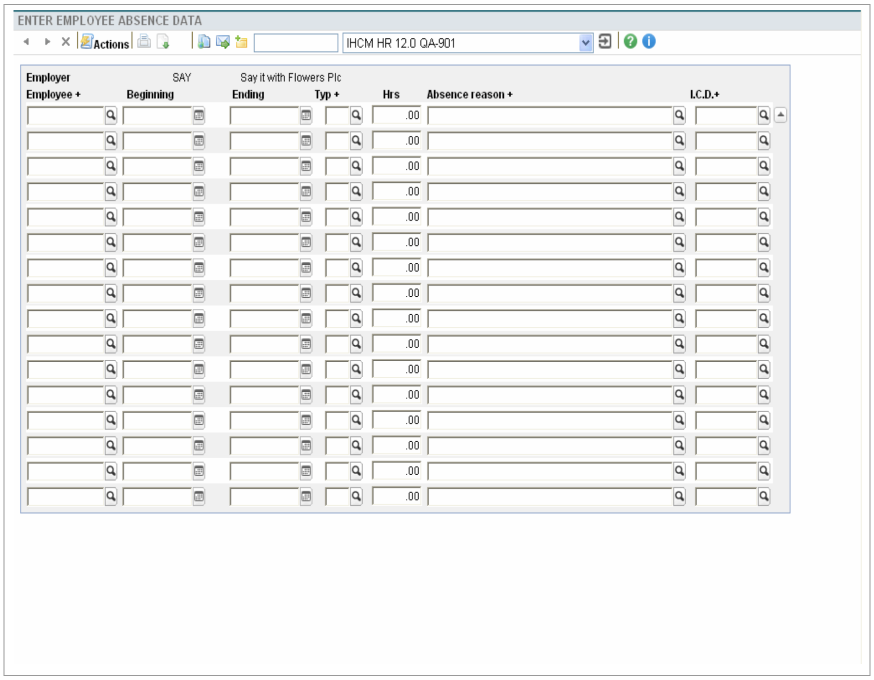


Figure 10-15: Enter Employee Absence Data screen 2 of 2

6 Use the following information to complete the fields on this screen. Enter each employee on a separate line.

Employee

Type the employee number of the employee for whom you are entering an absence.

Beginning

Type the start date of the absence.

Ending

Type the end date of the absence.

Typ

Type the absence type for this employee.

Hrs

Type the number of hours that you want to record as an absence for each of the work days that the employee was absent.

Absence reason

Type the reason for the absence.

I.C.D.

Type the ICD code associated with the absence reason you specified.

7 Press F21 to display the following additional fields that you can update through the *Mass Entering Employee Absences* option.

- *Cert.* or Certificate Type
- *End* or Valid to Date
- *Work A.* or Work Action Code
- *Wel* or Welfare Case
- *AOD* or Accident on Duty
- *OHS* or O.H.S. Absence

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system creates absence records for the employees using the information entered and returns you to the Infinium HR main menu. For absences that are linked to PTO accruals, the system adjusts the employee's PTO balances and creates a PTO history.

Mass Updating Current Absences

You use the *Mass Update Current Absences* option to automatically update detailed absence information for employees who have open-ended absence records on a particular date for SSP purposes.

You select the date up to which you want to record absences. The system updates the records of all employees who are currently absent from the workplace and creates a detailed absence record for each day from the start of the absence period until the date you selected. This allows the system to calculate the SSP absence correctly.

For example, you record an employee as absent starting from March 1^{st}. On March 5^{th}, you update all absence records. The system creates an absence record for each day between March 1^{st} and March 5^{th} for the absent employee. The absence period end date is still left blank.

Follow the steps below to mass update current absences.

1. From the Infinium HR main menu select *Absences*.
2. Select *Employee Absences*.
3. Select *Mass Update Current Absences* [MUCA]. The system displays the screen shown in Figure 10-16.

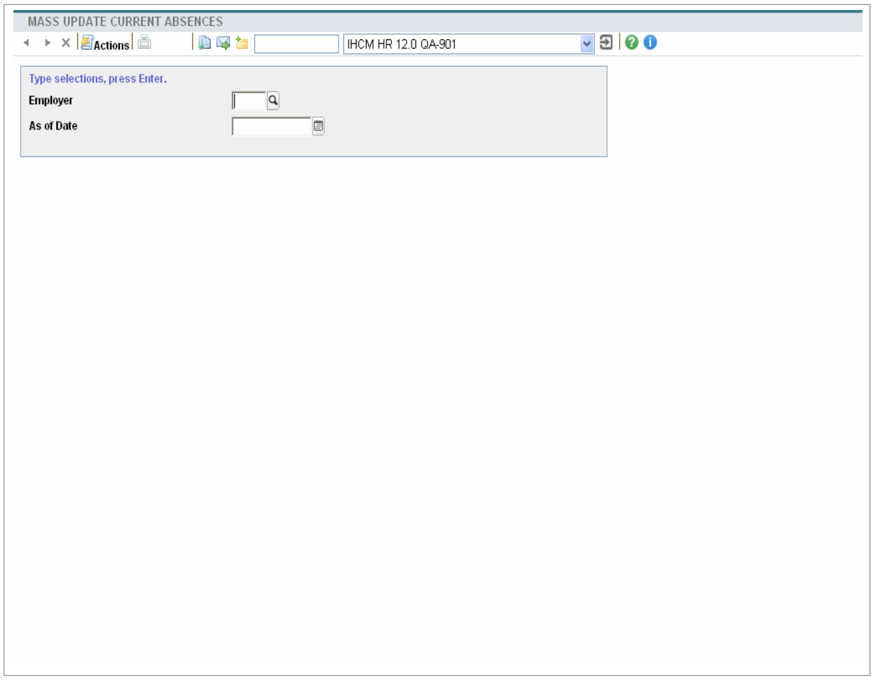


Figure 10-16: Mass Update Current Absences screen

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

Employer

Type the employer for which you want to update current absences. Leave this field blank to update absences for all employers.

As of Date

Type the date up to which you want the system to update absences.

5 Press Enter. The system creates detailed absence records for all employees who are currently absent from the workplace and returns you to the Infinium HR main menu.

Mass Creating Employee Absences

You use the *Mass Create Employee Absences* option to create an absence for a group of employees. You use the fields on the first screen to define a series of conditions about employee positions, job codes and so on. You use the fields on the second screen to define the absence you want to create. The system creates the absence for all employees that match the conditions you specified.

You can run the *Trial Mass Create Employee Abs* option to view the effect of the changes before you apply the changes to the employees' absence records.

Follow the steps below to mass create employee absences.

1 From the Infinium HR main menu select *Absences*.

2 Select *Employee Absences*.

3 Select *Mass Create Employee Absences* [MCEA]. The system displays the screen shown in Figure 10-17.

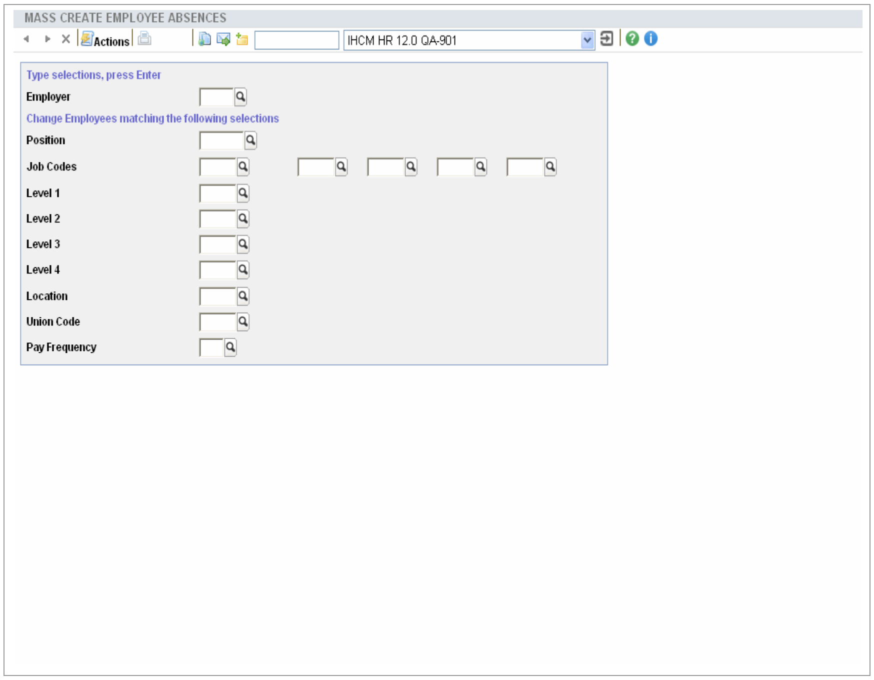


Figure 10-17: Mass Create Employee Absences screen 1 of 2

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

Employer

Type the employer for which you want to create absences.

Position

Type the position for which you want to create absences. The system compares the value you type here with the value in the *Position* field on each employee’s basic data record and creates absences only for the employees assigned to the specified position code.

To select all employees regardless of position, leave this field blank.

Job Codes

Type up to five job codes for which you want to create absences. The system compares the values you type here with the values in the *Job Code* fields on each employee’s basic data record and creates absences only for the employees assigned to the specified job codes.

To select all employees regardless of job code, leave this field blank.

Level 1

Type a value to restrict the creation of employee absences to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee’s *Level 1* field on the basic data record and creates absences only for employees assigned to the specified level 1.

To create absences for employees in all levels, leave this field blank.

Level 2, 3, 4

If you entered a value in the *Level 1* field, you can type values to restrict the creation of employee absences to employees assigned to particular levels within the specified level 1. The system compares the values you type in these fields with the values in each employee’s level fields on the basic data record and creates absences only for employees within the specified levels.

To complete a particular level, you must complete all the fields above that level. For example, to enter a value in the *Level 4* field, you must complete levels 1, 2 and 3.

To create absences for all employees in a particular level, leave these fields blank.

Location

Type the location for which you want to create absences. The system compares the value you type here to the value in the *Location* field on each employee's basic data record and creates absences only for the employees assigned to the specified location code.

To select all employees regardless of location, leave this field blank.

Union Code

Type the union for which you want to create absences. The system compares the value you type here to the value in the *Union Code* field on each employee's basic data record and creates absences only for the employees assigned to the specified union code.

To select all employees regardless of union code, leave this field blank.

Pay Frequency

Type the pay frequency for which you want to create absences. The system compares the value you type here to the value in the *Pay Frequency* field on each employee's payroll data record and creates absences only for the employees assigned to the specified pay frequency code.

To select all employees regardless of pay frequency, leave this field blank.

5 Press Enter. The system displays the screen shown in Figure 10-18.

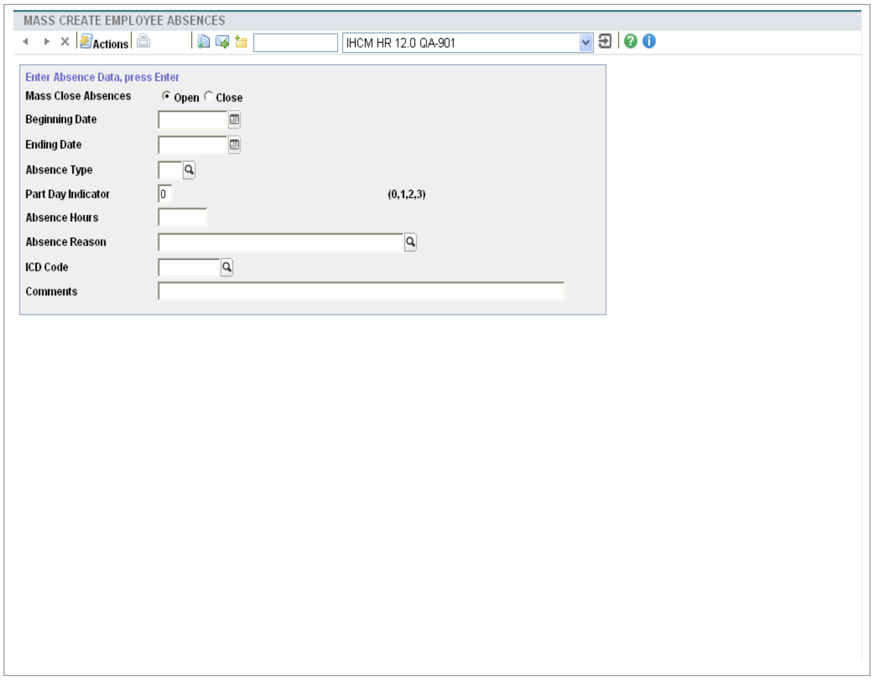


Figure 10-18: Mass Create Employee Absences screen 2 of 2

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

Mass Close Absences

Type a value to indicate whether to close the absences or leave them open. Valid values are:

0	Leave the absences open
1	Close the absences

Beginning Date

Type the date on which the absence begins.

Ending Date

Type the date on which the absence ends.

Absence Type

Type the code value that represents the type of absence for which you are creating a record for this employee.

Part Day Indicator

Type a value to indicate whether the employee was absent for part of the day at the start or at the end of the absence period. Valid values are:

0	The employee was absent for the entire absence period.
1	The employee was absent for part of the day at the start of the absence period.
2	The employee was absent for part of the day at the end of the absence period.
3	The employee was absent for part of the days at both the start and the end of the absence period

Absence Days / Hours

For an absence type that is associated with a PTO accrual, type the number of working days or hours for which the employee is absent.

For a non-accrual absence, leave this field blank.

Absence Reason

Type the reason code for the absence. You define absence reason codes through the *Update Absence Reason Code* option.

ICD Code

The system completes this field with the ICD code attached to the absence reason you selected in the *Absence Reason Code* field.

Comments

Type any comments relating to the absence. This is a 50-character free-form field.

7 Press Enter. The system creates the absence record for all employees meeting the conditions you specified and returns you to the Infinium HR main menu.

Tracking Short-term Absences with Bradford points

Use the *Bradford Points Absence Analysis* function to calculate a Bradford points score of employee absences for employees that meet your specified criteria including a date range, absence group, status group, levels, and location. You can specify that you want only information that exceeds a certain Bradford point level and whether to include all or only active employees.

After you use the *Bradford Points Absence Analysis* function, you can use the *Bradford Points Absence Report* function to generate a report that shows the results of the Bradford points analysis calculations.

When you use either the *Bradford Points Absence Analysis* function or the *Bradford Points Absence Report* function, the system lists the information in descending points order; employees with the worst absence record based on the Bradford analysis are first in the list.

Before you use the *Bradford Points Absence Analysis* function, you must set up absence groups.

Setting up Absence Groups

Absence group codes are employer codes. Use *Update Employer Codes* to create absence group codes and use the ABG code type before you use *Update Absence Groups*.

Complete the steps below to set up absence groups to use for Bradford points analysis.

1. From the Infinium HR main menu select *Controls*.
2. Select Absence Types.
3. Select *Update Absence Groups* [UPDABSGRP].
4. Press Enter. The system displays the screen shown in Figure 10-19.

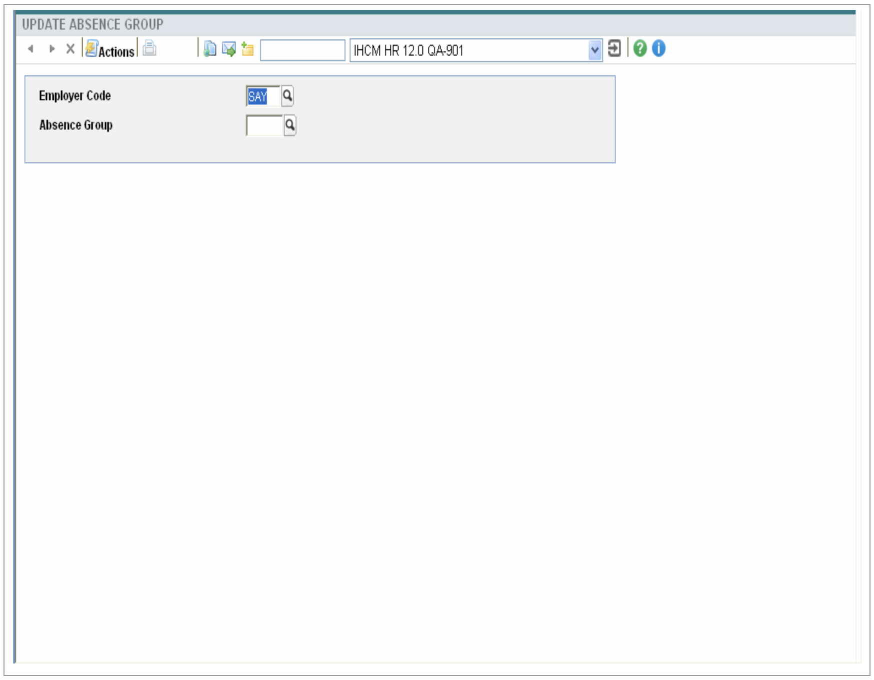


Figure 10-19: Update Absence Group prompt screen

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

Employer Code

Specify the value that represents the employer for whom you are setting up absence groups.

Absence Group

Type the value that represents the absence group.

6 Press Enter. The system displays a screen similar to Figure 10-20.

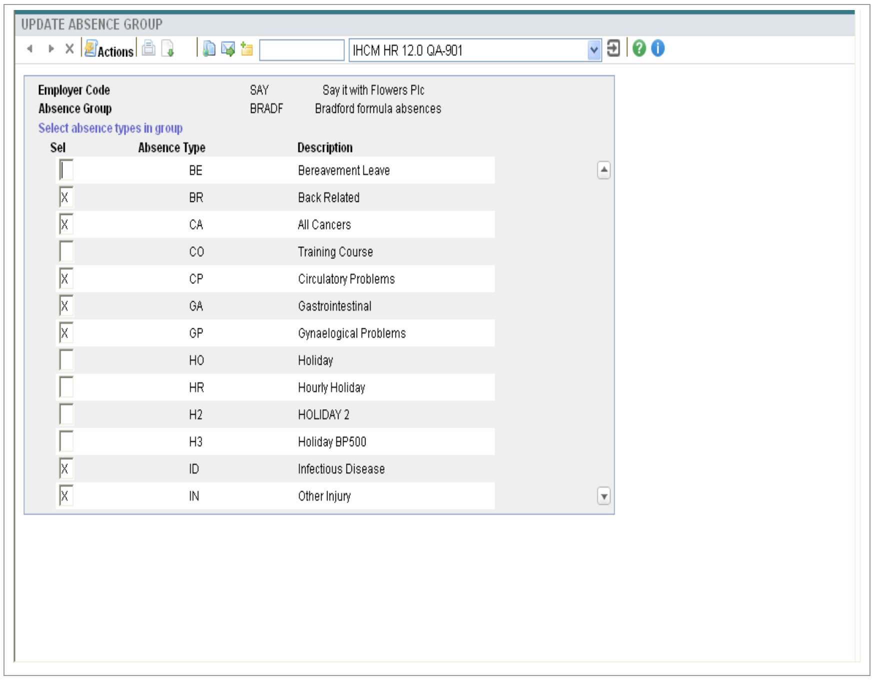


Figure 10-20: Update Absence Group selection screen

7 Type **X** next to each absence type to include in the group.

8 Press F3 to exit and save.

Calculating Bradford Points

Complete the steps below to generate Bradford points calculations.

