Human Resources/Payroll

Guide to Supervisor's Functions

INFINIUM
SOFTWARE

Publication Information

Table of Contents

Introduction

Overview

Within Human Resource 2000, there are a number of functions that should be restricted for use by those responsible for administering the system. These functions are not generally used in the day-to-day operations of HR2000, but are powerful facilities used for management and maintenance of the system.

The functions cover the following areas:

- Security

These functions allow the system supervisor to define users to HR2000 and indicate the functions and data that they can access.

- Mass Updates

There are a number of functions provided which allow the mass change of HR2000 data. This may be necessary because of organisational changes that occur over time or prior to "going live".

- File Maintenance

HR2000 maintains extensive history and performs extensive transaction updates during processing. Periodically, it is necessary to reorganise some of these files to "keep them tidy" and optimise processing performance.

- Purge

Organisations need to find a balance between the amount of HR2000 history that is to be kept on line and the disk storage that will be taken up by this history.

There are a number of functions available to achieve and purge the historical transactions that are no longer needed on line.

Security Functions

Introduction

The HR 2000 Supervisor functions related to security are discussed in this section. You must have authority to these menu options to access all of the functions discussed.

The topics covered include the following:

- Defining User Controls

- Defining Personnel 2000 User Controls

- Establishing Level Security

- Establishing Security Groups

User Controls

Overview

Before a user can access HR2000 functions, their user profile must be defined through User Controls. For each user, you define a profile which dictates functions that they may access and restrictions that apply to data that they may access.

Menu Selection

System:Personnel 2000
Menu Level 1:   Personnel Supervisor's Functions
Menu Level 2:   User Controls
Menu level 3:   Update User Controls

OR

System:Payroll 2000
Menu Level 1:   Payroll Supervisor's Functions
Menu Level 2:   Update User Controls

Screen 1 of 3

```
13/07/94  13:33:52          User Security Update        PRGMUC      PRDMUC

 Opt          User Profile            User Name
              PY2000                  Payroll Supervisor
  _           PY2000AM
  _           RESTRICTED
  _

















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

Key Information

- To work with an existing user, type any character in the Opt field.

- To create a new User control, press F6.

Select a user and press Enter↵ *to continue...*

OR

F6 to create...

Screen 2 of 3

```
13/07/94  13:35:45         User Security Update          PRGMUC    PRDMUC
                                                         Screen 1 of 2
User Profile . . . .  _____                                      ADD

Type 1 to permit access, 0 to deny access

On-Demand Cheques Control
Permit User to Function Type 1  . . . .  1 (1/0) (Calculate Only)
Permit User to Function Type 2  . . . .  0 (1/0) (Manual Cheques)
Permit User to Function Type 3  . . . .  0 (1/0) (Print Cheques)
Default Function Type . . . . . . . . .  1 (1,2,3, or blank)
Security Controls
Default Employer  . . . . . . . . . . .  ___ +
Restrict User to Employer Group . . . .  ____ +
Restrict User to Cycle Group  . . . . .  ____ +
Allow Access to Pay Info on Basic Data.  0  (1/0)
Programs after Enter New Employee
Update Employee Deductions  . . . . . .  0  (1/0)
Update Employee Incomes . . . . . . . .  0  (1/0)
Update Employee Benefit Enrollments . .  0  (1/0)
Update User-Defined Data  . . . . . . .  1  (1/0)

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

Key Information

- Specify the profile for the user you are defining.

- You can control which stages of the On Demand Cheque function the user can process.

- A default Employer code can be defined. This will display on all screens where Employer can be input.

- The user can be restricted to a particular Employer Group or Cycle Group.

- You can control whether the user can access screen 4 of Basic Data where the pay information is displayed.

- At Create New Employee, a number of functions can be called automatically depending on the options selected.

- Remember, throughout the system 1=Yes and 0=No

Required Fields

- Permit User to Function Type 1,2,3

- Allow Access to Pay Info on Basic Data

- All fields under Programs after Enter New Employee

Press Enter↵ *to continue...*

Screen 3 of 3

```
13/07/94  13:37:11          User Security Update      PRGMUC    PRDMUC
                                                      Screen 2 of 2
User Profile . . . :  TRAINING                                  ADD

Type 1 to permit access, 0 to deny access

Allow access to the following Employee Updates

Basic Data . . . . . . . . . . . . .  1   (1/0)
Payroll Data . . . . . . . . . . . .  1   (1/0)
Income Data  . . . . . . . . . . . .  1   (1/0)
Deduction Data . . . . . . . . . . .  1   (1/0)
Multiple Distribution  . . . . . . .  1   (1/0)
Job Authorisations . . . . . . . . .  1   (1/0)
User Defined Data  . . . . . . . . .  1   (1/0)

Personnel Actions Update

Allow Online PE Actions Update . . .  1   (1/0)



F3=Exit   F10=QuikAccess   F12=Cancel   F22=Delete
```

Key Information

- Access to certain employee update functions can be restricted.

- Online updates of Personnel Actions can be denied. In this case, the transaction will not update immediately, being held and processed in the same way as future dated transactions, via the Mass Update PE Actions function.

Required Fields

- All fields

Press Enter↵ *to update...*

Personnel User Controls

Overview

Through PE User Controls you can identify the functions that a user of Personnel 2000 has access to, including each of the Personnel Actions transactions.

Menu Selection

System:Personnel 2000
Menu Level 1:   Personnel Supervisor's Functions
Menu Level 2:   User Controls
Menu Level 3:   Update PE User Security

Screen 1 of 3

```
13/07/94  13:40:30        Update PE User Security        PEGMUC    PEDMUC

Select profile, press Enter.

Opt  User Profile  User Name
 _    PYCLERK
 _    PYDEMO        Payroll Demonstration
 _    PYTRAIN
 _    PY2000        Payroll Supervisor
 _    PY2000AM
 _    RESTRICTED











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

Key Information

- To work with an existing user, type any character in the Opt field.

- To create a new User control, press F6.

    Select a user and press Enter↵ *to continue...*

    OR

    F6 to create...

Screen 2 of 3

```
13/07/94  13:42:06          Update PE User Security      PEGMUC    PEDMUC
                                                                Page 1 of 2
User Profile . . . . :  PYCLERK

Type 1 to permit access, 0 to deny access.

Restrict User to Employer Group . . . .  _____  +

Transactions authorised to
Performance Reviews . . .  1   (1/0)      Salary Changes . .  1   (1/0)
Position Changes  . . . .  1   (1/0)      Inter Co. Transfer  1   (1/0)
Status Changes  . . . . .  1   (1/0)      Blood Donations  .  1   (1/0)
New Employment  . . . . .  1   (1/0)      Re-Employment  . .  1   (1/0)
End of Employment . . . .  1   (1/0)      Work Actions . . .  1   (1/0)
Personal Changes  . . . .  1   (1/0)

Programs after Enter New Employee
Update Employee Deductions . . . . . .  1   (1/0)
Update Employee Incomes  . . . . . . .  1   (1/0)
Update Employee Benefit Enrollments  .  1   (1/0)
Update User-Defined Data . . . . . . .  1   (1/0)

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

Key Information

- Some details here can also be maintained through Update User Controls.

