Infor Infinium Self Service
Guide to Administration

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About This Guide

This section focuses on the following information:

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

Intended audience

This guide is for Infor Infinium Self Service users who are responsible for setting up and maintaining the Self Service application on the IBM i so that Self Service web application users can access and update information from Infinium HCM or Infinium IHCM.

Purpose of this guide

Use this guide as a reference at your site. This guide will not teach you about human resources, benefits administration or payroll practices. This guide will show you, however, how to use the Self Service application administrative functions to complete specific setup and maintenance tasks.

Organization of this guide

This guide is task oriented. We have grouped related tasks into parts. Each part contains overview information and step-by-step instructions to lead you through the tasks.

Conventions used in this guide

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

- Fonts and wording
- Function keys
- Promptable fields
- Self Service web application icons and actions
- Infinium applications and abbreviations

Fonts and wording

Convention	Description	Example
Italic typeface	Functions and field names The guide uses the same abbreviations as the screen.	Use the *Group Attributes Maintenance* function*.* Use the *Group* field to specify the user group for which you are maintaining the library.
Bold standard typeface	Used for notes, cautions and warnings Characters that you type Messages that are displayed	**Caution:** This function deletes the entire contents of the flexible benefits credit table. Type **1** to allow multiple plans within the same category. The following message is displayed: **Employer not found**
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 F18 to work with output.
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.

Convention	Description	Example
Exit	Exit a screen or function, usually to return to a prior selection list or menu. May require exiting multiple screens in sequence.	Press F3 to return to the main menu.
Cancel	Cancel the work at the current screen (page) or dialog box, usually to return to the prior screen (page).	Press F12 to cancel your entries.

Function keys

Infinium AM function keys and universal Self Service application function keys for the IBM i are described in the table below. All Self Service function keys are identified at the bottom of each screen.

Function Key	Name	Description
F3	Exit	Returns you to the main menu
F4	Prompt	Displays a list of values from which you can select a valid entry
F12	Cancel	Returns you to the previous screen
F24	More keys	Displays additional function keys at the bottom of the screen

Promptable fields

A look-up icon displayed next to a field indicates that you can choose your entry from a list of possible values. Click the icon, or 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, right-click and select the value.
- Type the value in the appropriate field.

Infinium applications and abbreviations

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

Application	Abbreviation
Infinium Application Manager	Infinium AM
Infinium Human Capital Management Suite	Infinium HCM
Infinium Flexible Benefits	Infinium FB
Infinium Human Resources	Infinium HR
Infinium Human Resources International for U.K. customers	Infinium IHCM
Infinium Payroll	Infinium PY
Infinium Training Administration	Infinium TR
Infor Infinium Self Service	SHCM

Related documentation

For additional information about Self Service and Infinium Human Resources, refer to the following.

- *Infinium Human Resources Guide to Controls*
- *Infinium Human Resources Guide to Processing*
- *Infinium Human Resources Guide to Setup and Processing for Benefits Administration*
- *Infinium Payroll Guide to Controls*
- *Infinium Payroll Guide to Processing*
- *Infinium Human Resources (International) Guide to Controls*
- *Infinium Human Resources (International) Guide to Processing*

Installation instructions and release notes are available on Infor Xtreme Support along with additional Infinium Human Resources documentation.

Chapter 1 Setting Up and Maintaining Self Service

<div style="text-align: right">**1**</div>

The chapter provides an overview of the Self Service Administration functions described in this guide that you use to perform the tasks required to set up and maintain the Self Service application.

The chapter consists of the following topics:

Commonly used terms

This section provides definitions of commonly used terms that apply to the setup and maintenance of the Self Service application.

Entity

Self Service defines an entity as a collective unit that encompasses all employers, user groups, and users. The Self Service entity file contains information about user passwords, tax ID masking, terminated employees, and global workflow settings.

User group

A user group is a number of Self Service application users who share identical system access authorization. You use the Self Service Administration *Security/Group Attributes Maintenance* function to set up user groups. A separate group is required for terminated employees if you want them to have access to Self Service for a set period of time after they are terminated from employment. The terminated employees group is then identified in the entity file.

Web security file

The web security file determines who can sign onto the Self Service web application and whether the user is classified as an employee or manager. You use the Self Service Administration *Security/Maintain Web Security File* function to maintain the web security file. User IDs and passwords are stored in the Self Service web security file along with approver and manager authority settings. Terminated employees can be authorized to sign in to the Self Service web application for a predetermined time period. A separate user group is required, and you must identify the terminated employees group in the entity file.

The program that loads the users in the web security sub-file is processed one page at a time to improve performance when customers have large databases.

Manager authority file

The manager authority file determines how to display employee lists for managers in each user group, for example, by supervisor, by reports-to position, by levels, by tax ID, or by a custom file. The manager authority file also determines the manager's authorization to employee changes and employee information. You use the Self Service Administration *Security/Maintain Web Security File* function to maintain the manager authority file.

It is highly recommended that managers be set up to enable *Select By* methods to improve performance on the Self Service web. The time it takes to generate a list of employees is dependent on the number of records requested to be retrieved. Limiting the set to include only those employees for whom you need to take action improves the response time in generating the list.

Level security

Level security is the set of your company's organizational levels from which you authorize a manager to select employees to work with in the Self Service application. If you set up level security within the Infinium HCM application, Self Service uses those settings if you identify a IBM i profile in the manager web security file. Otherwise, the programs use the level security defined in Self Service. If no restrictions are found in the level security file, the manager has access to all employers and all levels as defined in Infinium HCM.

It is highly recommended that managers be restricted to reporting levels to improve performance on the Self Service web. The time it takes to generate a list of employees is dependent on the number of records requested to be retrieved. Limiting the set to include only those employees for whom you need to take action improves the response time in generating the list.

Position security

Position security is the set of position records that you authorize a manager to select from and work with in the Self Service application. It is highly recommended that managers be restricted to positions to improve performance on the Self Service web. By setting position security, you restrict the manager to a set of positions that the manager can access, and you improve performance if you have a large quantity of positions defined in Infinium HCM.

Web page settings

You use the Self Service Administration *Web Page and Payroll Settings*/*Web Page Settings* function to determine, by user group, the fields to display on Self Service web pages and whether the fields are read only or able to be changed by the user. Depending on the selected document type, you have the ability to set whether a field is available for update, read only, not displayed to the user, or is mandatory for your organization.

Time sheet

Time sheets are online user input pages that the Self Service application can display on the web *My Time Sheets* page. You use the Self Service Administration *Web Page and Payroll Settings*/*Payroll Options* functions to determine the fields displayed on the time sheet and the week-ending day for time entry, by user group. You have the ability to set if the user should use the weekly time sheet entry page or the weekly time clock entry page based on the user's web security file settings.

Timekeeper

A timekeeper is an employee whom you authorize to enter work hours for other employees. By default, managers have the ability to enter time sheets for other employees.

Enrollment group

An enrollment group is a number of Self Service application users who share benefit plan access authorization for a given plan year. You use the Self Service Administration *Benefit Settings/Open Enrollment Settings* function to set up enrollment groups. The enrollment groups include employees from one or more benefit groups that you use in Infinium HCM Benefits Administration to maintain employee benefit enrollment records.

Open enrollment

Open enrollment refers to the Self Service user's benefit plan election procedure available to the user during a designated calendar period. You use the Self Service Administration *Benefit Settings/Open Enrollment Settings* function to define the open enrollment period and benefit plans available to the user.

Benefit lifestyle change

Benefit lifestyle change refers to the Self Service user's benefit plan change procedure available outside the open enrollment period when a user experiences a lifestyle change such as marriage, birth, divorce, or death of a spouse or dependent. You use the Self Service Administration *Benefit Settings/Open Enrollment Settings* function to define the benefit plans available to employees with lifestyle changes.

Menu

Menu refers to the Self Service web options that a user can select to access information. You use the Self Service Administration *Menu Structure* functions for each user group to set up and maintain settings that determine the web options that managers and employees can access, to create new menu options and to add and maintain HTML pages to be displayed and URLs to be launched.

Workflow

Workflow is the process that the Self Service application uses to route Self Service web documents and transactions from one user to another for notification or approval. You use the Self Service Administration *Workflow* functions to set up workflow approvers and workflow document routing definitions. An originator of a workflow process is the user who initiates the transaction.

Document tracking

Document Tracking is used to view the workflow document history information. You can select all document types or multi-select document types by a single employee or for all employees. You can select to view document history as follows:

- Select one document type for a specific employee

- Select one document type for all employees

- Select many document types for a specific employee

- Select many document types for all employees

As an employee, you can view document history only if you are the originator or you are part of the workflow approval process. As a manager, you can view all history if your profile is authorized to see all history. You have the ability to view documents that are still in the workflow process or completed documents for which you were a participant in the workflow rules. If you leave the employee field blank, then the results page includes all employees that the user is associated with in the workflow process.

If you see differences in the time stamp within the document history, this may be due to the date/time setting on your IBM i versus your Websphere server.

Sorting

You have the ability to sort the columns of any list that uses the Infor Grid control. Click the column header to change the sort of the data in ascending or descending order.

Help text

Help text refers to information that is available on each Self Service web page to explain how the user works with the menu option. You use the Self Service Administration *Help Text* functions to add, remove, or edit header and footer help text and to maintain page attribute settings for each user group.

You have the option of displaying help text on the page when the page is displayed or hiding the help text upon initial entry until the user selects the Help Text (?) question mark on the toolbar. At that point, a separate window is opened containing standard Infor help text or user customized help text.

Copy function

A copy function is a Self Service administration function that you can use to expedite the setup process for such options as security, web page settings, time sheet configuration, benefit plans, web menu access, and workflow processing document controls.

Depending on the copy function, you can copy administrative setup information from one employer to another, from one user group to another, or from one user to another.

You use the Self Service Administration *Copy Functions* to copy administrative setup information.

Purge function

A purge function is a Self Service administration function that you can use to delete records in the files that accumulate large numbers of records over time.

You use the Self Service Administration *Purge and Reorganize Files* functions to purge records from files.

Languages

The web user interface of Self Service is currently available in these languages:

- English
- Spanish

The IBM i interface of Self Service is currently available in English.

The employee can change the default language any time after signing into Self Service for the first time. An employee can use the *Personal/Sign-on Preferences* menu option to change the default language. The change goes into effect the next time the employee signs into Self Service, or the administrator can set the user's language setting with the web security file.

Passwords

Employees can change their passwords any time after signing into Self Service for the first time. The user can click a link on the Self Service sign-in page to request an e-mail with a password reminder; however, the user's record in the web security file must contain the user's e-mail address.

Your Self Service administrator can use the Self Service Administration *Security Menu/Maintain Entity Settings* function to require users to change passwords when they first sign into Self Service or to change passwords at regular time intervals. You can also define these password restrictions:

- Minimum number of characters

- Case sensitivity

- Periodic password change

- Maximum number of sign-in attempts

Self Service blocks user access to the application for these conditions:

- When a user exceeds the defined maximum number of sign-in attempts

- When a user attempts to access Self Service by bypassing the standard sign-in page

- When a user attempts to access information without the proper authorization

Your Self Service administrator can use the Self Service Administration *Security /Maintain Entity Settings* and *Maintain Password Reset Question* functions to configure and activate functionality that allows users to define answers to security questions. This functionality allows users to reset their own passwords. However, if a user fails to answer the questions correctly, your administrator can configure Self Service to lock the user out of the application after a specified number of failed attempts.

Alternatively, you can use the Self Service Administration *Security Menu/Maintain Web Security File* function to reactivate a user's access to the application to reset the password to a default password if necessary.

You can use this password functionality only if you are using the web security file in Self Service to authenticate the users.

Note: Certain special characters, such as / \ : * ? " < > | & ! ^ [ ], are not supported by all browsers. We strongly recommend that you do not use any special characters in the user ID or password fields. Otherwise, errors will occur and the user may not be able to sign in to Self Service.

Internet access

If you implement Self Service outside your firewall, then your users can access it via the Internet. Infor strongly recommends that you implement Self Service on your Intranet because this is how it is designed to be implemented. Infor highly recommends that all content be placed behind a firewall so that security does not become an issue.

If you set up Self Service for users to access the application from an Internet browser, we strongly recommend that you set a restriction on a user's number of sign-in attempts. If a user attempts to access unauthorized Self Service functionality or information, Self Service can lock the user out of the application on the first attempt, but only if you set the *Max # Invalid Sign In Attempts* field in the Self Service Administration *Security Menu/Maintain Entity Settings* function to a value other than zero.

Caution: Self Service does not support the use of the browser Back button, regardless of what browser is used. Unpredictable results can occur. Self Service has its own back browser processing on web pages that bring the user back to the previously accessed page, when updating the database is not an issue.

WARNING! The document examples that we provide on our standard menu are there to illustrate the URL structure. We suggest that only non-secured documents use this option. You are responsible for the security of your data and any documents that you add to any group menu.

E-mail servers

Self Service can interact with any e-mail SMTP-compliant mail address. Customers most commonly use Self Service with Microsoft Outlook or Microsoft Exchange.

Single Sign-on

Infinium Self Service supports single sign-on (SSO) authentication with active directory using the WAFFLE (Windows Authentication Functional Framework Lite Edition) or the SAML (Security Assertion Markup Language) authentication. WAFFLE setup does not require users to have IBM i profiles set up.

If you are planning on using an intranet-based implementation, the WaffleAuthenticator should be configured for Self Service. If you are planning on using an Internet-based implementation, the SAMLAuthenticator should be configured for Self Service.

WARNING! The document examples that we provide on our standard menu are there to illustrate the URL structure. We suggest that only non-secured documents use this option. You are responsible for the security of your data and any documents that you add to any group menu.

In either case, contact Infor Infinium Consulting Services (ICS) for detailed information on the single sign-on implementations.

In addition, Self Service supplies the authentication support to enable customers to implement their own single sign-on mechanism. We created an application programming interface to allow customization of the authentication process. A customized authenticator can control such functions as:

- The display of the sign-in page

- User verification

- Authorization for a manager to enter a password for a new employee

- The requirement for a user to enter a password for user verification

- Sign-out capability

An AUTHENTICATOR property in the SHCMBundle.properties file controls the class that performs the user authentication. By default, Self Service uses the standard authentication against the AHPWEBA database table.

We recommend that you consult the Infor Infinium Consulting Services (ICS) for assistance.

Administration setup and maintenance tasks

When you set up the Self Service application for the first time, you must perform the tasks described in this section as they apply to your organizational requirements. You can repeat these tasks periodically to provide Self Service access to new users and to perform routine maintenance. Some tasks are not required for setup but are required to transfer user data from the Self Service web application to Infinium HCM or Infinium PY on your IBM i server.

When you install an upgrade version of the Self Service application, you do not need to complete these initial setup tasks. The Self Service application stores your setup data by user group in the database library.

Security

You must complete the tasks below to set up and maintain Self Service user security. Refer to the "Security" chapter in this guide for detailed information about these tasks.

1 Defining entity settings

You use the *Security/Maintain Entity Settings* function to perform this task, which affects user sign-in requirements such as language selection and passwords.

2 Creating user groups and defining attributes for each user group

You use the *Security/Group Attributes Maintenance* function to perform this task.

You can also use the *Copy Functions/Copy Group Attributes* function to copy attributes from one user group to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

3 Mass adding employees to the web security file

You use the *Security/Mass Add Employee Web Security* function to perform this task. When you mass add employees to Self Service, you configure the rules for defining user sign-in IDs and passwords. If you require users to change passwords, any changes must conform to the rules that you define.

4 Setting up manager authority

You use the *Security/Maintain Web Security File* function to perform this task.

You can also use the *Copy Functions/Copy Manager Authority* function to copy manager authority information from one manager to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

Optionally, you can complete the tasks below to set up and maintain additional Self Service user security.

5 Setting up manager level security, if applicable

You use the *Security/Maintain Level Security* function to perform this task. You can use the *List User Level Security File* function to generate a report of managers' level security information.

You can also use the *Copy Functions/Copy Level Security* function to copy level security information from one user to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

6 Setting up position security, if applicable

You use the *Security/Maintain Position Security* function to perform this task.

You can also use the *Copy Functions/Copy Position Security* function to copy position security information from one user to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

7 Setting up approver authority, if applicable

You use the *Security/Maintain Web Security File* function to perform this task.

You can also use the *Copy Functions/Copy Approver Authority* function to copy approver authority information from one user to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

Benefits

For these tasks, you use the Self Service Administration functions to access benefit plans that your benefits administrator sets up and maintains in Infinium HCM for a given plan year.

Setup requirements

For employees to use the *Benefit Changes* menu option, you must set up Infinium HCM Benefits Administration data to use plan year processing. The Benefit Changes page in the Self Service web application uses the KCYEAR field from the PRPKC table to determine the plan year.

For life insurance and disability benefit plans (Infinium HCM benefit plan types 01, 02, 05, 06, and 09), your benefits administrator must set the value for the benefit plan *Copy Cov. Amt* field to **1** and calculate a new coverage amount so that Self Service displays the recalculated coverage amount for the new plan year.

You must complete all Self Service Administration setup steps for *Benefits Settings* functions before Self Service can display the benefit enrollment forms on the web.

If you set the value in the *Allow benefit changes*, ALLOWBC, field in the AHPWEBA file to **0** (no), Self Service uses the display from RequestLifestyleChange.jsp. This display provides the employee a free form text field where the employee can explain the type of life style change associated with the requested benefit change. Upon workflow approval, Self Service changes the value to **1** (yes) and provides the employee with a second page that lists the plans that the employee can change.

If you set the value in the *Allow benefit changes*, ALLOWBC, field in the AHPWEBA file to **1** (yes), Self Service does not display the page with the free form text field for the life style change. Self Service uses the display from BenefitEnrollment.jsp. This file displays the page that lists the plans that the employee can change.

You use *the Reset Benefit Change Flag To* field in the *Group Attributes Maintenance* function to specify how you want Self Service to reset the *Allow Ben Changes* value in the *Maintain Web Security File* function after an employee submits a benefits change because of a lifestyle change.

Benefit settings

You must complete the tasks below to set up and maintain benefit plans for use with Self Service. Consult your benefits administrator well in advance of an open enrollment period to coordinate setting up the benefits plans for the Self Service application. Also, refer to the "Benefit Settings" chapter in this guide for specific set up details.

1 Setting up open enrollments

You use the *Benefit Settings/Open Enrollment Settings* function to perform several tasks associated with setting up open enrollments:

- Defining enrollment groups and open enrollment periods

- Assigning benefit plans to enrollment groups

- Setting up benefit plan access controls

- Activating and assigning benefit plans to dependent and beneficiary code values

- Activating maintenance reason codes for benefit changes

You can use the *List Benefit Settings* function to generate a report of the existing benefit settings.

You can use the *List Benefit Plan Settings* function to generate a report of the existing benefit plan settings.

You can also use the *Copy Functions/Copy Benefit Plan Settings* function to copy benefit plan settings from one benefit plan enrollment group to another.

2 Defining benefit plan box descriptions

You have the ability to identify the text that the employee sees on the web that identifies the types of plans that are contained in categories that you set up here. You use the *Benefit Settings/Maintain Box Descriptions* function to perform this task.

You can use the *List Box Descriptions* function to generate a report of the existing benefit plan box descriptions.

3 Selecting benefit plans for the box descriptions

You have the ability to determine which plans are displayed in the box description categories when the employee accesses the benefit options on the web. You use the *Benefit Settings/Box Selections* function to perform this task.

You can use the *List Box Selections* function to generate a report of the plan selections for the box descriptions.

Optionally, you can complete the tasks below to set up and maintain additional Self Service benefit settings.

4 Setting up e-mail notifications to:

- Remind open enrollment non-respondents to submit enrollment forms

- Inform open enrollment non-respondents that they are enrolled in default benefit plans

- Announce an upcoming open enrollment period for all employees or a group of employees

- Confirm benefit enrollments resulting from open enrollments

You use the *Workflow/Benefit Enrollment Settings* function to perform this task.

5 Sending open enrollment e-mail notifications

You use the *Workflow/Open Enrollment Notifications* function to perform this task.

6 After the close of the open enrollment period, transferring approved open enrollments from the Self Service web application to Infinium HCM *Benefits Administration* on your IBM i server

You use the *Benefit Settings/Upload Open Enrollments* function to perform this task.

After you transfer the approved open enrollments to Infinium HCM, your benefits administrator must run the Infinium HCM *Mass Update Enrollments* function to update the enrollments for the new benefit plan year.

7 For maintenance only, transferring approved benefit changes from the Self Service web application to Infinium HCM *Benefits Administration* on your IBM i server

You use the *Benefit Settings/Upload Benefit Changes* function to perform this task.

You can use the *List Benefit Uploads* function to generate a report of the benefit enrollment changes to be uploaded to Infinium HCM.

After you transfer the approved benefit changes to Infinium HCM, your benefits administrator must run the Infinium HCM *Mass Update Enrollments* function to update the enrollments for the current benefit plan year.

Beneficiaries

Object	Type	Description
AHPDP	PF	Holds beneficiary information until the workflow process is complete
AHPDPH	PF	Dependent history file

The *Beneficiaries* web menu option updates the data in the Infinium HCM PEPDP file.

Self Service does not perform an edit for the beneficiary's tax ID to confirm that the number is unique. A beneficiary can be a person or an organization, and the tax ID formats can differ.

Dependents

Object	Type	Description
AHPDP	PF	Holds dependent information until the workflow process is complete
AHPDPH	PF	Dependent history file

The *Dependents* web menu option updates the data in the Infinium HCM PEPDP file.

Self Service performs an edit for the dependent's tax ID to confirm that the number is unique. Self Service performs the edit only if the employer's country code is one of the following country code values:

- **USA** – United States
- **CAN** – Canada

The SHCM Benefits Plan Attributes program enables the user to set variable coverage on dependent-only life insurance plans.