1 From the Infinium HR main menu select *Absences*.

2 Select Employee Absences.

3 Select *Bradford Points Absence Analysis* [DSPBRADPTS]. The system displays the screen shown in Figure 10-21.

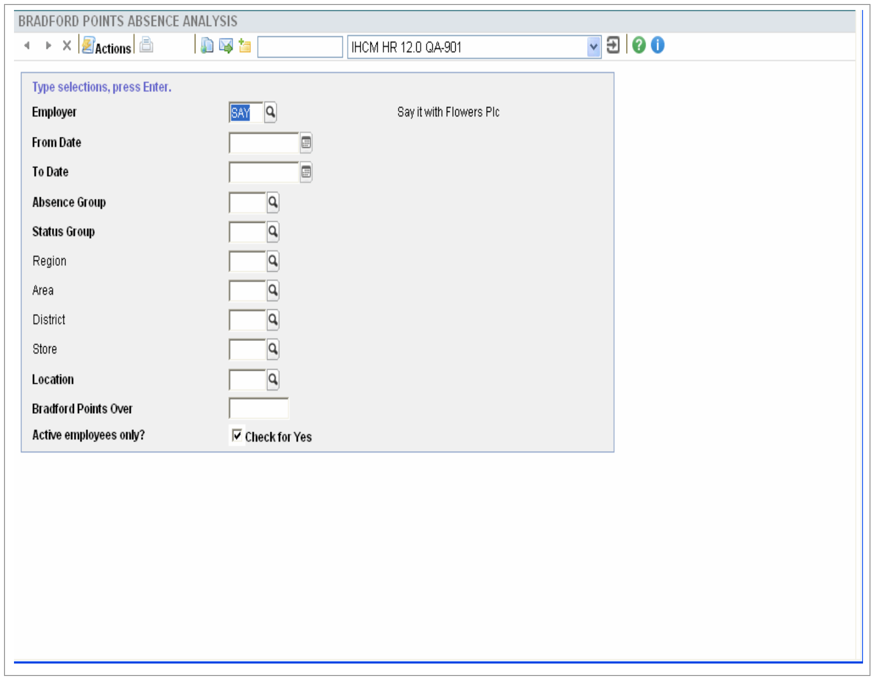


Figure 10-21: Bradford Points Absence Analysis prompt screen

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

Employer

Specify the employer for whom you are generating the Bradford points analysis.

From Date

Specify the earliest date for which you are generating the Bradford points analysis.

To Date

Specify the latest date through which you are generating the Bradford points analysis.

Absence Group

Specify the code value that represents the absence group for which you are generating the Bradford points analysis. The code type is ABG.

Status Group

Specify the code value that represents the status group for which you are generating the Bradford points analysis. The code type is SRP.

Levels 1 through 4

Specify the organizational levels for which you are generating the Bradford points analysis.

Location

Specify the location for which you are generating the Bradford points analysis.

Bradford Points Over

Specify the Bradford points value over which you want to include information in the calculation.

Active Employees only?

Specify yes to include only active employees. Otherwise, specify no.

5 Press Enter. The system displays a screen similar to Figure 10-22.

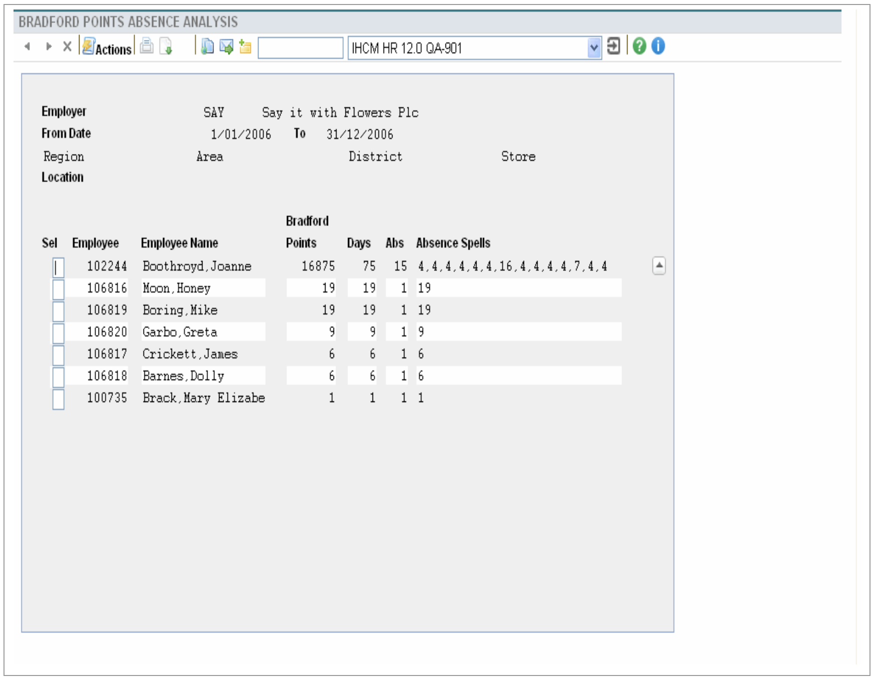


Figure 10-22: Bradford Points Absence Analysis employee selection screen

Use this screen to select an employee for whom you want to display analysis information.

6 Type **5** in the *Sel* field for the employee whose absence information you want to display.

7 Press Enter. The system displays a screen similar to Figure 10-23.

```
 3/27/08  09:52:44       Display Employee Absences        PEGAHD20   PEDAHD20

Employer . . . . :  SAY    Say it with Flowers Plc
Employee . . . . :     102244 Joanne Boothroyd
Position . . . . :  1019BS      NI Number        . . . : NP422255D
Date of Birth  . :   4/11/1991  Date of Employment . . :  1/07/1985
Hours  . . . . . :   39.00      Status . . . . . . . . : FTP
Type options, press Enter.
  5=Display absence   8=Display detail
                        Totl Work                                      Pay
Opt Beginning  Ending   Days Days Absence Reason             Cert WorkA Mth
 _   4/12/2006  8/12/2006   5    4  ID INFECTIOUS DISEASE           0        0
 _  23/10/2006 27/10/2006   5    4  ID INFECTIOUS DISEASE           0        0
 _  16/10/2006 20/10/2006   5    4  ID INFECTIOUS DISEASE           0        0
 _   2/10/2006 10/10/2006   9    7  ID INFECTIOUS DISEASE           0        0
 _  25/09/2006 29/09/2006   5    4  ID INFECTIOUS DISEASE           0        0
 _  18/09/2006 22/09/2006   5    4  ID INFECTIOUS DISEASE           0        0
 _   3/07/2006  7/07/2006   5    4  ID INFECTIOUS DISEASE           0        0
 _   1/05/2006  5/05/2006   5    4  ID INFECTIOUS DISEASE           0        0
 _  25/03/2006 15/04/2006  22   16  SK OTHER                        0        0
 _  13/02/2006 17/02/2006   5    4  ID INFECTIOUS DISEASE           0        +

F3=Exit   F10=QuikAccess   F12=Cancel   F13=Accrual Data   F24=More Keys
```

Figure 10-23: Display Employee Absences selection screen.

On this screen you can:

- Display general absence information for each episode in the list by typing **5** in the *Opt* field next to the episode.
- Display absence detail for each day of the selected episode in the list by typing **8** in the *Opt* field next to the episode.
- Display accrual information for the absence episode by pressing F13.
- Display SSP history by pressing F15.
- Display additional absence information by pressing F17. The system displays the Select Absence Type/Date Ranges window. You can specify an absence type and a date range to obtain additional absence information.
- Display more absence information by typing F21.

8 Type **5** next to the absence record to display. The system displays a screen similar to Figure 10-24.

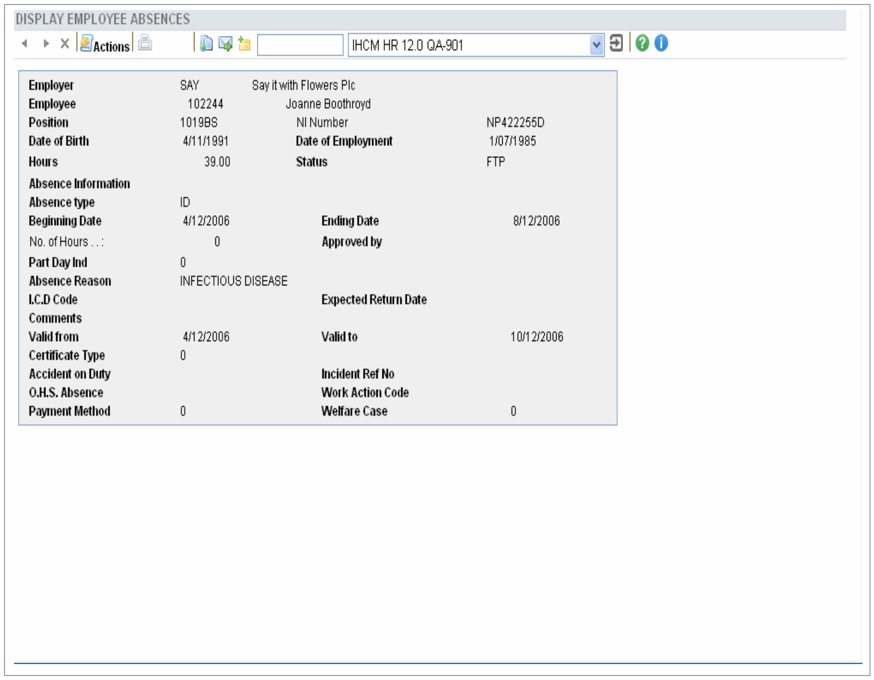


Figure 10-24: Display Employee Absences detail screen

Use this screen to view employee absence information.

9 Press F14 to display a screen similar to Figure 10-25.

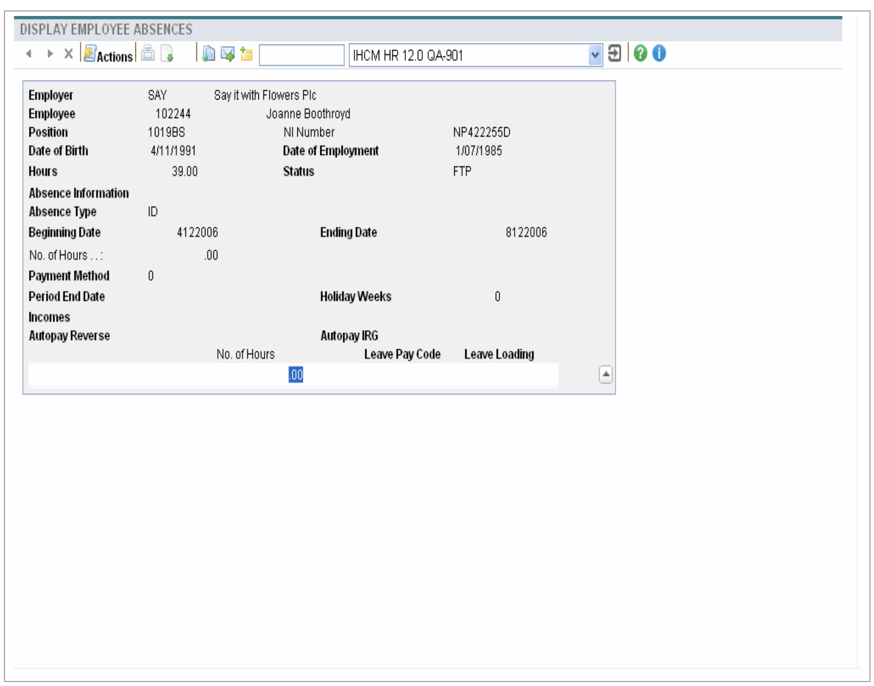


Figure 10-25: Display Employee Absences more detail screen

Use this screen to view additional absence information.

10 Press F3 to exit to the Display Employee Absences selection screen.

11 Type **8** next to an absence record to display a screen similar to Figure 10-26.

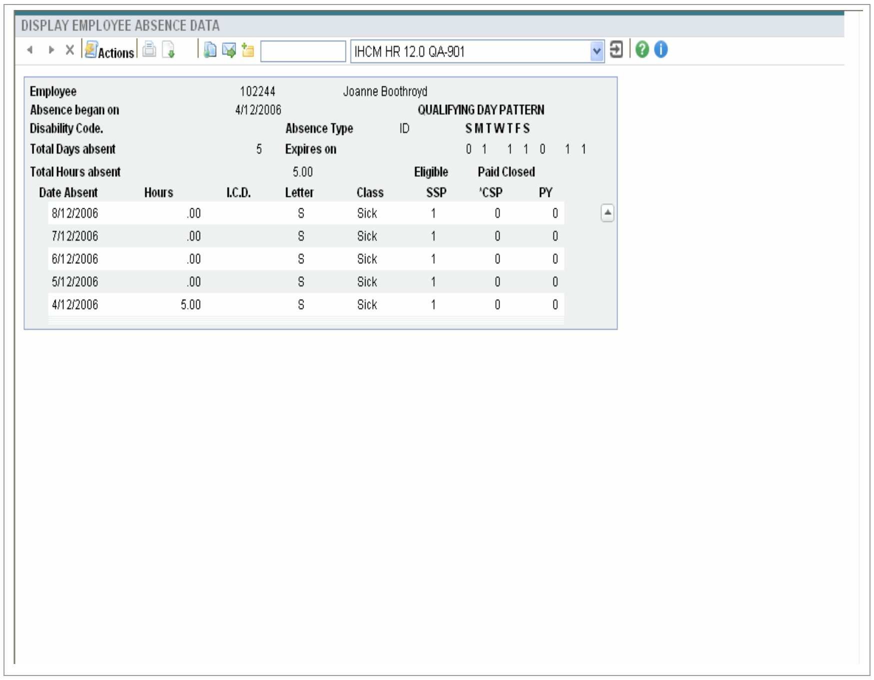


Figure 10-26: Display Employee Absence Data detail screen

Use this screen to view the detail for the selected date range and the qualifying pattern associated with that date range.

12 Press F3 to return to the Display Employee Absences selection screen.

13 Select another absence record to display or press F3 to exit to the main menu.

Generating the Bradford Points Absence Report

Complete the steps below to generate Bradford points calculations.

1 From the Infinium HR main menu select *Absences*.

2 Select Employee Absences.

3 Select *Bradford Points Absence Report* [PRTBRADPTS]. The system displays the screen shown in Figure 10-27.

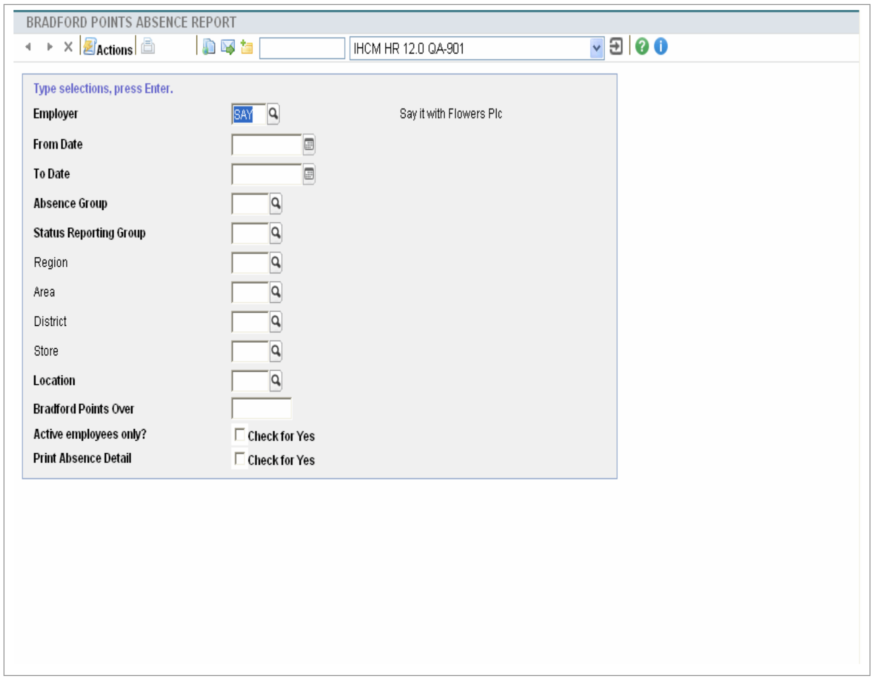


Figure 10-27: Bradford Points Absence Report screen

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

Employer

Specify the employer for whom you are generating the Bradford points report.

From Date

Specify the earliest date for which you are generating the Bradford points report.

To Date

Specify the latest date through which you are generating the Bradford points report.

Absence Group

Specify the code value that represents the absence group for which you are generating the Bradford points report. The code type is ABG.

Status Reporting Group

Specify the code value that represents the status group for which you are generating the Bradford points report. The code type is SRP.

Levels 1 through 4

Specify the organizational levels for which you are generating the Bradford points report.

Location

Specify the location for which you are generating the Bradford points report.

Bradford Points Over

Specify the Bradford points value over which you want to include information in the report.

Active Employees only?

Specify yes to include only active employees. Otherwise, specify no.

Print Absence Detail

Specify yes to include absence detail on the report. Otherwise, specify no.

5. Press F3 to generate the report and exit from the screen.

Summary

In summary, you have learned the following:

- How to record an absence for an employee
- How to record absences for a group of employees
- How to display absence details
- How to produce reports on absence information
- The relationship between absences and paid time off entitlement

Chapter 11 Examples of Paid Time Off (PTO) Accrual Processing and Absence Processing

11

This chapter provides examples of how to use PTO accrual processing and absence processing in Infinium HR. Set the controls as described, and then work through the examples given.

For more information on PTO processing, refer to the chapter in this guide entitled “Processing Paid Time Off (PTO) Accruals.”

For more information on absence processing, refer to the chapter in this guide entitled “Processing Absences.”

The chapter consists of the following topics:

Setting the PTO Accrual Controls

Before you work through the examples given, follow the steps below to set the accrual controls.