- You can restrict a user to only those employers within an *Employer Group*.

- You can define the Personnel Action transactions that the user can access. If 'O' is selected, the option will not appear on the available list of transactions for the user.

Required Fields

- All fields are required, except Restrict User to Employer Group.

Press Enter↵ *to continue...*

Screen 3 of 3

```
13/07/94  13:42:52          Update PE User Security      PEGMUC    PEDMUC
                                                                   Page 2 of 2
User Profile . . . :  PYCLERK

Type 1 to permit access, 0 to deny access.

Allow access to the following Employee Updates

Basic Data  . . . . . . .  1   (1/0)
Personnel Data  . . . . .  1   (1/0)
Education Data - Formal .  1   (1/0)
Education Data - OJT  . .  1   (1/0)
Property Data . . . . . .  1   (1/0)
Dependant Data  . . . . .  1   (1/0)
Vehicle Data  . . . . . .  1   (1/0)
Employee Log  . . . . . .  1   (1/0)




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

Key Information

- You can define the employee update functions that the user can access.

Required Fields

- All

Press Enter⏎ *to update...*

Security Levels

Overview

It is possible to restrict a User to specified organisation levels within an employer. This restriction applies to both displays and reports.

The user will be limited to access only those records which reside in the levels specified for access.

Menu Selection

System: Personnel 2000
Menu Level 1:   Personnel Supervisor's Functions
Menu Level 2:   User Controls
Menu Level 3:   Update User Security Levels

Screen 1 of 2

```
13/07/94  13:45:03      Update Employee Security Levels    PRGSQM      PRDSQM

User Profile . . .  PY2000____  +
Employer Code  . .  111 +

















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

Key Information

- Type both the user profile and the employer to which these controls will apply.

Required Fields

- User Profile

• Employer Code

Press Enter↵ *to continue...*

Screen 2 of 2

```
13/07/94  13:55:59      Update Employee Security Levels    PRGSQM    PRDSQM

User Profile  . . :  PY2000
Employer Code . . :  111  Software 2000 Training Company

Indicate with an X the levels accessible to the user
    Opt    Division      Location      Section      CostCentre
     _     FINN
     _     FINN          DPRO
     _     FINN          DPRO          ANPG
     _     FINN          DPRO          ANPG         3310
     _     FINN          DPRO          DPRO
     _     FINN          DPRO          DPRO         3100
     _     FINN          DPRO          SUPP
     _     FINN          DPRO          SUPP         3320
     _     FINN          FINN
     _     FINN          FINN          FINN
     _     FINN          FINN          FINN         3000
     _     FINN          GACT
     _     FINN          GACT          GACT
     _     FINN          GACT          GACT         3110
     _     FINN          MGAC                                        +
F3=Exit   F10=QuikAccess   F12=Cancel
```

Key Information

• When you select a level, the user is automatically authorised to all levels beneath that level.

• If no levels are selected, the user is authorised to all levels.

Required Fields

• None

Press F3 *to exit and save...*

Security Groups

Overview

With User Security Groups you can specify which Security Groups the user does <u>not</u> have access to. Security Groups are set up via Employer Codes, code type SEC. They are then allocated to a Position Control which will default to the employee level at Create New Employee, or to the employee basic data. In most cases, Security Groups will only be allocated to those employee records which have restricted access, for example Senior Management.

Menu Selection

System:Personnel 2000
Menu Level 1: Personnel Supervisor's Functions
Menu Level 2: User controls
Menu Level 3: Update User Security Groups

OR

System:Payroll 2000
Menu Level 1: Payroll Supervisor's Functions
Menu Level 2: Update User Security Groups

Screen 1 of 2

```
13/07/94  14:01:43     Update User Security Groups      PRGUSM      PRDUSM

Type selections, press Enter.

User Profile . . . .  PY2000     +













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

Key Information

- Type the *User Profile* for the user you wish to work with.

Required Fields

- User Profile

Press Enter↵ *to continue...*

Screen 2 of 2

```
13/07/94  14:02:50     Update User Security Groups     PRGUSM    PRDUSM

User Profile . . . :  PY2000
Security Group . . .  ____ +    Copy user . . . .  _____ +

4=Delete
Opt  Security Group Description
 _      EXEC       EXECUTIVE STAFF

















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

Key Information

- Type the *Security Group/s* that the user does not have access to in the top portion of the screen.

- Press Enter↵ and the details will appear in the bottom portion of the screen.

- To remove a Security Group from the list, type '4' against the Security Group to be removed.

- You can copy details of Security Group restrictions from another user.

Required Fields

- None

Press Enter↵ *to exit and update...*

Mass Update Functions

Introduction

These functions allow mass changes of HR 2000 data to assist the system supervisor to realign HR 2000 following organisational change or prior to "going live".

The functions covered are:

- Mass change of position levels

- Mass update of employee position data

- Printing/correcting position exceptions

- Copy codes from an employer

- Mass change of employer codes

- Copy income/deduction controls

- Copy income/deduction summarisation controls

- Mass change employee incomes/deductions

- Mass change employee auto pay groups

- Refresh income/deduction summarisation codes

Mass Change Position Levels

Overview

This function allows you to change groups of positions established within levels of your organisation, rather than changing each individual position's control.

The function is used to "relocate" groups of positions from the current levels of the organisation to a different part of the organisation. Only the position file is updated. You must use the Update Employee Position Data function to mass change the employee's records to the new levels.

Note: This function will not create a detailed history record for each employee. This can be achieved by creating a new position control with the new levels and creating a position change Personnel Action for each employee into the new position.

Menu Selection

System:Personnel 2000
Menu Level 1:   Personnel Supervisor's functions
Menu Level 2:   Mass Updates
Menu Level 3:   Mass Change Position Levels

Screen 1 of 2

```
 13/07/94 14:04:33      Mass Change Position Levels     PRGLCHG    PRDLCHG

 Type selections, press Enter.

 Employer . . . .  111 +

















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

Key Information

- You must specify the relevant employer

Required Fields

- Employer

Press Enter↵ *to continue...*

Screen 2 of 2

```
13/07/94 14:05:26      Mass Change Position Levels      PRGLCHG    PRDLCHG

Employer . . . :  111 Software 2000 Training Company

Enter all positions to change with levels.

Division       ____  +        TO      Division       ____  +
Location       ____  +                Location       ____  +
Section        ____  +                Section        ____  +
CostCentre     ____  +                CostCentre     ____  +

Example

If you request Level1  A  to be changed to Level1  E
               Level2  B                   Level2
               Level3                      Level3
               Level4                      Level4
Then positions with levels A,B,C,D  will change to E,B,C,D
( if E,B,C,D is a valid level combination)



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

Key Information

- An example of how this function will process is displayed on the screen.