If a user changes the coverage amount of one dependent, the program makes the coverage amount the same for all dependents or beneficiaries associated with the plan.

The Confirmation page of Open Enrollment/Benefit Changes displays the coverage amount and cost as calculated in Infinium HCM, when more than one dependent is selected.

Open Enrollment

Object	Type	Description
AHPBE	PF	Holds employee benefit enrollments during the open enrollment period
AHPBM	PF	Holds employee beneficiary and dependent enrollments during the open enrollment period

If you use user exits to process enrollments to Infinium HCM, Self Service calls the user exit programs listed below to run the user exits.

Object	Type	Description
AHGCOV	RPGLE	Calls coverage user exit for Infinium plans where BPFLEX equals **0**
AHGCOVF	RPGLE	Calls coverage user exit for Infinium plans where BPFLEX equals **1**
AHGRATE	RPGLE	Calls rate user exit for Infinium plans where BPFLEX equals **0**
AHGRATEF	RPGLE	Calls rate user exit for Infinium plans where BPFLEX equals **1**
AHGPREM	RPGLE	Calls premium user exit for Infinium plans where BPFLEX equals **0**
AHGPREMF	RPGLE	Calls premium user exit for Infinium plans where BPFLEX equals **1**

Setup requirements

For employees to use the *Open Enrollment* menu option, you must set up Infinium HCM Benefits Administration data to use plan year processing. The Open Enrollment page in the Self Service web application uses the *Plan Year* field, OEYEAR, in the Self Service Administration *Open Enrollment Settings* function to determine the plan year. For more information on setting up plan year processing, refer to the "Using Benefit Plan Year Processing" part in the *Infinium HCM Guide to Setup and Processing for Benefits Administration.*

In addition, each user must have a valid benefit group defined on the user's basic data record, and the benefit group must match the eligible benefit groups defined for the enrollment group to gain access to the open enrollment option.

You must complete all Self Service Administration setup steps for *Benefits Settings* functions before Self Service can display the benefit enrollment pages on the web.

If you do not make the plans available on the web, the employee receives a message to contact the system administrator.

Access restricted outside the open enrollment period

If an employee accesses the Self Service web application outside of an open enrollment period, the *Open Enrollment* menu option does not display in the *Benefits* menu list.

No changes option

The Self Service Administration *Benefits Settings/Open Enrollment Settings* function allows you to set a flag if you do not want to show the no changes option. When an employee accesses the *Benefits/Open Enrollment* menu option on the web, Self Service displays a *No changes to benefit selections from current year* check box on the Benefit Enrollment Form page. The employee can check this box to re-enroll in benefit plans from the previous plan year.

Self Service, however, removes the check box from the Benefit Enrollment page when one or more of these conditions occur:

- If the group attributes have been set up not to display the check box

- If a plan requires a preferred care provider (PCP) for the new plan year and the preferred care provider is not selected for the employee or the dependents for the current plan year

- If a dependent enrolled for a current benefit plan does not exist in the dependent table

- If a beneficiary is enrolled in a plan that requires dependents only

- If dependent children are no longer within the plan-specified age ranges for the new plan year

- If the number of dependents no longer conforms to the maximum or minimum number of dependents allowed for the plan for the new plan year

- If no primary beneficiaries are specified for a life insurance plan

- If the percentages for all primary beneficiaries for a life insurance plan do not total 100%

- If the percentages for all contingent beneficiaries for a life insurance plan do not total 100%

- If savings plan percentages exceed plan limits

- If savings plan amounts exceed plan limits

Non-respondents

You must complete the tasks below to enroll open enrollment non-respondents in default benefit plans.

Non-respondents are those employees who have not taken action to enroll in benefit plans by using the *Open Enrollment* web menu option.

1 Selecting default benefit plans for non-respondents

You must first identify the benefit plans that the employee is automatically enrolled into if the employee does not actively submit an open enrollment request via the web. The default plans established in Self Service override the plans in the employee benefit group. You use the *Benefit Settings/Non-Respondents/Maintain Default Benefit Plans* function to perform this task.

2   Identifying non-respondents

You use the *Benefit Settings/Non-Respondents/List Non-Respondents* function to perform this task.

3   Enrolling non-respondents in default benefit plans

The default plans established in Self Service override the plans in the employee benefit group. You use the *Benefit Settings/Non-Respondents/Enroll Non-Respondents* function to perform this task.

Flexible benefits

For these tasks, you use the Self Service Administration functions to access flexible benefit plans that your benefits administrator sets up and maintains in Infinium FB for a given plan year. Your benefits administrator must be using the Infinium FB functions and set up a default flexible benefits year before users can use the Self Service web *Flexible Benefits* menu option.

You must complete the tasks below to set up and maintain flexible benefit plans for use with Self Service.

1   Mass adding employees to the flexible benefits credit table

You use the *Benefit Settings/Flexible Benefits/Mass Add EE to Flex Credit Table* function to perform this task.

2   Setting up the flexible benefits credit table

You use the *Benefit Settings/Flexible Benefits/Flex Credit Table Maintenance* function to perform this task.

3   After you close the open enrollment period, canceling the flexible benefits enrollments for the current plan year

You use the *Benefit Settings/Flexible Benefits/Cancel Current Year Enrollments* function to perform this task.

4   Clearing all information from the flexible benefits credit table

You use the *Benefit Settings/Flexible Benefits/Clear Flex Credit Table* function to perform this task.

You can use the *Benefit Settings/Flexible Benefits/List Flex Credit Table* function to generate a report of all information from the flexible benefits credit table before you clear the information.

Payroll information

You complete the tasks below to set up and maintain payroll information for use with Self Service. Refer to the "Payroll Settings" chapter in this guide for detailed information about these tasks.

Time sheets

1 Configuring time sheets for each user group

You use the *Web Page and Payroll Settings/Time Sheet Options/Time Sheet Configuration* function to perform this task.

You can also use the *Copy Functions/Copy Time Sheet Configuration* function to copy time sheet configuration settings from one employer to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

2 For maintenance only, transferring approved time sheet data from the Self Service web application to Infinium Payroll

You use the *Web Page and Payroll Settings/Payroll Options/Close Time To Infinium PY* function to perform this task.

Timekeepers

3 Configuring controls for timekeepers who enter time for other employees

You use the *Web Page and Payroll Settings/Time Sheet Options/Maintain Timekeeper Controls* function to perform this task.

You can also use the *Copy Functions/Copy Timekeeper Controls* function to copy timekeeper configuration settings to additional timekeepers. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

Project codes

4 Configuring project codes for use with time entry

You use the *Web Page and Payroll Settings/Time Sheet Options/Maintain Project Codes* function to perform this task.

You can also use the *Copy Functions/Copy Project Codes* function to copy project codes from one user group to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

Pay history

5 If applicable for regular maintenance after each posted payroll period, loading payroll information from Infinium PY on the IBM i to the Self Service Web application

You use the *Web Page and Payroll Settings/Payroll Options/Load Current Year Payroll Info* function to perform this task. This task is applicable only if you set the *Payroll History Method* value to **1** in the *Group Attributes Maintenance* function.

Direct deposits

6 Mapping direct deposit deductions to Infinium PY

You use the *Web Page and Payroll Settings/Payroll Options/Map Direct Deposit Deductions* function to perform this task.

Then for maintenance, you use the *Upload Direct Deposit Changes* function to upload the employees' direct deposit changes.

Tax changes

7 Uploading tax changes to Infinium PY, for maintenance only if you set up the *Security/Group Attributes Maintenance* function not to automate the transfer of tax information

You use the *Web Page and Payroll Settings/Payroll Options/Upload Tax Changes* function to perform this task.

Menu structure

Setting up the Self Service web menu option structures

You use the *Menu Structure*/*Menu Maintenance* function to perform this task. You can use the *List Menu Options* function to generate a report of the existing menu option settings. Refer to the "Menu Structure" chapter in this guide for detailed information about these tasks.

You can also use the *Copy Functions/Copy Menu Structure* function to copy menu structure settings from one user group to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

Workflow

You complete the tasks below to set up and maintain workflow rules for use with Self Service. Refer to the "Workflow Implementation" chapter in this guide for detailed information about these tasks.

1 Setting up global workflow user routing profiles for users performing specific workflow roles

   You use the *Workflow/Global Workflow Users* function to perform this task.

   You can use the *List Workflow Users* function to generate a report of the existing workflow user routing profiles.

2 Setting up workflow time-out/error settings for all approvers defined for the Self Service workflow process and scheduling to run a review of documents whose scheduled approvers do not respond within the required time limit

   You use the *Workflow/Workflow Time-out/Error Settings* function to perform this task.

3 Setting up workflow rules for document or transaction types

   You use the *Workflow/Document Routing Maintenance* function to perform this task.

   You can use the *List Document Routing File* function to generate a report of the existing document routing rules.

   You can also use the *Copy Functions/Copy Document Routing* function to copy workflow document definitions from one document type to another. Refer to the "Copy Functions" chapter in this guide for detailed information about this task.

4 Setting up alternate approvers for one or more workflow document types

   You use the *Workflow/Alternate Approvers* function to perform this task.

You can use the *List Alternate Approvers* function to generate a report of the alternate approvers.

5 Reassigning workflow documents that are pending approval from the original designated approver to a new approver

You use the *Workflow/Reassign Documents* function to perform this task.

You can use the *List Workflow Docs in Progress* function to generate a report to identify documents pending approval beyond a specific date or time period.

6 Reassigning or rejecting workflow documents that have encountered an error in the workflow process

You use the *Workflow/Workflow in Error* function to perform this task.

Help text

You complete the tasks below to customize Self Service web page help text and to set up and maintain web page attributes by user group. Refer to the "Help Text" chapter in this guide for detailed information about these tasks.

1 Customizing Self Service web help text displayed in the page header

You use the *Help Text*/*Page Header Maintenance* function to perform this task.

2 Customizing Self Service web help text displayed in the page footer

You use the *Help Text*/*Page Footer Maintenance* function to perform this task.

3 Customizing Self Service web page attributes

You use the *Help Text*/*Page Attributes Maintenance* function to perform this task.

Purging files

To ensure optimal system performance, you can purge records from selected files that accumulate large numbers of records. Refer to the "Purge Functions" chapter in this guide for detailed information about purging files.

Infinium HCM IBM i prerequisite setup tasks

The information that users can access through the Self Service application is dependent on how your human resources, benefits, and payroll administrators set up and maintain data in Infinium HCM or Infinium IHCM. You should consult the appropriate representatives from these business disciplines to ensure that the appropriate data is available before you begin setting up the Self Service application.

Refer to the appropriate Infinium HCM or Infinium IHCM documentation for setup tasks associated with the Self Service web functionality below. See the "Related documentation" section in the "About This Guide" chapter of this guide.

HCM employer

For Self Service to display web pages properly, you must define the *Country* field on the HCM and Payroll Employer Controls file. Self Service uses the values in the COCTRY and COCTR2 fields to determine country-specific pages to be displayed to the users. If the country field is not defined, unpredictable results occur.

Employee lists

You can use employee positions and levels as criteria for displaying employee lists within the Self Service application. You can also use levels, positions, and locations for criteria for defining workflow rules. Consult your human resources administrator to confirm that this information is available in your Infinium HCM database before you begin configuring the Self Service application.

Employee Information

This is a view-only menu option. No files are updated. This menu option uses these Infinium HCM files:

- Employee Root Master file, PRPMS

- Positions Master file, PEPOG

- Employee Supervisor file, PRPSP

- Employee Payroll Master file, PYPMS

- Employee Personnel Master file, PEPMS

- Employee Education file, PEPED

- Personnel Licenses file, PEPLI

- Employee Automobile Data file, PEPAW

- Personnel Property file, PEPPP

- Codes Master file, PRPCD

Gender selection

Effective with the release of Infor Infinium SHCM 11.5.4, a manager or an employee can select values other than **M** or **F** in the sex/gender fields if the values have been defined initially in HCM. This affects these SHCM menu options:

- *Employee > Benefits > My Dependents*

- *Manager > New Employee*

- *Manager > Rehire Employee*

- *Employee > Personal > Personal Information*

- *Manager > Employee Information > Personal*

The sex/gender field in Infinium SHCM is now a code-driven field. JSP programs and the properties file to retrieve the gender values and descriptions from the HCM Employer Codes file, PRPCD, for code type GND.

Time off

For users to access the Self Service web *Manager/Employee Time Off* and *Personal/Time Off Request* menu options, your human resources administrator must set up absence codes and accrual category names.

To use the exception calendar feature to calculate non-work days, your human resources administrator must set up:

- Exception calendars in the SHCM *Maintain Exception Calendars* function within the *Web Pages and Payroll Settings* menu option.

- Calendars in the Infinium HCM *Update Holidays/Non-workdays* function within the *Update Calendar Data* menu option within the *Personnel Calendar Operations* main menu option.

- Calendar code values with the CAL code type in the Infinium HCM *Update Employer Codes* function within the *Update Master Files* menu option within the *Master Files* main menu option.

- Absence code values with the PAB code type in the Infinium HCM *Update Employer Codes* function within the *Update Master Files* menu option within the *Master Files* main menu option.

- You must also set up the *Update Absence Mapping* table in Infinium HCM in the *Update Calendar Data* function within the *Personnel Calendar Operations* menu option to enable the user to request time off in Self Service.

Consult your human resources administrator to confirm that this information is available in your Infinium HCM database before you begin configuring the Self Service application.

Annual Calendar

This is a view-only menu option. No files are updated. This menu option displays data from the Infinium HCM PEPHU and PEPAT files in a calendar format.

Self Service updates the calendar file with paid-time-off request information if you set the value of the *Update Employee Calendar* field to **1** (yes) in the Self Service administration *Group Attributes Maintenance* function.

Monthly Calendar

This menu option displays data from the Infinium HCM PEPHU and PEPAT files in a calendar format. The monthly calendar displays pending and approved paid time-off requests. Users have the ability to cancel a paid time-off request from the monthly calendar if the request is pending approval. After the request is approved, the user cannot update the record. The user must submit a reversal time-off request to remove the entry from the calendar.

Self Service updates the calendar file with paid-time-off request information if you set the value of the *Update Employee Calendar* field to **1** (yes) in the Self Service administration *Group Attributes Maintenance* function.

Performance review information

Before you implement Self Service for performance review management, consider the following setup prerequisites:

- Your human resources administrator must use the Infinium HCM *Update Employer Codes* function to create a ***MNGR** value for the Competency View, CVW, code type so that Infinium HCM can recognize the Self Service users designated as managers in the Self Service *Maintain Web Security File* function to display performance review scheduling information.

- Depending on whether your human resources administrator sets up Infinium HCM to use competencies, Self Service displays the related information on the performance review transaction form. If your human resources administrator is not using competencies, Self Service removes the fields from the form.

Consult your human resources administrator before you begin configuring the Self Service application to confirm the available data from your Infinium HCM database.

State and locality tax deduction controls

This is a US only setup requirement. For Infinium HCM users only, before a manager can use the Self Service web *Manager/New Employee* menu option to hire an employee, the Infinium PY administrator must set up *S and *L tax deduction codes for the required states and localities. The Self Service application creates a deduction control record for a new employee and bases the deduction control record on the payroll state and locality that the manager specifies during the *New Employee* process.

State tax claiming statuses

This is a US only setup requirement. For Infinium HCM users only, before a manager can use the Self Service web *Manager/New Employee* menu option to hire an employee, the Infinium PY administrator must confirm that any special state requirements for claiming statuses are available in Infinium PY. The Infinium PY administrator can use the *Update State Claiming Status* function within the *Tax Operations/Tax Table Functions/Update Tax Tables* menu option to review available claiming statuses and set up any newly required claiming statuses for each state.

T4 Information

This is a view-only menu option for Canadian users. No files are updated. This menu option accesses information from the Infinium PY T4 work file, PYPT4.

WARNING! Before the start of each calendar year, you must deactivate the *View T4 Information* field in the Self Service Administration Console *Group Attributes Maintenance* function to prevent users from viewing T4 information for the most recent prior year until your payroll department is ready to issue the information.

W-2 Information

This is a view-only menu option for US users. No files are updated. This menu option accesses information from the Infinium PY W-2 work files listed in the table below.

File	Description
PYPW2F	Federal W-2 data
PYPW2M	Miscellaneous W-2 data for Box 12
PYPW2O	Other W-2 data for Box 14
PYPW2ST	State W-2 data
PYPW2L	Locality data

WARNING! Before the start of each calendar year, you must deactivate the *View W-2 Information* field in the Self Service Administration Console *Group Attributes Maintenance* function to prevent users from viewing W-2 information for the most recent prior year until your payroll department is ready to issue the information.

W-4 Information

An enhancement for new W-4 2020 form changes was implemented in Infor Infinium HCM 11.1.13. As a result, SHCM also added new W-4 2020 form fields in Infor Infinium HCM 11.1.15.

New W-4 Form?

Note: This field is displayed only if you select the *FWT deduction:

Indicate if the employee submitted a new W-4 form for 2020 or later. Valid values are:

0   No. The employee has not submitted a new W-4 form for 2020 or later.

1   Yes. The employee submitted a new W-4 form for 2020 or later.

The *Fed. Exemptions* field on the employee's payroll master record is not used in the federal tax withholding calculation if you type **1** in this field.

If you indicate the employee submitted a new W-4 form for 2020 or later, you can also fill in the fields below:

Multiple Jobs?

Indicate if the employee checked the *Multiple Jobs* check box on the W-4 form.

Valid values are:

0   No. The employee did not check the *Multiple Jobs* check box on the W-4 form.

1   Yes. The employee did check the *Multiple Jobs* check box on the W-4 form.

If you type **1** in this field, the employee is taxed at a higher rate using the higher rate schedule on the USA Federal Tax Table.

Head of Household

Indicate if the employee claimed Head of Household on the W-4 form.

Valid values are:

0   No. The employee did not claim Head of Household.

1   Yes. The employee did claim Head of Household.

If you type **1** in this field, the Head of Household tax table is used to calculate the employee's federal tax deduction.

Dependent Tax Credits

Enter the amount the employee entered in the Dependent Credits section of the W-4 form, if any. The annualized federal income tax is reduced by this amount after the tax is calculated.

Other Income

Enter the amount the employee entered in the Other Income section of the W-4 form, if any. This amount is added to the annualized taxable income in the federal income tax withholding calculation.

Deductions

Enter the amount the employee entered in the Deductions section of the W-4 form, if any. The annualized taxable income is reduced by this amount in the federal income tax withholding calculation.

New fields are added to the web pages master file, AHPDCFG: Screen configurable fields for the New W-4 2020 form changes.

If you want these fields to be configurable, you must add them to the AHPSCFG: Screen fields configuration (Group) file.

This can be done in two ways:

- To update all document types within a selected group, press the F23=Restore Defaults function key on the Web Page Settings group page.

  a   Select *Web Pages and Payroll Settings > Web Page Settings*.

  b   Select a group and press Enter.

  c   Press F23=Restore Defaults; and confirm the submission to update all document types for the selected group.

- To update only the Tax Changes document type, use these SQL statements:

Dependent Tax Credits

INSERT INTO AHPSCFG (FGGRP, FGDOCT, FGLBL, FGFLD, FGVISF, FGUPDF, FGSEQ, FGREQ) VALUES('Tax_GRP', 'AH-TAX', 'MSGID_DCF0305_SSMSGT', 'W4DTCRD','U', 'Y', 8, 'Y').

Other Income

INSERT INTO AHPSCFG (FGGRP, FGDOCT, FGLBL, FGFLD, FGVISF, FGUPDF, FGSEQ, FGREQ) VALUES('Tax_GRP', 'AH-TAX', 'MSGID_DCF0306_SSMSGT', 'W4OINC', 'U', 'Y', 9, 'Y').

Deductions.

INSERT INTO AHPSCFG (FGGRP, FGDOCT, FGLBL, FGFLD, FGVISF, FGUPDF, FGSEQ, FGREQ) VALUES('Tax_GRP', 'AH-TAX', 'MSGID_DCF0307_SSMSGT', 'W4DEDCT','U', 'Y',10, 'Y').

New W4

INSERT INTO AHPSCFG (FGGRP, FGDOCT, FGLBL, FGFLD, FGVISF, FGUPDF, FGSEQ, FGREQ) VALUES('Tax_GRP', 'AH-TAX', 'MSGID_DCF0308_SSMSGT', 'W4FLGS1','U', 'Y',11, 'Y').

Multiple Jobs Flag

INSERT INTO AHPSCFG (FGGRP, FGDOCT, FGLBL, FGFLD, FGVISF, FGUPDF, FGSEQ, FGREQ) VALUES('Tax_GRP', 'AH-TAX', 'MSGID_DCF0309_SSMSGT', 'W4FLGS2','U', 'Y',12, 'Y').

Head Of Household Flag

INSERT INTO AHPSCFG (FGGRP, FGDOCT, FGLBL, FGFLD, FGVISF, FGUPDF, FGSEQ, FGREQ) VALUES('Tax_GRP', 'AH-TAX', 'MSGID_DCF0310_SSMSGT', 'W4FLGS3','U', 'Y',13, 'Y').

Note: Replace *Tax_GRP* with the group name used by the customer. The customer can use a sequence number greater than 9 if the Maintain Web Page Settings page already has more field descriptions.

Applicant Tracking

If you use the applicant tracking feature in Infinium HCM, Self Service enters available applicant data from the fields in the table below from the Infinium HCM Applicant Tracking file, PEPAP, into the appropriate fields for the new employee.

Field label	Field name
First name	APFNM
Last name	APLNM
Date of birth	APDOB8
Middle initial	APMNM
Tax ID	APSS
Gender	APSEX
Address line 1	APSTR1
City/Town	APCTY1
State/Province	APSTA1

Field label	Field name
Postal code	APZIP1
Ethnic ID	APETH
Marital status	APMART
Telephone	APTL1
County	APCNTY
Country	APCTR1

In addition, Self Service retrieves the information in the table below from the Applicant Tracking file and transfers the associated values to the specified files in Infinium HCM.

