Human Resources

Guide to Management Functions

INFINIUM
S O F T W A R E

Publication Information

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About This Guide

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Intended Audience

The *Infinium HR (International) Guide to Management Functions* is written for those responsible for use of the supervisory management functions in Infinium Human Resources (International).

Purpose of This Guide

The purpose of this guide is to explain how to set up and use advanced features in Infinium Human Resources (International).

This guide does not teach standard human resources practices and management concepts but does enable you to use the documented Infinium Human Resources (International) features.

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 HR 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.

Conventions used in this guide

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

- Font and Wording Conventions
- 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.
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.

Convention	Description	Example
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.
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.

Convention	Description	Example
[Quick Access Code]	Quick access codes provide direct access to functions. Most quick access codes in Infinium Payroll consist of the first letter of each word of the menu option name. Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.	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 System i 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

Function Key	Name	Description
F22	Delete	Deletes selected item(s)
F24	More keys	Displays additional function keys at the bottom of the screen

Character Based vs. Graphical Interface

The sample screens in this guide may be either character-based or graphical-based. Samples of both are included below.
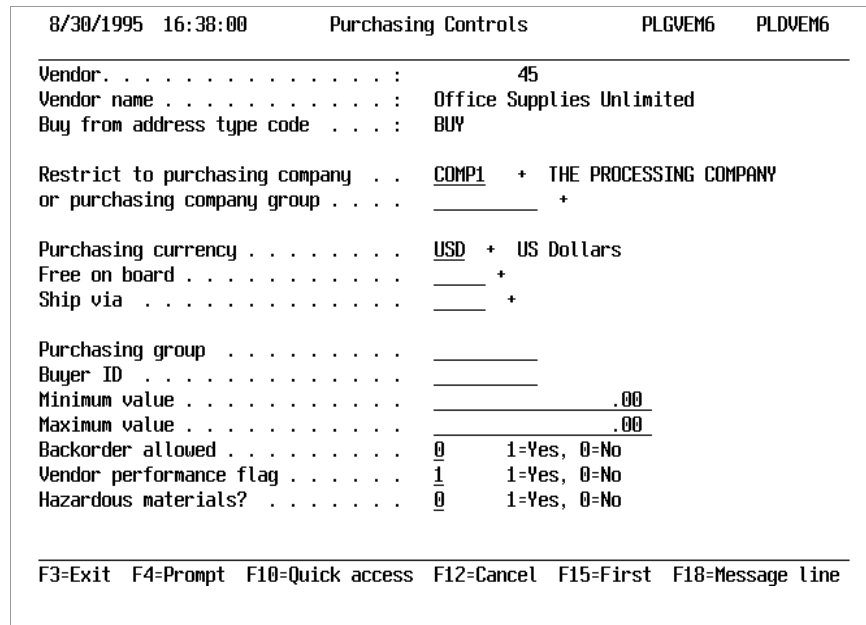
Figure 1: Sample character-based screen
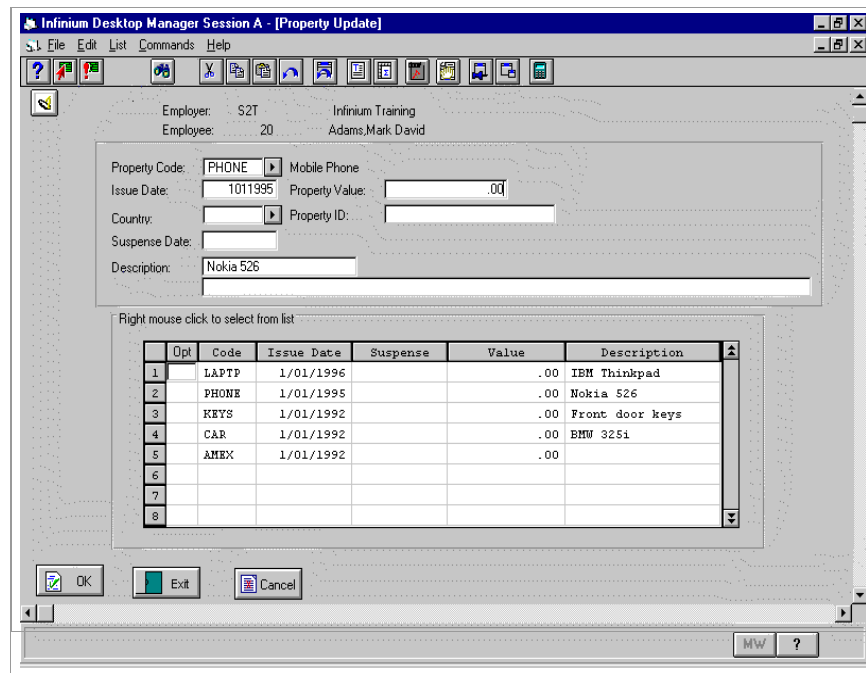
Figure 2: Sample graphical-based screen for Infinium HR suite