- Type the relevant level changes in the From and To fields.

- The new levels must exist before running this function.

Required Fields

- At least level 1 From and To fields must be entered.

Press Enter↵ *to submit the mass update to batch...*

Mass Update Employee Position Data

Overview

This function will maintain the fields in the employee master file that are controlled by employee position and job code. Any changes made in the position controls will be reflected in the employee record through using this function. You should use this function following use of the Mass Change Position Levels function.

Menu Selection

System:Personnel 2000
Menu Level 1:   Personnel Supervisor's Functions
Menu Level 2:   Mass Updates
Menu Level 3:   Mass Update EE Position Data

Screen 1 of 1

```
13/07/94  14:06:28      Mass Update EE Position Data    PEGJC50    PEDJC50

Type selections, press Enter.

Employer . . . .  ___ + (Leave Blank for all)

This function will perform mass maintenance on those data fields in the
employees' basic data that are controlled by employee positions and
job codes.

The entries for Levels 1, 2, 3, 4, job code, location, union code, EEO
category, EEO-4 function and salary range on an employee's basic data record
are compared with the entries contained in the  POSITION  to which the
employee is assigned and the  JOB CODE CONTROL.
If any differences are found, the employee record is updated with the
correct entry.

A Log will be printed of any changes made by this function to the employee
records, showing both the previous entries and the updated entries.




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

Key Information

- A description of the processing that will take place is displayed on the screen.

- Type the employer that is to be processed.

Required Fields

- Employer

Press ⌷Enter↵⌷ *to submit the mass update to batch...*

Print/Correct Position Exceptions

Overview

Position records hold details of current number of employees assigned to the position, the employees' numbers, total actual hours, total units, and so on.

These details are updated whenever an employee action is taken which impacts the position. For example, Enter New Employee or Position Change.

It is possible for the details on the position record to become out of sync with the actual details as represented by the employee records.

The Print Position Exceptions function lists these exceptions. The Correct Position Exceptions function realigns the position record with that represented by the employee records.

Menu Selection

System:Personnel 2000
Menu Level 1: Personnel Supervisors Functions
Menu Level 2: Mass Updates
Menu Level 3: Print Position Exceptions

AND

Menu Level 3: Correct Position Exceptions

Screen 1 of 1

```
13/07/94  14:13:07       Print Position Exceptions      PEGJC50    PEDJC50

Type selections, press Enter.

Employer  . . . .  ___ +
Position  . . . .  _____ +   (Leave blank to select all)
As of Date  . . .  _____    (Blank for current date)
Report Format . .  _          (0=Summary)
                              (1=Employee Detail)












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

Key Information

- The screens for both Print and Correct functions are the same.

- You can process all positions or a selected position.

- The comparison of data between position and employee records can be performed for the current date or as at a specific date.

- The report can be produced in summary or detail.

Required Fields

- Employer

Press Enter⏎ *to submit the mass update to batch...*

Copy Codes From Employer

Overview

This function allows you to copy all the employer code values for each code type from one employer to another. This is typically performed when code values set up for a test employer are copied prior to "going live" or when a new employer needs to be established.

Menu Selection

System:Payroll 2000
Menu Level 1: Payroll Initialisation Functions
Menu Level 2: Copy Codes from Employer

Screen 1 of 1

```
13/07/94  14:08:58              Copy Code Types            PRGCDC    PRDCDC

Type selections, press Enter.

From Employer . . . .  111 +
To Employer . . . . .  444 +
Code Type To Copy . .  ___ +   (Enter ALL to Copy all Types)

















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

Key Information

- From and To employers cannot be the same.

- Type the *Code Type* that you want code values copied for. Type 'All' to process all code types.

- The codes will be copied interactively.

Required Fields

- From Employer

- To Employer

- Code Type to Copy

Press Enter↵ *to copy codes...*

Mass Change Employer Codes

Overview

You would use this function when you need to change an existing employer code value on employee records with a new code value. For example, following the merger of two recruitment agencies, you may want to search for all the employment source codes for one of the agencies and replace them with the code for the other.

Menu Selection

System:Personnel 2000
Menu Level 1: Personnel Supervisor's Functions
Menu Level 2: Mass Updates
Menu Level 3: Mass Change of Employer Codes

Screen 1 of 1

```
13/07/94  14:12:02          Mass Codes Change          PRGMCHG    PRDMCHG

Enter Levels only if codes in that level are to be changed,
else leave blank

 Employer Code   111 +     Entry required

 Level 1 . . .  _____ +   (Leave blank for all)
 Level 2 . . .  _____ +
 Level 3 . . .  _____ +
 Level 4 . . .  _____ +

   Code Type   From Value    To Value
 1 .  __  +     _____ +      _____ +
 2 .  __  +     _____ +      _____ +
 3 .  __  +     _____ +      _____ +
 4 .  __  +     _____ +      _____ +
 5 .  __  +     _____ +      _____ +
 6 .  __  +     _____ +      _____ +




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

Key Information

- The new code must exist before the mass update is run and the old code cannot be deleted until it has been completed.

- You can process only employees within defined levels of the organisation, or all employees for an employer.

Required Fields

- Employer

- At least one Code Type with From and To values.

Press Enter⏎ *to submit mass update to batch...*

Copy Income/Deduction Controls

Overview

These functions allow you to copy income and deduction controls from one employer to another, with the option of replacing matching records and/or deleting controls which already exist for the "to" employer.

Menu Selection

System:Payroll 2000
Menu Level 1: Payroll Initialisation Functions
Menu Level 2: Copy Income Controls

AND

Menu Level 2: Copy Deduction Controls

Screen 1 of 1

```
13/07/94  14:22:17              Copy Incomes            PYGCIC    PYDCIC

Type selections, press Enter.

From Employer . . . . . . . . .  111 +
To Employer . . . . . . . . . .  444 +
Purge Existing Controls . . . .  1  (0=no, 1=yes)
Replace Duplicates  . . . . . .  1  (0=no, 1=yes)

















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

Key Information

- Type the code for the employer you want to copy the income controls from and the employer you want to copy to.

- From and To employers cannot be the same.

- You can purge all existing income controls for the To employer prior to the copy.

- You can define whether to replace matching income controls for the To employer, with those of the From employer, or leave existing controls in place.

- The income controls will be copied interactively.

Required Fields

- From Employer

- To Employer

- Purge Existing Controls

- Replace Duplicates

Press Enter ↵ *to copy income controls...*

Copy Income/Deduction Summarisation Codes

Overview

These functions allow you to copy income and deduction summarisation codes from one employer to another, with the option of replacing matching records and/or deleting codes which already exist for the "to" employer.

Menu Selection

System: Payroll 2000
Menu Level 1: Payroll Initialisation Functions
Menu Level 2: Copy Income Summarisation Codes

AND

Menu Level 2: Copy Deduction Summarisation Codes

Screen 1 of 1

```
13/07/94  14:23:29     Copy Income Summarisation Codes     PYGCIS     PYDCIS

Type selections, press Enter.