Infinium HCM destination	Field label	Field name
Employee Basic Data, PRPMS	*Hire source*	PRHIRE

Infinium HCM destination	Field label	Field name
Employee Personnel, PEPMS	*Height*	PEHT
	Weight	PEWT
	Restrictions	PEWKRE
	Ex-felon	PEEXFL
	Handicap code	PEHDC
	Relocation	PERELO
	Marital status	PEMART
	Dependents	PEDEP
	Citizen country	PECCTZ
	Visa country	PEVIC
	Alien number	PEAREG
	Visa type	PEVITY
	Visa number	PEVISA
	Place of birth	PEPOB
	Veterans code	PEMIL
	Vet 100 category	PELVL
	Military branch	PEMILB
	Discharge date	PEMDD8
	Military occupation	PEMOS
	Discharge type	PEMDIS
	Previous name	PEPNM

Infinium HCM destination	Field label	Field name
Employee Education, PEPED	*Year*	EDGRAD
	School	EDCRS
	Degree	EDDDEG
	Subject	EDSUBJ
	Major	EDDMAJ
	Minor	EDDMIN
	Rank	EDRANK
	GPA	EDGAVG
	Skill	EDSKIL
	Task	EDTSPR
	Date started	EDCBG8
	Date completed	EDCEG8
Employee OJT (on-the-job training), PEPOJ	*Skill code*	OJSKIL
	Task	OJTSPR
	Start date	OJSTR8
	Skill acquired	OJACQU
	Completion	OJEND8
	Date skill acquired	OJSKA8
	Last used	OJLUS8
	Skill years	OJYEAR
	Source	OJCOMM

Employee Training

You must install Infinium TR if you plan to make this menu option available to Self Service users.

Course Catalog

Object	Type	Description
AHPCE	PF	Holds employee training course enrollments
AHPCR	PF	Holds employee training requests
AHPCEH	PF	Holds history of employee training enrollments
AHPCRH	PF	Holds history of employee training requests

My Training

Object	Type	Description
AHPCE	PF	Holds employee training course enrollments
AHPCR	PF	Holds employee training requests
AHPCEH	PF	Holds history of employee training enrollments
AHPCRH	PF	Holds history of employee training requests

Miscellaneous objects used by Self Service

Object	Type	Description
AMGCDATE	RPGLE	Self Service date routine calculates the HYF, 8-digit format and edited format for all dates
AHPDATE	PF	DS for date program AMGCDATE
AHPELCST	PF	Employee list custom file used to create a list of employees that a manager is authorized to see; this file is loaded by a custom user program

Scheduled batch jobs

After you set up the Self Service application, you should set up a schedule for running the batch jobs listed in this section. Some of these batch jobs are available from the Self Service Administration menu. Others are accessible from the Infinium HCM menu.

Self Service administration

- *Security/Refresh EE Name in Web Security*

  Update employee name changes in the web security file.

- *Web Page and Payroll Settings/Payroll Options/Close Time To Infinium PY*

  Close time sheet data entered on the web to the Infinium PY time and attendance file on the IBM i.

- *Web Page and Payroll Settings/Payroll Options/Load Current Year Payroll Info*

  Post payroll cycle information to the web so that employees can access their most recent pay history. This scheduled batch job is applicable only if you set the *Payroll History Method* value to **1** in the *Group Attributes Maintenance* function.

- *Web Page and Payroll Settings/Payroll Options/Upload Tax Changes*

  Upload payroll tax changes that employees request from Self Service to the Infinium PY employee deduction records, PYPDE which Infinium PY uses to calculate and generate employee paychecks. This scheduled batch job is applicable only if you set the *Auto Update Tax Changes* value to **0** (no) in the *Group Attributes Maintenance* function.

- *Web Page and Payroll Settings/Payroll Options/Upload Direct Deposit Changes*

  Upload direct deposit payroll deduction changes that employees request from Self Service to the Infinium PY employee direct deposit deduction records, PYPDE and PYPDD, which Infinium PY uses to calculate and generate employee paychecks. This scheduled batch job is applicable only if you set the *Auto Update Direct Deposits* value to **0** (no) in the *Group Attributes Maintenance* function.

- *Benefit Settings/Upload Open Enrollments*

    After the close of an open enrollment, transfer to Infinium HCM on the IBM i all benefit enrollments that employees submit during the open enrollment period.

    You must run this function only if the value in the *Automatically Upd Open Enroll* field in the *Group Attributes Maintenance* function is **0** (no).

- *Benefit Settings/Upload Benefit Changes*

    Transfer to Infinium HCM on the IBM i, all benefit enrollment changes that employees submit because of lifestyle changes.

    You must run this function only if the value in the *Automatically Upd Benefit Chg* field in the *Group Attributes Maintenance* function is **0** (no).

- *Benefit Settings/Cancel Current Year Enrollments*

    At the end of the flexible benefit year, cancel the current year enrollments before you begin the next enrollment year.

Infinium HCM

- *Employee Data/Mass Update Employee Data/Mass Update PE Actions*

    Process employee personnel transactions submitted from the web and sent to the transaction file as unprocessed.

    When a manager uses the Self Service web *Manager/Employee Changes* menu option to submit employee changes, Self Service submits the changes as personnel transactions to Infinium HCM on the IBM i. These transactions remain pending in Infinium HCM until you run the *Mass Update PE Actions* function.

- *Benefits Administration/Mass Update Benefit Data/Mass Update Enrollments*

    Process employee benefit plan enrollments submitted from the web and sent to the transaction file as unprocessed.

Chapter 2 Security

2

The Self Service functions discussed in this chapter are located within the *Security* menu option on the Self Service Administration main menu.

The chapter consists of the following topics:

Maintaining entity settings

You use the *Maintain Entity Settings* function to maintain settings, such as user sign-on requirements, password settings, tax ID masking, terminated employee processing and global workflow server settings that affect all users of the Self Service application.

To maintain entity settings, complete these steps.

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *Security.*

4 Select *Maintain Entity Settings* [MES] to display the Entity Settings screen.

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

Password Change Frequency

Specify the maximum number of days that users can use a Self Service password before you require the users to change the passwords.

You can enter up to **999** days. If you leave the field blank, then password frequency is not enabled.

Change Preference 1st Sign-On

Specify yes to require users to change their passwords or default language preference when they sign on to Self Service for the first time. Otherwise, specify no.

Use Password Rule Processing

Specify yes to enable additional password processing rules when the password is added for a new user or an existing user updates the password in SHCM. Otherwise, specify no to use the standard minimum length password validation processing.

The password must contain three of the following four elements:

- A minimum of one uppercase letter A-Z
- A minimum of one lowercase letter a-z

- A minimum of one number 0-9

- A minimum of one special character: + < = > & * " ' ( ) , _ - . / : ; ?

Minimum Password Length

Specify the minimum number of characters that a Self Service user can use for a password. The range is from **1** to **10**.

Default Language Code

Specify the value that represents the default language to display when you add Self Service users to the Self Service web security file. Users can change the default language by using the Self Service web *Sign-on Preferences* menu option. Available languages are English and Spanish.

Max # Invalid Sign in Attempts

Type a value to indicate the maximum number of sign-in attempts before Self Service prevents the user from continuing to try to sign into the application. Self Service validates the sign-in attempts against the user's current password in the Employee Web Security file or against the LDAP password if you use LDAP for Self Service password authentication.

If you type **0**, Self Service allows users an unlimited number of sign-in attempts.

WARNING! If you set up Self Service for users to access the application from an Internet browser, we strongly recommend that you set a restriction on the number of sign-in attempts. If a user attempts to access unauthorized Self Service functionality or information, Self Service prevents the user from accessing the application on the first attempt only if you type a value other than **0** in the *Max # Invalid Sign In Attempts* field. If you type **0** in this field, Self Service does not prevent Internet users from accessing the application if they attempt to bypass the standard sign-in procedure or if they attempt to access unauthorized information.

After Self Service locks a user out of the system, you can reactivate the user by accessing the user record within the *Maintain Web Security File* function and pressing F23, or selecting the **Reset** action on the web, to reset the value in the *Invalid Sign In Attempts* field to **0**.

You can also reactivate the user from the user list within the *Maintain Web Security File* function by typing **9**, or selecting **Reset** on the web, in the *Opt* column next to the user record and pressing Enter.

If you specify yes in the *Reset Password Enabled* field, the user can reset a disabled password by answering a specified number of security questions. You also use the *Number of Security Questions* and *Max Number of Invalid*

Answers fields to set up this functionality, and you use the *Maintain Password Reset Question* function to define and maintain the security questions.

Allow Mixed Case Passwords

Specify yes to allow users to type a combination of uppercase and lowercase characters in the passwords they use to sign onto Self Service. Self Service then recognizes case sensitivity when users attempt to sign onto the application.

Specify no to require Self Service to accept all password entries as uppercase characters. Self Service then ignores case sensitivity when users attempt to sign into the application.

For example, when you specify yes in the *Allow Mixed Case Passwords* field and a user enters **AbCdEf** as a password, Self Service stores the password as **AbCdEf** in the user's web security file. The user must enter **AbCdEf** to sign onto Self Service. When you specify no in the *Allow Mixed Case Passwords* field and a user enters **AbCdEf** as a password, Self Service stores the password as **ABCDEF** in the user's web security file. The user can enter **abcdef**, **AbCdEf**, **ABCDEF**, or any other uppercase and lowercase combination of these characters to sign onto Self Service.

Reset Password Enabled

Specify yes to activate functionality that allows a user to reset a password that is disabled when the user reaches the maximum number of invalid sign-in attempts.

To deny user access to this functionality, specify no. A Self Service administrator must then reset any disabled passwords by using the *Maintain Web Security File* function.

When you activate the reset password functionality, you must use the *Maintain Password Reset Question* function to define security questions that a user must answer correctly to reset a deactivated password.

You cannot use the reset password functionality if you configure Self Service to use LDAP authentication to validate user IDs and passwords.

Number of Security Questions

Type a value from **1** to **99** to indicate the number of security questions that a Self Service user must answer correctly to retrieve a forgotten password, set a new password, or reset a disabled password.

You enter a value for the number of *non-required* security questions in the *Number of Security Questions* field. If you mark all security questions as

required in the *Maintain Password Reset Question* function, then you enter a value of **0** in the *Number of Security Questions* field.

The user must define answers to all of the questions displayed in the Self Service web *Personal/Sign-on Preferences* menu option to use the reset password functionality.

You use the *Maintain Password Reset Question* function to define the security questions. Refer to the "Maintaining password reset questions" section in this chapter for more information.

Max Number of Invalid Answers

Type a value to indicate the maximum number of invalid attempts that a user can make to answer the password reset questions during the sign-in process before Self Service prevents the user from continuing to try to sign into the application.

If you require users to answer multiple security questions to reset a password, Self Service increments the invalid answers number by one for each attempt, regardless of the number of incorrect answers for each attempt.

After Self Service locks a user out of the system, you can use the *Maintain Web Security File* function to reactivate the user.

Sensitive Date Access Controls

Tax ID Access

Specify a value to indicate what portion, if any, of the tax ID number to conceal from display when a user accesses a Self Service page that contains the user's tax ID.

Valid values are:

LASTFOUR	Show only the last four characters; mask all other characters.
FIRSTFOUR	Show only the first four characters; mask all other characters.
SHOWALL	Show all characters.
MASKALL	Mask all characters.

FANDLFOUR   Show the first four and last four characters; mask all others.

To override this value for individual Self Service users, use the *Tax ID Access* field in *the Maintain Web Security File* function.

Bank Account Access

Specify a value to indicate what portion, if any, of the bank account number to conceal from display when a user accesses a Self Service page that contains the user's bank account number.

Valid values are:

LASTFOUR   Show only the last four characters; mask all other characters.

FIRSTFOUR   Show only the first four characters; mask all other characters.

SHOWALL   Show all characters.

MASKALL   Mask all characters.

FANDLFOUR   Show the first four and last four characters; mask all others.

To override this value for individual Self Service users, use the *Bank Account Access* field in *the Maintain Web Security File* function.

Terminated Employees Access Controls

Termination Security Group

Specify the SHCM group to be used as the security group to control the access of terminated employees to a limited number of SHCM self-service functions.

The sign-on program has been changed to enable terminated employees to have access to Self Service if you have set up a termination security group and attached the group to the Entity Controls. If the Entity Controls does not have a terminated employee's security group assigned to it, then the terminated employee does not have access to Self Service.

If the Entity Controls has a terminated employees security group assigned to it, then during the termination transaction in Self Service, the program moves

the employee to that terminated security group. If the terminated security group field is blank on the Entity Controls, then the terminated employee remains in the current group and does not have access to Self Service.

Refer to the *Maintaining User Group Attributes* for additional details.

Activation Period

Specify the maximum number of days after the date of termination that a terminated employee in the termination group can have access to the permitted SHCM Self Service functions.

This enables you to set the amount of time that terminated employees can have access to the Self Service application. This field is required if you enter a termination security group.

6   Press Enter to continue to the next page.

7   Use the information below to complete the fields on the screen.

Mail Server Name

Type the name of the mail server that you plan to use to send Self Service e-mail notifications. Confirm the name with your Self Service system administrator.

SHCM Server Name

Type the name of the server on which the Self Service application resides. Confirm the name with your Self Service system administrator.

SHCM Server Port

Type the name of the server port that you are using for the Self Service application. Confirm the name with your Self Service system administrator.

Workflow E-mail URL

Type the URL to use for the return path of the e-mail sender in the heading of the e-mail if your e-mail service provides the option to include this information.

The workflow email URL comes from WORKFLOWEMAILURL in the SHCMBundle.properties file. If that value is blank or missing, then the URL usually comes from the request, by calling getRequestURL() on the request object.

The "/ahess/ess0.jsp?startPage=/ahess/Messaging.jsp" piece is hard-coded in WorkflowBean.java (in the send() method). This is also the place where

the rest of the message text is composed. Note that there are two ways the message can be formatted: HTML and non-HTML. That determination is made by the SENDHTMLEMAIL setting in SHCMBundle.properties. The default is false.

8 Press F3 to save your information and return to the main menu.

Maintaining user group attributes

A user group is an administrative unit that controls what a user or employee can perform within a Self Service session. Typically, you group users by job function. For example, a small company may have three groups: managers, supervisors, and employees. A large company may have more groups divided into geographical regions, for example, northeast managers, southeast managers, and so on. You can create as many user groups as you need for your organization.

If you set up Self Service so that users can access multiple languages, you may want to factor the users' primary languages as a variable for defining your user groups and assigning users to the groups.

A user can be a member of only one user group. You can, however, transfer a user from one group to another.

When you create a user group, you also specify a library list for the user group. The Self Service application uses the specified library list to find custom user exits. You must specify the library list in the order in which you want Self Service to search for custom user exits.

You use the *Group Attributes Maintenance* function to create user groups and define attributes for each user group.

To create a user group, complete these steps.

1   From the Self Service main menu select *Security.*

2   Select *Group Attributes Maintenance* [GAM] to display the screen. On the *Group Attributes Maintenance* screen you can do the following:

- Create a user group

  To create a user group, press F6 or click Create from Actions on the web to display a new screen.

- Select a user group whose attributes you want to change

  To select a user group, type **2** in the *Opt* field next to the user group whose attributes you want to change. Then, press Enter to display the update screen.

- Delete a user group and all of the settings for the user group

To delete a user group, type **4** in the *Opt* field next to the user group you want to delete. Then, press Enter.

3 Use the information below to complete the fields on the screens.

Salary Range Override

Type a value to indicate whether a manager can continue processing salary change transactions when the salary amount exceeds salary range limits. Valid values are:

0 Do not override. The user must change the salary amount to remain within salary range limits.

1 Override with a warning. The system displays a message to inform the user that the salary amount exceeds salary range limits but allows the user to continue processing the transaction.

2 Override with no warning. The system allows the user to continue processing the transaction without any warning.

Automatically Upd PE Actions

Specify yes to process an Infinium HR personnel action transaction automatically when a Self Service *Employee Change* transaction completes the predefined workflow process. If you do not define a workflow process for the transaction, Infinium HR generates the personnel action transaction when the manager submits the transaction from Self Service.

If you specify yes here, Infinium HR processes the transaction upon completion of the Self Service workflow process. Your Infinium HR administrator does not need to run the *Mass Update PE Actions* function to process the transaction. If a manager creates a future-dated transaction from Self Service and the transaction completes the workflow process before the effective date of the transaction, your Infinium HR administrator must run the *Mass Update PE Actions* function to process the transaction.

Specify no to store all Self Service *Employee Change* transactions in the personnel actions transaction file, PEPTR. Your Infinium HR administrator must run the *Mass Update PE Actions* function to process the transactions.

Automatically Upd Open Enroll

For Infinium HCM users, specify yes to transfer an open enrollment to Infinium HR automatically when a Self Service *Open Enrollment* request completes the predefined workflow process. If you do not define a workflow process for open enrollment, Self Service transfers the open enrollment to

Infinium HR when the employee submits the open enrollment from Self Service.

If you specify yes here, Self Service transfers the open enrollment to Infinium HR upon completion of the Self Service workflow process. You do not need to run the *Upload Open Enrollments* function to transfer the enrollments to Infinium HR.

Specify no to store all Self Service open enrollments in a temporary file. You must run the *Upload Open Enrollments* function to transfer the enrollments to Infinium HR.

Automatically Upd Benefit Chg

For Infinium HCM users, specify yes to transfer a benefit change to Infinium HR automatically when a Self Service *Benefit Change* request completes the predefined workflow process. If you do not define a workflow process for benefit changes, Self Service transfers the benefit change to Infinium HR when the employee submits the benefit change from Self Service.

If you specify yes here, Self Service transfers the benefit change to Infinium HR upon completion of the Self Service workflow process. You do not need to run the *Upload Benefit Changes* function to transfer the benefit changes to Infinium HR. If an employee creates a future-dated benefit change from Self Service and the benefit change completes the workflow process before the effective date of the change, Self Service processes the benefit change on the effective date.

Specify no to store all Self Service benefit changes in a temporary file. You must run the *Upload Benefit Changes* function to transfer the benefit changes to Infinium HR.

Reset Benefit Change Flag To

Specify how you want Self Service to reset the *Allow Ben Changes* value in the *Maintain Web Security File* function after an employee submits a benefits change because of a lifestyle change.

1   Yes. Always reset the *Allow Ben Changes* value to **1** (yes). This enables the employee to submit benefit change requests without authorization.

0   No. Allow the *Allow Ben Changes* value to remain as **0** (no). This requires that the employee request authorization to submit a benefit change request.

Allow Benefit Changes

Define the default value to be copied to the employee web security file record. Specify yes to authorize the employee to use the Self Service application to update benefit plan elections to accommodate lifestyle changes that may occur outside an open enrollment period. Otherwise, specify no. The value defined on the group becomes the default value used for the employee web security file record when new users are added.

Use Multiple Positions

For Infinium HCM users only, specify yes to authorize managers to the *Multiple Positions* menu option on the web. Otherwise, specify no.

Request New Position

Specify yes to authorize managers to the ability to request new positions to be filled using the positions requisitions feature. This value can be overridden at the manager security record. Otherwise, specify no.

Refer to the *Maintaining Web Security File/Maintaining Manager Authority* chapter in this document for additional details for securing the use of Position Requisitions in the Self Service web.

Request Existing Position

Specify yes to authorize managers to the ability to request existing positions to be filled using the positions requisitions feature. This value can be overridden at the manager security record. Otherwise, specify no.

Refer to the *Maintaining Web Security File/Maintaining Manager Authority* chapter in this document for additional details for securing the use of Position Requisitions in the Self Service web.

Can Create Alt. Approver

Specify yes to authorize users whom you define as approvers in the workflow process to set up alternate approvers from Self Service on the web. Otherwise, specify no. Use the *Maintain Web Security File* function to override this value for individual users.

Eligible Alternate Approver

Specify yes to authorize users to be eligible as alternate approvers for the original approvers who are setting up alternate approvers from Self Service on the web. Otherwise, specify no. Use the *Maintain Web Security File* function to override this value for individual users.

Allow To Reassign

Specify yes to authorize users whom you define as approvers in the workflow process to reassign documents to other approvers from Self Service on the web. Otherwise, specify no. Use the *Maintain Web Security File* function to override this value for individual users.

Default Status Codes for Termination

Specify the default status code for termination to set a common default termination code for all employees belonging to this group.

If the *Default Status Codes for Termination* field is blank, the employee's current status is used as the default value in the status field on the Termination transaction.

If you want the field to be protected within the Termination transaction after the default value is set, you can update the *Web Pages Settings* for the Termination-Status document type to be either read only or non-display.

Use the Infinium HCM *Update Employer Codes* function and code type STS to set up status codes.

Terminated Employees Group

Enter 1 for Yes if this group is used to enable terminated employees to have access to certain Self Service web menu options. Enter 0 for No if this group is not valid for terminated employees. Once this group is entered, you must identify the group on the Entity Controls in order for the employees to have access to Self Service.

You must create a security group specific to terminated employees. The Security Group Maintenance program adds the designated menu options to the termination security group. You can remove any of the menu options from the termination security group that you do not want terminated employees to access in addition to adding links to documents and other websites through menu maintenance.

The following menu options are automatically added to the designated termination group:

- Address
- Sign-on Preferences to change password
- Pay History
- Prior Year Pay
- T-4 Information for Canadian employees

- W-2 Information

- W-4 Form

- Benefit Changes

- My Benefits

- My Benefit Statement

- My Beneficiaries

- My Dependents

- Help

- Sign Out

Note: if you change an existing group to be a terminated employees group, then the maintenance program removes the menu options that are not allowed for terminated employees. If you change an existing terminated employees group to a regular group by removing the value from the field, you must manually add your menu options back to your group using the *Menu Maintenance* option.