1 From the Infinium HR main menu select *Absences.*

2 Select *Paid Time Off (PTO) Accruals.*

3 Select *PTO Controls.*

4 Select *Update PTO Accrual Controls* [UPAC]. The system displays the Update PTO Accrual Controls prompt screen.

5 Type **HOL1** in the *Accrual Type Code* field and press Enter. The system displays the screen shown in Figure 11-1.

6 Set the controls as shown below.

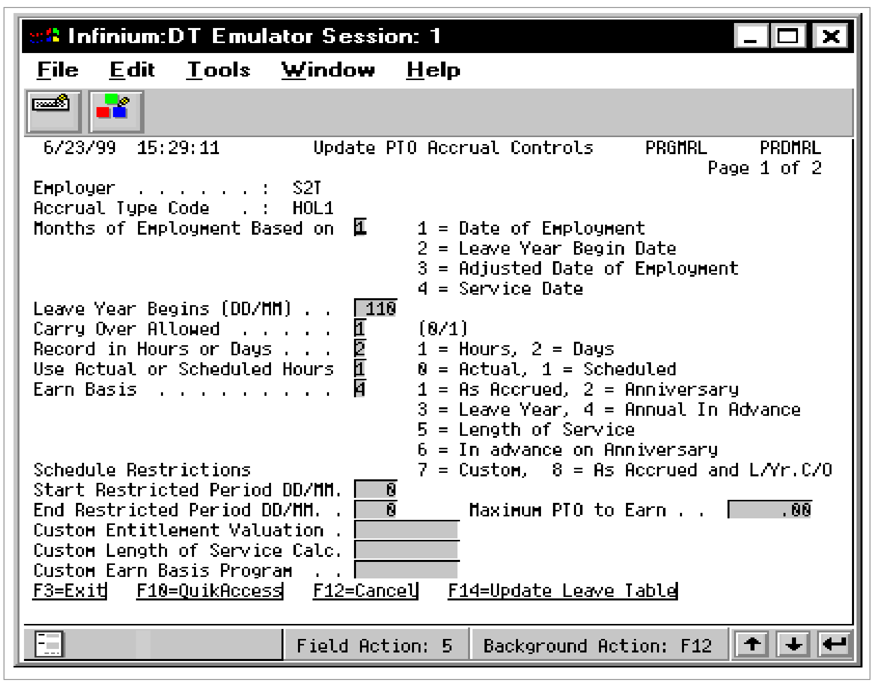


Figure 11-1: Update PTO Accrual Controls screen 1 of 2

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

8 Set the controls as shown below.

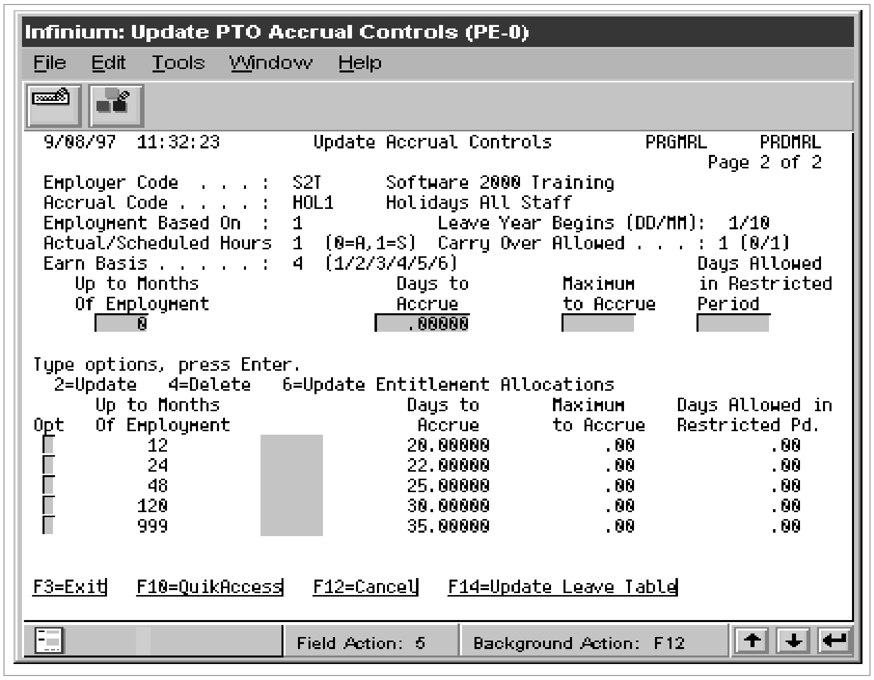


Figure 11-2: Update Accrual Controls screen 2 of 2

9 Press F14 to update the leave proration table as shown in Figure 11-3.

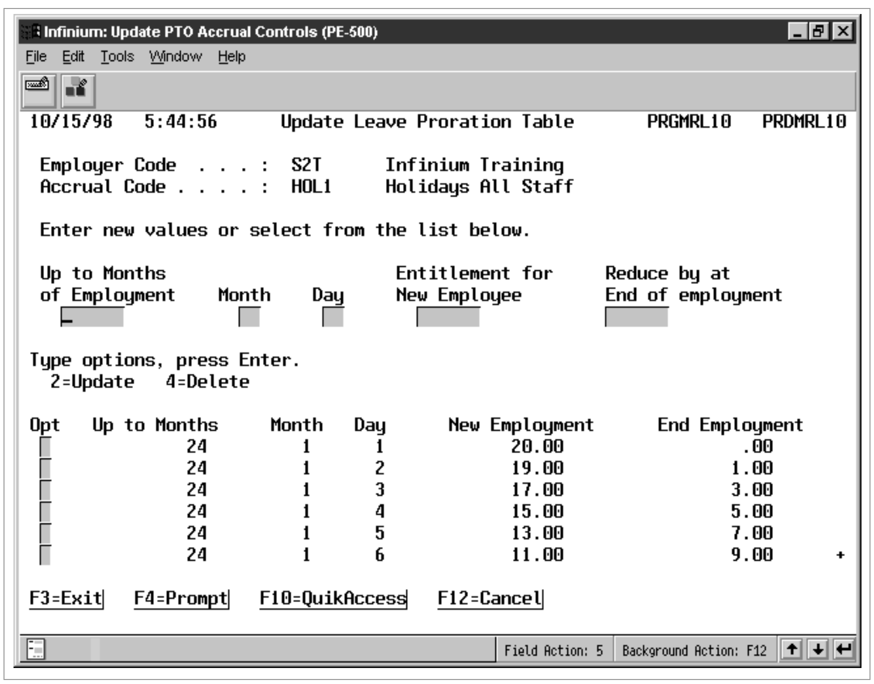


Figure 11-3: Update Leave Proration Table

10 Press F3. Then type **1** in the Exit Options window to save the changes to the table. The system returns you to the Update Accrual Controls screen 2.

11 Press F3. Then type **1** in the Exit Options window to save the changes to the accrual controls. The system returns you to the Update PTO Accrual Controls prompt screen.

Selecting the Employee to Use in the Examples

Follow the steps below to display the Employee Accruals screen for the employee you want to use for the examples.

1. From the Infinium HR main menu select *Absences*.
2. Select *Paid Time Off (PTO) Accruals*.
3. Select *Employee PTO Accruals*.
4. Select *Update Employee PTO Accruals* [UEPA].
5. From the Employee Accruals prompt screen, type the number of the employee you want to use for the example in the first *Employee* field.
6. Press Enter. The system displays the Employee Accruals summary screen.
7. Work through the examples shown in the following sections. Example 1: Entering PTO for an Employee

This example shows how to enter PTO for an employee.

Stage 1

An employee joins the company on April 1st in a position for which the accrual code in the job control record is **HOL1**. The system uses the Month 4 Day 1 entry in the Leave Proration Table to calculate a leave entitlement of 11 days.

The system displays the Employee Accruals summary screen as shown in Figure 11-4.

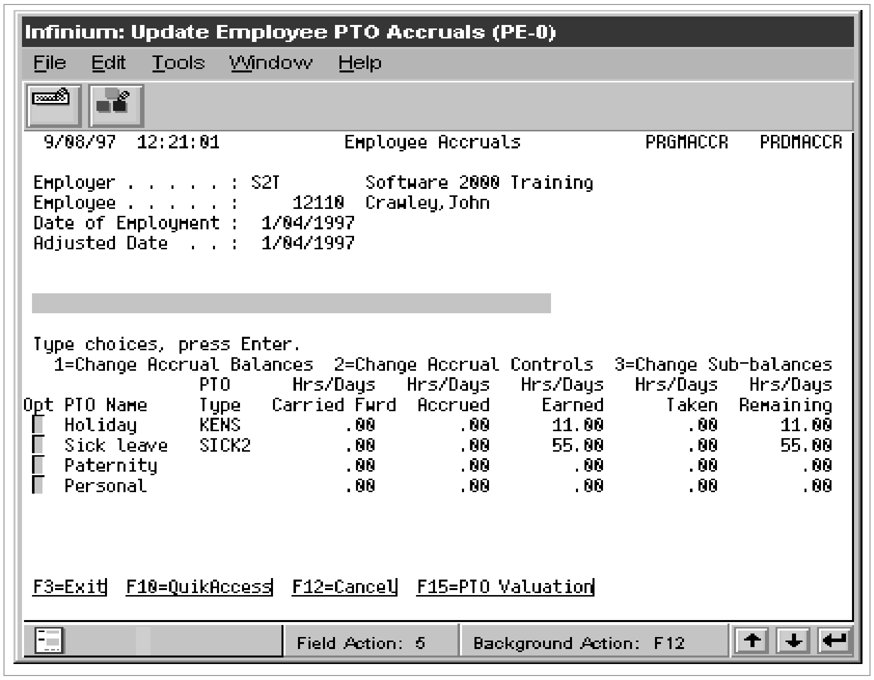


Figure 11-4: Employee Accruals screen

The employee’s PTO accrual transactions appear on the Update Employee PTO Accruals screen as shown in Figure 11-5.

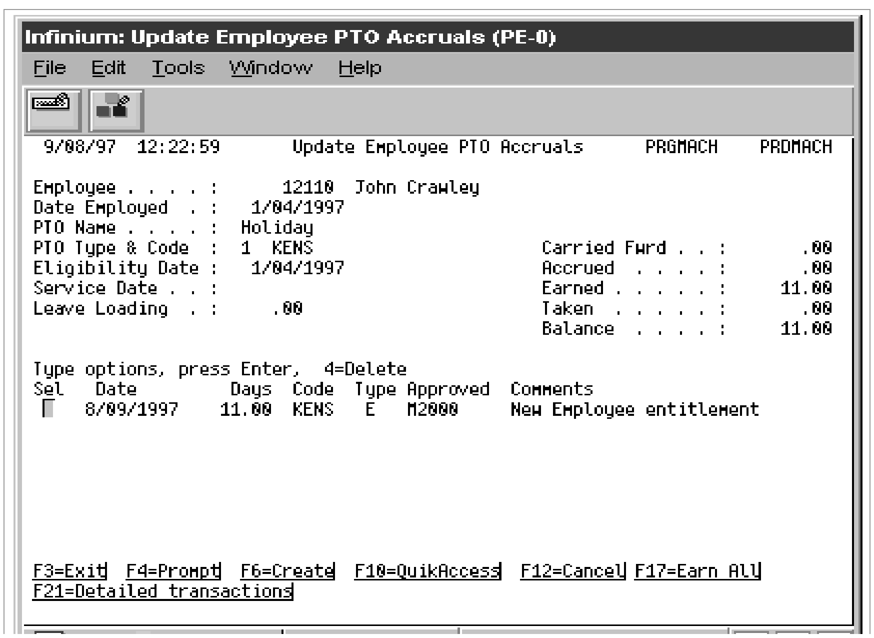


Figure 11-5: Update Employee PTO Accruals screen

Stage 2

The employee takes 5 days leave in July. You use the *Update Employee Absences* option to enter this leave record, as shown in Figure 11-6.

Note: Absence type AL, annual leave, is linked to PTO category 1.

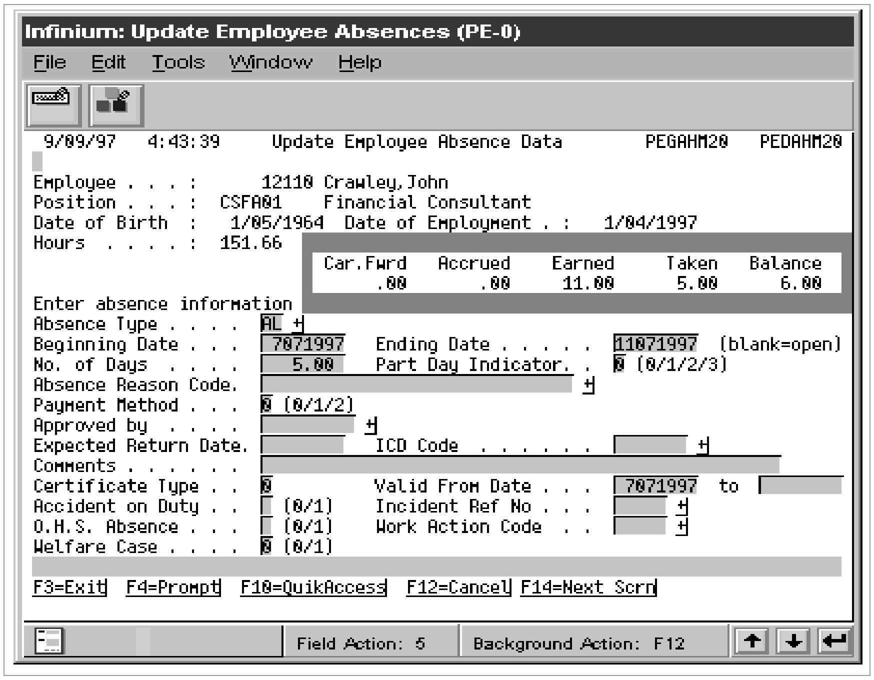


Figure 11-6: Update Employee Absence Data screen

The system displays this leave in the Update Employee Absence Data summary screen in Figure 11-7.

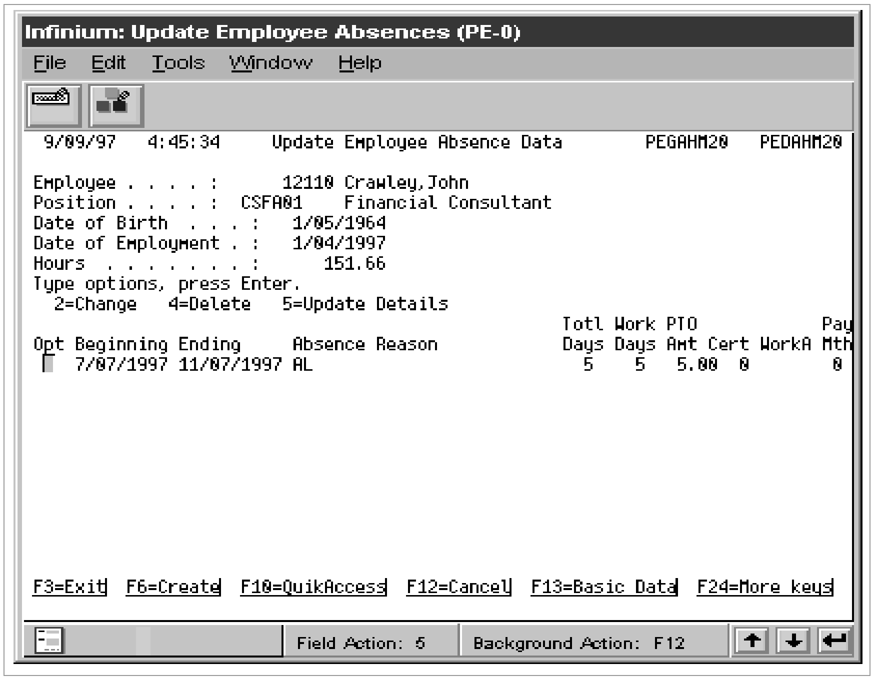


Figure 11-7: Update Employee Absence Data summary screen

The system automatically adjusts the employee's PTO accrual balance for this absence and creates a PTO transaction history, as shown in Figure 11-8.

Note: You can press F18 from the Update Employee Absences screen to reach this screen directly.

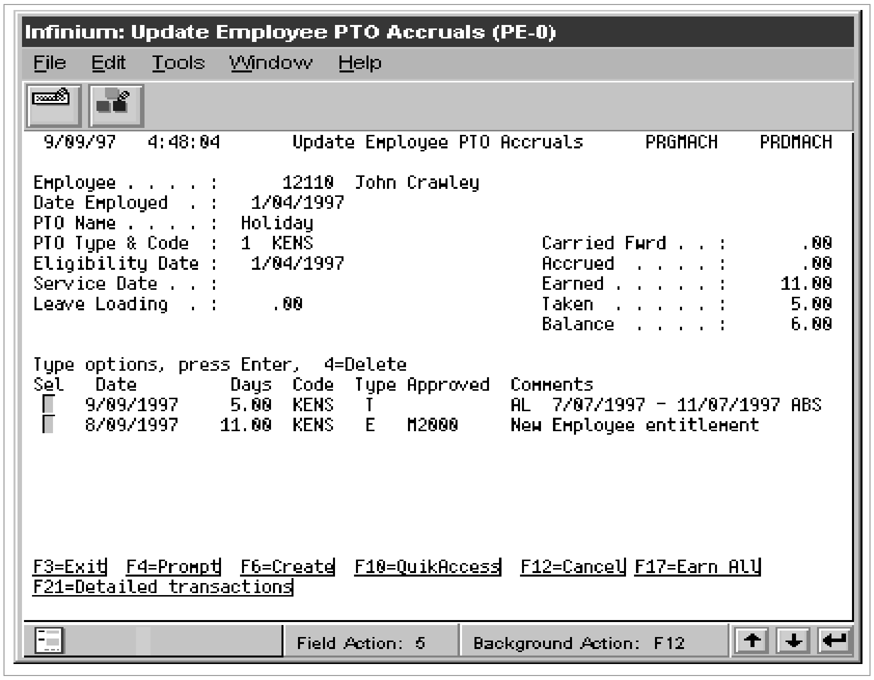


Figure 11-8: Update Employee PTO Accruals screen

The system automatically displays the absence type and dates in the *Comments* field of the transaction.

Stage 3

October 1st is the beginning of the new leave year for this PTO accrual type. Run the *Mass Update PTO Entitlements* option with the settings shown in Figure 11-9.

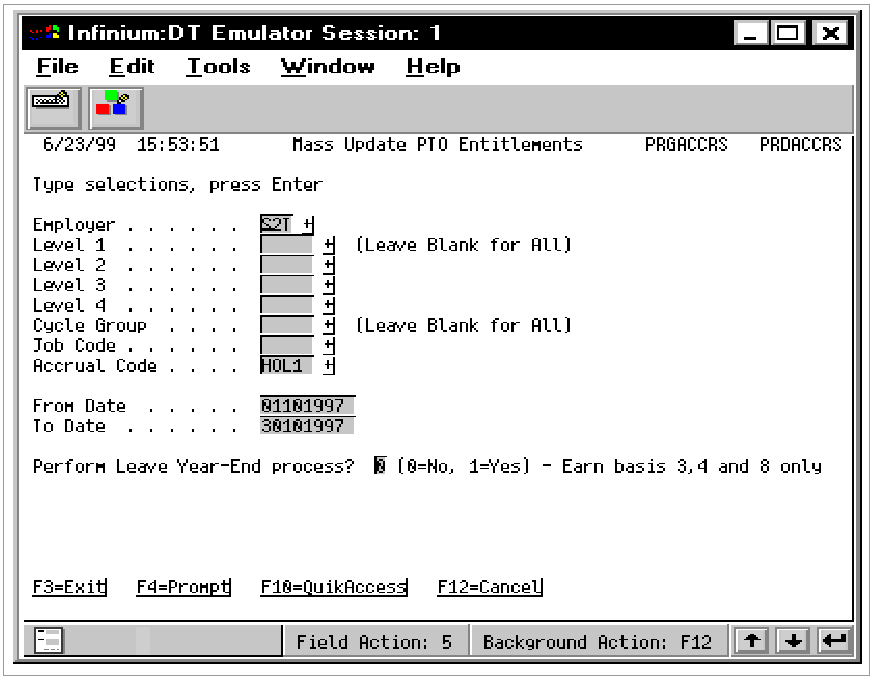


Figure 11-9: Mass Update PTO Entitlements screen

As the dates shown include the leave year begin date on the PTO control of 0110, the system performs both leave year end processing for the old leave year and entitlements processing in advance for the coming leave year.

This is reflected in the employee’s PTO entitlements shown in Figure 11-10.

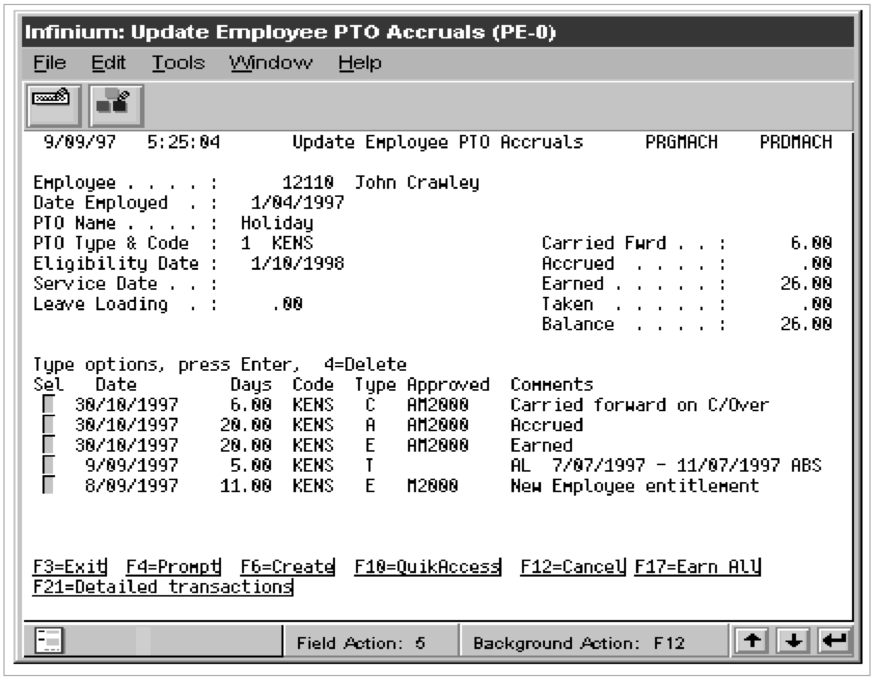


Figure 11-10: Update Employee PTO Accruals screen

As you have set the controls to allow outstanding PTO from the previous leave year to be carried over, the system creates a “carried forward” transaction showing the remaining 6 days (11 days entitlement minus 5 days taken).