From Employer . . . . . . . . .  111 +
To Employer . . . . . . . . . .  444 +
Purge Existing Codes  . . . . .  1  (0=no, 1=yes)
Replace Duplicates  . . . . . .  1  (0=no, 1=yes)
```

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

Key Information

- Type the code for the employer you want to copy the income summarisation codes from and the employer you want to copy to.

- *From* and *To employers* cannot be the same.

- You can purge all existing income summarisation codes for the *To employer* prior to the copy.

- You can define whether to replace matching income summarisation codes for the *To employer*, with those of the *From employer*, or leave existing codes in place.

- The income summarisation codes will be copied interactively.

Required Fields

- From Employer

- To Employer

- Purge Existing Controls

- Replace Duplicates

Press Enter↵ *to copy income summarisation codes...*

Mass Change Employee Incomes/Deductions

Overview

These functions allow you to make additions, changes or deletions to employee incomes and deductions. With deletions, if the employee has had activity on the specified code, the record will be deactivated, not deleted.

Both functions are similar. The Mass Change Employee Incomes is used as the example.

Menu Selection

System:Payroll 2000
Menu Level 1: Payroll Initialisation Functions
Menu Level 2: Mass Change of Employee Incomes

AND

Menu Level 2: Mass Change Employee Deductions

Screen 1 of 2

```
13/07/94  14:25:16   Mass Change Employee Income Codes    PYGMCIE   PYDMCIE

Type selections, press Enter.

Employer . . . . . . 111 +          Income Code . . . . . _____  +
Transaction Type  . . A  (A/C/D)    Replace Duplicates  . 0  (0=no, 1=yes)
Incl.Non Actv Emps. . 0 (0=no, 1=yes)  Reactivate . . . . . 0  (0=no, 1=yes)


Selection criteria    (all are optional - use "N" for negation)

Levels . . . . . . . . _  ____  ____  ____ ____  +
Job Code . . . . . . _  ____  +      Union Code . . . . . _ ____  +
Pay Type . . . . . . _  _  (H/N/S)   Pay Frequency . . . . _ _  (W/M)
Shift . . . . . . . . _  _  (1-9)    Pay Cycle . . . . . . _ ____  +
Auto Pay Group . . . _  ____  +      PY Auth Group . . . . _ _____  +




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

Key Information

- The top portion of the screen contains details of the update to be performed and the bottom portion of the screen defines the criteria for selecting the employees to process.

- Type the *Income Code* that you want to process and the relevant Transaction Type, 'A' for add, 'C' for change or 'D' for delete.

- For an add transaction, you can choose whether to replace a matching employee income code or to leave the existing code in place.

- Inactive employees can be included or excluded from the mass change.

- Reactivate should be set to '1' if you want to reactivate an income en masse.

- Selection Criteria can be entered with an 'N' in the first field of each criteria, indicating to process records that do not match the entered value.

- If no selection criteria are entered, all employees will be processed.

- Mass change will be performed interactively.

Required Fields

- Employer Code

- Income Code

- Transaction Type

- Replace Duplicates

- Incl. Non Active Emps

- Reactivate

Press Enter↵ *to continue...*

Screen 2 of 2

```
 6/10/94  12:45:52   Mass Change Employee Income Codes    PYGMCIE    PYDMCIE

Type selections, press Enter.

Employee income data  (for duplicates & changes - use "X" to exclude field)

Starting Date  . .  _  _____          Ending Date  . .  _ _____
Cycle  . . . . . .  _  ____  +          Rate/Ext % . . .  _ _____
Amount . . . . . .  _  _____        Hours Limit  . .  _ _____
Income Basis . . .  _  _                Factor . . . . .  _ _____
Matrix Code  . . .  _  ____  +          Row  . . . . . .  _ ____   +
Std. Hours . . . .  _  _____           Column . . . . .  _ ____   +
Labour Exp. Acct .  _  _____   +

        Additions          Changes        Deletions        Deactivations




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

Key Information

- For duplicates and changes, type the income field values that you want changed.

- Place an 'X' next to the field to exclude that field from the changes or duplicates.

Required Fields

- None

Press Enter↵ . *A Confirm Request window will be displayed. Type 'I' to confirm.*

Mass Change Employee Auto Pay Groups

Overview

This function allows you to change the auto pay group for a number of employees.

Menu Selection

System: Payroll 2000
Menu Level 1:   Payroll Initialisation Functions
Menu Level 2:   Mass Change Employee Auto Pay Groups

Screen 1 of 1

```
13/07/94  14:26:34      Mass Change Auto Pay Groups      PYGMCPY     PYDMCPY

Type selections, press Enter.

Employer . . . . . . . . . .  111  +
Include Non Active Employees  0  (0/1)

Selection Criteria     (all are optional - use "N" for negation)

Levels  . . . . . .  _  ____   ____   _____  ____  +
Job Code  . . . . .  _  ____  +      Union Code . . . .  _  ____  +
Pay Type  . . . . .  _  _  (H/N/S)   Pay Frequency . . .  _  __  (W/M)
Shift . . . . . . .  _  _  (1-9)     PY Auth.Group . . .  _  _____  +
Pay Cycle . . . . .  _  ____  +      Auto Pay Group . .  _  ____  +

Employee Payroll Data

New Auto Pay Group . .  ____  +

                        Changes


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

Key Information

- Non active employees can be included or excluded from the mass change.

- Selection criteria can be entered with an 'N' in the first field of each criteria, indicating to process records that do not match the entered value.

- If no selection criteria are entered, all employees will be processed.

- You must specify the *New Auto Pay Group* that all selected employees are to receive.

- Mass change will be performed interactively.

- The number of records selected to be changed will appear at the bottom of the screen after you enter the selection criteria and the *Auto Pay Group*.

Required Fields

- Employer

- Include Non Active Employees

- New Auto Pay Group

Press Enter ↵ *to perform mass change...*

Refresh Income/Deduction Summarisation Codes

Overview

These functions allow you to update employee Income/Deduction controls with the summarisation codes on the related income/deduction control records. This will ensure that the employee records and the control records are in sync.