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.
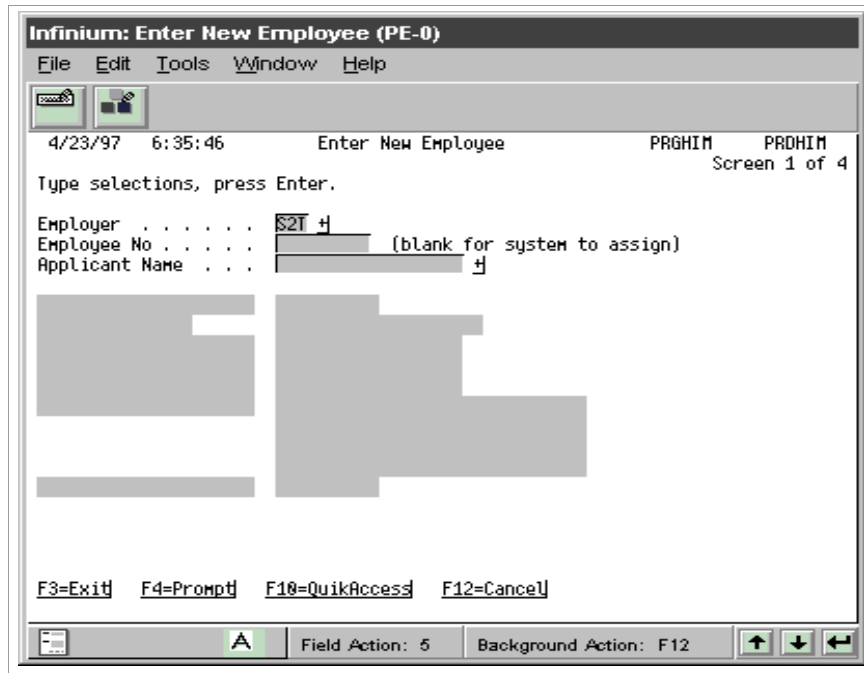
Figure 3: Enter New Employee prompt screen
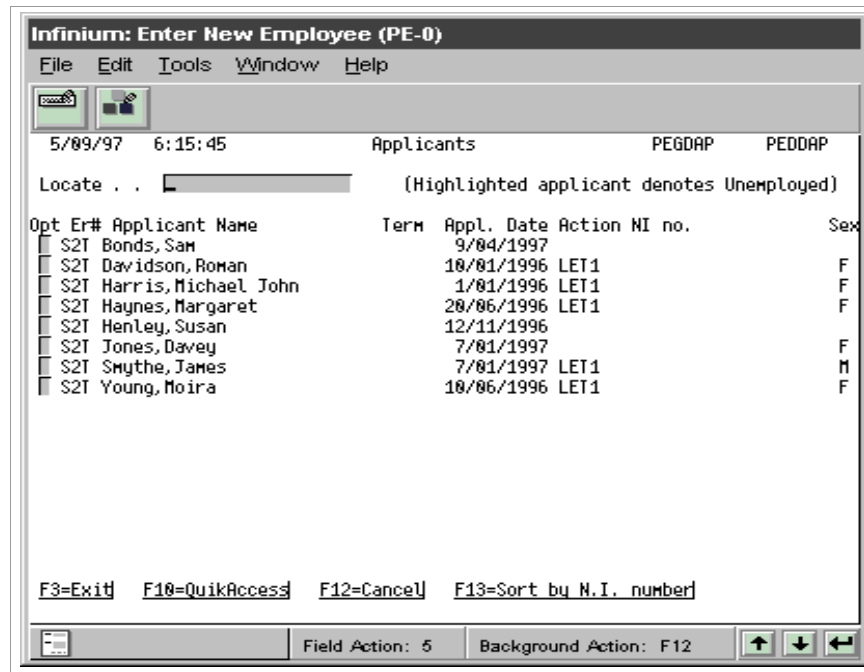
Figure 4: Applicant selection screen