The employee is entitled to 20 days leave for the coming leave year, having worked for the company for 6 months. As you have defined the PTO control using earn basis 4 (earned in advance) the 20 days appears as both an accrued and an earned transaction.

Press F21 to view a more detailed record of the accounting transactions that have taken place along with the PTO balances, as shown in Figure 11-11.

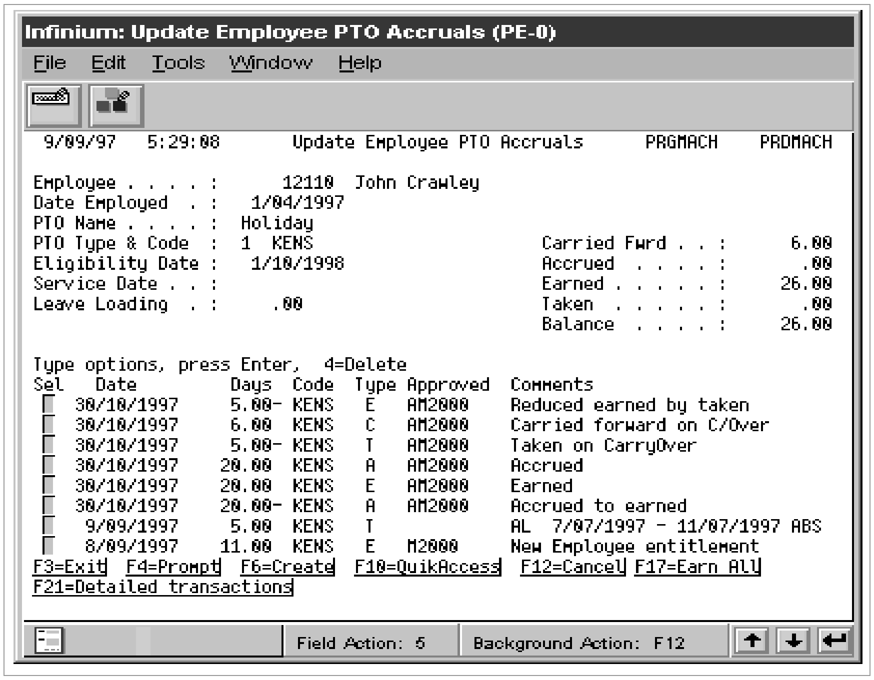


Figure 11-11: Update Employee PTO Accruals detail screen

These transactions present an accurate accounting record of the year end process:

- The employee’s earned amount from last year is reduced by the total amount of leave taken last year, which is 5 days.
- This balance (11 less 5) is carried forward to the next leave year balance.
- The 5 days taken in the previous leave year are removed from the taken balance. The system displays this as “Taken on CarryOver.”
- The taken balance is then reset to 0.
- The annual leave entitlement of 20 days is added to the employee’s accrued balance.
- This accrued balance is then moved to the earned balance.
- The accrued balance is then reduced by this 20 days.

Example 1: Limiting the PTO an Employee Can Earn

This example shows the effect of setting a maximum limit to the amount of PTO an employee can earn. This limit applies regardless of the length of service.

Your company imposes a limit on the maximum amount of leave an employee can learn. Set the controls as described in the section in this chapter entitled “Setting the PTO Accrual Controls,” but set the *Maximum PTO to Earn* field to **25**.

Stage 2

The employee takes some time off as described in the previous example. Run the *Mass Update PTO Entitlements* option as before. The system again performs both leave year end processing for the old leave year and entitlements in advance processing for the coming leave year.

The employee’s PTO entitlements are now as shown in Figure 11-12.

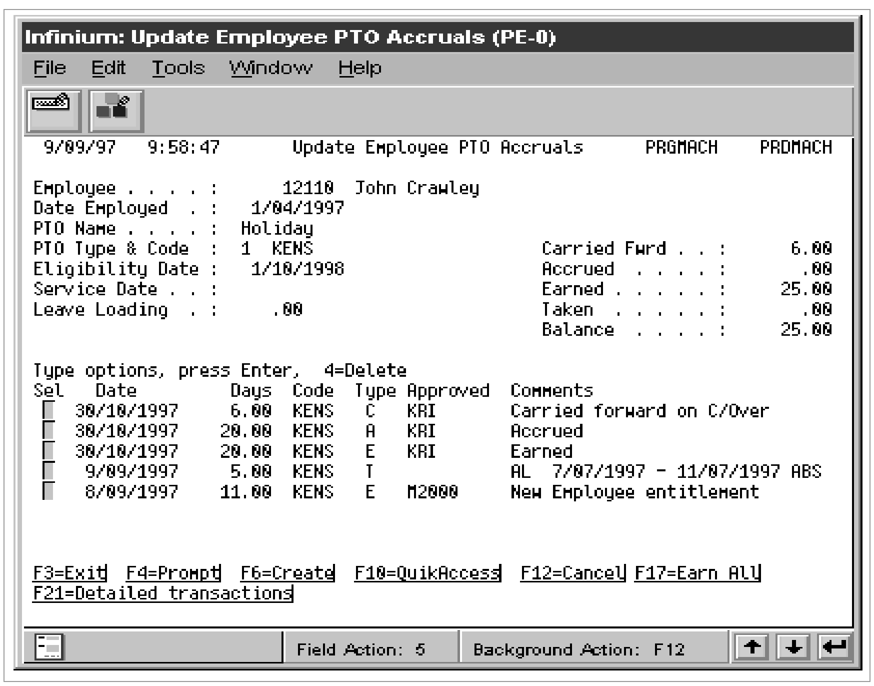


Figure 11-12: Update Employee PTO Accruals screen

Although the employee has earned 26 days leave (6 carried over plus 20 annual entitlement), the leave balance now shows only 25 days, as this is the maximum allowed according to the limit you set in the PTO accrual controls. The system caps the balance and the employee forfeits the excess.

This is reflected in the detailed record, as shown in Figure 11-13.

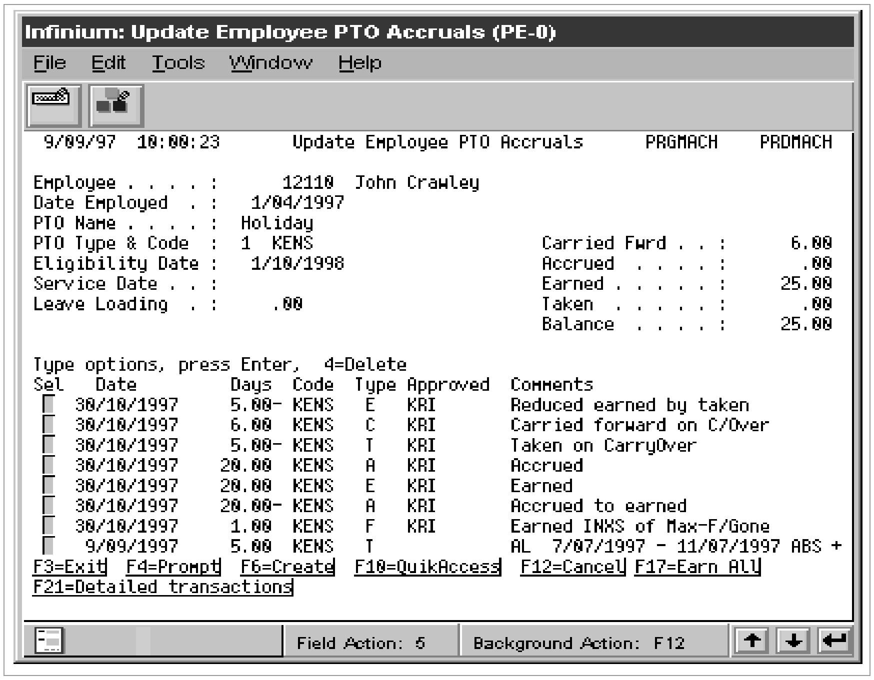


Figure 11-13: Update Employee PTO Accruals summary screen

The transactions shown are the same as in the previous example. However, an additional entry indicates that the earned balance is capped at the maximum of 25 and the extra 1 day is forfeited. The forfeited transaction is identified by type “F.”

Example 2: Limiting the PTO an Employee can Earn According to Length of Service

This example shows the effect of setting a maximum limit to the amount of PTO an employee can earn, according to the employee's length of service.

Stage 1

Set the first Update PTO Accrual Controls screen as shown in the first example. Leave the *Maximum PTO to Earn* field blank. Set the second screen as shown in Figure 11-14.

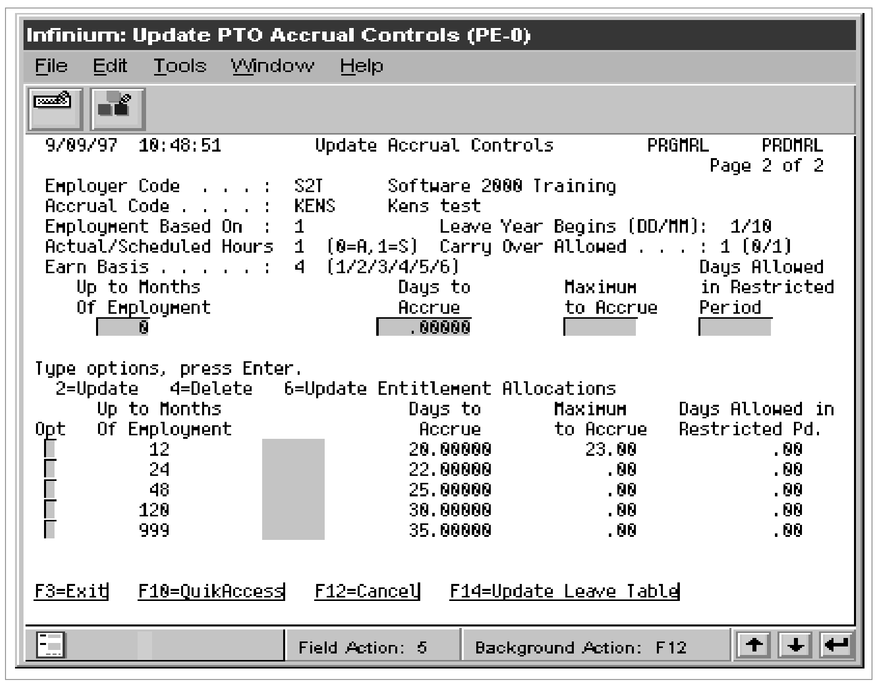


Figure 11-14: Update Accrual Controls screen 2 of 2

Stage 2

The employee takes some time off as described in the first example. Run the *Mass Update PTO Entitlements* option as before. The system again performs both leave year end processing for the old leave year and entitlements in advance processing for the coming leave year.

The employee's PTO entitlements are now as shown in Figure 11-15.

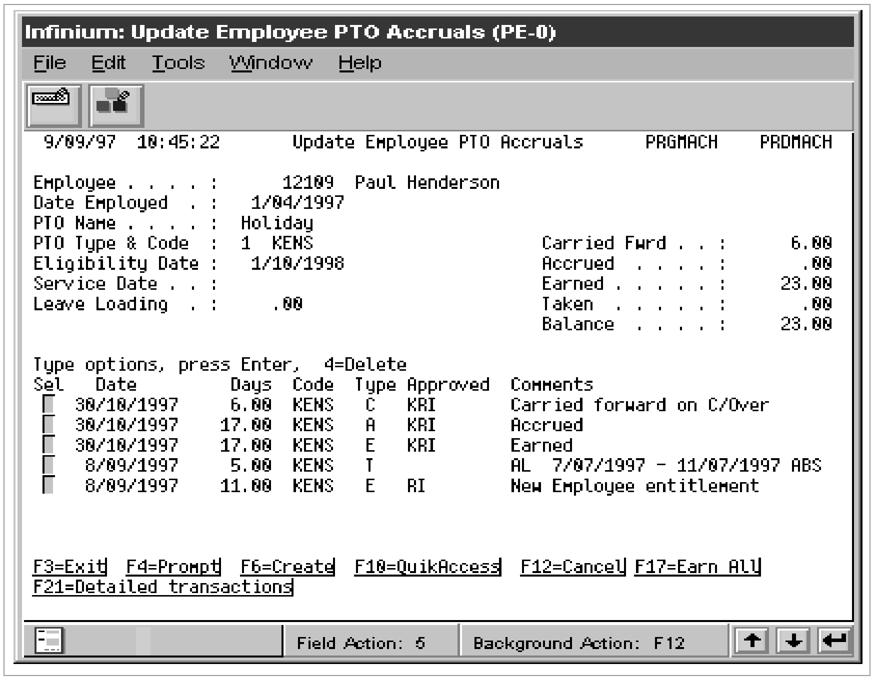


Figure 11-15: Update Employee PTO Accruals screen

The employee has 6 days leave carried over from the previous leave year. Although he is entitled to a further 20 days for his annual entitlement according to the leave proration table, his length of service means that he cannot accrue more than 23 days in total.

Since 6 days have been carried over, the system adds only 17 days to his entitlement. The system caps the balance at this level and the employee forfeits the excess.

This is reflected in the detailed record, as shown in Figure 11-16.

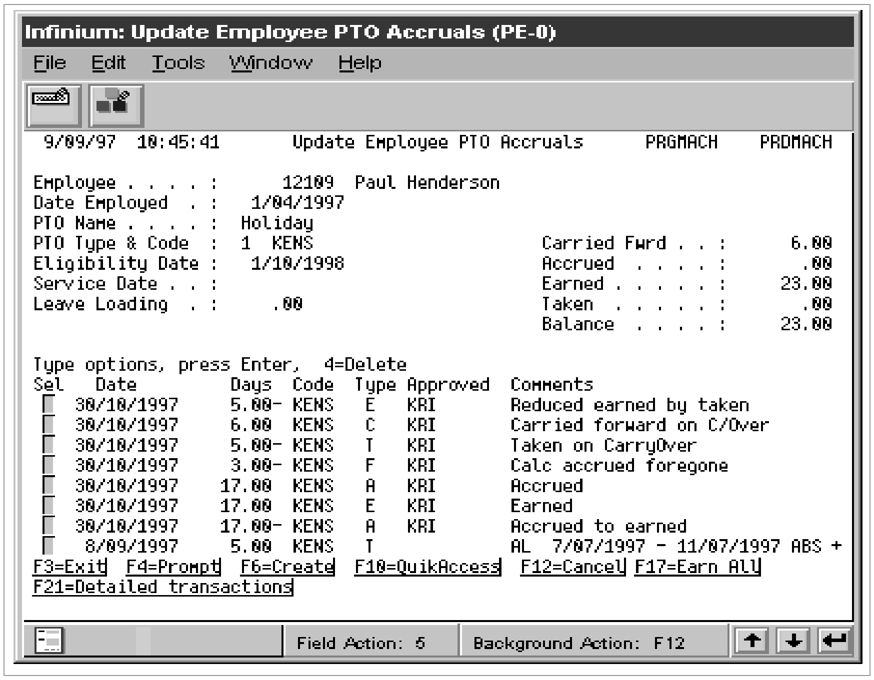


Figure 11-16: Update Employee PTO Accruals detail screen

The transactions show:

- The employee's earned amount from last year is reduced by the total amount of leave taken last year, which is 5 days.
- This balance (11 less 5) is carried forward to the next leave year balance.
- The 5 days taken in the previous leave year are removed from the taken balance. The system displays this as "Taken on CarryOver."
- The accrued balance is capped at the maximum allowed and the remaining 3 days are forfeited.
- The adjusted annual leave entitlement of 17 days is added to the employee's accrued balance.
- This accrued balance is then moved to the earned balance.
- The accrued balance is then reduced by this 17 days.

Setting the Absence Controls

Before you work through the examples given, ensure that the PTO accrual controls are set up as defined in the section in this chapter entitled “Setting the PTO Accrual Controls”. Then use the information in the sections below to define an absence type and an absence payment control.

Setting up an Absence Type

Follow the steps below to define an absence type.

1. From the Infinium HR main menu select *Controls.*

2. Select *Absence Types.*

3. Select *Update Absence Types* [UAT]. The system displays the Update Absence Types prompt screen.

4. Type ***L** in the *Absence Type* field and press Enter. The system displays the screen shown in Figure 11-17.

5. Set the controls as shown below.

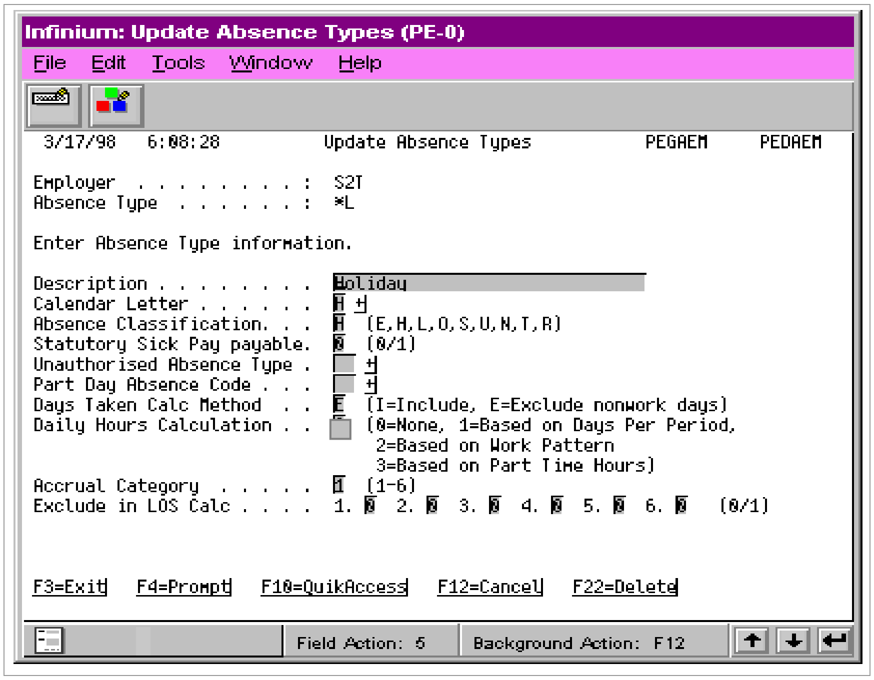


Figure 11-17: Update Absence Types screen

Note: In this example, the Holiday absence type uses accrual category 1.

6 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Absence Types prompt screen.

Setting up an Absence Payment Control

Follow the steps below to define an absence payment control.

1 From the Infinium HR main menu select *Controls.*

2 Select *Absence Payment Controls.*

3 Select *Update Absence Payment Controls* [UAPC]. The system displays the Update Absence Payment Controls prompt screen.

4 Type the employer code you require and press Enter. The system displays the Update Absence Payment Controls selection screen.