Menu Selection

System:Payroll 2000
Menu Level 1: PY2000 Initialisation Functions
Menu Level 2: Refresh Income Summarisation Codes

AND

Menu Level 2: Refresh Deduction Summarisation Codes

Screen 1 of 1

```
13/07/94  14:28:39            Refresh Income Summ        PYGJC50    PYDJC50

Type selections, press Enter.

Employer  . . . . . . . . . . .  ___ +  (Leave blank for all)













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

Key Information

- Leave Employer blank to process for all employers.

- The refresh will be performed in batch.

Required Fields

- None

Press Enter↲ *to submit the refresh to batch...*

File Maintenance Functions

Introduction

The file maintenance functions covered in this section are used to reorganise various files within HR 2000, removing deleted records to improve overall performance of HR 2000.

These functions should be performed periodically, the frequency depending on factors such as the number of employees in your organisation, the amount of transaction activity against your employees and the amount of disk space that you have available.

The functions covered are:

- Reorganising PE 2000 Files

- Reorganising PY 2000 Files

- Reorganising Cycle Work Files
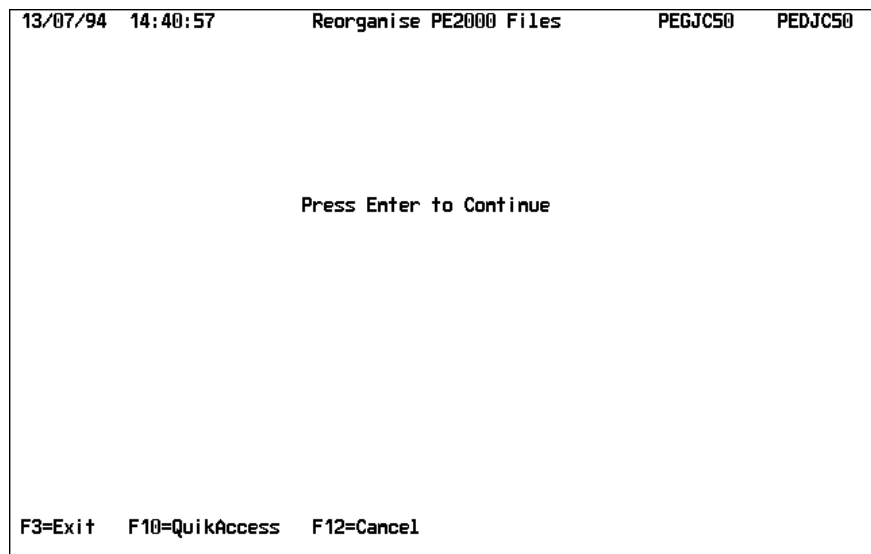
Reorganise Personnel 2000 Files

Overview

This function reorganises all personnel (PE) and Root (PR) files. It is recommended to run this on a regular basis, such as monthly, to optimise processing.

Menu Selection

System:Personnel 2000
Menu Level 1:   Personnel Supervisors Functions
Menu Level 2:   System Controls
Menu Level 3:   Reorganise PE 2000 Files

Screen 1 of 1

```
13/07/94  14:40:57          Reorganise PE2000 Files          PEGJC50    PEDJC50




                            Press Enter to Continue









F3=Exit    F10=QuikAccess   F12=Cancel
```

Key Information

- This job requires exclusive use of all personnel and root files. <u>No</u> users can be using the system while this is running.

- Before using this function you should have backed up the HR 2000 database.

- To prevent the accidental running of this job, you should change the job control so that the job is held on the job queue.

✍ Note: Because this is a long-running job which requires exclusive allocation of files, you should run the job during non-production hours, such as a weekend.

Press Enter⏎ *to submit the reorganise to batch...*

Reorganise Payroll 2000 Files

Overview

This option reorganises all payroll (PY) and root files. It is recommended to run this on a regular basis such as monthly, to optimise processing.

Menu Selection

System:Payroll 2000
Menu Level 1:   Payroll Supervisor's Function
Menu Level 2:   Reorganise PY 2000 Files

Screen 1 of 1

```
13/07/94  14:42:55          Reorganise PY2000 Files        PYGJC50    PYDJC50




No selections to make, press Enter to continue.












F3=Exit   F10=QuikAccess   F12=Cancel
```

Key Information

- This job requires exclusive use of all payroll and root files. <u>No</u> users can be using the system while this is running.

- Before using this function you should have backed up the HR2000 database.

- To prevent the accidental running of this job, you should change the job control so that the job is held on the job queue.

✎   Note: Because this is a long-running job which requires exclusive
                                     allocation of files, you should run the job during non-production hours,
                                     such as a weekend.

Reorganise Cycle Work Files

Overview

Payroll 2000 Performs most of its processing in cycle work files. Updates to master and transaction files do not occur until Post Cycles and Print Cheques.
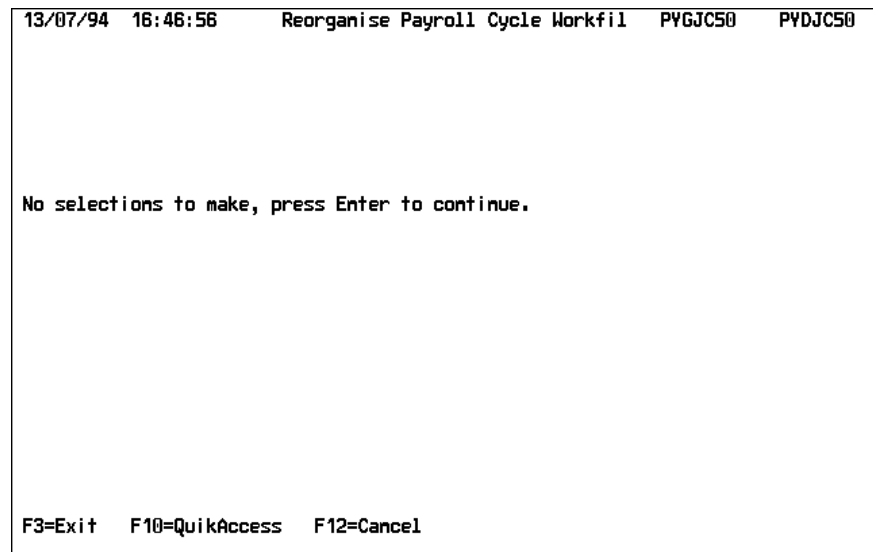
You can optimise your cycle processing time by deleting unnecessary records from your cycle work files and reorganising them. This also reduces the amount of disk space required.

You should reorganise the cycle work files on a regular basis, for example after every cycle or once a week.

Menu Selection

System:Payroll 2000
Menu Level 1: Payroll Supervisor's Functions
Menu Level 2: Reorganise Payroll Cycle Workfiles

Screen 1 of 1

```
13/07/94  16:46:56      Reorganise Payroll Cycle Workfil   PYGJC50    PYDJC50




No selections to make, press Enter to continue.