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 AM
Infinium Application Manager Extended	Infinium AM/X
Infinium Query	Infinium QY
Infinium Query Extended	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 Infinium HR, refer to the following related documentation:

- *Infinium Human Resources Reports*

- *Infinium Human Resources Employer Codes Workbook*
  About Training

Infinium Software offers the Infinium HR training courses listed below at our regional training centres and on-site at your location.

- UK Tax Year End Training

- UK IMP/HR Infinium HR Implementors Training

- UK-PE1 Personnel Basics Application Training

- UK-PE2 Personnel Advanced Application Training

- UK-PY1 Infinium PY Basic Operations Application Training

- UK-PY2 Infinium PY Advanced Operations Application Training
- UK-QYHR Infinium QY for Human Resources Training
- UK-TR1 Infinium Tr Basic Application Training
- UK-TR2 Infinium TR Advanced Application Training

About Training

Course Objectives

At the conclusion of the Infinium HR Implementors course you should be able to:

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

Course Organisation

Infinium HR Implementors is a 2-day course. The first day of the course covers set up 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, hire 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 & New Employees
- Introduction
- Overview of Infinium HR
- Key Infinium HR concepts and terminology
- Position control mechanism

- Relationship with Infinium PY
- Control file maintenance (levels, pay grades, locations etc.)
- Positions and workforce levels
- New employee process

Day 2

Employee Maintenance

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

Chapter 1 Infinium Human Resources: An Overview

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 duplicate maintenance of basic employee data.

For a detailed overview of Infinium Human Resources (International), refer to Chapter 1 of the *Infinium Human Resources International Guide to Processing*.

Notes

Chapter 2 Correcting PE Action Dates in Multiple Records

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This chapter of the guide describes how to use *PE Actions Supervisor* to correct dates in multiple related personnel actions for an employee simultaneously without having to delete and reenter each action separately.

The chapter consists of the following topics:

Overview of PE Action Date Correction

Purpose

Use *PE Actions Supervisor* as a fast method of correcting the effective date in one or more related personnel transactions without having to delete and reenter the transactions and without having to use *Mass Update Personnel Actions*.

Enter New Employee does not let you update the effective date of an existing PE action, if, for example, the information was incorrectly typed. You have to delete and reenter the transaction with the correct date. You may also have to use *Mass Update Personnel Actions* to update the date dates on related fields in the employee's basic data.

If PE actions are linked, such as when you create a Position Change followed by Salary Change, and if the effective date was incorrect, the delete/reenter procedure must be repeated for each PE action. This can be time consuming and carries the risk of other correct data in the PE action such as codes and so forth being incorrectly keyed.

In *PE Actions Supervisor* for an employee and PE action code, simply enter the correct effective date and select from a list the related PE actions to be updated. The system prefills the selection field for related PE actions. For example if you select an NE action, the system automatically marks the NE, PC, SC, and PS actions for selection in the list. The system then corrects the effective date in all these PE actions and also updates the corresponding or related dates in employee basic data, such as date entered position, or date of last salary change.

The action must be the most recent action of its type for this employee, such as the most recent salary change.