5 Press F6 to create a new control. The system displays the screen shown in Figure 11-18.

6 Set the controls as shown below.

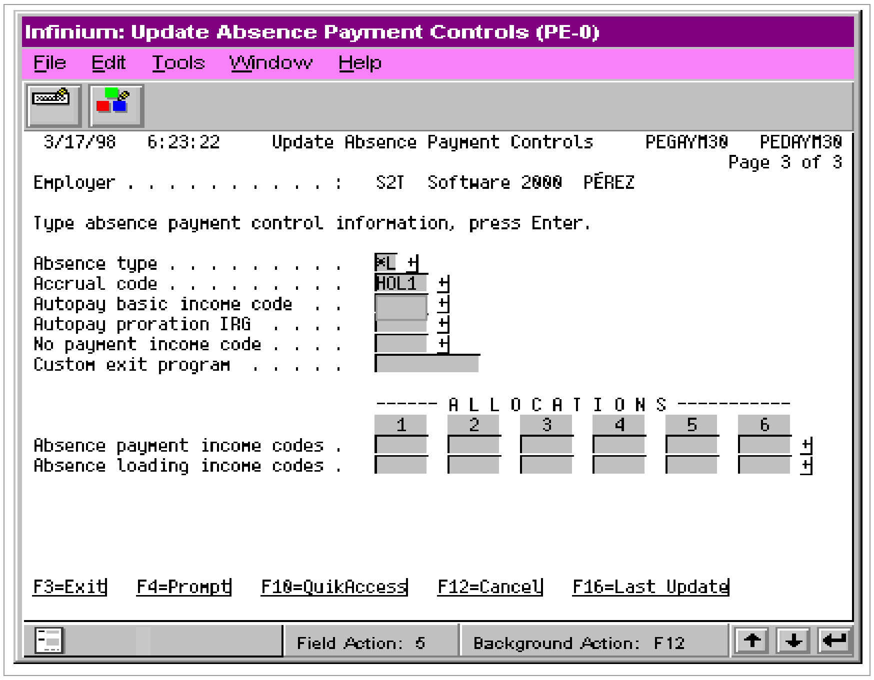


Figure 11-18: Update Absence Payment Controls screen

7 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the changes you have made and returns you to the Update Absence Payment Controls selection screen.

Example 1: Entering an Absence without PTO Accruals

This example shows how to enter an absence that is not linked to a PTO accrual. You may want to use this for jury service, for example.

Follow the steps below to enter an absence for an employee.

1. From the Infinium HR main menu select *Absences*.
2. Select *Employee Absences*.
3. Select *Update Employee Absences* [UEA1]. The system displays the Update Employee Absences prompt screen.
4. Type the employer and employee for which you want to create an absence and press Enter. The system displays the Update Employee Absence Data selection screen.
5. Press F6 to create a new absence.
6. Complete the applicable fields.

Example 2: Entering an Absence Linked to PTO Accruals

This example shows how to enter an absence that is linked to a PTO accrual.

Follow the steps below to enter an absence for an employee.

1 From the Infinium HR main menu select *Absences*.

2 Select *Employee Absences*.

3 Select *Update Employee Absences* [UEA1]. The system displays the Update Employee Absences prompt screen.

4 Type the employer and employee for which you want to create an absence and press Enter. The system displays the Update Employee Absence Data selection screen.

5 Press F6 to create a new absence. The system displays the screen shown in Figure 11-19.

6 Complete the fields on this screen as shown below.

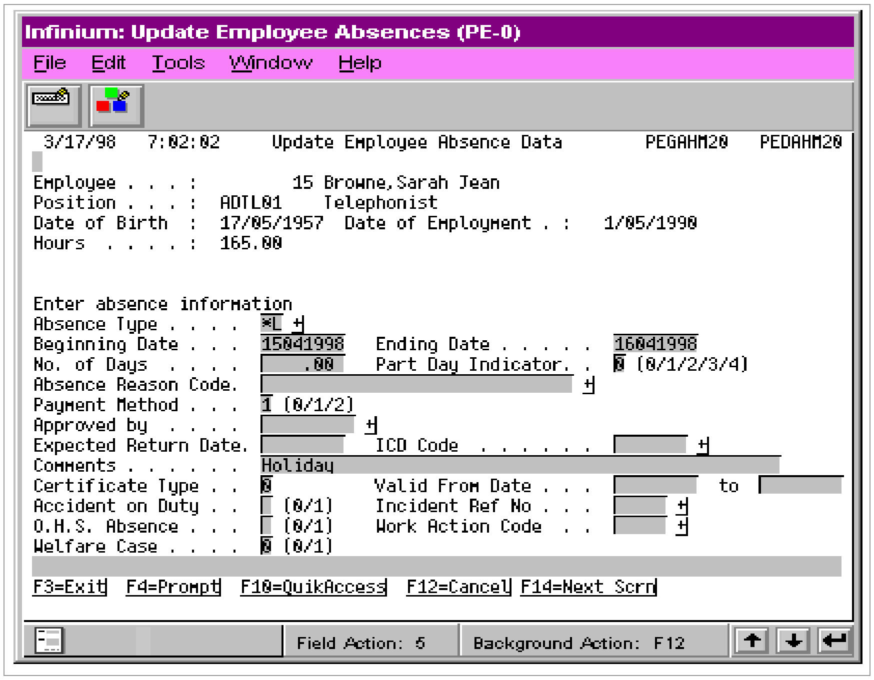


Figure 11-19: Update Employee Absence Data screen

7 Press Enter. The system updates the screen to show the PTO balances for the employee as shown in Figure 11-20.

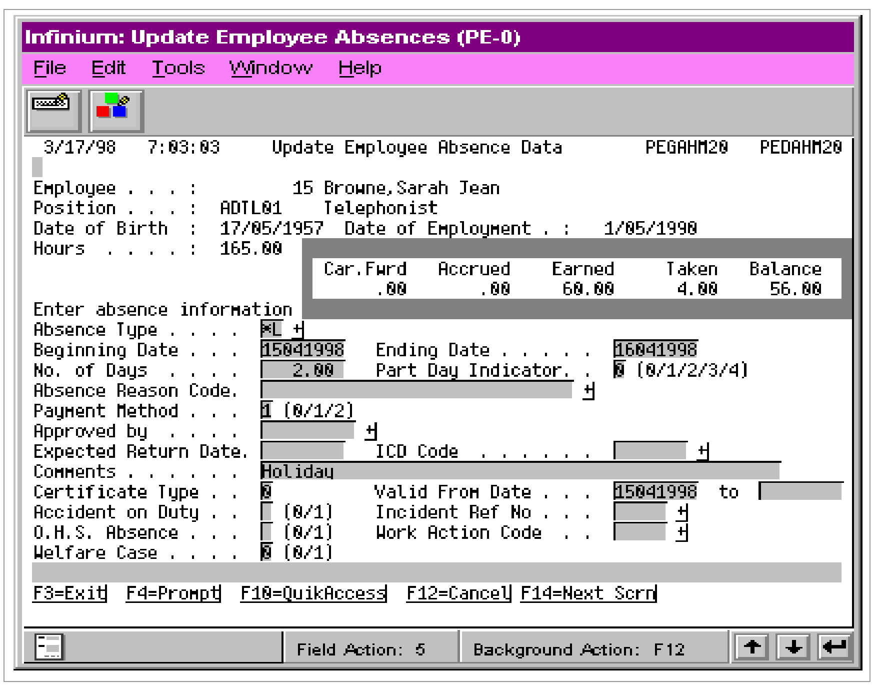


Figure 11-20: Update Employee Absence Data screen

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system saves the absence you have entered and returns you to the Update Employee Absence Data selection screen. The system updates the screen to include the new absence, as shown in Figure 11-21.

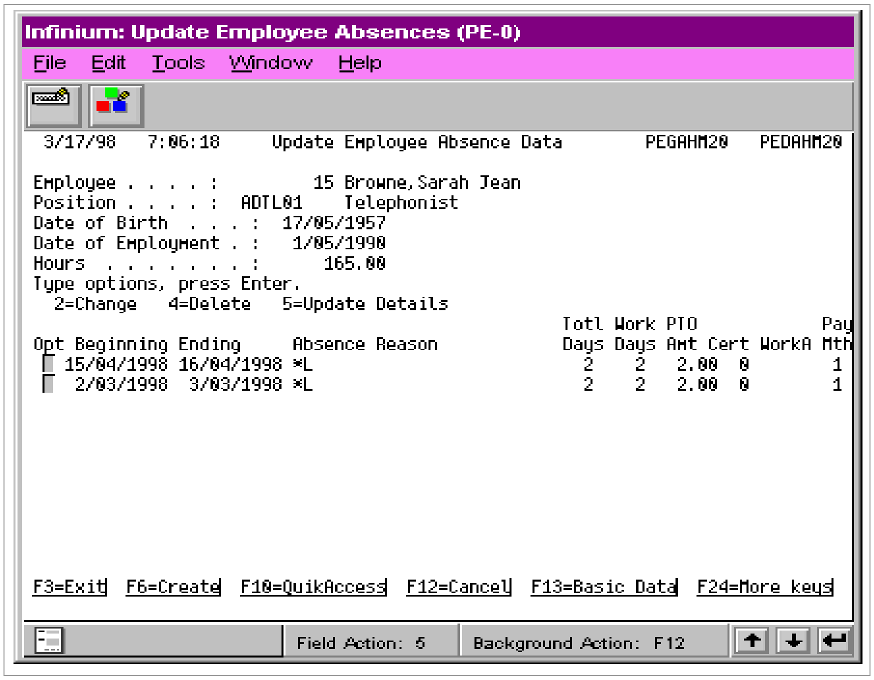


Figure 11-21: Update Employee Absence Data screen

Note: If an absence period falls outside the current PTO year, the system displays one of the following warning messages:

- **Absence in next Leave Year. F16=Update PTO at Lv Yr End, F17=Update PTO now**

  This message indicates that the absence period is in the next Leave Year. Use F16 to prevent updating the current leave year PTO balance for the employee. This creates a scheduled PTO taken transaction that the system uses in the next leave year PTO balance. If you want to update the current year PTO balance, use F17.

- **Absence in prior Leave Year - F16 to prevent PTO update, F17 to allow update**

Notes

Chapter 12 Maintaining Staffing Initiatives

12

Staffing initiatives are a means of monitoring staff levels and planned increases and decreases in the workforce. You can track updates to workforce levels and link these changes to an initiative or a plan. This allows you to track gain and wastage involved in a particular employment cycle.

The chapter consists of the following topics:

Overview of Staffing Initiatives

Objectives

After you complete this chapter, you should understand how to use Infinium Human Resources to implement, monitor and control staffing initiatives.

Understanding Staffing Initiatives

The staffing initiative options allow you to associate changes in the workforce level of an employer with a particular staffing plan or initiative. You can monitor workforce levels by tracking new hires, rehires, position changes and terminations, and you can link these to an initiative. This means that you can track the development of an initiative and the gain/wastage involved.

Enquiring about Effects of an Initiative

You can identify employees who have been affected by a particular staffing initiative and view a report, based on the criteria you set, that shows the employees affected and the nature of the change. You can also identify positions that have been affected.

Printing Reports on Initiatives

You can print reports on the following:

- Positions affected by an initiative
- The effect of an initiative on the workforce level
- Personnel action records that are not associated with an initiative

Setting Up and Maintaining Staffing Initiatives

Setting Up a Staffing Initiative

Follow the steps below to set up a staffing initiative.

1 From the Infinium Human Resources main menu select *Positions*.

2 Select *Staffing Initiative*.

3 Select *Staffing Initiative M/F Maint* [PIES]. Press Enter. The system displays the screen shown in Figure 12-1.

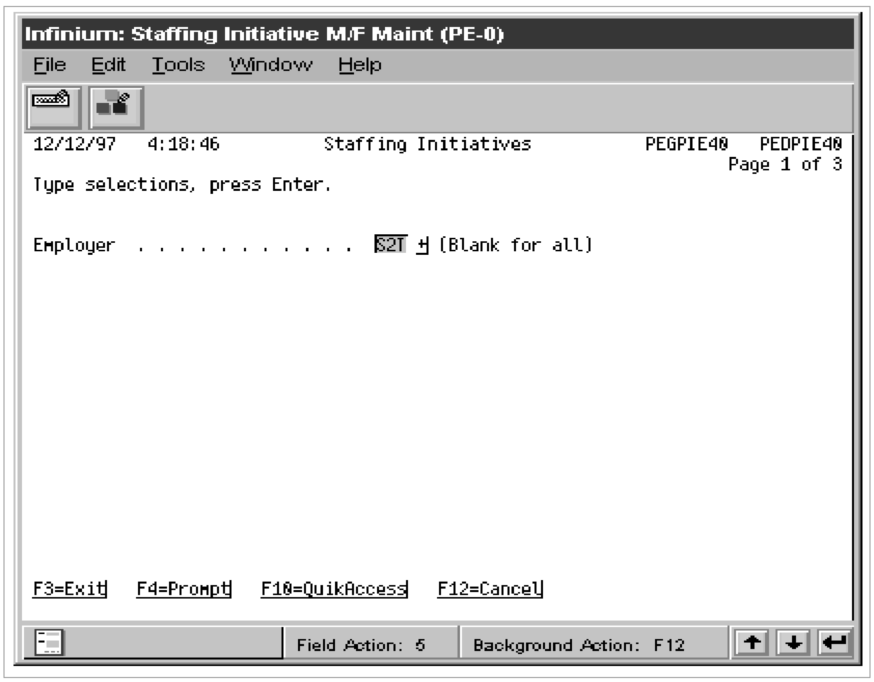


Figure 12-1: Staffing Initiatives prompt screen

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

Employer

Type the value that identifies the employer for which you want to create a staffing initiative. Leave this field blank to create the initiative for all employers on your Infinium Human Resources system

5 Press Enter. The system displays the screen shown in Figure 12-2.

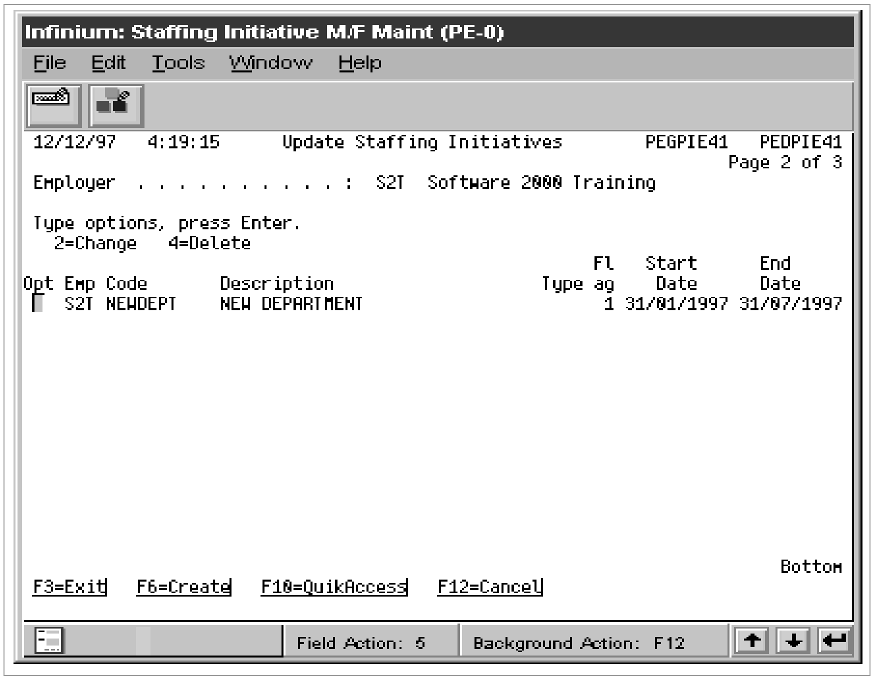


Figure 12-2: Update Staffing Initiatives screen 2 of 3

6 Press F6 to create a new initiative. The system displays the screen shown in Figure 12-3.

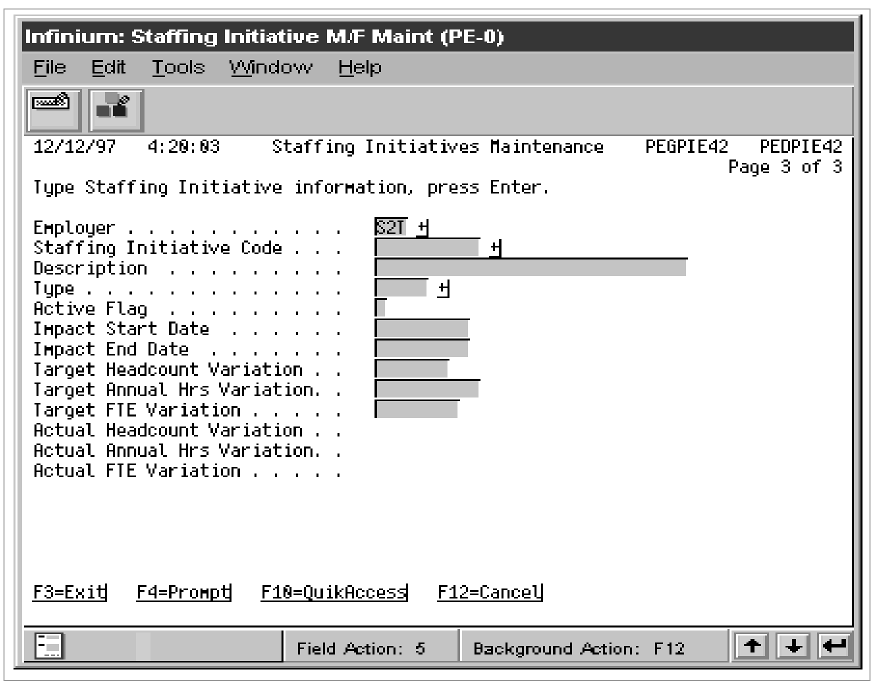


Figure 12-3: Staffing Initiatives Maintenance screen 3 of 3

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

Staffing Initiative Code

Type a code to represent the staffing initiative you want to create.

Description

Type a description for the initiative. This is a 30-character free-format field.

Type

Type a code value for the type of initiative you want to create. You define code values for this field using code type **SIT** in *Update Employer Codes*.

Active Flag

Indicate whether the initiative is currently in use. Valid values are:

0	No. The initiative is inactive.
1	Yes. The initiative is active.

Impact Start Date

Type the date that you want to start monitoring the initiative.

Impact End Date

Type the date that you want to stop monitoring the initiative.

Target Headcount Variation

Type the change in the workforce level that you want to achieve through the initiative.

Target Annual Hrs Variation

Type the change in the annual number of hours worked by employees that you want to achieve through the initiative.

Target FTE Variation

Type the change in FTE that you want to achieve through the initiative.

Actual Headcount Variation

Actual Annual Hrs Variation

Actual FTE Variation

The system fills these fields with the changes that take place as the initiative develops. You can view these fields to monitor the progress of the initiative, but you cannot type anything in them.

8 Press F3. Then type **1** in the Exit Options window and press Enter. The system creates the staffing initiative and returns you to the Update Staffing Initiatives screen 2 of 3.

Updating a Staffing Initiative

Follow the steps below to update a staffing initiative.