F3=Exit   F10=QuikAccess   F12=Cancel
```

Key Information

- This job requires exclusive use of the cycle workfiles. All payroll cycles must have been completed.

- To prevent the accidental running of this job, you should change the job control so that the job is held on the job queue.

Press Enter↵ *to submit the reorganise to batch...*

Purge Functions

Introduction

HR2000 provides the following functions to purge/archive records from various Payroll and Personnel files.

Payroll 2000

- Employers

  Purge Selected Employers (PY)

  Purge Selected Employers (PR)

- Detailed History

  Purge Detailed History

  Consolidate Income History

  Consolidate Deduction History

  Delete Unused Incomes/Deductions

- Tax Data

  Purge Tax Liability Data

- Accounting Data

  Purge General Ledger company

  Purge General ledger Transactions

  Purge Labour Distribution History

- Miscellaneous

  Purge Cycle History

  Purge Cheque Reconciliation Data

  Purge Daily Time

Personnel 2000

- Employers

  Purge Selected Employers (PE)

  Purge Selected Employers (PR)

- Employee Data

  Purge Non Active Employees

- Miscellaneous Data

  Purge Audit Details

  Purge Report Selections File

✍

Note: All purge functions should be run outside of normal production hours. A backup of the affected files should also be taken prior to running a purge function.

Purge Selected Employers (PY)

Overview

This function deletes all data associated with a specific employer from the payroll files. The purge runs interactively after the deletes have been completed. You can exit with or without reorganising the files.

Menu Selection

System:Payroll 2000
Menu Level 1: Payroll Initialisation Functions
Menu Level 2: Purge Selected Employers

Screen 1 of 1

```
13/07/94  16:48:41              Purge Employers            PYGDELS    PYDDELS

Type selections, press Enter.

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




           ** Employer Records Must be Manually Deleted from PY2000 **


                              C A U T I O N

        This function will purge the specified employer from all PY2000 files




F3=Exit (without reorg)   F4=Prompt   F10=QuikAccess   F12=Exit (with reorg)
```

Key Information

- This function is primarily used to delete test data.

- Employer controls must be deleted separately.

- Because PR files are needed to access the PY files, run the Purge Selected Employers (PR) function <u>after</u> running this option.

- No one should be using HR2000 when this is run.

Required Fields

- Employer

Press $\boxed{\text{F3}}$ *to exit without reorganising files...*

Press $\boxed{\text{F2}}$ *to exit with reorganising files...*

Purge Selected Employers (PE)

Overview

This function deletes all data associated with a specific employer from the personnel files. After the deletes have been completed, you can exit with or without reorganising the files.

Menu Selection

System: Personnel 2000
Menu Level 1: Personnel Initialisation Functions
Menu Level 2: Purge Test Data
Menu Level 3: Purge Selected Employers PE2000

Screen 1 of 1

```
13/07/94  16:50:42          Purge Employers          PEGDELS    PEDDELS

Type selections, press Enter.

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




             ** Employer Records Must be Manually Deleted from PE2000 **



                                C A U T I O N

        This function will purge the specified employer from all PE2000 files




F3=Exit (without reorg)    F4=Prompt    F10=QuikAccess    F12=Exit (with reorg)
```

Key Information

- This function is primarily used to delete test data.

- Employer controls must be deleted separately.

- Because PR files are needed to access the PE files, run the Purge Selected Employers (PR) function <u>after</u> running this option.

- No one should be using HR2000 when this is run.

Purge Selected Employers (PR)

Overview

This function deletes data associated with a specific employer from the root files, those files shared by personnel and payroll. This should not be run before the PE and PY purges have been completed. After the deletes have been completed, you can exit with or without reorganising the files.

Menu Selection

System: Personnel 2000
Menu Level 1: Personnel Initialisation Functions
Menu Level 2: Purge Test Data
Menu Level 3: Purge Selected Employers PR2000

OR

System: Payroll 2000
Menu Level 1: Payroll Initialisation Function
Menu Level 2: Purge Selected Employers - PR

Screen 1 of 1

```
13/07/94  16:52:04           Purge Employers          PRGDELS    PRDDELS



                     Employer . . . . .  ___  +


          ** Employer Records Must be Manually Deleted from PR2000 **



                              C A U T I O N

        This function will purge the specified employer from all PR2000 files







F3=Exit (without reorg)    F4=Prompt    F10=QuikAccess    F12=Exit (with reorg)
```

Key Information

- This function is primarily used to delete test data.
- Employer controls must be deleted separately.
- No one should be using HR2000 when this is run.

Required Fields

- Employer

Press ⌐F3⌐ *to exit without reorganising files...*

Press ⌐F1⌐⌐F2⌐ *to exit with reorganising files...*

Purge Detailed History

Overview

This function removes records from the Income Ledger, Deduction Ledger and Cheque ledger files, based on entered selection criteria. The records are added to temporary files to allow them to be saved to tape using the Save Detailed History function.

Menu Selection

System:Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Purge Detailed History

Screen 1 of 1

```
13/07/94  16:53:59        Purge Detailed History       PYGPHS    PYDPHS

Type selections, press Enter

Employer . . . . . . .  __  +       (Leave Blank for All)

Purge Through Date . .  _____     (Cheque Date)


This function will split Payroll Detail files, moving the PURGED DATE to
THREE NEW FILES (PYPILT PYPCLT PYPDLT) in your current DATA FILE LIBRARY

These files will be REMOVED FROM DISK during the SAVE PAYROLL HISTORY function

Should you choose NOT TO MAINTAIN this data on tape, instruct DATA PROCESSING
to DELETE the three files




F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F13=Submit
```

Key Information

- If you leave the *Employer* blank, all employers will be processed.

- Records will be purged up to and including the data entered.

- This function requires exclusive allocation of the Income, Deduction and Cheque Ledger files.

- Before running this function, you should backup the affected files.

Required Fields

- Purge Through Date

✍ Note: Because this is a long-running job which requires exclusive allocation of files, you should run the job during non-production hours, such as a weekend.

✍ Note: You can use the Restore Detailed History function to copy the saved detailed history data back to the PY2000 files. This function restores data to the temporary files from tape and then adds the records to the Income, Deduction and Cheque Ledgers.

Press F3 *to submit the purge to batch...*

Consolidate Income History

Overview

This function allows you to combine income history per pay cheque by specified income reporting group, into a single income record. The original income records are added to a temporary file, PYPILT, which can be saved to tape using the Save Detailed History function. There is a Trial function that allows you to see the impact of the consolidation before updating.

Menu Selection

System:Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Trial Consolidate Income History

AND

Menu Level 2: Consolidate Income History

Screen 1 of 1

```
11/08/94  12:10:56    Trial Consolidate Income History    PYGMERGE   PYDMERGE

Type selections, press Enter.


Employer . . . . . . . . . . . . . . .  ___  +
Income Reporting Group . . . . . . .  ____   +
Consolidate to Income Code . . . . .  ____   + (must begin with ##)
From Cheque Date   . . . . . . . . .  _____
Through Cheque Date  . . . . . . . .  _____    (must be prior year(s))
Process Only Cleared Cheques . . . .  _    (0=no, 1=yes)


Note: This function will only process records which have been closed to G/L.
      Any incomes beginning with an '*' will be excluded.







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

Key Information

- The *Income Reporting Group* must have been defined through the Update Employer Codes function, code type IRG. In Update

Income Reporting Groups you identify which incomes are to be consolidated.

- The income code specified in the *Consolidate to Income Code* field must begin with '##'.

- Dates entered must be from a prior year.