Actions Available to Correct

The full range of personnel actions is available for selection:

- RE Performance Review
- SC Salary Change
- ST Status Change
- NE New Employee

- EE End Employment
- PC Personal Change
- PS Position Change
- TR Intercompany Transfer
- RM Re-employment
- WA Work Action

Summary of Process

When you have identified the combination of employee and action or actions that requires date correction, the system prompts you for the new effective date. The system also displays a list of related actions to which this date change may apply.

The list includes all the logically related actions that shared the same effective date as the corrected action and may include actions not on the initial selection list, such as AP Additional Position.

You can select each action that is also to have this new date to update the other selected actions as well. Note that this process applies only to the most recent personnel action of each type.

Example of Automated Related Updates

For example, if you correct the date in an NE (New Employee) action, you can simultaneously correct the related action dates such as a salary change, personal change, and position change if each of these is the most recent action of its type.

If there was an additional personal change action a week later, however, you cannot include correction of the original personal change action in this multi-action correction.

Updates for Related Income and Deduction Information

After you submit the date correction in *PE Actions Supervisor*, the system automatically displays the Update Employee Incomes and Update Employee Deductions pages whose information you can review and possibly correct. Process these pages as in *Update Employee Income Data* and *Update Employee Deduction Data*.

The system displays any warnings or notifications of errors that may now apply, as usual on these pages.

When You Must Use *Enter Personnel Actions* Instead

If a transaction is ineligible for correction through *PE Actions Supervisor*, you must instead follow the usual manual date correction procedure within *Enter Personnel Actions*. This entails deleting the old action and creating a new action.

Correcting PE Actions as a Supervisor

Overview

Use *PE Actions Supervisor* to correct an erroneous action date for an employee's most recent PE action and have the system automatically apply the correction to all related date values.

The system automatically displays a selection list of the logically related actions eligible for the same correction so that you can select other actions to which this new date is to be applied.

To update employee basic data, the system uses the standard update programs used by *Enter Personnel Actions*. Therefore, for Infinium Payroll users the system also displays related income and deduction information for review and correction.

Example of Use

A user specified the incorrect date of employment. Use *PE Actions Supervisor* to enter the correct date once. The system then makes all the necessary corrections in related basic data such as the date the employee entered the position and the date the employee started at the grade.

When the system lists related actions SC (salary change), PC (personal change), and PS (position change) that have the same original date, you can select all three to apply the same new date to those actions.

Path

▸ *Infinium HR*

▸ PE Supervisor's Functions

▾ PE Actions Supervisor *[PEA_SUPER]*

PE Actions Supervisor Functions Selection Page

About This Page

On the PE Actions Supervisor Functions selection page, specify the employee and the personnel action or actions that require correction.

Field Information

Employer

Specify the employee's employer.

Employee

You must specify the employee for whom the action date correction is required. When you specify the employee, the system displays the employee's current primary position and job information.

Action/Description

Specify the two-character code for the personnel action to be corrected. This must be the most recent action of this type for this employee.

Alternatively, leave blank and select one or more personnel actions.

How Do I…

Select additional related actions for the same correction	Type any character in *Opt* next to each action to be corrected to the same new date.
Continue the correction process	Press Enter to display the PE Actions Supervisor Functions date correction page.
Exit this function	Press F3.

PE Actions Supervisor Functions Date Correction Page

About This Page

On the PE Actions Supervisor Functions date correction page, you can specify the corrected date and select actions to which the new date applies.

The list of actions includes all actions for this employee that are logically related to the actions you specified on the prior page.

If the selected employee has a future action of a particular listed type pending, this page displays a warning next to the listed action.

Field Information

New Effective Date

Specify the correct date to be applied to the selection action or actions.

How Do I…

Apply the new date	Type **1** next to each action to be updated and press Enter. Confirm proceeding and process the income and deduction pages as in *Update Employee Income Data* and *Update Employee Deduction Data*. When you press F3 at the deduction page, you return to the PE Actions Supervisor Functions date correction page.
Exit to the selection page	Press F3.

Notes