4 Press Enter to display the next screen.

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

Payroll History Method

Type a value to specify the method for retrieving an employee's payroll history. Valid values are:

0   Self Service retrieves summarized payroll history directly from the Infinium PY cycle work files (PYPCZ/PYPIZ/ PYPDZ) that can be cleared after every payroll cycle or on a periodic basis so the employees see only the current year pay history contained in the files. Self Service does not display on-demand checks with this method.

1   Self Service uses the check summary file created by the *Load Current Year Payroll Info* function on the Payroll Settings Menu page each time a user requests to access check information. Self Service displays on-demand checks with this method.

                 Refer to the "Loading Current Year Payroll Information" section in the "Payroll Settings Menu" chapter in this guide for detailed information.

2   Self Service retrieves detailed payroll history directly from Infinium PY including on-demand check information. Use this method to display year-to-date totals on the Self Service web *Payroll/Payroll History* menu option. Retrieved information is displayed by income and deduction code.

3   Self Service retrieves detailed payroll history directly from Infinium PY including on-demand check information. Use this method to display year-to-date totals on the Self Service web *Payroll/Payroll History* menu option. Retrieved information is summarized by income and deduction summarization code.

Pay History Records Displayed

Type the number of pay history records that Self Service should display initially when a user views their payroll history on the web.

This field controls only the initial number of records displayed. If the user enters a *From* and *To* date on the Payroll History screen then more (or fewer) records can be displayed.

If you leave this field blank, the system displays all pay history records for a user.

Note: If you change the value of this field, you should clear your PC cache in order to see the changes take place within the Pay History page.

Use Time Clock Entry

Specify yes to activate the time clock entry format for all users in this user group when they use the *My Time Sheets* menu option to enter time. Otherwise, specify no. Use the *Maintain Web Security File* function to override this value for individual users.

Update Employee Calendar

For Infinium HCM users, specify yes to activate the updating of the absentee file portion of the Infinium HR *Personnel Calendar Operations* functions. Otherwise, specify no.

Use PTO Mapping to Payroll

Specify yes to validate approved paid time-off information that Self Service users request from the web *Personal/Time Off Request* menu option against the accrual mapping table in Infinium HCM. Otherwise, specify no.

When you specify yes for this field, the PTO program uses the Infinium HCM mapping table to validate the transferred values in the Employee Calendar file, PEPAT. Infinium PY then uploads the absences to the Time Entry file, PYPWK. You must specify yes for this field if the value in the *Pto Earned Override* field is **1** or **2**. Also, when you specify yes for this field, you must specify yes for the *Update Employee Calendar* field.

PTO Earned Override

Specify a value to indicate whether a Self Service user can submit a PTO request if the PTO requested exceeds the PTO balance that the user has earned.

Valid values are:

0	Do not check the user's earned PTO. The system allows the user to submit the transaction with no warning.
1	Check the user's earned PTO and issue a warning if the requested PTO exceeds the earned PTO. The warning informs the user that the requested amount exceeds the user's earned PTO balance, but the user can continue and submit the transaction.
2	Check the user's earned PTO and issue an error message if the requested PTO exceeds the earned PTO. The user must enter a new date range that does not exceed the earned PTO balance.

Display User Verification

Specify yes to display a user verification message to require Self Service users to provide confirmation that their *Benefits/Open Enrollments*, *Benefits/Benefit Changes*, and *Payroll/Tax Information* selections are correct. Otherwise, specify no.

You use the Self Service Administration *Maintain User Verification Text* function to maintain the content of the text of the user verification message.

Auto Update Direct Deposits

For Infinium HCM users, specify yes to allow users to automatically update the direct deposit information in their Infinium PY employee direct deposit deduction records, PYPDE and PYPDD, by using the Self Service web application *Payroll/Direct Deposits* menu option.

Specify no to allow users to submit the direct deposit changes from the web but they do not automatically update Infinium PY until they are uploaded by the administrator. Self Service stores the changes in a staging table upon

successful completion of defined workflow approvals. You use the Self Service Administration *Upload Direct Deposit Changes* function to upload the changes from the staging table to Infinium PY.

You use the Self Service Administration *Map Direct Deposit Deductions* function to define the Infinium PY deduction codes to use to map the data. You must set the *Auto Update Direct Deposits* value to no before you can upload direct deposit information to Infinium PY.

Caution: If you do not set up a direct deposit mapping table and you process updates automatically, the program writes a record to the employee deduction file, PYPDE, with a blank deduction code because it cannot determine which deduction code to use.

Auto Update Tax Information

For Infinium HCM users, specify yes to automate the transfer of federal and state tax changes to Infinium Payroll when a Self Service tax change request completes the predefined workflow process, or if no workflow process is defined, when the employee submits the tax change request from the Self Service *Payroll/Tax Information* menu option.

If you specify yes in this field, each employer is responsible for ensuring full compliance with federal and state tax regulations, which can include obtaining completed, signed copies of the employee W-4 forms for their files.

Specify no to store all Self Service tax changes in a temporary file. You must run the Self Service Administration *Upload Tax Changes* function to transfer the tax changes to Infinium Payroll.

View W2 Information

For Infinium HCM users, specify yes to authorize Self Service users paid in the U.S. to view W-2 information for the most recent prior year within the Self Service web *Payroll/W-2 Information* menu option. Otherwise, specify no.

Users can always view W-2 information for years other than the current year and most recent prior year within the *Payroll/W-2 Information* menu option.

WARNING! Before the start of each calendar year, you must deactivate this field to prevent users from viewing W-2 information for the most recent prior year until your payroll department is ready to issue the information.

View T4 Information

For Infinium HCM users, specify yes to authorize Self Service users paid in Canada to view T4 information for the most recent prior year within the Self Service web *Payroll/T4 Information* menu option. Otherwise, specify no.

Users can always view T4 information for years other than the current year and most recent prior year within the *Payroll/T4 Information* menu option.

> **WARNING!** Before the start of each calendar year, you must deactivate this field to prevent users from viewing T4 information for the most recent prior year until your payroll department is ready to issue the information.

Default D.D.O. Table

For Canadian employers only, specify the originator code for the organization that initiates the direct deposit electronic funds transfer.

This value is used as the default value on an employee's direct deposit page on the web. The field on the employee's direct deposit web page can be restricted from being changed if *Web Page Settings* have been implemented for the Direct Deposit document type.

Welcome Page To Display

Type the URL for your custom welcome page. You must store the welcome page document within the installed Self Service application in your WebSphere installed applications directory. For example, if you place your welcome page file in the existing Self Service directory, you type the value below in this field

/SHCM/xxx.html

where **xxx.html** is the name of the welcome page document.

Log Sign In/Sign Out Info

Specify yes to activate the logging of users' Self Service sign-in and sign-out information. Otherwise, specify no.

This log tracks which employees have signed in and the times that they signed in and out. The default setting is no. The log file name is AHPSOSO, and the default library location for the file is SSDBFA. To view the contents of the log, use the *List Employee Sign In/Sign Out* function on the Audit Log Reports screen.

Log Employee Selections

Specify yes to activate the logging of users' Self Service selections. Otherwise, specify no.

This log tracks the Self Service selections that the employees make. The default setting is no. The log file name is AHPESLT, and the default library location for the file is SSDBFA. To view the contents of the log, use the *List Employee Selections* function on the Audit Log Reports screen.

Log Employee Transactions

This function is not active.

6 Press Enter to display the next screen.

7 Use the information below to complete the fields on the third screen.

Display Employee ID

Specify yes to include the employee ID next to the employee name in the title bar on all Self Service web pages. Otherwise, specify no.

Display Position Dropdown

Specify yes to activate the display of a drop-down list for the *Position* field that a Self Service manager uses to select a position for a new employee or for an employee change that requires the selection of a new position.

Specify no to deactivate the display of the drop-down list for the *Position* field. The Self Service manager must use the Position Search Criteria window, accessible by clicking the icon next to the *Position* field, to search for and select the position.

Approver/Reviewer/Supervisor Name List Box Attributes

The fields contained in this section on the page enable the administrator to set additional information to be displayed in the drop-down list box on the web to ensure that the correct user is being selected. There may be occasions where the organization has multiple employees with the same first and last name. The fields in this section enable you to show or not show the additional information in the drop-down list box. The purpose is to provide more information for clarification purposes only.

Note: If level security has been implemented, these fields may not be displayed to the user when prompting on the drop-down list box fields.

Employer

Specify yes to include the employer code in the description of Self Service list box field entries for all approver, reviewer, and supervisor names associated with the selected user group.

Specify no to exclude the employer code from the description.

Employee ID

Specify yes to include the employee ID in the description of Self Service list box field entries for all approver, reviewer, and supervisor names associated with the selected user group.

Specify no to exclude the employee ID from the description.

Position Code

Specify yes to include the position code in the description of Self Service list box field entries for all approver, reviewer, and supervisor names associated with the selected user group.

Specify no to exclude the position code from the description.

Position Title

Specify yes to include the position title in the description of Self Service list box field entries for all approver, reviewer, and supervisor names associated with the selected user group.

Specify no to exclude the position title from the description.

Performance Review Notification Controls

Review Lead Time

Type the number of days that Self Service uses to identify the lead time between the date of a scheduled performance review and the inclusion of the performance review on the manager's e-mail notification reminder.

Review Notification Method

You use this function to specify whether to notify the manager of employees' review schedules by the employees' supervisor, position or from a custom file.

Type a value to indicate the review notification method.

1	Supervisor - valid only for Infinium HCM users
2	Position
3	Custom file

You define the default setting for this authorization for the user group. You can then override the default setting for specific managers when you use the *Maintain Web Security File* function.

Day Of The Week

Specify a value to indicate on which day of the week Self Service sends a notification to managers for all scheduled performance reviews that fall within the lead-time criteria.

0	Do not run
1	Monday
2	Tuesday
3	Wednesday
4	Thursday
5	Friday
6	Saturday
7	Sunday
8	Run any day of the week

Include Employees On Leave

Specify yes to include employees on leave on the performance review notification. Otherwise, specify no.

Include Laid-off Employees

Specify yes to include laid-off employees on the performance review notification. Otherwise, specify no.

8 Press F3 to save your information and return to the Group Attributes Setup user group selection screen.

9 Press F3 to return to the main menu.

Maintaining the web security file

You use the *Maintain Web Security File* function to add, change or delete an individual user in a user group. The user must exist in the Infinium database. You can also transfer a user from one group to another. In addition, you can enable terminated employees access to the Self Service application by assigning them to the terminated employee's security group. Refer to the *Maintaining Entity Controls* and *Maintaining Security Groups* sections in this chapter.

However, if a user is terminated from the system and is part of the workflow routing, you must manually remove the terminated user so that the workflow continues successfully. In addition, you must remove the terminated user from the web security file unless you transfer the terminated user to the terminated employee group. If a user is terminated from Infinium Self Service *Manager* option, the program automatically moves the user to the terminated users group.

Self Service validates a user's sign-in attempts against the current password in the Employee Web Security file, AHPWEBA, or against the LDAP password if you use LDAP for Self Service password authentication. If you use LDAP authentication, including single sign-on processing, Self Service deactivates the password information in the web security profile. Refer to Appendix B for additional details on setting up LDAP with Self Service.

You use the *Max # Invalid Sign In Attempts* field in the *Maintain Entity Settings* function to define the maximum number of sign-in attempts a user has to sign into Self Service.

Should a user exceed the maximum number of attempts allowed to sign into Self Service, you can reactivate the user within the *Maintain Web Security File* function by selecting the user's security file record and pressing F23, or selecting the **Reset** action on the web. You can also reactivate the user from the security list by typing **9**, or selecting **Reset** on the web, in the *Opt* column next to a record and pressing Enter.

You can also use this procedure to reactivate a user who fails to answer the predetermined security questions correctly. You use the *Reset Password Enabled*, *Number of Security Questions*, and *Max Number of Invalid Answers* fields in the *Maintain Entity Settings* function to set up this functionality. You use the *Maintain Password Reset Question* function to define and maintain the security questions.

You also use the *Maintain Web Security File* function to set up and maintain approver and manager authorization information.

You can also use the *Mass Add Employee Web Security* function if you want to add multiple employees to the user groups.

To maintain the web security file, complete these steps.

1 From the Self Service main menu select *Security.*

2 Select *Maintain Web Security File* [MWSF] to display the Employee Maintenance user group selection screen.

3 Type any character in the *Select* field next to the user group for which you are maintaining employee web security.

4 Press Enter to display the Maintain Web Security File employer selection screen.

5 Specify the employer of the user group for which you are maintaining employee web security.

6 Press Enter to display the Maintain Web Security File screen.

The screen displays a list of all employees in the web security file for the selected user group. On the screen you can do the following:

- Add an employee to the selected user group

  To add an employee, press F6 to display the new user screen.

- Change an employee's security profile

  To change an employee's security profile, type **2** in the *Opt* field next to the employee whose information you want to change and press Enter to display the update screen.

- Delete an employee from the selected user group

  To delete an employee, type **4** in the *Opt* field next to the employee you want to delete. Then, press Enter to delete the selected employee from the list at the bottom of the screen.

- Set up and maintain approver authorization information for an employee from the selected user group

  To set up and maintain approver authorization information for an employee, type **6** in the *Opt* field next to the employee you want to authorize, and press Enter to display the *Maintain Approver Authority* screen.

- Set up and maintain manager authorization information for an employee from the selected user group

  To set up and maintain manager authorization information for an employee, type **8** in the *Opt* field next to the employee you want to authorize, and press Enter to display the *Maintain Manager Authority* screen.

  Before you can set up and maintain manager authorization information for an employee, you must first define the employee as a manager. To define the employee as a manager, you type **M** in the *Type* field on the Maintain Web Security File screen.

- Reactivate an employee's sign-in access to Self Service

  To reactivate an employee's access, type **9** in the *Opt* field next to the employee you want to reactivate, and press Enter.

  When you reactivate an employee, Self Service resets the *Invalid Sign In Attempts* field in the employee's web security file record to zero. To confirm, type *2* in the *Opt* field next to the employee you reactivated and press Enter. The *Invalid Sign In Attempts* field is now blank. You use the *Max # Invalid Sign In Attempts* field in the *Maintain Entity Settings* function described previously in this chapter to define the maximum number of sign-in attempts.

- Search for an employee within the selected user group

  To search for an employee, type all or part of the employee's name in the *Search* field and press Enter.

- Change the order in which the employees in the list are displayed

  To change the order in which the employees are listed, press F8 to display the employees by employee number, or press F7 to display the employees by last name.

- Change the starting point of the employee list

  To change the starting point of the list, type a value in the *Position To* field and press Enter.

  If you display the list by last name, you type all or part of the employee's last name in the *Position To* field.

  If you display the list by employee number, you type all or part of the employee number in the *Position To* field.

  The *Position To* field is case sensitive. Your entry must correspond to how the system displays the employee names. For Infinium HCM, the

names use all capital letters. For Infinium IHCM, the names are a combination of upper and lower case letters.

- Display entries by employee type

  To change the list to include all employees, managers only or employees only, press F9. The default display lists all employees.

- Transfer an employee from one user group to another

  To transfer an employee, use F6 to create a new web security record for the user group and type the number of the employee you are transferring in the *Employee #* field and press Enter. A confirmation window is displayed indicating "Would you like to transfer employee" with the "from group" and the "to group" displayed. Select yes to transfer the employee or no to keep the employee in the "from" group.

7 After you complete your work on the Maintain Web Security File employee list screen, press F3 to return two times to the main menu.

Creating a web security file record

1 To create a web security file record press F6 on the Maintain Web Security File screen to display the *Maintain Web Security* screen.

   For an active Self Service user who is locked out of the system after the designated number of invalid sign-in attempts, you can reactivate the user from this screen by pressing F23 to reset the value in the *Invalid Sign In Attempts* field to **0**.

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

   Employee ID

   Specify the number of the employee.

   To transfer an employee, type the number of the employee you want to transfer to this group in the *Employee ID* field, press Enter, and then type **1** on the Transfer Employee to Group window.

   User ID

   Type a user ID that the employee uses to sign into the Self Service application on the web.

Password

Type a password that the employee uses to sign into the Self Service application on the web. Some special characters are not to be used in the password. The security scheme has been designed so that we have safeguards in place for malicious script. This is the reason that certain patterns are not allowed to be used in the passwords.

For security, when you save this record, the system encrypts the value of this password in the database so you cannot see it when you view the file. The system displays the password as **********.

You may recommend to the employee to change this password to a password of the employee's choice when the employee signs on to Self Service for the first time.

Note: Certain special characters, such as / \ : * ? " < > | & ! ^ [ ], are not supported by all browsers. We strongly recommend that you do not use any special characters in the user ID or password fields. Otherwise, errors will occur and the user may not be able to sign in to Self Service.

Type

Specify the value for the employee type. You use the employee type to determine the menu functions available to the employee. Valid values are:

M   Manager

E   Employee

iSeries User Profile

If applicable, type the user profile that the manager uses to sign into the HR or training applications on the Series. Otherwise, leave blank. A user does not need an IBM i profile to use the Self Service application.

Self Service uses the IBM i user profile only for managers' level security.

Allow Ben Changes

For Infinium HCM users only, specify yes to authorize the employee to use the Self Service application to update benefit plan elections to accommodate lifestyle changes that may occur outside an open enrollment period. Otherwise, specify no.

For new users, the value defined in the *Group Attributes Maintenance* function is entered in this field. You can override the value.

Language Code

Specify the value that represents the language to display when the user accesses Self Service on the web. Leave blank to use the default language code, which is US English.

Use Time Clock Entry

Specify yes to require the employee to use the time clock entry method when the employee uses the *My Time Sheets* menu option in Self Service. Specify no to restrict the employee from using the time clock entry method.

Leave blank to use the default value from the *Group Attributes Maintenance* function.

Timekeeper

Specify yes to give the user timekeeper authorization to the *Timekeeper Entry* menu option to enter time for other employees. Otherwise, specify no.

Use the *Maintain Timekeeper Controls* function to assign the timekeeper to employees for whom to maintain time sheets.

E-mail Address

Type the employee's corporate e-mail address. If you type an e-mail address in this field, the Self Service application sends all Self Service messages to this address in addition to the employee's Self Service message in-box. Leave blank if you do not want Self Service messages sent to the employee's corporate e-mail in-box.

Note: This is for a single e-mail address. The field is split into two separate entry fields, which the program concatenates to send to Infinium HR.

Caution: Typing an e-mail address in this field overwrites the e-mail address on the employee's basic data record in Infinium HR. Also, changing the employee's e-mail address in the Infinium HR basic data record updates the employee's Self Service e-mail address in this field.

Tax ID Access

Use this field to override the default *Tax ID Access* field value from the *Maintain Entity Settings* function for the selected user.

Specify a value to indicate what portion, if any, of the tax ID number to conceal from display when a user accesses a Self Service page that contains the user's tax ID.

Valid values are:

LASTFOUR	Show only the last four characters; mask all other characters.
FIRSTFOUR	Show only the first four characters; mask all other characters.
SHOWALL	Show all characters.
MASKALL	Mask all characters.
FANDLFOUR	Show the first four and last four characters; mask all others.

Bank Account Access

Use this field to override the default *Bank Account Access* field value from the *Maintain Entity Settings* function for the selected user.

Specify a value to indicate what portion, if any, of the bank account number to conceal from display when a user accesses a Self Service page that contains the user's bank account number.

Valid values are:

LASTFOUR	Show only the last four characters; mask all other characters.
FIRSTFOUR	Show only the first four characters; mask all other characters.
SHOWALL	Show all characters.
MASKALL	Mask all characters.
FANDLFOUR	Show the first four and last four characters; mask all others.

Invalid Sign In Attempts

The value in this display-only field indicates the number of invalid sign-in attempts that the user tried while signing into the last Self Service session. Each time that the user signs into the application successfully, Self Service resets the value in this field to zero.

Self Service validates the sign-in attempts against the user's current password in the Employee Web Security file or against the LDAP password if you use LDAP for Self Service password authentication. Refer to Appendix B for additional details on setting up LDAP with Self Service.

When this number is equal to the value defined in the *Max # Invalid Sign In Attempts* field in the *Maintain Entity Settings* function, Self Service deactivates the user's password. You reactivate the user by accessing the user record within the *Maintain Web Security File* function and pressing F23 or selecting the **Reset** action on the web to reset the value in this field to **0**. You can also reactivate the user from the user list within the *Maintain Web Security File* function by typing **9** or by selecting **Reset** on the web in the Opt column next to the user record and pressing Enter.

If you set the value of the *Reset Password Enabled* field in the *Maintain Entity Settings* function to yes and set up security questions, the user can reactivate the password by answering a specified number of security questions correctly. After validating the answers, Self Service resets the value in this field to **0**.

If a user attempts to bypass the standard sign-in procedure or access unauthorized Self Service information, Self Service sets the value in this field to the value in the *Max # Invalid Sign In Attempts* field in the *Maintain Entity Settings* function and locks the user out of the system.

Invalid Security Answers

The value in this display-only field indicates the number of security questions that the user answers incorrectly while attempting to reset a password after reaching the maximum number of invalid sign-in attempts.

Depending on the type of security question, Self Service validates the answers to the security questions against the values in specific fields associated with the user's Self Service or Infinium HCM data or against answers that the user defines in the *Personal/Sign-on Preferences* menu option.

When this number is equal to the value defined in the *Max Number of Invalid Answers* field in the *Maintain Entity Settings* function, Self Service deactivates the user's password.

You reactivate the user by accessing the user record in the *Maintain Web Security File* function and pressing F23 or by selecting the **Reset** action on the web to reset the value in this field to **0**. You can also reactivate the user from the user list within the *Maintain Web Security File* function by typing **9** or by selecting **Reset** on the web in the Opt column next to the user record and pressing Enter.