- Income codes that begin with '*' are excluded from the consolidation process.

- If Accumulators have been written to Income History, you can have them deleted.

- You can specify whether to process <u>only</u> cleared cheques.

Required Fields

- Income Reporting Group

- Consolidate to Income Code

- From Cheque Date

- To Cheque Date

- Process Only Cleared Cheques

- Delete Accumulates Records.

Press Enter↵ *to submit the consolidation to batch...*

Consolidate Deduction History

Overview

This function allows you to combine deduction history per pay cheque by specific deduction reporting group, into a single deduction code. The original deduction records are added to a temporary file, PYPDLT, which can be saved to tape using the Save Detailed History function. There is a Trial function that allows you to see the impact of the consolidation before updating.

Menu Selection

System: Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Trial Consolidate Deduction History

AND

Menu Level 2: Consolidate Deduction History

Screen 1 of 1

```
13/07/94  16:57:04    Trial Consolidate Deduction His    PYGMERGE   PYDMERGE

Type selections, press Enter.

Employer . . . . . . . . . . . . . . ___  +
Deduction Reporting Group  . . .  _____   +
Consolidate to Deduction Code  .  _____   + (must begin with ##)
From Cheque Date   . . . . . . .  _____
Through Cheque Date  . . . . . .  _____     (must be prior year(s))
Process Only Cleared Cheques . .  _          (0=no, 1=yes)

Note: This function will only process records which have been closed to G/L.

      Any deductions beginning with an '*' will be excluded.




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

Key Information

- The *Deduction Reporting Group* must have been defined through the Update Employer Codes function, code type DRG. In Update

Deduction Reporting Groups you identify which deductions are to be consolidated.

- The deduction code specified in the *Consolidate to Deduction Code* field must begin with '##'.

- Dates entered must be from a prior year.

- Deduction codes that begin with '*' are excluded from the consolidation process.

- If Accumulators have been written to Deduction History, you can have them deleted.

- You can specify whether to process <u>only</u> cleared cheques.

Required Fields

- Deduction Reporting Group

- Consolidate to Deduction Code

- From Cheque Date

- To Cheque Date

- Process Only Cleared Cheques

Press Enter⏎ *to submit the consolidation to batch...*

Delete Unused Incomes/Deductions

Overview

This function deletes income and/or deduction records that have no
current or prior year data and that do not contain consolidated data.
Consolidated data is identified by an income or deduction code that
begins with '##'. You can use the Print Unused Incomes & Deductions
function to see what will be deleted prior to running this function.

Menu Selection

System:Payroll 2000
Menu Level 1: Payroll Initialisation Functions
Menu Level 2: Delete Unused Income & Deductions

Screen 1 of 1

```
13/07/94  16:58:53     Delete Unused Incomes & Dedns     PYGMERGE    PYDMERGE

Type selections, press Enter.

Employer . . . . . . . . . . . . .  ___   +
Process Income Records . . . . .  0    (0=no, 1=yes)
Process Deduction Records  . . .  0    (0=no, 1=yes)

















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

Key Information

- Leave employer blank to process all employers

- You can choose to process unused incomes, deductions or both.

- Records are deleted from PYPIE, PYPIH, PYPDE and PYPDH.

Required Fields

- None

Press Enter↵ *to submit the delete to batch...*

Purge Tax Liability Data

Overview

This function removes tax liability history up to and including a specified pay date. The selected records will be deleted and the file (PYPXL) reorganised.

Menu Selection

System: Payroll 2000
Menu Level 1:   Purge Payroll History
Menu Level 2:   Purge Tax Liability Data

Screen 1 of 1

```
13/07/94  17:00:37          Purge Tax Liability Data        PYGPHS    PYDPHS

Type selections, press Enter

Employer Code  . . .  ___ +     (Leave Blank for All)
Purge Through Date . _____   (Cheque Date)
Print Purged Data? .  0  (0/1)













F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F13=Submit
```

Key Information

- Leave employer blank to process all employers.

- You must enter the Purge Through Date.

- You can optionally print a report of the records that have been purged.

Required Fields

- Purge Through Data

Press $\boxed{\text{F3}}$ *to submit the purge to batch...*

Purge General Ledger Company

Overview

This function removes records from the General Ledger Company file and Chart of Accounts file. It runs interactively and reorganises the files on completion.

Menu Selection

System: Payroll 2000
Menu Level 1: General Ledger Functions
Menu Level 2: Purge General Ledger Company

Screen 1 of 1

```
13/07/94  17:02:14           Purge G/L Company           PYGDGLS    PYDDGLS

Press Enter to remove the specified G/L Company from all PY2000 files.
Press F3 to exit without removing.

G/L Company  . . .  ___  +













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

Key Information

- This is used primarily to remove test companies and their chart of accounts.

Required Fields

- GL Company

Press Enter↵ *to submit purge to batch...*

Purge General Ledger Transactions

Overview

This function deletes records from the general ledger transactions file (PYPAC) up to and including a defined accounting month and year.

Menu Selection

System: Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Purge General Ledger Transaction

Screen 1 of 1

```
13/07/94  17:03:54    Purge General Ledger Transaction    PYGPHS    PYDPHS

Type selections, press Enter

Employer . . . . . .  ___ +     (Leave Blank for All)

Purge Through

Accounting Month . .  _0
Accounting Year  . .  ___0

Print Purged Data? .  0  (0/1)




F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F13=Submit
```

Key Information

- Leave employer blank to process all employers.

- You must enter the Accounting Month and Accounting Year.

- You should ensure that the GL interface has been run for all periods up to the entered month and year.

- You can optionally print a report of the transactions that have been purged.

Required Fields

- Accounting Month

- Accounting Year

Press F1 F3 *to submit purge to batch...*

Purge Labour Distribution History

Overview

This function removes records from the Labour Distribution file (PYPLB) up to and including the entered accounting year. The selected records are deleted and the file reorganised.

Menu Selection

System: Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Purge Labour Distribution History

Screen 1 of 1

```
13/07/94  17:05:04     Purge Labour Distribution Hist    PYGPHS    PYDPHS

Type selections, press Enter

Employer . . . . . .  ___ +     (Leave Blank for All)
Purge Through Year .   0        (Accounting Year)
Print Purged Data? .  0  (0/1)













F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F13=Submit
```

Key Information

- Leave employer blank to process all employers

- You must enter the Accounting Year (YYYY)

- You can optionally print a report of the records that have been deleted.

Required Fields

- Purge Through Year

Press $\boxed{\text{F1}}$ $\boxed{\text{F3}}$ *to submit the purge to batch...*

Purge Cycle History

Overview

This function removes records from the Cycle History file (PYPCH) up to and including the entered pay date. You should keep your cycle history data as long as you keep your detailed cheque history data. The selected records are deleted and the file reorganised.

Menu Selection

System:Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Purge Cycle History

Screen 1 of 1