1 From the Infinium Human Resources main menu select *Positions*.

2 Select *Staffing Initiative*.

3 Select *Staffing Initiative M/F Maint* [PIES]. Press Enter. The system displays the screen shown in Figure 12-4.

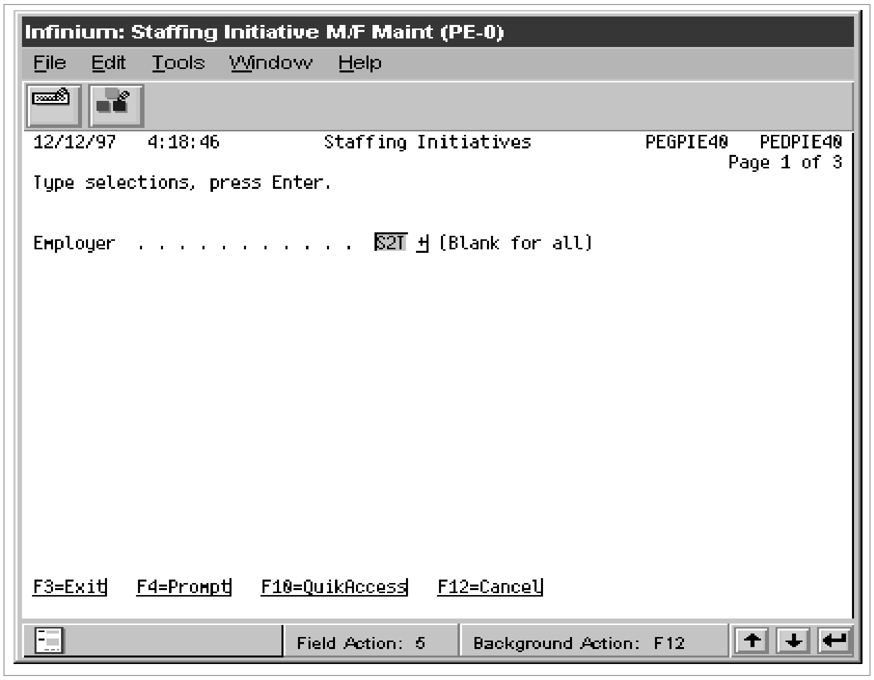


Figure 12-4: Staffing Initiatives prompt screen

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

Employer

Type the value that identifies the employer for which you want to update a staffing initiative. Leave this field blank to display all initiatives for all employers on your Infinium Human Resources system

5 Press Enter. The system displays the screen shown in Figure 12-5.

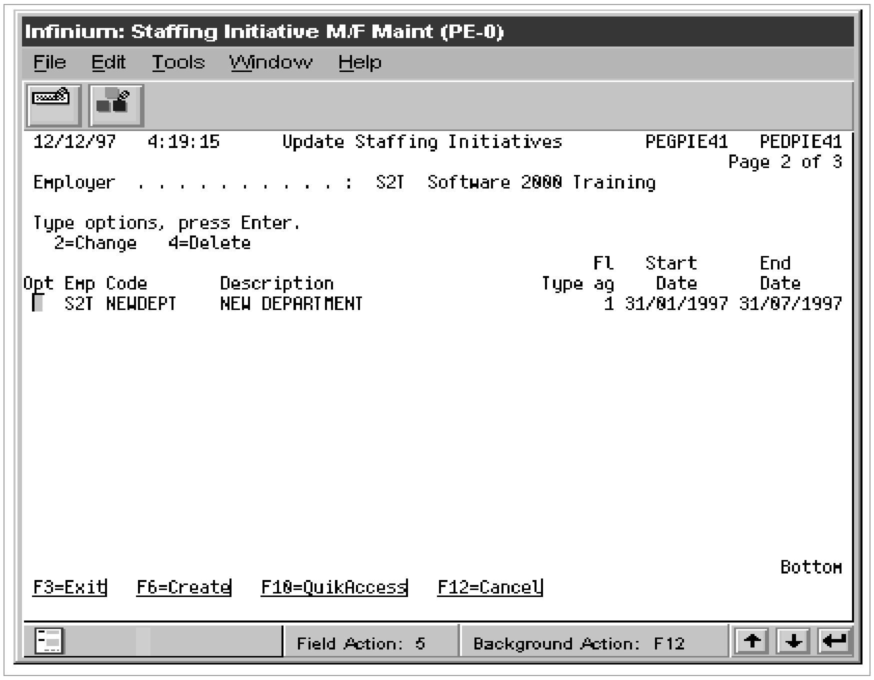


Figure 12-5: Update Staffing Initiatives screen 2 of 3

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

Opt

Type **2** in this field next to the staffing initiative you want to update.

7 Press Enter. The system displays the screen shown in Figure 12-6.

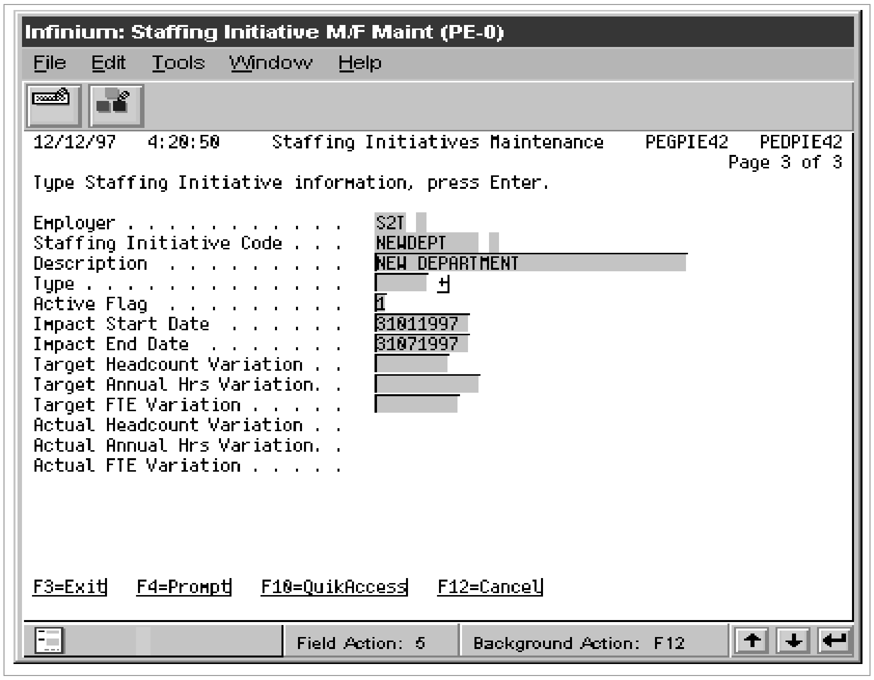


Figure 12-6: Staffing Initiatives Maintenance screen 3 of 3

8 Use the information in the previous section to update this screen.

9 Press F3. Then type **1** in the Exit Options window and press Enter. The system updates the staffing initiative and returns you to the Update Staffing Initiatives screen 2 of 3.

Deleting a Staffing Initiative

Follow the steps below to delete a staffing initiative.

1 From the Infinium Human Resources main menu select *Positions*.

2 Select *Staffing Initiative*.

3 Select *Staffing Initiative M/F Maint* [PIES]. Press Enter. The system displays the screen shown in Figure 12-7.

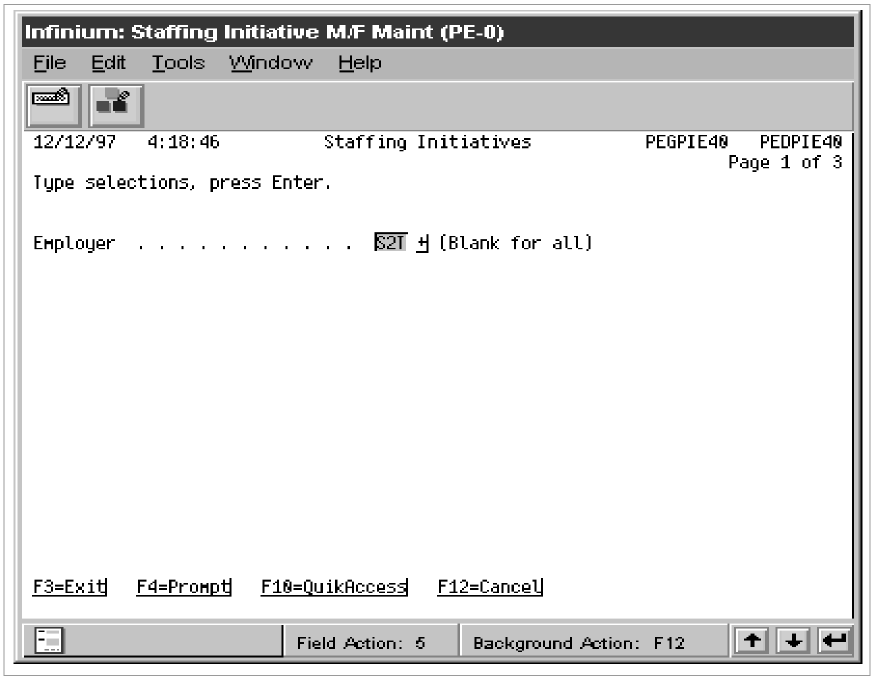


Figure 12-7: Staffing Initiatives prompt screen

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

Employer

Type the value that identifies the employer for which you want to delete a staffing initiative. Leave this field blank to display all initiatives for all employers on your Infinium Human Resources system.

5 Press Enter. The system displays the screen shown in Figure 12-8.

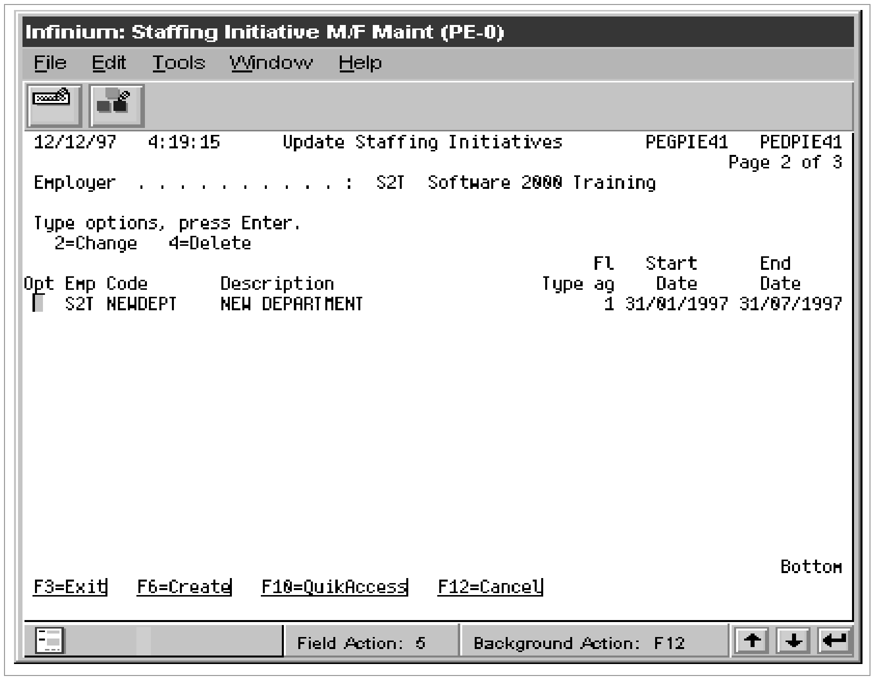


Figure 12-8: Update Staffing Initiatives screen 2 of 3

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

Opt

Type **4** in this field next to the staffing initiative that you want to delete.

Note: You cannot delete an active initiative. If you try to do so, the system generates the following message:

Cannot Delete - Flagged as Active

7 Press Enter. Then type **1** in the Confirm Deletion window and press Enter. The system deletes the staffing initiative and returns you to the Update Staffing Initiatives screen 2 of 3.

Linking a Personnel Transaction to an Initiative

When you create a staffing initiative, you can link changes in workforce levels and positions to the initiative and monitor the effect that the initiative is having. When you enter a personnel action that is linked to an initiative, the system records the change and attaches it to the initiative.

You can link the following personnel transaction options to a staffing initiative:

- *Position Change*
- *Re-Employment*
- *New Employment*
- *Status Change*
- *End Employment*
- *Update Authorised Force Levels*

Follow the steps below to link a personnel transaction to an initiative.

1. From the Infinium Human Resources main menu select *Employees*.
2. Select *Employee History*.
3. Select *Enter Personnel Actions* [EPA]. Press Enter. The system displays the screen shown in Figure 12-9.

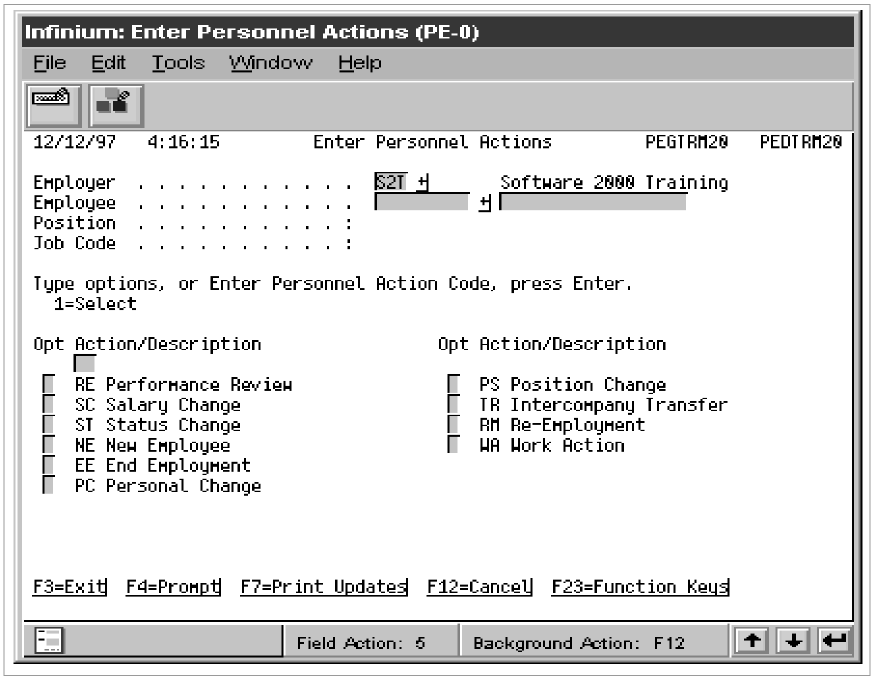


Figure 12-9: Enter Personnel Actions screen

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

Employer

Type the value that identifies the employer that you want to update.

Employee

Type the employee number for the employee you want to update.

Opt

Type **1** next to the personnel action you want to update for the employee you have chosen.

5 Press Enter.The system displays the corresponding update screen. As you update the employee's record, use the following information to link the changes you are making to a staffing initiative.

Staffing Initiative

In this field, type the code for an initiative that you have defined. When you save the changes, the system links them to the initiative you selected.

Note: For a position change, you can link the change to two initiatives; one for gain and one for wastage. You can enter the same initiative in both fields, or two different initiatives.

Generating Enquiries and Reports

You can monitor the effect that staffing changes have on a staffing initiative. You do this through performance enquiries, which you can run either as on-screen displays, or as printed reports.

Generating a Project Impact Enquiry by Employees

You use this option to identify employees who have been affected by a particular staffing initiative.

Follow the steps below to generate a project impact enquiry by employee.

1 From the Infinium Human Resources main menu select *Positions*.

2 Select *Staffing Initiative*.

3 Select *Project Impact Enquiry - Employee* [PIEE]. Press Enter. The system displays the screen shown in Figure 12-10.

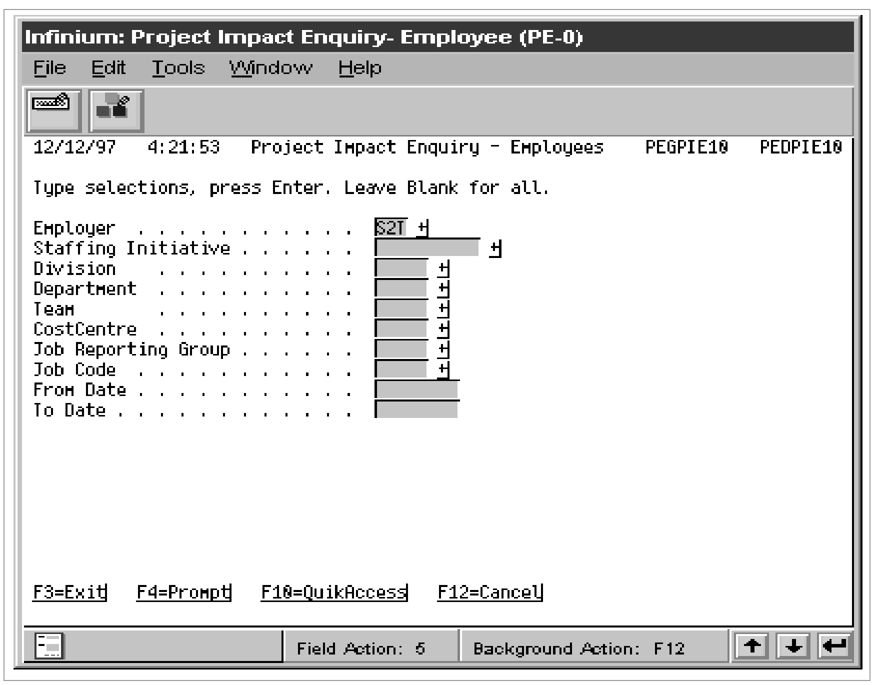


Figure 12-10: Project Impact Enquiry - Employees screen

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

Employer

Type the employer for whom you want to generate the enquiry.

Staffing Initiative

Type a code that identifies the staffing initiative for which you want to generate the enquiry.

Level 1, 2, 3, 4

Use these fields to specify the particular levels about which you want to enquire.

Job Reporting Group

Type a code representing the job reporting group about which you want to enquire.

Job Code

Type a code representing the job associated with the position about which you want to enquire.

From Date

Specify the start date of the period for which you want to generate the enquiry.

To Date

Specify the end date of the period for which you want to generate the enquiry.

5 Press Enter. The system generates a report based on the criteria you entered and displays, for each employee affected by the initiative:

Transaction

The personnel action that you have entered.

Position

The employee's position after the transaction.

Date

The date on which the transaction occurred.

Hrs Change

The change in the annual number of hours worked by the employee.

Generating a Project Impact Enquiry by Position

You use this option to identify positions that have been affected by a particular staffing initiative.

Follow the steps below to generate a project impact enquiry by position.

1 From the Infinium Human Resources main menu select *Positions*.

2 Select *Staffing Initiative*.

3 Select *Project Impact Enquiry - Position* [PIEP]. Press Enter. The system displays the screen shown in Figure 12-11.

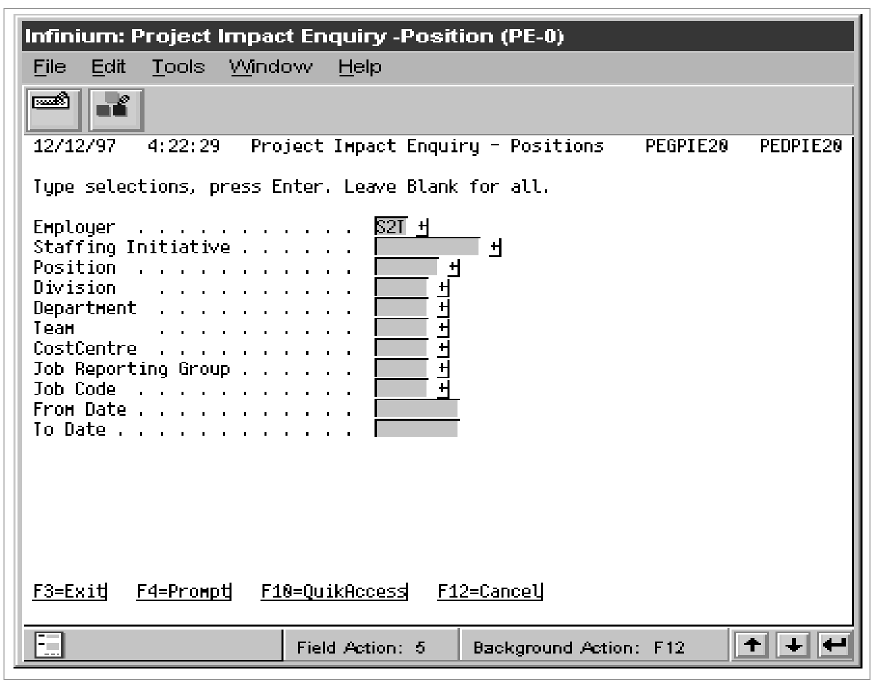


Figure 12-11: Project Impact Enquiry - Positions screen

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

5 Press Enter. The report shows, for each position affected by the initiative:

From

To

Authorised Force Level

Budgeted Force Level

The system displays the information that appears in these fields on the Authorised Force Levels Update screen.