3 Press F3 to save your changes and return to the *Maintain Web Security File* employee list screen.

Deleting a web security file record

To delete an employee from the web security file:

1 Type **4** in the *Opt* field next to the employee you want to delete. Press Enter to delete the selected employee from the list.

2 If the user is part of the workflow document routing process the following message is displayed:

    User exists in a workflow routing step and cannot be deleted.

    You must first remove the user from the document routing steps before you can delete them from the web security file.

3 If the user is part of a Global Workflow User group, the following message is displayed when you delete a user:

    The user is assigned to a Global Workflow user group. Select 1=Yes to remove the user from the Global Workflow user group. Select 0=No to Cancel.

    If you select no, the user remains in the web security file. If you select yes, the selected employee is removed from the Global Workflow User group and from the list on the web security page.

4 If the user is part of a Global E-mail User group, the following message is displayed when you delete a user:

    The user is assigned to a Global E-mail user group. Select 1=Yes to remove the user from the Global E-mail user group. Select 0=No to Cancel.

    If you select no, the user remains in the web security file. If you select yes, the selected employee is removed from the Global E-mail User group and from the list on the web security page.

Maintaining approver authority

You also use the *Maintain Web Security File* function to set up and maintain approver authority information for the employees in the user group.

You can configure whether the user can create alternate approvers, whether the user is eligible to be an alternate approver, and whether the user can reassign transactions pending approval to other users. You configure default values for these settings when you use the *Group Attributes Maintenance* function.

You can also specify by transaction type whether the user can only view and approve or reject the transactions or whether the user can edit the workflow transactions before approval.

1 To set up and maintain approver authorization information for an employee, type **6** in the *Opt* field on the Maintain Web Security File screen next to the employee you want to authorize, and press Enter to display the *Maintain Approver Authority* screen.

2 Use the information below to complete the fields on the screen.

Can Create Alt. Approver

If you set up the user as an approver for workflow processing, specify yes to authorize the user to set up alternate approvers from Self Service on the web. Otherwise, specify no.

Leave blank to accept the default value from the *Group Attributes Maintenance* function.

Eligible Alt. Approver

If you set up the user as an approver for workflow processing, specify yes to indicate that the user is eligible to be an alternate approver for an original approver who is setting up alternate approvers from Self Service on the web. Otherwise, specify no.

Leave blank to accept the default value from the *Group Attributes Maintenance* function.

Allow to Reassign

If you set up the user as an approver for workflow processing, specify yes to authorize the user to reassign documents to other approvers from Self Service on the web. Otherwise, specify no.

Leave blank to accept the default value from the *Group Attributes Maintenance* function.

Alt. Approver Security

Specify the employee's authorization for selecting an alternate approver when using the *Alternate Approvers* menu option on the web.

1 Select an alternate from the list of eligible alternate approvers.

2	Select an alternate from the list of eligible alternate approvers with authority to edit and approve or approve only for the selected transaction type.
3	Select an alternate only from the list of eligible alternate approvers in the same user group as the employee.
4	Select an alternate only from the list of eligible alternate approvers in the same organizational level as the employee.
5	Limit the user to select an alternate from the list within the *Maintain Alternate Approvers* function. The user will not have access to assigning alternate approvers on the web.

3 Press Enter to display the second page of the *Maintain Approver Authority* screen shown.

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

Workflow Document Security

For each transaction type, specify the user's approver authorization.

Valid values are:

0	The user cannot modify or approve the transaction.
1	The user can modify and approve the transaction.
2	The user can only approve the transaction. The user cannot modify the transaction.

RE Performance Reviews

Specify the user's authorization level for modifying and approving performance review transactions that managers initiate from the Self Service web *Employee Changes* menu option.

SC Salary Changes

Specify the user's authorization level for modifying and approving salary change transactions that managers initiate from the Self Service web *Employee Changes* menu option.

PR Promotions

For Infinium HCM users only, specify the user's authorization level for modifying and approving promotion transactions that managers initiate from the Self Service web *Employee Changes* menu option.

TR Transfers

For Infinium HCM users only, specify the user's authorization level for modifying and approving transfer transactions that managers initiate from the Self Service web Employee *Changes* menu option.

ST Status Changes

Specify the user's authorization level for modifying and approving status change transactions that managers initiate from the Self Service web *Employee Changes* menu option.

TE Terminations (Infinium HCM) EE End Employment (Infinium IHCM)

Specify the user's authorization level for modifying and approving termination transactions that managers initiate from the Self Service web Employee Changes menu option.

DM Demotions

For Infinium HCM users only, specify the user's authorization level for modifying and approving demotion transactions that managers initiate from the Self Service web *Employee Changes* menu option.

LV Leave of Absence

Specify the user's authorization level for modifying and approving leave-of-absence transactions that managers initiate from the Self Service web *Employee Changes* menu option.

LO Lay Off

Specify the user's authorization level for modifying and approving layoff transactions that managers initiate from the Self Service web *Employee Changes* menu option.

EA Employment Actions

Specify the user's authorization level for modifying and approving employment action transactions that managers initiate from the Self Service web *Employee Changes* menu option.

PS Position Changes

For Infinium IHCM users only, specify the user's authorization level for modifying and approving position change transactions that managers initiate from the Self Service

NH New Employees (Infinium HCM)/NE New Employees (Infinium IHCM)

Specify the user's authorization level for modifying and approving new employee transactions that managers initiate from the Self Service web *New Employee* menu option.

RH Rehire Employees

For Infinium HCM users only, specify the user's authorization level for modifying and approving rehire employee transactions that managers initiate from the Self Service web *Rehire Employee* menu option.

PC Personal Changes

Specify the user's authorization level for modifying and approving personal change transactions that employees initiate from the Self Service web *Personal* menu option.

OE Open Enrollment

For Infinium HCM users only, specify the user's authorization level for modifying and approving open enrollment requests that employees initiate from the Self Service web *Open Enrollment* menu option.

BC Benefit Changes

For Infinium HCM users only, specify the user's authorization level for modifying and approving benefit change transactions that employees initiate from the Self Service web *Benefit Changes* menu option.

Tax Information

For Infinium HCM users only, specify the user's authorization level for modifying and approving tax change transactions that employees initiate from the Self Service web *Update Tax Information* menu option.

Training Enrollment

Specify the user's authorization level for modifying and approving training enrollment transactions that employees initiate from the Self Service web *Training* menu option.

Training Request

Specify the user's authorization level for modifying and approving training request transactions that employees initiate from the Self Service web *Training* menu option.

5 Press F3 to save your changes and return to the Maintain Web Security File employee list screen.

Maintaining manager authority

You also use the *Maintain Web Security File* function to set up and maintain manager authority controls that determine how users designated as managers use the Self Service *Manager* menu option on the web to select employees within your company's organizational structure.

A manager can select from employees listed by supervisor, position, your company's organizational level, custom file, or tax ID. The option to authorize managers to employees by supervisor is available only to Infinium HCM users.

When a manager selects employees by supervisor or position, you can define the number of organizational levels that Self Service uses to generate the employee list. If you authorize the manager to select employees by supervisor for only one organizational level, the manager can work with direct reports only. If you authorize the manager to select employees for two organizational levels, the manager can work with direct reports and the next level of employees who report to the manager's direct reports.

If you authorize the manager to select employees by position for only one organizational level, the manager can work with employees in positions, as defined by Infinium HR, reporting directly to the manager's position. If you authorize the manager to select employees for two organizational levels, the manager can work with employees in positions that report directly to the manager's position and with employees in positions that report directly to the manager's direct report positions.

The custom file option uses the AHPELCST file in the Self Service installation library to select employees. You create custom supervisor relationships by completing the fields in the file. You can complete the fields manually with an appropriate IBM i file editor or automatically through an IBM i program.

You can also override for individual managers the performance review notifications that you set up within the *Group Attributes Maintenance* function. You can also authorize the manager to create and submit specific employee

changes, update employee time sheets, create and submit new and/or position requisitions, creating multiple positions, selecting employee change dates that are outside of the payroll cycle and initiate mass salary changes from the Self Service web *Salary Planning* menu option.

1 To set up and maintain manager authorization information for an employee, type **8** in the *Opt* field next to the employee you want to authorize and press Enter to display the first *Maintain Manager Authority* screen.

2 Use the information below to complete the fields on the screen.

By Supervisor

Type **1** (yes) to allow the manager to select employees by supervisor. Otherwise, type **0** (no).

Supervisor Depth

For Infinium HCM users only, type a value to indicate the organizational level to which you are authorizing the manager to work with employees by supervisor. Type **1** to authorize the manager to work with direct reports only. Type a higher number to increase the organizational level that the manager can use.

By Position

Type **1** (yes) to allow the manager to select employees by position. Otherwise, type **0** (no).

Position Depth

Type a value to indicate the organizational level to which you are authorizing the manager to work with employees by position. Type **1** to authorize the manager to work with only direct reports. Type a higher number to increase the organizational level that the manager can use.

By Level

Type **1** (yes) to allow the manager to select employees by organizational level. Otherwise, type **0** (no).**.**

By Custom File

Type **1** (yes) to allow the manager to select employees by custom file. Otherwise, type **0** (no).

By Tax ID

Type **1** (yes) to allow the manager to select employees by tax ID number. Otherwise, type **0** (no).

Review Lead Time

Type the number of days that Self Service uses to identify the lead time between the date of a scheduled performance review and the inclusion of the performance review on the manager's e-mail notification reminder.

Self Service enters a default value in this field from the *Group Attributes Maintenance* function. You can override the default value here with a specific value for each manager.

Review Notification Method

Type a value to indicate the review notification method. Valid values are:

1   Supervisor, valid only for Infinium HCM users

2   Position

3   Custom file

Self Service enters a default value in this field from the *Group Attributes Maintenance* function. You can override the default value here with a specific value for each manager.

Update Time Sheet

Type **1** (yes) to allow the manager to update employees' time sheets.

Type **0** (no) to allow the manager only to approve employees' time sheets. The manager cannot update time sheets.

Mass SC from Sal Planning

Type **1** (yes), to allow the manager to mass create salary change transactions from the Self Service web *Manager/Salary Planning* menu option. Otherwise, type **0** (no).

Restrict SC Date

Type **1** (yes) to restrict the dates a manager can select to a payroll cycle beginning date when creating a salary change transactions from the Self Service web *Manager/Employee Changes* menu option. Otherwise, type **0** (no).

Note that in order to use this feature you must set up future cycle schedules within Infinium PY. If you use this feature, the calendar only allows selection of cycle beginning dates that are greater than or equal to today's date when performing salary changes.

Restrict TR/PR/DM Date

Type **1** (yes) to restrict the dates a manager can select to a payroll cycle beginning date when creating a transfers, promotions and demotion transactions from the Self Service web *Manager/Employee Changes* menu option. Otherwise, type **0** (no).

Note that in order to use this feature you must set up future cycle schedules within Infinium PY. If you use this feature, the calendar only allows selection of cycle beginning dates that are greater than or equal to today's date when performing transfers, promotions and demotion transactions.

Use Multiple Positions

For Infinium HCM users only, specify yes to authorize the manager to the *Multiple Positions* menu option on the web. Otherwise, specify no.

Leave blank to accept the default value from the *Group Attributes Maintenance* function.

Request New Position

Specify yes to authorize the manager the ability to request new positions to be filled utilizing the positions requisitions feature. Otherwise, specify no. Leave blank to accept the default value from the *Group Attributes Maintenance* function.

3 Press Enter to display the *Maintain Manager Authority* employee changes screen.

4 Use the information below to select the employee changes that the manager can access.

Request Existing Position

Specify yes to authorize the manager the ability to request existing positions to be filled utilizing the positions requisitions feature. Otherwise, specify no. Leave blank to accept the default value from the *Group Attributes Maintenance* function.

- If the Request New Position field is set to 0=No and the Request Existing Position field is set to 0=No, then the user does not have access to the *Manager/Position Requisitions* menu option on the web.

- If the Request New Position field is set to 0=No and the Request Existing Position field is set to 1=Yes, then the user has access to the *Manager/Position Requisitions* menu option on the web but the user does not have access to create position requisitions for new positions.

- If the Request New Position field is set to 1=Yes and the Request Existing Position field is set to 1=Yes, then the user has full access to the *Manager/Position Requisitions* menu option on the web.

- If the Request New Position field is set to 1=Yes and the Request Existing Position field is set to 0=No, then the user has access to the *Manager/Position Requisitions* menu option on the web but the use does not have access to create position requisitions for existing positions.

Salary Range Override

Type a value to indicate whether the manager can continue processing salary change transactions when the salary amount exceeds salary range limits. Leave blank to accept the default value from the *Group Attributes Maintenance* function. Valid values are:

0   Do not override. The user must change the salary amount to remain within salary range limits.

1   Override with a warning. The system displays a message to inform the user that the salary amount exceeds salary range limits but allows the user to continue processing the transaction.

2   Override with no warning. The system allows the user to continue processing the transaction without any warning.

5 Use the fields below to select the employee changes that a manager can perform.

RE

Type **1** (yes) to allow the manager to access performance review transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

SC

Type **1** (yes) to allow the manager to access salary change transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

PR

For Infinium HCM users only, type **1** (yes) to allow the manager to access promotion transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

TR

For Infinium HCM users only, type **1** (yes) to allow the manager to access transfer transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

PC

Type **1** (yes) to allow the manager to access personal change transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

PS

For Infinium IHCM users only, type **1** (yes) to allow the manager to access position change transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

ST

Type **1** (yes) to allow the manager to access status change transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

TE

For Infinium HCM users only, type **1** (yes) to allow the manager to access termination transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

EE

For Infinium IHCM users only, type **1** (yes) to allow the manager to access termination transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

DM

For Infinium HCM users only, type **1** (yes) to allow the manager to access demotion transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

LV

Type **1** (yes) to allow the manager to access leave of absence transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

LO

Type **1** (yes) to allow the manager to access layoff transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

EA

Type **1** (yes) to allow the manager to access employment action transactions from the Self Service web *Employee Changes* menu option. Otherwise, type **0** (no).

6 Press Enter to display the *Maintain Manager Authority* employee information screen.

7 Use the information below to select the employee information that the manager can view.

Personal

Type **1** (yes) to allow the manager to access employees' personal information from the Self Service web *Employee Information* menu option. Otherwise, type **0** (no).

Contacts

Type **1** (yes) to allow the manager to access employees' emergency contact information from the Self Service web *Employee Information* menu option. Otherwise, type **0** (no).

Education

Type **1** (yes) to allow the manager to access employees' education information from the Self Service web *Employee Information* menu option. Otherwise, type **0** (no).

Licenses

Type **1** (yes) to allow the manager to access employees' license information from the Self Service web *Employee Information* menu option. Otherwise, type **0** (no).

Property

Type **1** (yes) to allow the manager to access employees' company property information from the Self Service web *Employee Information* menu option. Otherwise, type **0** (no).

Vehicle

Type **1** (yes) to allow the manager to access employees' vehicle information from the Self Service web *Employee Information* menu option. Otherwise, type **0** (no).

View Document History

Specify whether the manager can view all documents within the document tracking history file even if the manager is not part of the workflow approval process.

Specify yes to allow the manager to view all workflow document tracking history. Otherwise, specify no.

Note: When viewing document tracking history, it is recommended that you filter the results to improve performance since the history file can be large.

8 Press F3 to save your changes and return to the Maintain Web Security File employee list screen.

Mass adding employees to the Web security file

You use the *Mass Add Employee Web Security* function to add multiple employees to a user group. You can specify criteria to generate a user ID and password for each employee. Self Service posts this information to the web security file. You can also use this option to add terminated employees to a terminated employee security group so that they can continue to gain access to limited functions within the Self Service application.

When you define the criteria to generate user IDs and passwords, use definitions that do not generate duplicate IDs and passwords. For example, you can define a user ID that begins with the first letter of the employee's first name plus all the letters, up to 18 characters, of the last name plus the last four digits of the social security number. Avoid using fields that you may use inconsistently, such as *Middle Initial*, in Infinium HR.

If you require users to change passwords periodically or when they first sign into Self Service, the system validates that the changed password conforms to the rules that you define.

You use the *Maintain Entity Settings* function described previously in this chapter to define password requirements including the case sensitivity and frequency for required changes.

To mass add employees to the web security file, complete these steps.

1 From the Self Service main menu select *Security.*

2 Select *Mass Add Employee Web Security* [MAEWS] to display the Mass Add Employee to Web user group selection screen.

3 Type any character in the *Select* field next to the user group for which you are mass adding employees to the web security file.

4 Press Enter to display the Mass Add Employee to Web employer selection screen.

5 Specify the employer of the user group for which you are mass adding employees to the web security file.

6 Press Enter to display the selection screen.

7 Use the fields on this screen to define the criteria for selecting the employees whom you are mass adding to the selected user group.

Levels 1-4

Specify the level(s) of the users whom you are mass adding to the web security file. Leave blank to include all level values within your criteria selections. Only active levels can be used for selection criteria.

Status

Specify the status of the users whom you are mass adding to the web security file. Leave blank to include all statuses within your criteria selections.

Shift Code

Specify the shift code of the users whom you are mass adding to the web security file. Leave blank to include all shift codes within your criteria selections.

Status Rept Group

Specify the status reporting group of the users whom you are mass adding to the web security file. Leave blank to include all status reporting groups within your criteria selections.

Pay Cycle

Specify the payroll cycle of the users whom you are mass adding to the web security file. Leave blank to include all pay cycles within your criteria selections.

Union Code

Specify the union code of the users whom you are mass adding to the web security file. Leave blank to include all union codes within your criteria selections.

Location

Specify the location of the users whom you are mass adding to the web security file. Leave blank to include all locations within your criteria selections.

Cycle Group

Specify the payroll cycle group of the users whom you are mass adding to the web security file. Leave blank to include all cycle groups within your criteria selections.

Mail Group

Specify the mail group of the users whom you are mass adding to the web security file. Leave blank to include all mail groups within your criteria selections.

Security Group

Specify the security group of the users whom you are mass adding to the web security file. Leave blank to include all security groups within your criteria selections.

Pay Auth Group

Specify the pay authorization group of the users whom you are mass adding to the web security file. Leave blank to include all pay authorization groups within your criteria selections.

Benefit Group

Specify the benefit group of the users whom you are mass adding to the web security file. Leave blank to include all benefit groups within your criteria selections.

Pay Type

Specify the pay type of the users whom you are mass adding to the web security file.

Valid values are:

- H   Hourly
- S   Salaried
- N   Non-exempt

Leave blank to include all pay types within your criteria selections.

Include Terminated

Specify if terminated employees should be included or excluded from the employees being mass added.

Valid values are:

- 0   Do not include any terminated employees
- 1   Include terminated employees where the date of termination is within the date range specified

- 2   Only terminated employees where the date of termination is within the date range specified are to be added. No current active employees are added.

From Termination Date

If you would like to limit the terminated employees to be included based on their termination date, enter a starting date range for your criteria selection

To Termination Date

If you would like to limit the terminated employees to be included based on their termination date, enter an ending date range for your criteria selection.

8 Press Enter to display the *Build User ID* screen.

9 Use the fields on this screen to define the criteria for the user IDs.

For example, the system builds ACJOHNSO12349 as the user ID for an employee named Carolyn Johnson, whose tax ID number is 010-10-1234, as illustrated in the table below.

Sequence	Field and character position	Value
Before name	Constant Before User Name	**A**
1	First Name (position 1)	**C**
2	Last Name (positions 1 through 6)	**JOHNSO**
3	Tax ID (positions 6 through 9)	**1234**
After name	Constant After User Name	**9**

10 Press Enter to display the *Build Password* screen.

11 Use the fields on this screen to define the criteria for the user passwords.

12 Press Enter to display the *Final Confirmation* screen.

13 Press Enter. The system generates an error report that you should review to identify any errors.

14 Press F3 to return to the main menu.

Refreshing an employee name in the web security file

You use *the Refresh EE Name in Web Security* to update the employee's record in the file with any changes.

For example, an HR administrator changes the name of a recently married employee on the employee's Infinium HR record on the IBM i. When you run the *Refresh EE Name in Web Security* function, you update the employee's name in the web security file. This also updates the employee's *E-mail One Address* from HCM to Self Service.

To refresh an employee name in the web security file, complete these steps:

1 From the Self Service main menu select *Security*.

2 Select *Refresh EE Name in Web Security* [RENIWS] for Infinium HCM users or [RENIWSI] for Infinium IHCM users to refresh the web security file with recent employee additions, changes, or deletions.

3 Press F3 to return to the main menu.

Maintaining level security

You use the *Maintain Level Security* function to restrict managers to employee information by your company's defined organizational levels.

If the manager has an IBM i profile and is set up in the Infinium HR level security file, the Self Service application can use the manager's Infinium HR level security authorization for Self Service. You must, however, enter the IBM i profile on the manager's authority record in the *Maintain Web Security File* function. Only active levels can be assigned to managers.

It is highly recommended that managers be restricted to reporting levels to improve performance on the Self Service web. The time it takes to generate a list of employees is dependent on the number of records requested to be retrieved. Limiting the set to include only those employees for whom you need to take action improves the response time in generating the list.

To maintain level security, complete these steps:

1   From the Self Service main menu select *Security*.

2   Select *Maintain Level Security* [MLS] to display the Level Security Maintenance user group selection screen.

3   Type any character in the *Select* field next to the user group for which you are maintaining level security.

4   Press Enter to display the *Update User Security Levels* screen.

5   Specify a user profile and employer.

6   Press Enter to display the *Update User Security Levels* screen to restrict the user to an employer and levels.

7   Type any character in the *Opt* field next to the highest level or combination of levels to which to authorize the user.

8   Press F3 to return to the Update User Security Levels user profile selection screen.

9   Press F3 to return to the main menu.

Maintaining position security

You use the *Maintain Position Security* function to define position security for a manager.