```
13/07/94  17:05:57          Purge Cycle History          PYGPHS    PYDPHS

Type selections, press Enter

Employer Code  . . .  ___ +      (Leave Blank for All)
Purge Through Date .  _____   (Cheque Date)
Print Purged Data? .  0  (0/1)
```

```
F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F13=Submit
```

Key Information

- Leave employer blank to process all employers.

- You must enter the Purge Through Date.

- You can optionally print a report of the records that have been purged.

Required Fields

- Purge Through Date

Press F1 F3 *to submit purge to batch...*

Purge Cheque Reconciliation Data

Overview

This function removes records from the Cheque Reconciliation file (PYPRC) up to and including the entered pay date. Selected records will be deleted and the file reorganised.

Menu Selection

System:Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Purge Cheque Reconciliation Data

Screen 1 of 1

```
13/07/94  17:08:45     Purge Cheque Reconciliation Data     PYGPHS     PYDPHS

Type selections, press Enter

Employer Code  . . .  ___ +      (Leave Blank for All)
Purge Through Date .  _____   (Cheque Date)
Print Purged Data? .  0  (0/1)

















F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F13=Submit
```

Key Information

- Only cleared cheques where the cheque amount matches the cleared amount will be deleted.

- Leave *Employer Code* blank to process all employers.

- You must enter the *Purge Through Date*.

- You can optionally print a report of the records that have been purged.

Required Fields

- Purge Through Date

Press F1 F3 *to submit purge to batch...*

Purge Daily Time

Overview

This function removes records from the Time and Attendance Daily Time file (PYPWK) up to and including the specified calendar date. Selected records are deleted and the file reorganised. Records that match the selection criteria are purged regardless of whether they have been closed to payroll.

Menu Selection

System: Payroll 2000
Menu Level 1: Purge Payroll History
Menu Level 2: Purge Daily Time Data

Screen 1 of 1

```
13/07/94  17:10:32          Purge Daily Time Data       PYGPHS    PYDPHS

Type selections, press Enter

Employer Code  . . .  ___ +     (Leave Blank for All)
Purge Through Date .  _____   (Calendar Date)
Print Purged Data? .  0  (0/1)















F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel   F13=Submit
```

Key Information

- Leave Employer code blank to process all employers.

- You must enter the Purge Through Date.

- You can optionally print a report of the records that have been purged.

✍ Note: Prior to running this purge function, make sure that the time data has been closed to payroll and pay processed successfully for the dates selected.

Required Fields

- Purge Through Date

Press F1 F3 *to submit the purge to batch...*

Purge Non Active Employees

Overview

This function removes records for non-active employees from master files, including dependents, multiple distributions, income and deduction ledgers, pay history, and so on. Employees with the *Keep Permanently* field on their basic data record set to '1' will be excluded from the purge. The purged records from PEPMS, PRPMS, PYPMS can optionally be added to temporary files to allow them to be saved to tape. The Display Purged Employees function can be used to view employees in the temporary file.

✍

Note: You will be unable to purge non-active employees who left in the current tax year because tax year end processing may be affected.

Menu Selection

System: Personnel 2000
Menu Level 1: Personnel Supervisors Functions
Menu Level 2: Purge Non Active Employees

Screen 1 of 1

```
13/07/94 17:17:32        Purge Non Active Employees      PRGJC50    PRDJC50

Type selections, press Enter

Employer . . . . . . . . .  ___ +
Purge Through Date . . . .  _____ 0
Leaving Reason Code  . . .  _____ +  (Leave Blank for All)

List Purged Employees? . .  0      (1=Yes/0=No)
Purge Applicant Records? .  1      (1=Yes/0=No)
Save Purged Data?  . . . .  0      (1=Yes/0=No)

If 'Save Purged Data?' = Yes is specified, then Basic Data, Payroll Master,and
Personnel Master records (if applicable) for purged employees will be saved to
disk files PRPMST, PEPMST, and PYPMST. These files may be then saved to tape,
cleared, or deleted at the discretion of the user.

  NOTE: Purging records of employees who left in the current tax year may
        have serious consequences for the production of tax year end reports

                        Proceed with caution.

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

Key Information

- Type the *Employer Code* and *Purge Through Date.*

- You can selectively purge non-active employees with a specific leaving reason code.

- You can optionally print a report of the employees that have been purged.

- You can optionally purge applicant records related to each non-active employee to be purged.

- If you want the purged employees to be saved to the temporary files, Type '1' in the *Save Purged Data* field.

Required Fields

- Employer Code

- Purge Through Data

Press Enter↵ *to submit the purge to batch...*

Purge Audit Details

Overview

This function removes records from the Audit files for the dates specified. You can choose which Audit files to purge. The selected records are deleted from the selected files and the files reorganised.

Menu Selection

System:Personnel 2000
Menu Level 1:   Personnel Supervisors Functions
Menu Level 2:   System Controls
Menu Level 3:   Purge Audit Details

Screen 1 of 1

```
13/07/94  17:27:47          Purge Audit Details        PRGAUDEL   PRDAUDEL

Type selections, press Enter.

Employer  . . . . . . . . . . . .  ___ +  (Leave blank for all)
Purge From Date . . . . . . . .  _____
Purge Through Date  . . . . . .  _____
Purge Only Header Flag 1 = to .  _
Purge Only Header Flag 2 = to .  _

Audit Files to Purge

Employee Basic Data . . . . . .  _ (0/1)
Employee Payroll Master . . . .  _ (0/1)
Employee Personnel Master . . .  _ (0/1)
Employee Income Authorisations.  _ (0/1)
Employee Deduction Auth . . . .  _ (0/1)
Employee BACS Authorisation . .  _ (0/1)




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

Key Information

- Leave employer blank to process all employers.

- You must enter the date range of records to be purged.

- You can indicate that only audit records where the header flag/s equals a specified value should be purged.

- Select the Audit files that are to be purged.

Required Fields

- Purge Through Date
- File Selection

Press Enter↵ *to submit the purge to batch...*

Purge Report Selections File

Overview

Every job that is submitted within HR2000 adds a record to the Task Coupling file (PRPLD) which is used to pass details between jobs. This function removes records from the file up to and including the date specified. Selected records are deleted and the file reorganised. You should keep data in this file for a specific period of time, such as six months. You can use the records as an audit trail of jobs that were selected to run during that time.

Menu Selection

System:Personnel 2000
Menu Level 1: Personnel Supervisors Functions
Menu Level 2: User Controls
Menu Level 3: Purge Report Selection

Screen 1 of 1

```
13/07/94  17:30:18          Purge Report Selections        PEGJC50    PEDJC50

Type selections, press Enter.

Through Date . . . .       0
Select Option  . . .  _           (0 = listing only)
                                  (1 = list and purge)













F3=Exit   F10=QuikAccess   F12=Cancel
```

Key Information

- You can run this process to produce a listing only prior to deleting the records.

- You must enter the *Through Date*.

Required Fields

- Through Data

Press Enter⏎ *to submit the purge to batch...*