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

Opt

Type **5** next to a position to view more detail about the change.

7 Press F3. Type **1** in the Exit Options window and press Enter. The system returns you to the Staffing Initiative prompt screen.

Generating a Project Impact Report

You can generate reports showing the effect of a staffing initiative. You can specify whether to print this information by:

- Positions
- Workforce Levels
- Personnel Actions

Follow the steps below to generate a report.

1 From the Infinium Human Resources main menu select *Positions*.

2 Select *Staffing Initiative*.

3 Select the report you want to generate. The following menu options are available:

- *Project Impact Report - Positions* [PIER]
- *Proj Imp Rpt - Work Force Levels* [PIRWFL].
- *Proj Imp Rpt - Personnel Actions* [PIRPAC].

4 Press Enter. The system displays the corresponding screen. An example is shown in Figure 12-12.

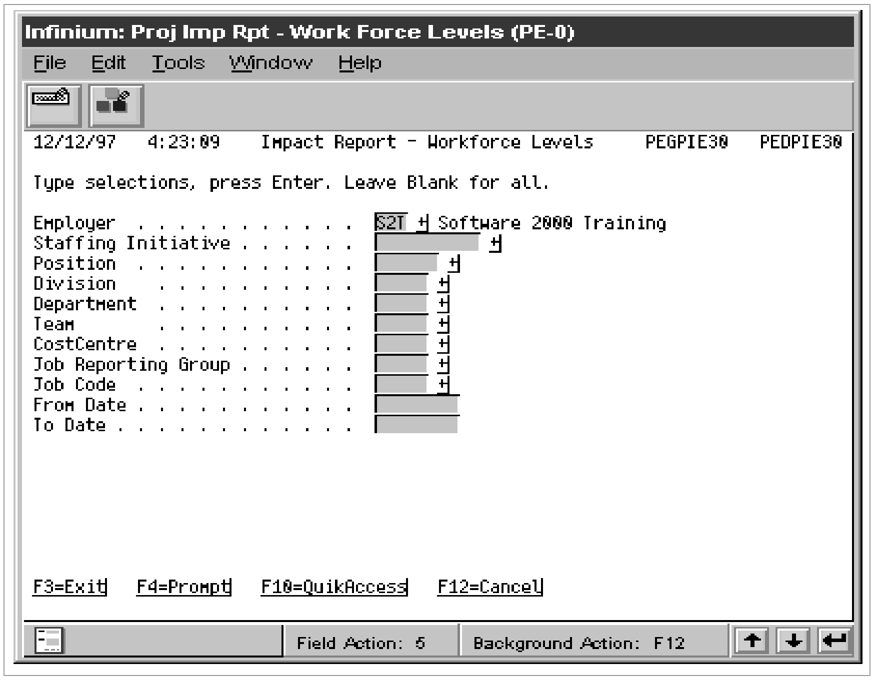


Figure 12-12: Impact Report - Workforce Levels screen

The fields on this screen are identical for all reports.

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

Employer

Type the employer for whom you want to generate the enquiry.

Staffing Initiative

Type a code that identifies the staffing initiative for which you want to generate the enquiry.

Level 1, 2, 3, 4

Use these fields to specify the particular levels about which you want to enquire.

Job Reporting Group

Type a code representing the job reporting group about which you want to enquire.

Job Code

Type a code representing the job associated with the position about which you want to enquire.

From Date

Specify the start date of the period for which you want to generate the enquiry.

To Date

Specify the end date of the period for which you want to generate the enquiry.

6 Press Enter. The system generates the following message and returns you to the Infinium Human Resources main menu.

Building submission request . . .

Summary

In summary you have learned the following:

- How to create and update a staffing initiative
- How to link an initiative to a personnel transaction
- How to monitor the changes in staffing levels
- How to view and print reports on the effect of the initiative

Notes

Chapter 13 Processing Employee Medical Claims

13

This chapter of the guide provides instructions for setting up controls and master files necessary for processing employee medical claims, maintaining claim information, and completing related period end tasks.

The chapter consists of the following topics:

Overview of *Medical Claims Tracking*

The *Medical Claims Tracking* menu, accessible from the *Health & Safety* menu, provides the following functions with the following quick access codes:

- *Update Claims Control* [CLAIMCTL]

  Use to define an entitlement period for a specified employer and to indicate whether excess claims are allowed for this combination of employer and period.

- *Update Claims Eligibility* [CLAIMELIGU]

  Use to define claim eligibility criteria such as length of service and maximum entitlement amounts. A table of claims entitlements can be established by defining eligibility criteria for each applicable combination of employer and job.

  You can also define criteria for any specific employee's claim type that involves exceptions to the job-related eligibility criteria.

- *Update Employee Claims* [UPDEECLAIM]

  Use to record information about personal or family medical expenses for which the employee claims reimbursement, and about the approvals for the claims.

- *Display Employee Claims History* [DSPEECLAIM]

  Use to display information about an employee's medical claim history and current status of claims.

- *Trial Close Claims to Payroll* [TRIALCLAIM]

  Use to perform a trial close of an employer's medical claim transactions for a specified date range to a specified payroll cycle and period, creating a Trial Close Claims to Payroll report.

- *Close Employee Claims to Payroll* [CLOSECLAIM]

  Use to process medical claims for a specified employer and close claim transactions for a specified date range to a specified payroll cycle and period. You can limit the close by claim type.

  The close creates income transactions for the employee in the Payroll Cycle Employee Income File and generates a Close Claims to Payroll report.

The income code used in payroll to pay the claim must have the same code value as the claim type. The income code must be set up in Income Controls and the income code must be authorised to the employee.

- *Claims Enquiry* [CLAIMENQRY]

  Use to display information about medical claims submitted to a specific employer.

  You can limit the display by claim type, date range, employee or dependent or both claims, and amounts less than, equal to, or greater than a specified incurred, claimed, or approved amount. You can also limit the display to only claims that exceed amounts allowed.

- *Print Employee Claims* [PRTEECLAIM]

  Use to print an Employee Claims Report including information about all claims submitted to an employer or limited by employee, type, organisational levels, or date.

  The report lists the employee name, claim description, date, approver, and amounts incurred, claimed, and approved as well as the total amounts for the specified employer.

- *Purge Employee Claims* [PURGECLAIM]

  Use to purge medical claim information for a specified employer through a specified date and to print a report with audit details for the purged information.

The menu also includes three older medical claims tracking functions from prior to the enhancement of this module effective with Release 11.0. These functions remain on the menu for those who already use them and elected not to make the transition to the new functions.

The older functions are the following:

- *Update EE Medical Claims*
- Display EE Medical Claims
- Print EE Medical Claims

The new functions do not include cheque number and date on the claims. Since the payment of the claims now takes place through regular payroll cycle processing, their history can be viewed through Display Employee pay History.

Updating Claims Controls

Overview

Use *Update Claims Control* to define an entitlement period for a specified employer and to indicate whether excess claims are allowed for this combination of employer and period.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Update Claims Control [CLAIMCTL]*

Update Claims Control Prompt Page

About This Page

On the Update Claims Control prompt page, specify the employer for which you are defining the controls.

Field Information

Employer

Type the code for the employer whose controls you are defining.

How do I...

Access the Update Claims Control page	Press Enter.
Exit to the menu	Press F3.

Update Claims Control Page

About This Page

On the Update Claims Control page, identify the entitlement period for the specified employer and indicate whether excess claims are allowed for employees of this employer during this period.

Field Information

Entitlement Start Date

Type the date the entitlement period begins for this employer.

Entitlement End Date

Type the date the entitlement period ends for this employer.

Excess Claims Override

Type **1** if users are allowed to enter claim amounts that exceed the calculated entitlement. Note that even if this flag is set to **1**, a warning message will still be displayed in *Update Employee Claims* when the total claims exceed the entitlement amount.

If this warning is overridden, the system will record the overriding user and the overriding amount in the claim record. If **0** the system will always display an error message if total claims exceed the entitlement.

How do I...

Exit to the prompt page saving your information	Press F3 and confirm saving.

Updating Claims Eligibility

Overview

Use *Update Claims Eligibility* to define eligibility criteria such as length of service and maximum entitlement.

Build a table of entitlement values by defining eligibility criteria for each applicable combination of employer and job and length of service. When you enter an employee Medical Claim, the system will use the appropriate Claims eligibility entry for an employee to determine the allowed claims entitlement and validate this against the total claims.

You can also define criteria for any specific employee's claim type that involves exceptions to the job-related eligibility criteria.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Update Claims Eligibility [CLAIMELIGU]*

Update Claims Eligibility Prompt Page

About This Page

On the Update Claims Eligibility prompt page, you can specify the employer and either the job or the employee to which the controls apply.

If this is a new entry, you can also save time by copying controls from another job.

Field Information

Employer

Type the code for the employer whose controls you are defining.

Job Code

Type the code for the job to which the controls apply, or leave *Job Code* blank if you are specifying controls for an individual employee. The job code must already exist.

Copy from Job Code

To copy controls that already exist for a different job into the controls for a job specified in *Job Code*, specify here the job to be copied.

You cannot perform the copying if the target in *Job Code* already has eligibility controls defined. Delete the value in *Copy from Job Code* and amend the existing controls instead.

Or Employee Number

If specifying controls for an individual employee rather than a job, type the employee's number. If you specified a job, leave this value blank.

If an employee has no eligibility controls, the controls associated with the employee's job apply. Specify only exceptions for the employee, such as just the employee's dental coverage.

How do I...

Copy eligibility controls from another job to this job	Specify the code for the job to be copied in *Copy from Job Code* and press Enter.
Access the claims eligibility selection screen for this job or employee	Specify the job or the employee and press Enter.

Enter/Update Claims Eligibility Initial Page

About This Page

On the Enter/Update Claims Eligibility initial page, displayed if there are no claim type eligibility entries yet for this job or employee, you can create a new claims eligibility entry. Upon creation of the first entry, you return to the Enter/Update Claims Eligibility selection page.

Deletion of all selection page entries returns you to the initial page.

How Do I…

Create a new claim type entry	Press F6 to display the Enter/Update Claims Eligibility details screen

Enter/Update Claims Eligibility Selection Page

About This Page

On the Enter/Update Claims Eligibility selection page, you can select a listed claim type to edit its eligibility information, delete the claim type, or create a new claim type.

The columns indicate the length of employment (length of service) in months to which these controls apply, type of claim, and the employee and family entitlement amounts available through that period of service.

How Do I…

Set up a new claim type's eligibility details	Press F6 to display the details page.
Edit an existing claim type's eligibility details	Type **2** next to the claim type and press Enter to display the details page.
Delete a claim type's eligibility details	Type **4** next to the claim type and press Enter. Confirm the deletion.
Exit to the prompt page	Press F3.

Enter/Update Claims Eligibility Details Page

About This Page

On the Enter/Update Claims Eligibility details page in create mode you specify the period of months' employment to which these eligibility criteria apply, the claim type, and the initial employee and family maximum entitlement amounts for the specified claim type.

In change mode, you can only update the amounts.

Field Information

Up to Months of Employment

When creating new eligibility controls, you must specify the period of months of employment to which these eligibility criteria apply, such as **12** for the first year of employment. You cannot later change this value.

The example below illustrates how the eligibility controls are calculated. LOS refers to length of service.

LOS	Claim Type	Employee	Family
12	MEDIC	1000.00	500.00
36	MEDIC	1250.00	750.00
999	MEDIC	1500.00	1000.00

If an employee has worked less than 12 months, the eligibility limit is 1000.00.

If an employee worked 12 months up to, but not including, 36 months, the eligibility limit is 1250.00.

Claim type

When creating new eligibility controls, you must specify a claim type code that was created for code type MCL in *Update Employer Codes*.

The code you specify here appears throughout the medical claims tracking system for the employee's claims. You therefore cannot change this value within these eligibility controls in change mode.

Entitlement Amounts
Employee

You must specify the maximum the employee can claim for him or herself under this type of claim during this eligibility period and for the length of service defined

Entitlement Amounts
Family

You must specify the maximum the employee can claim for his or her family under this type of claim during this eligibility period, if applicable.

How Do I…	
Exit to the selection list saving these eligibility criteria	Press F3 and confirm saving.

Updating Employee Claims

Overview

Use *Update Employee Claims* to record information about personal or family medical expenses for which the employee claims reimbursement, and about the approvals for the claims.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Update Employee Claims [UPDEECLAIM]*

Update Employee Claims Prompt Page

About This Page

On the Update Employee Claims prompt page, you can specify the claims with which you plan to work by identifying the employer and employee and optionally a claim type. You can also restrict the list to claims for only the employee, claims for only dependents, or both.

Field Information

Employer

You must specify the employer for which the employee works.

Employee

You must specify the employee whose claims you are processing.

Claim Type

You can specify the type of claim you are processing.

Claims for

Type **1** to include claims for only the employee, **2** to include claims for only dependents, or leave the value blank to include claims for both the employee and dependents.

How Do I…

Display a selection list of claims matching your prompt page criteria	Press Enter.

Update Employee Claims Initial Page

About This Page

On the Update Employee Claims initial page, displayed when there are no claims matching the criteria you specified at the Update Employee Claims prompt page, you can create information for new claims.

When you complete creating a claim, you return to the Update Employee Claims selection page where you can select an existing claim for update, delete an existing claim, or specify information for a new claim.

How Do I…

Create new claim information	Press F6 to display an Update Employee Claims details page.
Return to the prompt page	Press F3.

Update Employee Claims Selection Page

About This Page

On the Update Employee Claims selection page you can select an existing claim for update, delete an existing claim, or specify information for a new claim.

The system will also show the amount of all claims made in the eligibility period in the *Period to Date - All Claims* field.

If you delete all of the listed claims, you return to the Update Employee Claims initial page where you can either create new claims to return to the selection page, or exit to the prompt page.

How Do I…

Create new claim information	Press F6 to display an Update Employee Claims details page.
Edit an existing claim	Type **2** next to the claim and press Enter to display the Update Employee Claims details page.
Delete an existing claim	Type **4** next to the claim and press Enter. Confirm the deletion.
Return to the prompt page	Press F3.

Update Employee Claims Information Details Page

About This Page

On the Update Employee Claims details page, you can enter information about a new claim in create mode or modify information in a selected claim in change mode.

Since you must specify approval information (amount, approver, and date), you cannot create claim information until the claim is approved.

You can also view the total of the employee's claims to date, how much the employee has available for claims, and, in edit mode, whether the claim has been closed to payroll.

Field Information

Claims Type Total to date

The display-only total amount of this employee's claims of this type that have been approved so far during this eligibility period.

Available to claim

Amount available remaining for this type of claim by this employee during this eligibility period. That is, the full period eligibility amount from the control information minus any amounts already claimed.

If the employee has claimed more than is available, this is a negative value.

Claim Type

You must specify the code for the type of claim you are entering, such as a dental claim or a medical claim.

Claim Date

You must enter the date that you received the claim.

Sequence number

Type the unique identifying number distinguishing each claim

Use this field only when you have multiple claims of the same type on the same date. Enter different sequence numbers in order for the system to distinguish them.

The system will default **0001** into this field. This is required.

Service Provider

You can specify the person or organisation that provided this service.

Claim Description

Describe the claim, for example, doctor bill, prescription drug or eye test.

Claimed for

Type **1** if the claim is for service to the employee. Type **2** if the claim is for a dependent.

Dependent Name

If you typed **2** in *Claimed for*, type the dependent's name here.

Amount Incurred

You must type the charge incurred for the service received. Neither the amount claimed nor the amount approved can exceed this amount.

Amount Claimed

Specify the amount the employee is claiming if this amount differs from the amount incurred. The default is the amount in *Amount Incurred*.

Amount Approved

You must specify the amount of this claim that is approved. If the total amount approved for all claims of this type in this period exceeds the amount specified as available in the eligibility controls and the *Excess Claims* field in the Claims Control is set to **1**, the system will display a warning message. You can override this message.

If the *Excess Claims* field is set to **0**, the system will display an error message. If you override the warning message by pressing F13, the system will record your user profile and the amount by which the claim exceeded the entitlement in the internal security fields in the claim record.

Approved by

You must specify the person who approved the claim.

Date Approved

You must specify the date this claim was approved.

Claim Closed

Yes (the claim has been closed to payroll) or **No** (the claim has not been closed to payroll) is displayed here only when you select an existing claim at the selection page. You cannot modify this value.

How Do I…

Return to the claim selection list saving the new or changed information	Press F3 and confirm saving.

Displaying Employee Claims History

Overview

Use *Display Employee Claims History* to display information about an employee's medical claim history and current status of claims. You can limit the displayed selection list by claim type, a range of dates, and whether the claims are for the employee, dependents, or both the employee and dependents.

If you include all claim types, the selection list does not display the amounts the employee is eligible to claim and that are still available to the employee. These are associated with specific claim types.

If you select a listed claim to display details, the display includes the same information as the Update Employee Claims details page.

Path

- *Health & Safety*
- *Medical Claims Tracking*
    - *Display Employee Claims History [DSPEECLAIM]*

Trial Closing Claims to Payroll

Overview

You can use Infinium Payroll cycle processing to reimburse the approved amounts of employees' medical claims. These claim amounts can be closed into the employees' normal payroll cycles as income transactions.

The income transactions will be created with the same income codes as the claim types. Therefore, you must set up income controls in Infinium PY using the flat amount method that corresponds to your claim types.

Employees qualifying for such medical claim reimbursements must also be authorised to the corresponding income codes in Infinium PY. If this is not done, you will receive error messages on the Close to Payroll report.

Use *Trial Close Claims to Payroll* to perform a trial close of an employer's medical claim transactions for a specified date range to a specified payroll cycle and period. This function creates a Trial Close Claims to Payroll report.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Trial Close Claims to Payroll [TRIALCLAIM]*

Trial Close Claims to Payroll Submission Page

About This Page

On the Trial Close Claims to Payroll submission page, identify the claims and the payroll cycle to be included in the trial closing.

You must identify employer, date range, payroll cycle, and period end date. You can also limit the closing to a single claim type.

Field Information

Employer

You must specify the employer for which you are testing the closing.

Claim Type

Limit the trial closing to a particular claim type by specifying a valid MCL employer code type value here. Blank means all types.

From Date

You must specify the beginning of the claim date range for claims to be included in the trial closing.

To Date

You must specify the end of the claim date range for claims to be included in the trial closing.

Payroll Cycle

You must specify the code for the payroll cycle to which you are performing the trial close. This cycle must be at the timesheet entry stage.

Period Ending Date

You must identify the payroll period to which you are closing by typing the date on which the period ends.

The combination of employer, cycle, and period end date must exist as a valid scheduled payroll cycle.

How Do I…

Submit a batch job for the trial closing report and return to the menu	Press Enter.

Trial Close Claims to Payroll Report

The Trial Close Claims to Payroll report includes the following information:

- Date and time processed
- The employer, date range, claim type, payroll cycle, and period ending date for which this trial close was run

- For each included claim, the employee, income code, claim date, dependent name if applicable, amounts incurred, claimed, and approved, the claim description, and approval date
- Notes on claims that cannot be closed such as due to the absence of the required income code for the employee
- Total amounts incurred, claimed, and approved for all listed claims

Closing Employee Claims to Payroll

Overview

You can use Infinium PY cycle processing to reimburse the approved amounts of employees' medical claims. These claim amounts can be closed into the employees' normal payroll cycles as income transactions.

The income transactions will be created with the same income codes as the claim types. Therefore, you must set up income controls in Infinium PY using the flat amount method that corresponds to your claim types.