Position security is the set of position records that you authorize a manager to select from and work with in the Self Service application. It is highly recommended that managers be restricted to positions to improve performance on the Self Service web. By setting position security, you restrict the manager to a set of positions that the manager can access, and you improve performance if you have a large quantity of positions defined in Infinium HCM.

To maintain position security, complete these steps:

1 From the Self Service main menu select *Security*.

2 Select *Maintain Position Security* [MPS] for Infinium HCM users or [MPSI] for Infinium IHCM users to display the *Maintain Position Security* screen.

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

Group

Specify the user group of the manager for whom you are maintaining position security.

User Profile

Specify the user profile of the manager for whom you are maintaining position security.

Employer

Specify an employer from which to display a list of positions that you want to assign to the manager.

Level 1

Specify the level 1 associated with one or more positions that you want to assign to the manager. Leave blank to include all level 1 positions within the manager's employer.

Level 2

Specify the level 2 associated with one or more positions that you want to assign to the manager. Leave blank to include all level 2 positions within the selected level 1.

Level 3

Specify the level 3 associated with one or more positions that you want to assign to the manager. Leave blank to include all level 3 positions within the selected level 2.

Level 4

Specify the level 4 associated with one or more positions that you want to assign to the manager. Leave blank to include all level 4 positions within the selected level 3.

Location

Specify the location associated with one or more positions that you want to assign to the manager. Leave blank to include all locations within the selected criteria.

Job Code

Specify the job code associated with one or more positions that you want to assign to the manager. Leave blank to include all job codes within the selected criteria.

4   Press Enter to display the screen with the list of positions to select from.

5   Type **X** in the *Opt* field next to one or more positions to assign to the Self Service user that you select on the Maintain Position Security selection page.

   You can press F15 to select all positions in the list, or you can press F16 to deselect all positions in the list.

6   Press F3 to return to the Maintain Position Security selection screen.

7   Press F3 to return to the main menu.

Maintaining user verification text

You use the *Maintain User Verification Text* function to maintain the content of the text that you want to display as the verification message on the Self Service web application benefit submission page.

The user verification message applies only to the Self Service *Benefits/Open Enrollments* and *Benefits/Benefit Changes* menu options when you must require Self Service users to provide confirmation of their benefit elections.

To maintain user verification text, complete these steps:

1 From the Self Service main menu select *Security*.

2 Select *Maintain User Verification Text* [MUVT] to display the Maintain User Verification Text user group selection screen.

3 Type any character in the *Sel* field next to the user group for which you are maintaining user verification text, and press Enter to display the Maintain User Verification Text language selection screen.

4 Type any character in the *Sel* field next to the language for which you are maintaining user verification text, and press Enter to display the *Maintain User Verification Text* screen.

5 Use the information below to complete this screen.

User Verification Text

Type the content of the text that you want to display as the Self Service web application user verification message.

Leave blank if you do not want to display the user verification message to Self Service web application users.

The user verification message applies to the *Self Service Benefits/Open Enrollments*, *Benefits/Benefit Changes*, and *Payroll/Tax Information* menu options when you must require Self Service users to provide confirmation of their benefit elections and tax changes.

6 Press F3 to return to the Maintain User Verification Text user group selection screen.

7 Press F3 to return to the main menu.

Maintaining questions for resetting passwords

You use the *Maintain Password Reset Question* function to define the security questions that a user must answer correctly to reset a password that is disabled when the user reaches the maximum number of invalid sign-in attempts.

You must also use the *Reset Password Enabled*, *Number of Security Questions*, and *Max Number of Invalid Answers* fields in the *Maintain Entity Settings* function to set up the reset password functionality. Refer to the "Maintaining entity settings" section for more information.

To be able to use the reset password functionality, a Self Service user must first access the Self Service web *Sign-on Preferences* menu option and define answers to the required number security questions.

You cannot use the reset password functionality if you configure Self Service to use LDAP authentication to validate user IDs and passwords.

Understanding security question types

You can define the following types of security questions within the *Maintain Password Reset Question* function:

- Tax ID question

  Self Service includes a system-defined security question that uses the tax ID number from the employee's basic data record.

  For Infinium HCM users, Self Service validates the user's entry with the value in the tax ID field, PRSSN, in the employee basic data record.

  For Infinium IHCM users, Self Service validates the user's entry with the value in the tax ID field, PRSS in the employee basic data record.

- Employee data questions

  You can define required questions, for example, an employee's date of birth, that Self Service validates against a value in a designated field from the user's Self Service or Infinium HCM data. You use the *Required*, *File,* and *Field* fields within the *Maintain Password Reset Question* function to define these questions. To reset a password, users are required to answer all active employee data questions.

■ Free-format questions

You can define free-format questions that Self Service displays within the Self Service web *Sign-on Preferences* menu option. To use the reset password functionality, a user must access the *Sign-on Preferences* menu option and define answers to a specified number of free-format questions. Self Service stores the user's questions and answers in the security question and answers files, AHPRQ and AHPRA, for future validation whenever the user tries to reset a disabled password.

You can require a user to answer a free-format question, and the user must answer it when resetting a password.

If you define a free-format question as not required, Self Service displays the question in a list box with other optional free-format questions that you define. You then use the *Number of Security Questions* field in the *Maintain Entity Settings* function to specify the number of free-format questions that a user must define to use the reset password functionality.

You leave the *File* and *Field* fields within the *Maintain Password Reset Question* function blank when you set up free-format questions.

Maintaining security questions

To maintain questions for resetting passwords, complete these steps:

1   From the Self Service main menu select *Security*.

2   Select *Maintain Password Reset Question* [MPRQ] to display the Password Reset Questions Maintenance screen.

On this screen you can do the following:

■ Add a reset password question

To add a question, press F6 or select the **Create** action on the web to display the second Password Reset Questions Maintenance screen.

■ Change information for a reset password question

To change information for a question, type **2** in the *Opt* field or select the **Change** option on the web next to the question whose information you want to change. Then, press Enter to display the second Password Reset Questions Maintenance screen.

■ Delete a reset password question

To delete a question, type **4** in the *Opt* field or select the **Delete** action next to the question to delete. Then, press Enter to delete the selected question from the list.

3 Use the information below to complete this screen.

Question Code

Type a unique code to identify the security question.

Active

Specify **Active** to indicate that the question is active. Otherwise, specify **Inactive**.

Self Service displays active security questions to users when they access the *Personal/Sign-on Preferences* menu option to define answers to the security questions or when they access the Reset Password page to set a disabled password.

When a user accesses the *Personal/Sign-on Preferences* menu option to define answers to security questions, Self Service displays only the active free-format questions.

When a user accesses the Reset Password page to reset a disabled password, Self Service displays all active questions from the three question types.

Required

Specify yes to require the user to answer this question to reset a disabled password.

If you are defining an employee data-type question, you must specify yes in this field. You must also use the *File* and *Field* fields to specify the field to use to validate the answer when the user attempts to reset a password.

If you are defining a free-format question, you can specify yes or no in this field. If you specify yes, Self Service displays the question as a required question in the *Personal/Sign-on Preferences* menu option. If you specify no, the user has the option of selecting the question from a list box in the *Personal/Sign-on Preferences* menu option when defining answers to the security questions.

The following are examples of free-format questions:

- In what town or city were your born?
- What was the name of your first pet?

- What is your mother's first name?

The number of free-format questions that a user must answer depends on the value that you enter in the *Number of Security Questions* field in the *Maintain Entity Settings* function.

As the prerequisite for resetting a disabled password, you can require the user to answer:

- The tax ID number
- One or more questions to validate personal data
- One or more free-format questions
- A combination of required and free-format questions

File

Type the name of the Self Service or Infinium HCM file associated with the field that contains the value that represents the user's answer to the security question.

For example, for the question "What is your date of birth?" type **PRPMS**, for the employee basic data record, in this field.

We recommend that you use data from the following files:

- Infinium HCM Employee Basic Data file, PRPMS
- Infinium HCM Employee Personnel Master file, PEPMS
- Self Service Employee Web Security file, AHPWEBA

For free-format questions, leave blank.

Field

Type the name of the Infinium HCM field that contains the value that represents the user's answer to the security question.

For example, for the question "What is your date of birth?" type **PRDOB8**, for the Infinium HCM *Date of Birth* field, in this field.

For free-format questions, leave blank.

Language Code

Specify the language code associated with the security question. The language code designates the language that Self Service uses to display the security questions to the user.

Specify a language code to allow only users associated with the language code to access the question.

Leave this field blank to allow users of all languages to access the question.

Question Text

Type the text of the security question that users must answer to reset a disabled password.

If the question is required and is validated against data stored in Self Service or Infinium HCM fields, include information in the question text to instruct users how to format their answers correctly.

For example:

- **Social Security Number (format XXX-XX-XXXX)**
- **Date of Birth (format MMDDYYYY)**

4 Press F3 to save the information and return to the Password Reset Questions Maintenance screen.

5 Press F3 to return to the main menu.

Maintaining logo information

You use the *Maintain Logo Information* function to maintain a logo file and up to four lines of text information for your corporate address, all of which you can display on specific Self Service web application pages. If you are using this feature, the company logo and address are displayed between the page title bar and the page header help text.

The logo and address information applies only to the following Self Service Payroll menu options so that you can provide a corporate identity to the payroll information that Self Service users can access:

- *Pay History*
- *My Benefits*
- *Benefit Changes*
- *Open Enrollments*
- *T4 Information*
- *W-2 Information*

To maintain logo information, complete these steps:

1 From the Self Service main menu select *Security*.

2 Select *Maintain Logo Information* [MLI] to display the entry screen.

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

   Employer

   Specify the employer for whom you are maintaining logo or address information.

   Image URL

   Type the URL address of the corporate logo or image that you want to display. If you are using this feature, you must enter /SHCM or http:// before the path where the logo resides.

   Text 1

   Type the first line of the corporate address that you want to display.

   Leave blank if you do not want to display an address.

Text 2

Type the second line of the corporate address that you want to display.

Leave blank if you do not want to display an address.

Text 3

Type the third line of the corporate address that you want to display.

Leave blank if you do not want to display an address.

Text 4

Type the fourth line of the corporate address that you want to display.

Leave blank if you do not want to display an address.

4 Press F3 to save the information and return to the main menu.

Listing employee web security file information

You use the *List Employee Web Security* function to create a print file that contains the information in your employee web security file.

To print employee web security information, complete these steps.

1 From the Self Service main menu select *Security*.

2 Select *List Employee Web Security* [LEWS] to display the selection screen.

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

Group

Specify the user group for which to generate a report of information from your employee web security file. Leave blank to include all user groups.

Employer

Specify the employer for which to generate a report of information from your employee web security file. Leave blank to include all employers.

Employee

Specify the employee for which to generate a report of information from your employee web security file. Leave blank to include all employees.

Type

Specify the employee type for which to generate a report of information from your employee web security file. Valid values are:

E	Employee
M	Manager

Leave blank to include employee and manager information on the report.

4 Press Enter to generate the report and return to the main menu.

Listing employee selections

You use the *List Employee Selections* function to create a print file containing some or all of the information about employee selections.

You must use the *Log Employee Selections* field in the *Group Attributes Maintenance* function on the Self Service Administration Security Options screen to activate the *List Employee Selections* function for each user group for which you want to collect employee selections.

To generate a report of employee selections, complete these steps.

1 From the Self Service main menu select *Security*.

2 Select *List Employee Selections* [LES] to display the selection screen.

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

User

Specify the user ID of the user for whom to generate a report of employees' Self Service menu selection information.

Employer

Specify the employer for whom to generate a report of employees' Self Service menu selection information. Leave blank to include all employers.

4 Press Enter to generate the report and return to the main menu.

Listing employee sign-in and sign-out information

You use the *List Employee Sign In/Sign Out* function to create a print file containing some or all of the information about users' sign-in and sign-out actions.

You must use the *Log Sign In/Sign Out Info* field in the *Group Attributes Maintenance* function on the Self Service Administration Security Options screen to activate the *List Employee Sign In/Sign Out* function for each user group for which you want to collect sign-in and sign-out information.

To generate a report of sign-in and sign-out information, complete these steps.

1 From the Self Service main menu select *Security*.

2 Select *List Employee Sign In/Sign Out* [LESOSO] to display the selection screen.

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

User

Specify the user ID of the user for whom to generate a report of employees' Self Service sign-in and sign-out information.

Employer

Specify the employer for whom to generate a report of employees' Self Service sign-in and sign-out information. Leave blank to include all employers.

Begin Date

Specify the beginning date for which to generate the security report. Leave blank to include all records in the file.

End Date

Specify the ending date for which to generate the security report. Leave blank to include all records starting at the begin date entered. If you specify an *End Date*, you must also specify a *Begin Date*.

Level 1

Specify the level 1 for which to generate the security report. Leave blank to include all level 1 records within the specified employer.

Level 2

Specify the level 2 for which to generate the security report. Leave blank to include all level 2 records within the selected level 1.

Level 3

Specify the level 3 for which to generate the security report. Leave blank to include all level 3 records within the selected level 2.

Level 4

Specify the level 4 for which to generate the security report. Leave blank to include all level 4 records within the selected level 3.

4 Press Enter to generate the report and return to the main menu.

Listing position requisitions

You use the *List Position Requisitions* function to create a print file that contains the information in your position requisitions file.

To print position requisition information, complete these steps.

1 From the Self Service main menu select *Security*.

2 Select *List Position Requisitions* [POSREQLST] to display the selection screen.

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

   Group

   Specify the user group for which to generate a report of information from your position requisitions file. Leave blank to include all user groups.

   Employer

   Specify the employer for which to generate a report of information from your position requisitions file. Leave blank to include all employers.

   Requestor

   Specify the user for which to generate the position requisitions report. Leave blank to include all requestors or prompt to select from a list of valid users.

4 Press Enter to generate the report and return to the main menu.

Listing user level security information

You use the *List User Level Security File* function to generate a user level security report by user group, user, employer or a specific organizational level.

To list user level security information, complete these steps.

1 From the Self Service main menu select *Security*.

2 Select *List User Level Security File* [LULSF] to display the selection screen.

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

   Group

   Specify the user group for which to generate the user level security report. Leave blank to include all user groups.

   User

   Specify the user for which to generate the user level security report.

   Employer

   Specify the employer for which to generate the user level security report. Leave blank to include all employers.

   Level 1

   Specify the level 1 for which to generate the user level security report. Leave blank to include all level 1 users within the specified employer. Only active levels can be selected.

   Level 2

   Specify the level 2 for which to generate the user level security report. Leave blank to include all level 2 users within the specified level 1. Only active levels can be selected.

   Level 3

   Specify the level 3 for which to generate the user level security report. Leave blank to include all level 3 users within the specified level 2. Only active levels can be selected.

Level 4

Specify the level 4 for which to generate the user level security report. Leave blank to include all level 4 users within the specified level 3. Only active levels can be selected.

4 Press Enter to generate the report and return to the main menu.

Notes

Chapter 3 Benefit Settings

<div style="text-align: right">3</div>

The Self Service functions discussed in this chapter are located within the *Benefit Settings* menu option on the Self Service Administration main menu.

These functions discussed in this chapter are for use with Infinium HCM only. They do not apply to iHCM U.K. users.

The chapter consists of the following topics:

Working with benefit settings

You use the *Benefit Settings* functions to prepare benefit plans for:

- Annual or special benefit plan open enrollment periods

- Benefit plan enrollment for employees experiencing lifestyle changes such as marriage, childbirth, divorce, disablement or death

- New employees hired after the company open enrollment period has ended

- The upload of new enrollments and benefit changes from Self Service to Infinium HR Benefits Administration files

You use these functions to specify what benefit plans to offer and how to present them on the Self Service *Open Enrollment* and *Benefit Changes* web pages.

Note: Your benefits administrator must be using the Infinium HR *Benefits Administration* functions and plan year processing for you to set up and use the Self Service web *Benefits* menu options.

To set up benefit plans, complete the steps below in sequence. Each step is described in detail in this chapter.

1 Define the settings for the open enrollment period.

2 Select the benefit plans available for the open enrollment period.

3 Assign benefit groups to the enrollment groups.

4 Assign benefit plans to dependents

5 Select the benefit plans available for benefit changes throughout the benefit plan year

6 Set up benefit plan categories, which are box descriptions or labels displayed on the *Open Enrollment* and *Benefit Changes* web pages.

7 Assign benefit plans to display within benefit plan categories or boxes.

8 Set up and send e-mail notifications to:

- Remind open enrollment non-respondents to submit enrollment forms

- Inform open enrollment non-respondents that they are enrolled in default benefit plans

- Announce an upcoming open enrollment period

- Confirm benefit enrollments resulting from lifestyle changes

9 Upload employees' benefit enrollments from the web to the IBM i at the close of the open enrollment period.

10 Upload employees' benefit changes from the web to the IBM i for employees with lifestyle changes and for new employees.

Setting up open enrollment

During an open enrollment period, employees can elect their benefit plans for the benefits plan year. You use the *Open Enrollments Settings* function to

- Define and maintain enrollment groups

- Assign benefit groups to specific enrollment groups

- Specify the opening and closing dates of the open enrollment period

- Set up and maintain benefit plan access controls including activating plans for benefit changes resulting from lifestyle changes

- Activate dependent and beneficiary code values for each enrollment group and assign benefit plans to each relationship code

- Activate maintenance reason codes for each enrollment group and assign benefit plans to each code for use in processing benefit changes throughout the benefit plan year

To set up open enrollments, complete these steps.

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *Benefit Settings*.

4 Select *Open Enrollment Settings* [OES] to display the selection screen.

On this screen you can perform setup and maintenance procedures for open enrollment. For open enrollment setup, you perform the steps below. Each step is described in detail later in this section.

a   If you are setting up open enrollments for the first time, you must first define one or more enrollment groups.

An enrollment group represents the open enrollment time frame when employees can select their benefit plan options.

b   After you define the enrollment group, you assign benefit groups to the enrollment group.

You base the composition of the enrollment group on benefit groups that you set up and maintain in Infinium HR *Benefits Administration*.

c   After you assign benefit groups to the enrollment group, you assign benefit plans to the enrollment group.

You can assign the same benefit plans to all enrollment groups, or you can assign separate benefit plans to one or multiple enrollment groups.

Caution: Self Service does not support Infinium HR benefit plan types 12 and 13, which are flexible benefit plans for personal leave and vacation. Do not attempt to assign these benefit plans to an enrollment group.

d   After you assign the benefit plans, you assign dependents to the benefit plans within the enrollment group.

You base the composition of the enrollment group and the benefit plans that you set up and maintain in Infinium HR *Benefits Administration*.

e   After you assign the benefit plans, you assign maintenance reason codes to the enrollment group for new employee enrollments and benefit changes made throughout the year.

5   Use the sections below to continue setting up open enrollments.

6   After you complete the open enrollment setup and maintenance steps, press F3 to exit this function and return to the main menu.

Adding an enrollment group

1   To add an enrollment group, press F6 on the *Maintain Open Enrollment Settings* enrollment group selection screen to display the entry screen.

2   Use the information below to complete the fields on the screen.

Employer

Specify the employer for which to create or maintain the enrollment group.

Plan Year

Specify the plan year for which to create or maintain the enrollment group. Plan year codes are created in Infinium HCM using code type YER.

Enrollment Group

Type a unique name for the enrollment group.

Description

Type a detailed description of the enrollment group.

Beginning Date

Type the date when the open enrollment period begins for this enrollment group.

Ending Date

Type the date when the open enrollment period ends for this enrollment group. Once the ending date has been reached, the Open Enrollments menu option is no longer available to users in Self Service.

Effective Date

Type the date when the benefit plan elections associated with the open enrollment period go into effect for this enrollment group.

Enrollment Type

Specify whether the open enrollment period is for annual open enrollment or special open enrollment.

Use Flex Plans

Specify yes to allow employees to enroll in flexible benefit plans during the open enrollment period.

No Changes Check Box

Specify yes to display the option to select the no changes check box during the open enrollment period.

3 Press F3 to save your information and return to the *Maintain Open Enrollment Setting* enrollment group definition screen.

Changing an enrollment group

1 From the *Maintain Open Enrollment Settings* enrollment group selection screen, type **2** in the *Opt* field next to the enrollment group whose information you want to change.

2 Press Enter to display the *Maintain Open Enrollment Setting* enrollment group definition screen.

3 Use the information in the "Adding an enrollment group" section to complete the fields on this screen.

4 Press F3 to save your information and return to the *Maintain Open Enrollment Setting* enrollment group definition screen.

Deleting an enrollment group

1 From the *Maintain Open Enrollment Settings* enrollment group selection screen, type **4** in the *Opt* field next to the enrollment group you want to delete.

2 Press Enter to delete the enrollment group from the list.

Note: An enrollment group cannot be deleted if benefits have been selected and defined for it.

Assigning benefit groups to the enrollment group

1 From the *Maintain Open Enrollment Settings* enrollment group selection screen, type **6** in the *Opt* field next to the enrollment group to which you want to assign benefit groups from Infinium HR Benefits Administration.

2 Press Enter to display the *Update Enrollment Period Benefit Groups* screen.

3 Type any character in the *Opt* field next to each benefit group to include in the enrollment group.

You can assign a benefit group to only one annual open enrollment group within the same plan year, but you can assign multiple benefit groups to the enrollment group.

You can, however, assign a benefit group to more than open enrollment groups if the enrollment groups are defined as special open enrollment groups. Special open enrollment groups are set up by selecting the plans using Option 9.

4 Press F3 to save your information and return to the *Maintain Open Enrollment Setting* enrollment group definition screen.

Assigning benefit plans to all enrollment groups

1 From the *Maintain Open Enrollment Settings* enrollment group selection screen, type **8** in the *Opt* field next to any enrollment group.

2 Press Enter to display the *Maintain Plan Attributes* screen.

On this screen you can do the following:

- Select one or more benefit plans for the enrollment group

  To select a benefit plan, type **1** in the *Opt* field next to plan that you want to include in the enrollment groups and press Enter. Selected plans are highlighted.

  Caution: Self Service does not support Infinium HR benefit plan types 12 and 13, which are flexible benefit plans for personal leave and vacation. Do not attempt to assign these benefit plans to an enrollment group.

- Select all benefit plans for the enrollment groups

  To select all benefit plans, press F15 to enter **1** in the *Opt* field next to all benefit plans and press Enter. Selected plans are highlighted. To deselect all benefit plans, press F16 to enter 4 in the *Opt* field next to all benefit plans and press Enter. None of the plans is highlighted.

- Exclude one or more benefit plans for the enrollment groups

  To exclude a previously selected benefit plan, type **4** in the *Opt* field next to plan that you want to exclude from the enrollment groups and press Enter. Excluded plans are not highlighted.

- Change benefit plan control information

  To change benefit plan requirements, type **2** in the *Opt* field next to the benefit plan whose controls you want to change. Press Enter to display the *Maintain Plan Attributes* detail screen.

Maintaining plan attributes

Use the information below to complete the fields on this screen. Then press F3 to save your changes and return to the *Maintain Plan Attributes* plan selection screen.

PCP Plan

The value displayed here indicates whether employees can update primary care physician information for themselves and their dependents. To change the value, use the *Update Benefit Plans* function in Infinium HR Benefits Administration. Valid values are:

1   Yes

0   No

Benefit Changes

Specify yes to allow new employees and existing employees to access this benefit plan outside the open enrollment period to change elections related to lifestyle changes such as marriage, childbirth and divorce.

Variable Coverage

Specify yes to indicate that the employee can elect an optional coverage amount for the plan.

The variable coverage field is only available for the following benefit types:

- 01 = Life insurance
- 02 = A D & D (accidental death & dismemberment)
- 05 = STD (short term disability)
- 06 = LTD (long term disability)
- 09 = Survivor income

Freeze Coverage/Rate

Type a value to indicate how the program should update the coverage and/or rates in employee enrollment records when you use the Open Enrollments or Benefit Changes menu options. Valid values are:

- 0 = Do not freeze coverage or rates: This is used to continually update employee enrollment records based on current salaries and plan premiums.
- 1 = freeze both coverage and rates: This is used if you want the coverage and the rates to remain as the employee has submitted them.
- 2 = freeze coverage but recalculate rates: This is used if you want to freeze the coverage amount that the employee has requested but for the program to recalculate rates if the rates change on the plan level.

- 3 = freeze rates but recalculate coverage: This is used if you want to freeze the plan rates but recalculate or override what the employee has requested

The default value for this field is retrieved from the benefit plan controls but can be overridden here.

The default value is retrieved from the Infinium HCM plan controls when a new enrollment group is created in Self Service. You can override the value in Self Service and this value updates the employee enrollment record in Infinium HCM during a benefit change or new enrollment. After the value in Self Service is changed, the program no longer changes the value of the field based on the benefit plan controls.

The freeze flag values are available for the following benefit types and are available to be set only if the variable coverage flag is set to yes on the plan:

- 01 = Life insurance

- 02 = A D & D (accidental death & dismemberment)

- 05 = STD (short term disability)

- 06 = LTD (long term disability)

- 09 = Survivor income

Plan Level

Type a value to indicate whether enrollment in this plan is dependent on the employee's enrollment in other plans. Valid values are:

0	None. Enrollment in this plan is not dependent on the employee's enrollment in other plans.
1	Primary. An employee must enroll in this plan to qualify for enrollment in secondary or tertiary plans.
2	Secondary. An employee must enroll in a specified primary plan before qualifying to enroll in a secondary plan.
3	Tertiary. An employee must enroll in a specified secondary plan before qualifying to enroll in a tertiary plan.

Conditional ID 1

Enter a benefit reporting group ID if this plan has dependencies on other plans that need to be selected as part of the enrollment or benefit change. For example a dental or vision plan may be dependent on the employee having first selected a medical plan in a different benefit ID. If a value is entered in this field, then if an employee accesses Benefit Changes to make

a benefit change, an error message is displayed if the user selects this plan without first selecting a plan that is within the benefit ID group.

Conditional ID 2

If using conditional groups then the plan level must be set at zero. If using both Conditional ID 1 and 2 for the plan, Condition 1 and 2 must be met when selecting benefit plans.

Dependents/Beneficiaries

Type a value to indicate whether the plan allows or requires the employee to select dependents and beneficiaries or dependents only. A Dependent is anyone who you can claim on your annual tax return. A Beneficiary is a recipient of funds such as an insurance policy and cannot be claimed on your annual tax return. A Dependent can also function as a Beneficiary but not all Beneficiaries (such as Trusts or Charities) can be Dependents. Valid values are:

B   Both dependents and beneficiaries

D   Dependents only

Excepted Plan

Specify yes if the plan is an excepted benefit plan for processing dependent age limits based on dependent student status. Otherwise, specify no.

When you specify yes, the *Minimum Age* and *Maximum Age* fields are checked to determine if the dependent is within the age range. If the dependent is within the age range, it is then determined whether the dependent is a full-time student. If the dependent is a student, the dependent is included on the Self Service selection page for the plan. If not a student, the dependent is not included on the selection page.

If the dependent is not within the age range, it is determined whether the dependent is under the minimum age. If yes, the dependent is included on the Self Service selection page for the plan. If no, the dependent is not included on the selection page.

See the *Minimum Age* and *Maximum Age* field descriptions for additional details.

Minimum Dependents

For a plan in which an employee can enroll dependents, specify the minimum number of dependents allowed, if applicable.

Maximum Dependents

For a plan in which an employee can enroll dependents, specify the maximum number of dependents allowed, if applicable.

Minimum Age

For excepted benefit plans in which an employee can enroll dependents, specify the minimum age a dependent can be as a student to qualify for enrollment. Otherwise, leave the field blank.

For example, if the dependent must be a student from 21 to 24 to be covered, enter **21** in the *Minimum Age* field and **24** in the *Maximum Age* field for excepted benefit plans.

If this is not an excepted plan, then the age range should be the range in which a dependent is qualified for coverage, regardless of student status.

Self-Service uses the *Minimum Age* field with the dependent relationship code values that you assign to the plan to maintain the dependent's enrollment in the plan.

Maximum Age

For excepted benefit plans in which an employee can enroll dependents, specify the maximum age a dependent can be as a student to qualify for enrollment. Otherwise, leave the field blank.

For example, if the dependent must be a student from 21 to 24 to be covered, enter **21** in the *Minimum Age* field and **24** in the *Maximum Age* field for excepted benefit plans.

If this is not an excepted plan, then the age range should be the range in which a dependent is qualified for coverage, regardless of student status.

Self Service uses the *Maximum Age* field with the dependent relationship code values that you assign to the plan to maintain the dependent's enrollment in the plan.

Flex Plan Credits

If you use Infinium FB and you offer employees flexible benefit credits for this plan, type the number of credits available. Otherwise, leave blank.

Assigning dependents to the enrollment group

1 From the *Maintain Open Enrollment Settings* enrollment group selection screen, type **7** in the *Opt* field next to the enrollment group to which you want to assign dependents from Infinium HCM.

2 Press Enter to display the *Update Plan Dependent Codes* screen.

3 To select a dependent/beneficiary, type **1** in the *Opt* field next to the relationship code that you want to include in the enrollment group and press Enter. Selected dependents/beneficiaries are highlighted

4 To remove a dependent/beneficiary, type **4** in the *Opt* field next to the relationship code that you want to exclude from the enrollment group and press Enter. The dependents/beneficiaries are no longer highlighted.

5 To assign benefit plans to a selected dependent/beneficiary, type **8** in the *Opt* field next to the relationship code that you want to assign to benefit plans and press Enter. A list of eligible benefit plans is displayed. Select one or more benefit plans for the selected dependent/beneficiary.

6 Type **X** in the *Opt* field next to the plans that are to be associated with this dependent/beneficiary relationship code.

   To select all benefit plans, press F15 to enter **X** in the *Opt* field next to all benefit plans. Selected plans are highlighted. To deselect all benefit plans, press F16 to remove all benefit plans. None of the plans is highlighted.

7 Press F3 to save your information and return to the *Update Plan Dependent Codes* definition screen.

8 Press F3 to save your information and return to the *Maintain Open Enrollment Setting* enrollment group definition screen.

Dependent processing

Dependent processing works in conjunction with the Infinium HCM relationship code value (code type REL) *Apply Age Limits* field. Make sure that the field is set correctly for each relationship code value before using the Self Service benefits processing module.

When the user accesses the *Benefits/Benefit Changes* or the *Benefits/ Open Enrollment* menu option on the web, the following processing takes place:

The program checks to see if the relationship code is assigned to the plan that the user selected.

- If no (**0**), the dependents and beneficiaries assigned to that relationship code value are not displayed in the list.

  - If yes (**1**), the program checks the HCM relationship code to determine if the minimum and maximum age limits should be checked.

  - If no (**0**), the dependents and beneficiaries are displayed in the list.

  - If yes (**1**), the program checks the minimum and maximum age fields in Self Service for the selected benefit plan.

    - If no minimum or maximum age is specified (that is, the values are 0), the dependents and beneficiaries are displayed in the list.

    - If a minimum or maximum age is specified, the program checks the age of the dependent or beneficiary to determine if the age is within the specified limits.

      - If no, the dependents and beneficiaries are not displayed in the list.

      - If yes, the dependents and beneficiaries are displayed in the list.

The plan level age settings also come into effect if the dependent's or beneficiary's date of birth is within the benefit change date or enrollment date.

Age limits processing

This section describes how Self Service benefits programs process the age limits of dependents. Relationship codes are assigned to benefit plans within the open enrollment setup. When the user signs in to the Self Service web application to process either benefit changes or open enrollments, the program checks to determine which relationship codes (dependents) are assigned.

When the program checks the employer codes file, PRPCD, for the code type REL (relationship), it checks how the *Apply Age Limits* field, @AGELM, is set.

If the *Apply Age Limits* field is set to **0**, then age is not a factor in determining if the dependent is listed on the Dependent/Beneficiary Selection page If the *Apply Age Limits* field is set to **1**, then age processing becomes a factor in determining if the dependent is displayed in the list.

Note: The *Apply Age Limits* field should be set to **1** only for dependent children, that is, the employee's sons and daughters.

When this field is set to **1**, the program checks the individual plan attributes to determine if the relationship code is assigned to the plan.

- If the relationship code is not assigned to plan, no additional processing needs to take place. The dependent is not listed on the selection page.

- If the relationship code is assigned to the plan, the program checks if the plan is an excepted plan.

    - If the *Excepted Plan* value is **0**, the program continues with standard processing to check the minimum/maximum age as noted below.

    - If the *Excepted Plan* value is **1**, then the program must check the *Student Status* field, DPSTUD, on the dependent file, PRPDP, in Infinium HCM.

        - If the *Student Status* field, DPSTUD, is set to **1** (full time student) then the program continues with current processing to check the minimum/maximum age as noted below.

        - If the *Student Status* field, DPSTUD, is any value other than **1** (including blank), no additional processing takes place. The dependent is not listed on the selection page.

- For standard age processing, the program checks the plan attributes to determine if there is a minimum and/or maximum age entered.

    - If the dependent's age is outside of the minimum/maximum age, the dependent is not listed in the Dependent/Beneficiary Selection page list.

    - If the dependent's age is within the minimum/maximum age, the dependent is listed in the Dependent/Beneficiary Selection page list.

Assigning maintenance reason codes to the enrollment group

Maintenance reason codes are used only when you are using the *Benefits/Benefit Changes* menu option. They are not used during Open Enrollment. The maintenance reason codes are defined within Infinium HCM using code type MRC.

1 From the *Maintain Open Enrollment Settings* enrollment group selection screen, type **5** in the *Opt* field next to the enrollment group to which you want to assign maintenance reason codes from Infinium HCM.

2 Press Enter to display the *Update Enrollment Reason Codes* screen.

3 To select a maintenance reason code, type **1** in the *Opt* field next to the reason code that you want to include in the enrollment group and press Enter. Selected reason codes are highlighted

4 To change the definition of a maintenance reason code, type **2** in the *Opt* field next to the reason code that you want to update and press Enter. The *Update Enrollment Reason Code* screen is displayed.

Use the information below to complete the fields on this screen. Then press F3 to save your changes and return to the *Update Enrollment Reason Codes* selection screen.

Activation Period

Enter the number of days that benefit plans can remain open for selection using the benefit maintenance reason code entered by the employee.

The Activation Period is an attribute of the Maintenance Reason Code. All the plans attached to reason code are evaluated for inclusion or exclusion.

The program checks the *Activation Period* field to see if there is a value in the field that needs to be checked against the user defined date field. It compares the date field to the activation period to make sure it falls within the range.

Note: The following processing is performed on every plan that is eligible for the employee to select.

If the '*Activation Period'* field is blank, continue processing to the next page. If the '*Activation Period'* field has a value, compare the HCM file/date field to the *Benefit Change Date*. Add the '*Activation Period'* value to HCM date field. If the date is before the *Benefit Change Date* then do NOT include the plan(s) associated with the *maintenance reason code* as an available selection to the employee on the next screen.

File

Specify the file name containing the date field to be used to determine if the benefit change using this reason code is within the activation period.

Press F4 to display a list from which you can select a valid entry. Administrators can select date fields from the following list of HCM files:

- PRPMS - Employee Root Master File

- PEPMS - Employee Personnel Master File

- PRPUD - User Defined Employee File

- PEPDP - Employee Dependents File

Date Field

Specify the date field to be used to determine if the benefit change using this reason code is within the activation period.

For maintenance reason codes that use the dependents date of birth on the dependents file (PEPDP), use the last sequence number in the file to determine which dependent is the latest one added. If you find that the dependent that you are processing the benefit change for is not in the list, this means that you have not added the dependent in Infinium HCM. You must add the dependent first before proceeding with the benefit change transaction.

Override EOI Rules

If you want the program to override EOI rules when using this maintenance reason code, enter a 1 in this field. Otherwise, enter a 0. This only applies to the following benefit plan types:

- Type 01: Life Insurance

- Type 02: Accidental death & dismemberment

- Type 05: Short term disability

- Type 06: Long term disability

- Type 09: Survivor income

Caution: This field is intended for New Hires and it bypasses any EOI control settings that have been established in Infinium HCM.

5 To remove a maintenance reason code, type **4** in the *Opt* field next to the relationship code and press Enter. The reason codes are no longer highlighted

6 To assign the plans to the maintenance reason code, type **8** in the *Opt* field next to the reason code that you want to assign to plans in the enrollment group and press Enter. The *Update Reason Code Plans* screen is displayed.

Note: You should include all plans that are possible selections for each maintenance reason code to ensure that they are processed correctly. The program checks the enrollment group settings for the plans assigned to the maintenance reason code entered against the plans that are in the employee's benefit group. The program displays to the employee only those plans assigned to the maintenance reason code and that in the employee's benefit group.

7 Type **X** in the *Opt* field next to the plans that are to be associated with this reason code.

To select all benefit plans, press F15 to enter **X** in the *Opt* field next to all benefit plans. Selected plans are highlighted. To deselect all benefit plans, press F16 to remove all benefit plans. None of the plans is highlighted.

8 Press F3 to save your information and return to the *Update Enrollment Reason Codes* definition screen.

9 Press F3 to save your information and return to the *Maintain Open Enrollment Setting* enrollment group definition screen.

Assigning benefit plans to one or multiple enrollment groups

You set up benefit plans by enrollment group when the open enrollment period differs for the enrollment groups. Benefit changes for lifestyle changes do not apply to the enrollment group setup. However, if your organization has only one open enrollment period for your employees, you use option 8 to set up your open enrollment settings.

1 From the *Maintain Open Enrollment Settings* enrollment group selection screen, type **9** in the *Opt* field next to the enrollment group to which you are assigning benefit plans.

2 Press Enter to display the *Maintain Plan Attributes* plan selection screen.

On this screen you can do the following:

- Select one or more benefit plans for the enrollment group

- Select all benefit plans for the enrollment group

- Exclude one or more benefit plans for the enrollment group

- Change benefit plan control information

Caution: Self Service does not support Infinium HR benefit plan types 12 and 13, which are flexible benefit plans for personal leave and vacation. Do not attempt to assign these benefit plans to an enrollment group.

3 Use the information in the "Assigning benefit plans to all enrollment groups" section to work with this screen.

4 Press F3 to save your information and return to the *Maintain Open Enrollment Setting* enrollment group definition screen.

Submitting benefit requests multiple times

The open enrollment and benefit changes program displays the most recent Coverage amount submitted allowing employees to see most current amount when the benefit requests are submitted multiple times. The program checks for any pending transactions in the Infinium HCM benefit changes file that have not yet been processed by the Mass Update Enrollments program and retrieve the most recent requested coverage amount to be displayed to the user,

This only applies to the following type plans:

- 01 = Life insurance
- 02 = A D & D (accidental death & dismemberment)
- 05 = STD (short term disability)
- 06 = LTD (long term disability)
- 09 = Survivor income

Maintaining box descriptions

You use the *Maintain Box Descriptions* function to define categories within which to group the different benefit plans. Self Service uses these categories as the box descriptions or labels displayed on the *Open Enrollment* and *Benefit Changes* web pages. You use the *Box Selections* function later to assign the benefit plans to these box descriptions.

Examples of enrollment box descriptions are:

- Medical
- Dental
- Life Insurance

To set up box descriptions, complete these steps.

1 From the Self Service main menu select *Benefit Settings.*

2 Select *Maintain Box Descriptions* [MBD] to display the selection screen.

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

Employer

Specify the employer for whom you are setting up or maintaining benefit plan box descriptions.

Plan Year

Specify the plan year for which you are setting up or maintaining benefit plan box descriptions.

Enrollment Group

Specify an enrollment group to associate the benefit plan box descriptions with a specific group of Self Service users enrolling in the benefit plans.

Leave blank to associate the benefit plan box descriptions with all enrollment groups.

If you set up your benefit plans by enrollment group, you must also set up the box descriptions by enrollment group.

4 Press Enter to display the *Maintain Box Descriptions* entry screen.

On this screen you can do the following:

- Create a benefit plan box description
- Change a benefit plan box description
- Delete a benefit plan box description

  To delete a box description, type **4** in the *Opt* field next to the box description you want to delete. Then, press Enter to delete the selected category from the list on the screen.

5 To create a box description, press F6 to display the entry screen.

6 To change a box description, type **2** in the *Opt* field next to the box description you want to change and press Enter to display the update screen.

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

Box Number

Type a unique number for the box. Self Service uses this number to determine the sequence in which the categories are displayed on the web page. Increment the numbers to allow for future categories.

Box Description

Type a description of the box such as **Medical**.

Benefit ID Group

If applicable, specify the benefit ID group associated with this benefit plan box. Self Service uses the *Benefit ID Group* value to enter a default box number in the *Box* field in the *Box Selections* function to save setup time.

Multi Select Plans

Specify yes to allow employees to select multiple plans within the same Self Service benefit plan box description.

8 Press F3 to save your information and return to the Maintain Box Description File maintenance screen.

9 Repeat steps 7 through 9 to add, change or delete additional box descriptions.

10 Press F3 to return to the main menu.

Assigning plans to benefit plan categories

You use the *Box Selection* function to assign each benefit plan to a benefit plan category or box. This assignment allows an employee to select the plan from the designated category, such as Medical, from the *Open Enrollment* or *Benefit Changes* web pages.

To make the box selections, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Box Selections* [BS] to display the selection screen.

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

Employer

Specify the employer for whom you are assigning benefit plans to a benefit plan box.

Plan Year

Specify the benefit plan year for which you are assigning benefit plans to a benefit plan box.

Enrollment Group

Specify the enrollment group for which you are assigning benefit plans to a benefit plan box. Leave blank to make the same assignments for all enrollment groups.

If you assign benefit plans by enrollment group, you must also set up the box selections by enrollment group.

4 Press Enter to display the entry screen.

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

Box

Specify the number of the benefit plan box in which the plan is to display on the web page.

If you enter a value in the *Benefit ID Group* field in the *Maintain Box Description* function, Self Service enters the corresponding box number in this field.

Seq

Type the sequence number to determine in what sequence to display the plan within the box if you include multiple plans in the box.

Multi Type

Type **1** (yes) to allow employees to enroll in this plan along with other plans of the same Infinium HR benefit type. Otherwise, type **0** (no).

6 Press F3 to save your information and return to the Box Selections selection screen.

7 Press F3 to return to the main menu.

Setting up and generating e-mail notifications

You use the *Benefit Enrollment Settings* function on the *Workflow* menu to set up e-mail notifications for the following tasks:

- Remind open enrollment non-respondents to submit enrollment forms

- Inform open enrollment non-respondents that they are enrolled in default benefit plans

- Announce an upcoming open enrollment period

- Confirm benefit enrollments resulting from open enrollments

You use the *Open Enrollment Notifications* function on the *Workflow* menu to generate the open enrollment e-mails.

Refer to the "Workflow Implementation" chapter in this guide for detailed information on setting up and sending e-mail notifications.

Listing benefit settings

You use the *List Benefit Settings* function to generate a report of the benefit settings that you set up and maintain when you use the *Benefit Settings* options.

Benefit settings include:

- Beginning, ending and effective dates of open enrollment periods
- Open enrollment period type
- Indication whether flexible benefit plans are included in an open enrollment period
- Benefit plans included in the open enrollment period

To print benefit settings information, complete these steps.

1 From the Self Service main menu select *Benefit Settings.*

2 Select *List Benefit Settings* [LBS] to display the selection screen.

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

   Employer

   Specify the employer for which you are generating the report. Leave blank to include all employers.

   Plan Year

   Specify the plan year for which you are generating the report. Leave blank to include all plan years.