Employees qualifying for such medical claim reimbursements must also be authorised to the corresponding income codes in Infinium PY. If this is not done, you will receive error messages on the Close to Payroll report.

After performing a trial close, use *Close Employee Claims to Payroll* to process medical claims for a specified employer and close claim transactions for a specified date range to a specified payroll cycle and period. You can limit the close by claim type.

The close creates income transactions for the employee in the Payroll Cycle Employee Income File and generates a Close Claims to Payroll report.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Close Employee Claims to Payroll [CLOSECLAIM]*

Close Claims to Payroll Submission Page

About This Page

On the Close Claims to Payroll submission page, identify the claims and the payroll cycle to be included in the closing.

You must identify employer, date range, payroll cycle, and period end date. You can also limit the closing to a single claim type.

Field Information

Employer

You must specify the employer for which you are closing claims.

Claim Type

Limit the closing to a particular claim type by specifying a valid MCL employer code type value here. Blank means all types.

From Date

You must specify the beginning of the claim date range for claims to be included in the closing.

To Date

You must specify the end of the claim date range for claims to be included in the closing.

Payroll Cycle

You must specify the code for the payroll cycle to which you are closing.

Period Ending Date

You must identify the payroll period you are closing by typing the date on which the period ends.

How Do I…

Submit a batch job for the closing and report, and return to the menu	Press Enter.

Close Claims to Payroll Report

The Close Claims to Payroll report includes the following information:

- Date and time processed
- The employer, date range, claim type, payroll cycle, and period ending date for which this close was run

- For each included claim, the employee, income code, claim date, dependent name if applicable, amounts incurred, claimed, and approved, the claim description, and approval date
- Notes on claims that were not paid due to reasons such as the absence of the required income code for the employee
- Total amounts incurred, claimed, and approved for all listed claims

Claims Enquiry

Overview

Use *Claims Enquiry* to access Display Employee Claim pages with information about medical claims submitted to a specific employer.

You can limit the selection list by claim type, date range, employee or dependent claims or both kinds, and amounts less than, equal to, or greater than a specified incurred, claimed, or approved amount. You can also limit the display to only claims that exceed amounts allowed.

The selection list identifies matching claims by employee, claim date and type, and claim amount. You can select a listed claim to view further details including sequence number, provider, description, dependent name if applicable, amount incurred, approval information, excess claim approver if applicable, and whether the claim has been closed to payroll.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Claims Enquiry [CLAIMENQRY]*

Printing Employee Claims

Overview

Use *Print Employee Claims* to submit a batch job to print an Employee Claims Report including information about all claims submitted to an employer or limited to claims of a specified type for that employer.

You can further limit the report to claims either for a specific employee or associated with specified organisational groupings (level 1 through level 4 values). In addition, you can specify a date range.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Print Employee Claims [PRTEECLAIM]*

Employee Claims Report

The Employee Claims Report includes the following information:

- Date and time processed
- Employer
- For each listed claim, the employee, claim date and type, amounts incurred, claimed, and approved, claim description, and who approved the claim
- Total amounts incurred, claimed, and approved for all listed claims

Purging Employee Claims

Overview

Use *Purge Employee Claims* to purge medical claim information for a specified employer through a specified date and to print a report with audit details for the purged information.

If no claims are purged, there is no report.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Purge Employee Claims [PURGECLAIM]*

Purging Claims History Submission Page

About This Page

On the Purging Claims History submission page, you must specify an employer and a purge through date. The system purges all claims to this employer that are dated before or on this date.

Field Information

Employer

You must specify the employer for which you are purging claims.

Purge Through Date

You must specify a date. The system purges all claims for this employer that are dated on or before the date you type here.

The system will prevent you from entering a date which is within the eligibility from and to dates defined in the Claims control. This ensures you do not purge any claims in the current period.

How Do I…

Submit the purging as a batch job	Press F13.
Exit without submitting the job	Press F3.

Purged Claims Report

The Purged Claims Report includes the following information:

- Date and time processed
- Employer and purge through date
- For each claim purged, the employee, claim date and type, dependent name if applicable, amounts incurred, claimed, and approved, claim description, and approval date
- Total incurred, claimed, and approved amounts purged

Updating Employee Medical Claims (Alternative Function)

Overview

Use *Update EE Medical Claims* to track employee claims if you are not using the enhanced medical claim tracking functions that appear earlier on the *Medical Claims Tracking* menu.

This function remains on the menu for those who used *Update EE Medical Claims* prior to the introduction of the enhanced functionality effective with Release 11.0 and choose to continue to use this older function.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Update EE Medical Claims [UEMC]*

Displaying Employee Medical Claims (Alternative Function)

Overview

Use *Display EE Medical Claims* to display claim information if you are not using the enhanced medical claim tracking functions that appear earlier on the *Medical Claims Tracking* menu.

This function remains on the menu for those who used *Update EE Medical Claims*, *Display EE Medical Claims*, and *Print EE Medical Claims* prior to the introduction of the enhanced functionality effective with Release 11.0 and choose to continue to use these older functions.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Display EE Medical Claims [DEMC]*

Printing Employee Medical Claims (Alternative Function)

Overview

Use *Print EE Medical Claims* to print claim information if you are not using the enhanced medical claim tracking functions that appear earlier on the *Medical Claims Tracking* menu.

The report produced by *Print EE Medical Claims* includes the employee name, type and date of claim, amount and description of claim, the date a cheque was issued, and the cheque number.

This function remains on the menu for those who used *Update EE Medical Claims*, *Display EE Medical Claims*, and *Print EE Medical Claims* prior to the introduction of the enhanced functionality effective with Release 11.0 and choose to continue to use these older functions.

Path

- *Health & Safety*
- *Medical Claims Tracking*
  - *Print EE Medical Claims [PEMC]*

Notes

Chapter 14 Cost Budgeting

14

This chapter of the guide describes how to set up controls for cost budgeting, maintain cost budgeting information such as amounts, and perform cost budgeting enquiries.

The chapter consists of the following topics:

Overview of Cost Budgeting

Cost Budgeting is designed to allow you to maintain basic cost budget information for your Human Resources and Payroll functions. It is not designed to be an accounting application or to interface with Infinium General Ledger. Therefore it does not use Infinium G/L account codes.

The *Costs Budgeting* menu, accessible from the *Salary Planning* menu, provides the following functions:

- *Update Budget Controls*

  Use *Update Budget Controls* to define controls for individual budgets such as the budget's code, description, and currency. You can also identify the current budget and freeze a budget.

- *Update Budget Costs*

  Use *Update Budget Costs* to specify amounts and comments for types of cost associated with various organisational levels as defined in your system, such as departments, teams, and cost centres.

- *Budget Costs Enquiry*

  Use *Budget Costs Enquiry* to view budget data by employer, budget code, and budget category. You can further select budget data by level or by position, and restrict the display to a particular cost type.

  You can define multiple budgets along with the periods to which they apply, categorize types of costs and amounts, and copy an existing budget for efficient generation of a new budget that you can edit.

Updating Budget Controls

Overview

Use *Update Budget Controls* to define controls for individual budgets such as the budget's code, description, and currency. You can also identify the current budget and freeze a budget.

Path

- *Salary Planning*
- *Cost Budgeting*
  - *Update Budget Controls [UBUDGETCTL]*

Update Budget Controls Prompt Page

About This Page

On the Update Budget Controls prompt page, you can specify the employer for which you are defining budget controls.

Field Information

Employer

Specify an employer's code.

How Do I…

display the Update Budget Controls selection page for this employe	Press Enter.

Update Budget Controls Selection Page

About This Page

On the Update Budget Controls selection page, you can select a listed budget to view and change its control information, delete the controls for an existing budget, or create controls for a new budget.

How Do I…

Create a new budget	Press F6.
View and change details for a listed budget	Type **2** in the *Opt* field next to that budget and press Enter.
Delete a listed budget	Type **4** in the *Opt* field next to that budget and press Enter. Confirm the deletion.
Exit the selection list to the prompt page	Press F3.

Update Budget Controls Details Page

About This Page

On the Update Budget Controls details page, you can specify basic control information about this budget, whether the budget is current, and whether it is frozen. When creating a new budget, you can also assign a code to the budget.

Field Information

Budget Code

When creating a new budget control, assign a new budget code. You cannot change this code during later maintenance of this budget control.

Description

Type a brief description of this budget.

From Date

Specify the beginning date of the period covered by this budget.

To Date

Specify the ending date of the period covered by this budget.

Freeze?

Type **1** if this budget is frozen. Otherwise, type **0**. You cannot use *Updating Budget Costs* to modify information for a frozen budget. You can edit the controls to, for example, unfreeze the budget.

Current Budget?

Type **1** if this is the current budget. Otherwise, type **0**.

Recruitment Cost Category

Code for the related recruitment cost category. This code is used within the *Recruitment Costs Enquiry* function to enable the system to show budgeted recruitment costs versus actual costs

Currency Code

Code for currency in which the budget's amounts are expressed.

How Do I…

Return to the selection list saving your information	Press F3 and confirm saving.

Updating Budget Costs

Overview

Use *Update Budget Costs* to specify amounts and comments for types of cost associated with various levels such as specified functions, departments, teams, and cost centres.

Path

- *Salary Planning*
- *Costs Budgeting*
  - *Update Budget Costs [UBUDGETCST]*

Update Budget Costs Prompt Page

About This Page

On the Update Budget Costs prompt page, you can specify the employer, budget, and budget category to work with. You can also specify a different budget from which to copy details for this budget. Then press Enter to display the Update Budget Costs subset page.

Field Information

Employer

You must specify the employer for which you are maintaining budgets.

Budget Code

Specify the budget to be maintained. The budget must already have been defined in budget controls and not be flagged as frozen.

Copy from Budget

To create budget details by copying details from another budget, specify the source budget here and the target budget in the previous field.

Budget Category

You must specify the category for which you are maintaining this budget's details, such as a Clerk category.

How Do I…

Display the Update Budget Costs subset page	Complete the required fields and press Enter.
Exit to the menu	Press F3.

Update Budget Costs Subset Page

About This Page

On the Update Budget Costs subset page, you can specify additional criteria for the subset of budget entries to be listed on the upcoming selection page.

Field Information

Level 1

Specify the code for your level 1 to restrict the upcoming list to budget entries for that level, such as a organisational function. Leave this and the following three fields blank to specify a position for the subset of the list.

Level 2

Specify the code for your level 2, such as a department, to restrict the upcoming list to budget entries for that level. Leave this and the other level fields blank to specify a position for the subset of the list.

Level 3

Specify the code for your level 3, such as a team, to restrict the upcoming list to budget entries for that level. Leave this and the other level fields blank to specify a position for the subset of the list.

Level 4

Specify the code for a cost centre (level 4) to restrict the upcoming list to budget entries for that cost centre. Leave this and the preceding three fields blank to specify a position for the subset of the list.

Position

If you left the level fields blank, you can specify a position by code to list only the budget information for levels associated with that position.

Cost Type

To restrict the list to a particular cost type, specify that type.

How Do I…

Display the Update Budget Costs selection page	Press Enter.
Exit to the prompt page	Press F3.

Update Budget Costs Selection Page

About This Page

On the Update Budget Costs selection page, you can create a new budget entry, or select an existing entry for change or deletion. The list includes existing entries that match criteria you specified on the preceding page.

How Do I…

Create a new entry for category within this budget	Press F6.
Change details for a listed entry	Type **2** in the *Opt* field next to that entry and press Enter.
Delete a listed entry	Type **4** in the *Opt* field next to that entry and press Enter. Confirm the deletion.
Return to the subset page	Press F3.

Update Budget Costs Level Details Page

About This Page

On the Update Budget Costs level details page, you can specify level information, a cost type, the amount, and optionally add a comment during entry creation.

During maintenance, you can modify the amount and comment for the entry you selected at the selection page.

Field Information

Level 1

If creating a new entry, you must specify the level 1 code such as an organisational function code. You cannot edit level information for an existing budget entry.

Level 2

If creating a new entry, you can specify level 2, such as a department. You cannot edit level information for an existing budget entry.

Level 3

If creating a new entry, you can specify level 3, such as a team. You cannot edit level information for an existing budget entry.

Level 4

If creating a new entry, you can specify level 4, such as a cost centre. You cannot edit level information for an existing budget entry.

Cost Type

If creating a new entry, you must specify a cost type code.

Amount

If creating or editing an entry, specify the amount for this budget entry. Press Enter to format the amount.

Comment

If creating or editing an entry you can supply a short comment.

How Do I…

Return to the selection page saving the budget information	Press F3 and confirm saving.

Budget Costs Enquiry

Overview

Use *Budget Costs Enquiry* to view budget data by employer, budget code, and budget category. You can further select budget data by organisational levels or by position, and can restrict the display to a particular cost type.

This function uses prompt, subset selection, budget entry selection, and budget entry details pages similar to the pages for the *Update Budget Costs* function. You cannot edit the budget entry details.

Path

- *Salary Planning*
- *Costs Budgeting*
    - *Budget Costs Enquiry [BUDGECSTI]*

Notes

Chapter 15 Defining and Maintaining Competency Models

15

This chapter of the guide describes how to define and use a competency model that represents a set of related skills and competencies and that can be referenced in position and employee records.

The chapter consists of the following topics:

Overview of Working with Competency Models

Competency models allow you to group sets of related skills and competencies under specific names. You can reference model names in position and employee records rather than retyping the full information about the same skills and competencies in multiple records.

Creating and using a competency model is a multi-step process.

1. Define the competency model name, description, and status (active or inactive) directly in *Update Skill/Competency Models* or by *Controls* function *Update Employer Codes* for code type MOD.

   If you use *Update Skill/Competency Models*, the system automatically adds the new model code to the list of MOD values.

2. Specify skills and competencies to be associated with the model using *Update Skill/Competency Models*. The codes for these items must already have been defined through *Maintain Skills/Competencies*.

   You can also display information about previously defined models using *Display Skill/Competency Models*.

3. Assign the model to the appropriate position by specifying the model code in the position record's *Competency Model* field. Use *Controls* / *Position Controls* (or *Current Organisational Data*) / *Update Organisation Positions* for this step.

4. You can modify an individual employee's competency model value using *Update Employee Data*. The *Competency Model* field is under *Performance Review Data* within the *Basic Data* area of the employee record. The default in this field for new employees is the value in the position control record for the employee's position.

   The competency model code is also accessible through the *Update Employee Skills and Competencies* function. In addition, you can display but not update the value in the *Skills and Competencies* area of the employee record within *Update Employee Data*.

Updating Skill/Competency Models

Overview

Use *Update Skill/Competency Models* to define a model and the skills and competencies that are to be included in that model. You can define the code for the model either here or through working with code type MOD in *Update Employer Codes*.

The codes for the skills and competencies you associate with a model must already be defined through *Maintain Skills/Competencies*.

After setting up the model with its list of skills and competencies, you can associate the model with position controls and employee records.

Path

- *Skills & Competencies*
- *Skills Maintenance*
  - *Update Skill/Competency Models [UPS]*

Update Competency Models Prompt Page

About This Page

On the Update Competency Models prompt page, specify the employer for which you are maintaining a competency model.

Then specify which of the following to include on the competency model selection page: skills, competencies, skill groups.

Field Information

Employer

Specify a code to indicate the employer for which you are maintaining a competency model.

Include Skills (0/1)

Type **1** to include skills on the competency model selection page.

This does not limit the list of models on the subsequent Update Competency Model selection page, but it does affect the list that is displayed when you type **6** in *Opt* on that page.

Include Competencies (0/1)

Type **1** to include competencies on the competency model selection page.

This does not limit the list of models on the subsequent Update Competency Model selection page, but it does affect the list that is displayed when you type **6** in *Opt* on that page.

Include skill groups (0/1)

Type **1** to include skill groups on the competency model selection page.

This does not limit the list of models on the subsequent Update Competency Model selection page, but it does affect the list that is displayed when you type **6** in *Opt* on that page.

How Do I…

Display the Update Competency Model selection page	Press Enter
Return to the menu	Press F3.

Update Competency Model Selection Page

About This Page

On the Update Competency Model selection page, you can create a new model, select a listed model to change its description and whether it is active, copy a listed model to create a new model, delete a model, or work with the set of skills and competencies associated with the model.

If you create a new model code here, the system automatically adds that code to the values for employer code type MOD.

How Do I…

Create a new model from scratch	Press F6.
Copy an existing model to create a new model	Type **3** in *Opt* next to the model and press Enter.
Type **3** in *Opt* next to the model and press Enter.	Type **2** in *Opt* next to the model and press Enter.
Work with the list of skills and competencies in a model	Type **6** in *Opt* next to the model and press Enter.
Delete a listed model	Type **4** in *Opt* next to the model and press Enter.
Exit the selection list to the menu	Press F3.

Update Competency Model Description Page

About This Page

On the Update Competency Model description page, you can name the model during a create or copy process.

During creation, copying, and maintenance you can specify a brief description of this model and indicate whether the model is active.

The system displays descriptions wherever you access a list of models.

Field Information

Competency Model

When creating a new model record, type the code for the new model. You cannot change this code during maintenance of this model.

Description

Specify a brief description of this model to be displayed with the code elsewhere in the system.

Active

Type **1** if this model is active and available for use in position and employee records. Otherwise type **0**.

How Do I…

Return to the model selection list saving your changes	Press F3 and specify saving changes at the confirmation window.

Update Competency Model Skill/Competency Selection Page

About This Page

On the Update Competency Model skill/competency selection page, you can view summary information about skills and competencies included in the selected model.

You can also add and delete skills and competencies for this model, and change or display details for a skill or competency already in this model.

Before deleting a model, you must delete all the skills and competencies associated with that model. You cannot delete a model that is associated with any position or employee record.

How Do I…

Add a new skill or competency to this model	Press F6 to display the Update Skill/Competency in Model page.
Change details for a listed skill or competency	Type **2** next to the item and press Enter to display the Update Skill/Competency in Model page.
Display details for a listed skill or competency	Type **5** next to the item and press Enter. When done viewing the details, press Enter to return to the selection list.
Delete a listed skill or competency from the model	Type **4** next to the item and press Enter. Confirm the deletion.

Update Skill/Competency in Model Page

About This Page

On the Update Skill/Competency in Model page, you can add new skills and competencies to this model if you accessed the page in Create mode.

In Change mode, you can modify the details for the skill or competency you selected at the Update Competency Model skill/competency selection page.

Field Information

Skill/Competency Code

In Create mode, specify the code that identifies the skill or competency to be added to this model. The skill or competency must already be defined through *Maintain Skills/Competencies*.

You cannot modify this field if you are in Change mode.

Priority

Type a value between 1 and 99 to specify the priority of this skill or competency for any position with which this model is to be associated.

Required Indicator

Type **1** if this skill or competency is required for any position with which this model is to be associated. Otherwise type **0**.

Required Level

Type a value between 1 and 999 to specify the skill's or competency's level required for any position with which this model is to be associated.

This value must not exceed the maximum level defined in *Maintain Skills/Competencies* for this skill or competency.

Date Last Evaluated

Specify the date as of which these details are effective for this model.

How Do I…	
Complete adding skills and competencies to this model in Create mode	Specify an existing skill/competency code, complete the remaining fields, and press Enter to save the new item. Repeat for each additional new item.
Define a new skill or competency so that you can add it to this model	Press F10 to display the quick access window, type quick access code **MS**, and press Enter to access *Maintain Skills /Competencies*. Define the new code and exit back here.
Exit to the Update Competency Model skill/competency selection list saving your changes	Press F3 and confirm your changes.

Displaying Skill/Competency Models

Overview

Use *Display Skill/Competency Models* to view information about the available models and about the skills and competencies associated with particular models.

Path

- *Skills & Competencies*
- *Skills Maintenance*
  - *Display Skill/Competency Models [DSPCMPMODL]*

Notes