   Enrollment Group

   Specify the enrollment group for which you are generating the report. Leave blank to include all enrollment groups.

4 Press Enter to generate the report and return to the main menu.

Listing benefit plan settings

You use the *List Benefit Plan Settings* function to generate a report of the benefit plan settings that you set up and maintain when you use the *Benefit Settings* options. The report includes benefit plan settings for both open enrollment and benefit changes for employees with lifestyle changes.

To print benefit plan settings information, complete these steps.

1 From the Self Service main menu select *Benefit Settings.*

2 Select *List Benefit Plan Settings* [LBPS] to display the selection screen.

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

Employer

Specify the employer for which you are generating the report. Leave blank to include all employers.

Plan Year

Specify the plan year for which you are generating the report. Leave blank to include all plan years.

Enrollment Group

Specify the enrollment group for which you are generating the report. Leave blank to include all enrollment groups.

Include Relationship Code

Type **1** (yes) to include the code value that represents a dependent's or beneficiary's relationship to the employee on the report. Otherwise, type **0** (no).

Benefit Changes Only

Type **1** (yes) to include on the report only the benefit plans that the employee can change outside an open enrollment period because of a lifestyle change.

Type **0** (no) to include all benefit plans on the report.

4 Press Enter to generate the report and return to the main menu.

Listing box descriptions

You use the *List Box Descriptions* function to generate a report of the benefit plan box descriptions that you set up and maintain when you use the *Maintain Box Descriptions* function for the benefit plans that Self Service users can access from the *Open Enrollment* and *Benefit Changes* web menu options.

To print box descriptions, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *List Box Descriptions* [LBD] to display the selection screen.

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

Employer

Specify the employer for which you are generating the report. Leave blank to include all employers.

Plan Year

Specify the plan year for which you are generating the report. Leave blank to include all plan years.

Enrollment Group

Specify the enrollment group for which you are generating the report. Leave blank to include all enrollment groups.

4   Press Enter to generate the report and return to the main menu.

Listing box selections

You use the *List Box Selections* function to generate a report of the benefit plans selected for each box description that Self Service users can access from the *Open Enrollment* and *Benefit Changes* web menu options.

You use the *Box Selections* function to assign benefit plans to the box descriptions or categories.

To print box descriptions, complete these steps.

1   From the Self Service main menu select *Benefit Settings.*

2   Select *List Box Selections* [LBXS] to display the selection screen.

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

Employer

Specify the employer for which you are generating the report. Leave blank to include all employers.

Plan Year

Specify the plan year for which you are generating the report. Leave blank to include all plan years.

Enrollment Group

Specify the enrollment group for which you are generating the report. Leave blank to include all enrollment groups.

4 Press Enter to generate the report and return to the main menu.

Listing benefit uploads

You use the *List Benefit Uploads* function to generate a report of the open enrollments and benefit changes that you collect from employees before you upload the enrollments and changes from the web to Infinium HR and Infinium FB.

If you automatically upload benefit open enrollments and benefit changes to Infinium HR, the *List Benefit Uploads* report is blank. You use the *Automatically Upd Open enroll* and *Automatically Upd Benefit Chg* fields in the *Group Attributes Maintenance* function to upload the open enrollments and benefit changes automatically to Infinium HR. Refer to the "Security Options" chapter in this guide for more information.

To list open enrollments and benefit changes to upload, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *List Benefit Uploads* [LBU] to display the selection screen.

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

You must enter a value in the *Employer* or *Employer Group* field but not in both.

Employer

Specify the employer for which to generate the benefits upload report.

Employer Group

Specify the employer group for which to generate the benefits upload report.

From Plan Year

Specify the benefits plan year for which to generate the benefits upload report.

From Enrollment Group

Specify the benefits enrollment group for which to generate the benefits upload report.

Employee

Specify the employee for whom to generate the benefits upload report.

Include Benefit Changes

Specify yes to include benefit changes in the benefits upload report.

Include Open Enrollments

Specify yes to include open enrollments in the benefits upload report.

4 Press Enter to generate the report and return to the main menu.

Uploading open enrollments

You use the *Upload Open Enrollments* function at the close of the open enrollment period to transfer from the web to Infinium HR and Infinium FB all of the benefit enrollment information that you collect from employees during the open enrollment period. After you upload the open enrollments, your benefits administrator must run the Infinium HR *Mass Update Enrollments* function to process the new enrollments.

If the value for the *Automatically Upd Open Enroll* field is **Y** in the *Group Attributes Maintenance* function, you can skip this task. Your benefits administrator, however, must run the Infinium HR *Mass Update Enrollments* function to process the new enrollments.

When you use the *Upload Open Enrollments* function, Self Service generates a report (printer file AHTPBE) of the uploaded open enrollment information. The report identifies the terminated employees with an asterisk (*) and prints a message along with the employees' termination dates.

To upload enrollments, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Upload Open Enrollments* [UOE] to display the selection screen.

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

Employer

Specify the employer for which you are uploading the benefit enrollment information to Infinium HR and Infinium FB.

From Plan Year

Specify the plan year for which you are uploading the benefit enrollment information to Infinium HR and Infinium FB.

From Enrollment Group

Specify the enrollment group for which you are uploading the benefit enrollment information to Infinium HR and Infinium FB.

Include Terminated

Specify which open enrollments should be selected for the upload processing. Valid values are:

0	Select open enrollments only for active employees.
1	Select open enrollments for both active and terminated employees.
2	Select open enrollments only for terminated employees.

The default value is **0** (no).

Delete Terminated

Define how to process the open enrollments of any terminated employees. Valid values are:

1	Delete terminated employees from the Self Service open enrollment work files and do not upload them to Infinium HCM open enrollments.
0	Upload and process the open enrollments for any terminated employees.

The default value is **0** (no).

Employee

Specify an employee if you are uploading benefit enrollment information for only one employee.

4 Press Enter to upload the open enrollments and return to the main menu.

Uploading benefit changes

You use the *Upload Benefit Changes* function to upload from the web to Infinium HR and Infinium FB any benefit enrollment changes that you collect from employees with lifestyle changes. After you use this function, your benefits administrator must run the Infinium HR *Mass Update Enrollments* function to process the benefit changes.

If the value for the *Automatically Upd Benefit Chg* field is **Y** in the *Group Attributes Maintenance* function on the *Security Options* menu, you can skip this task. Your benefits administrator, however, must run the Infinium HR *Mass Update Enrollments* function to process the benefit changes.

When you use the *Upload Benefit Changes* function, Self Service generates a report (printer file AHTPBE) of the uploaded benefit changes. The report identifies the terminated employees with an asterisk (*) and prints a message along with the employees' termination dates.

To upload benefit changes, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Upload Benefit Changes* [UBC] to display the selection screen.

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

Employer

Specify the employer for which you are uploading benefit changes to Infinium HR.

From Plan Year

Specify the plan year for which you are uploading the benefit changes to Infinium HR.

Include Terminated

Specify which benefit changes should be selected for the upload processing. Valid values are:

0	Select benefit changes only for active employees.
1	Select benefit changes for both active and terminated employees.
2	Select benefit changes only for terminated employees.

The default value is **0** (no).

Employee

Specify an employee if you are uploading benefit changes for one employee.

4 Press Enter to display the confirmation selection screen.

On this screen you can do the following:

- Submit an employee's benefit changes to Infinium HR without changing the effective date and change reason

- Change the effective date and change reason for the employee's benefit changes and then submit the changes to Infinium HR

  To change the effective date and change reason, type **2** in the *Opt* field next to the employee whose information you want to change. Then, press enter to display the information in the fields at the top of the screen.

- Delete an employee's benefit change transaction before it is uploaded to Infinium HR

5 Type **1** in the *Opt* field next to each employee whose benefit changes you want to submit to Infinium HR.

6 Type **2** in the *Opt* field next to each employee whose benefit changes you want to update. Use the information below to complete the fields on this screen.

Effective date

Type the effective date that Infinium HR uses for the date when the employee's benefit changes take effect. Leave blank to use the date that you run this function as the effective date for the employee's benefit changes.

Change reason

Specify a value that represents the reason why the employee is submitting the benefit change.

7 Type 4 in the *Opt* field next to each employee whose benefit changes you want to delete and not submit to Infinium HR. A confirmation screen is displayed the record is permanently deleted.

Note: The processing logic first checks and processes the records selected to be deleted (option 4) before processing the records selected for submission (option 1) or updating (option 2). The sub-file is then redisplayed for further selection choices to clarify what is being deleted and what is submitted for processing.

8 Press Enter to upload the benefit changes and return to the main menu.

Working with non-respondents

You use the *Non-Respondents* options on the Benefit Settings screen to enroll employees in default benefit plans when the employees fail to enroll in benefit plans during an open enrollment period.

The non-respondent enrollment process uses a separate enrollment group that includes only those benefits that you define as default plans for the company so that the non-respondents have access to the basic plans. These default plans override the plans that are assigned to the employee's assigned benefit group. Use care when you set up plans for your enrollment groups and define default plans for non-respondents as it is possible to assign non-respondents to default plans that do not belong to the plans assigned to the employee's benefit enrollment group.

To work with non-respondents, complete the steps below in sequence. Each step is described in detail in this chapter.

1 Identify and maintain default benefit plans. You use the *Maintain Default Benefit Plans* function described in this section to maintain default plans.

2 Identify the non-respondents for the open enrollment period. You use the *List Non-Respondents* function described in this section to identify non-respondents.

3 Enroll the non-respondents in the default benefit plans. You use the *Enroll Non-Respondents* function described in this section to enroll non-respondents in the default benefit plans that you set up within the *Maintain Default Benefit Plans* function. The *Enroll Non-Respondents* function adds the non-respondents' enrollment records to the Infinium Self Service Employee Benefits Enrollments file, AHPBE.

4 Upload the non-respondent enrollments to Infinium HCM. You use the *Upload Open Enrollments* function described previously in this chapter to upload the non-respondents' enrollments to the Infinium HCM Employee Benefits Enrollments file, PRPBE.

Caution: When you upload AHPBE records for the non-respondents' enrollments to Infinium HCM, any PRPBE records for plans that are not in the AHPBE file but are included in the open enrollment settings are deleted for the non-respondent employees.

Also, if you use the Infinium HCM *Mass Copy Enrollments* function to copy enrollments from a previous year to the new plan year, the upload process for the non-respondent records deletes the copied benefit plan enrollment records in the PRPBE file if an employee does not have a matching record in the uploaded AHPBE file.

To prevent the deletion of existing enrollment records for non-respondents in the PRPBE file, when you use the *Maintain Default Benefit Plans* function, type **9** next to those enrollment groups that you want to use the default plans and select the default plans for the enrollment groups. After you complete the non-respondent enrollment process and upload the open enrollments to Infinium HCM, use the *Maintain Default Benefit Plans* function, type **9** next to the previously selected enrollment groups, and delete the default plan selections for the enrollment groups.

Maintaining default benefit plans

You use the *Maintain Default Benefit Plans* function to identify and maintain a list of default benefit plans into which you can enroll employees who fail to submit elections for a benefit plan open enrollment period.

You can maintain the default benefit plans for all employees, or you can override the default plans for specific enrollment groups.

To maintain default benefit plans, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Non-Respondents*.

3 Select *Maintain Default Benefit Plans* [MDBP] to display the selection screen.

4 To select default plans for all enrollment groups, type **8** in the *Opt* field next to any enrollment group.

   To select default plans for one or more specific enrollment groups, type **9** in the *Opt* field next to the enrollment groups.

5 Press Enter to display the *Default Benefit Plans* selection screen.

6 Type **1** in the *Opt* field next to all benefit plans that you want to include as default plans for the specified enrollment group.

   Type **4** in the *Opt* field next to all previously selected benefit plans that you want to exclude as default plans for the specified enrollment group.

7 Press Enter to save your information.

8 Press F3 to return to the Maintain Default Benefit Plans enrollment group selection screen.

9 Press F3 to return to the main menu.

Listing non-respondents

You use the *List Non-Respondents* function to generate a report that identifies employees who fail to submit enrollments to a benefit plan open enrollment period.

To list non-respondents, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Non-Respondents*.

3 Select *List Non-Respondents* [LN] to display the selection.

You list non-respondents by only one of the following selection criteria:

- By level, job code, position combination
- By supervisor
- By reports-to position

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

Employer

Specify the employer of the non-respondents to include in the report.

Plan Year

Specify the benefit plan year of the non-respondents to include in the report.

Enrollment Group

Specify the enrollment group of the non-respondents to include in the report. Leave blank to include all enrollment groups.

Level 1, 2, 3, 4

Specify the level or combination of levels of the non-respondents to include in the report. Leave blank to include all levels.

Job Code

Specify the job code of the non-respondents to include in the report. Leave blank to include all job codes.

Position

Specify the position of the non-respondents to include in the report. Leave blank to include all positions.

Supervisor

Specify the supervisor of the non-respondents to include in the report. Leave blank to include all supervisors.

Reports To Position

Specify the reports-to position of the non-respondents to include in the report. Leave blank to include all reports-to positions.

Send E-Mail Reminder?

Specify yes to send an e-mail notification to non-respondents as a reminder to submit enrollments before the end of the open enrollment period.

5 Press Enter to generate the report and return to the main menu.

Enrolling non-respondents

You use the *Enroll Non-Respondents* function to enroll benefit plan open enrollment non-respondents into default benefit plans.

To enroll non-respondents, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Non-Respondents*.

3 Select *Enroll Non-Respondents* [EN] to display the selection screen.

You enroll non-respondents in the default benefit plans by only one of the following selection criteria:

- By level, job code, position combination
- By supervisor
- By reports-to position

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

Employer

Specify the employer of the non-respondents to enroll in the default plans.

Plan Year

Specify the benefit plan year of the non-respondents to enroll in the default plans.

Enrollment Group

Specify the enrollment group of the non-respondents to enroll in the default plans. Leave blank to include all enrollment groups.

Level 1, 2, 3, 4

Specify the level or combination of levels of the non-respondents to enroll in the default plans. Leave blank to include all levels.

Job Code

Specify the job code of the non-respondents to enroll in the default plans. Leave blank to include all job codes.

Position

Specify the position of the non-respondents to enroll in the default plans. Leave blank to include all positions.

Supervisor

Specify the supervisor of the non-respondents to enroll in the default plans. Leave blank to include all supervisors.

Reports To Position

Specify the reports-to position of the non-respondents to enroll in the default plans. Leave blank to include all reports-to positions.

Send E-Mail Notification?

Specify yes to send an e-mail notification to non-respondents to confirm enrollment in the default benefit plans.

5 Press Enter to enroll the non-respondents in the default plans and return to the main menu.

Working with flexible benefit settings

You use the *Flex Benefits* options on the Benefit Settings menu to prepare for using flexible benefits with open enrollment. Before you set up flexible benefits, you must set up your system for open enrollments.

To set up flexible benefits, complete the steps below in sequence.

1 Mass add employees to the flexible benefits credit table.

2 Maintain the flexible benefits credit table.

3 Print the flexible benefits credit table.

4 Cancel current year enrollments.

5 Clear the flexible benefits credit table.

Each step is described in detail in this chapter.

Mass adding employees to the flexible benefits credit table

You use the *Mass Add EE to Flex Credit Table* function to mass add employees to the flexible benefits credit table. When you add employees to the credit table, you can specify the flexible benefit credit amount for the employees, or you can access your own custom program for credits designated in the *Credits program* field, KCPROG, in the Infinium FB flexible benefits control file, PRPKC.

To mass add employees to the flexible benefits credit table, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Flexible Benefits*.

3 Select *Mass Add EE to Flex Credit Table* [MAETFCT] to display the Mass Add into Flex Credit Table user group selection screen.

4 Type any character in the *Select* field next to the user group for which you are mass adding employees to the flexible benefits credit table.

5 Press Enter to display the Mass Add Employee to Flex Credit Table employer selection screen.

6 Specify the employer and benefit plan year of the user group for which you are mass adding employees to the flexible benefits credit table.

7 Press Enter to display the selection screen.

8 Use the information below to complete the fields on this screen. Leave the fields in the Employee Selection section blank to mass add all employees in the specified user group to the flexible benefits credit table.

Use Flex Credits User Exit Program

Specify **1** (yes) to use the user-exit program designated in the Credits program field on the Infinium FB benefits control for your flexible benefits credits. Otherwise, specify **0** (no).

Levels

To restrict your selection criteria to employees within a specific level, specify the level or levels for the employees that you are mass adding to the flexible benefits credit table.

Status

To restrict your selection criteria to employees within a specific status, specify the status for the employees that you are mass adding to the flexible benefits credit table.

Location

To restrict your selection criteria to employees within a specific location, specify the location for the employees that you are mass adding to the flexible benefits credit table.

Benefit Group

To restrict your selection criteria to employees within a specific benefit group, specify the benefit group for the employees that you are mass adding to the flexible benefits credit table.

Union Code

To restrict your selection criteria to employees within a specific union code, specify the union code for the employees that you are mass adding to the flexible benefits credit table.

Annual Flex Credits

Type the amount for the annual flexible benefits credit available to each employee you are adding to the credit table.

9 Press Enter to mass add the employees to the flexible benefits credit table and return to the main menu.

Maintaining the flexible benefits credit table

You use the *Flex Credit Table Maintenance* function to add, change or delete employees from the flexible benefits credit table.

To maintain the flexible benefits credit table, complete these steps.

1 From the Self Service main menu select *Benefit Settings*.

2 Select *Flexible Benefits*.

3 Select *Flex Credit Table Maintenance* [FCTM] to display the Flex Credit Table Maintenance user group selection screen.

4 Type any character in the *Select* field next to the user group for which you are maintaining the flexible benefits credit table.

5 Press Enter to display the *Maintain Flex Credit File* employer selection screen.

6 Specify the employer and plan year of the user group for which you are maintaining the flexible benefits credit table.

7 Press Enter to display the selection screen.

On this screen you can do the following:

- Add an employee to the credit table

  To add an employee, type the information for the new employee in the fields at the top of the screen.

- Change an employee's flexible benefit credit information

  To change an employee's information, type **2** in the *Opt* field next to the employee whose information you want to change. Then, press Enter to display the information in the fields at the top of the screen.

- Delete employee from the credit table

To delete an employee, type **4** in the *Opt* field next to the employee you want to delete. Then, press Enter to delete the selected employee from the list at the bottom of the screen.

▪ Transfer an employee from one user group to another

To transfer an employee, type the number of the employee you want to transfer in the *Employee ID* field, press Enter and then type **1** on the Transfer Employee to Group window.

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

Employee ID

Specify the ID number of the employee for whom you are maintaining flexible benefits credit information.

Flex Annual Salary

Type the annual salary for the selected employee for the specified flexible benefits plan year.

To determine the employee's flexible benefits annual salary, Self Service uses the Infinium FB flexible benefits credits file, PRPBY. If the salary information in the file is blank, Self Service uses the amount that you enter here in the *Flex Annual Salary* field for the annual salary. If you leave this field blank, Self Service uses the information from the employee's Infinium HR basic data record, PRPMS, to calculate the salary.

Flex Annual Credits

Type the amount of the annual flexible benefits credits available to the selected employee.

9 Press Enter to save your information.

10 Press F3 to return to the main menu.

Canceling current year enrollments

You use the *Cancel Current Year Enrollments* function to cancel the flexible benefits enrollments for the current plan year. Use this function after you close the open enrollment period. After you run the *Cancel Current Year Enrollments* function, you must also run the following functions in Infinium FB to process the cancellations to payroll.

▪ *Mass Update Cash Incomes*

- *Update Spending Acct Deductions*
- *Mass Update Cost Deductions*

After you run these functions, you must run the Self Service *Upload Open Enrollments* function to transfer all web enrollments to Infinium FB.

To cancel current year enrollments, complete these steps.

1 From the Self Service main menu select *Benefit Settings.*

2 Select *Flexible Benefits.*

3 Select *Cancel Current Year Enrollments* [CCYE] to display the selection.

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

Employer

Specify the employer for which you are canceling current year enrollments.

Employee

Specify an employee to cancel current year enrollment information for one employee.

Plan Year

Specify the benefits plan year for which you are canceling current year enrollment information.

Cancel Effective Date

Specify the effective date for canceling the current year enrollment information.

5 Press Enter to cancel the current flexible benefits enrollments and return to the main menu.

Clearing the flexible benefits credit table

You use the *Clear Flex Credit Table* function to delete all information from the flexible benefits credit table.

Caution: This function deletes the entire contents of the flexible benefits credit table.

To clear the flexible benefits credit table, complete these steps.

1 From the Self Service main menu select *Benefit Settings.*

2 Select *Flexible Benefits.*

3 Select *Clear Flex Credit Table* [CFCT] to display the selection screen.

4 Specify yes in the *Clear Flex Credit Table* field.

5 Press Enter to clear the table and return to the main menu.

Listing flexible benefits credit table information

You use the *List Flex Credit Table* function to create a report containing all information in the flexible benefits credit table.

To print the flexible benefits credit table, complete these steps.

1 From the Self Service main menu select *Benefit Settings.*

2 Select *Flexible Benefits.*

3 Select *List Flex Credit Table* [LFCT] to generate the report and return to the main menu.

4 Press F18 to work with the report file, which is the most recently created spool file.

5 Type **5** in the *Opt* field next to the file to display the contents of the file.

6 Press F3 to exit the file.

Notes

Chapter 4 Web Page Settings

<div style="text-align: right;">4</div>

The Self Service functions discussed in this chapter are located within the *Web Page and Payroll Settings* menu option on the Self Service Administration main menu.

The chapter consists of the following topics:

Topic	Page
Working with web page settings	4-2

Working with web page settings

You use the *Web Page Settings* function on the Self Service Administration Settings Menu screen to specify by user group whether fields are read-only, editable, mandatory, or not displayed on the Self Service web application.

You can maintain settings for the following Self Service web pages:

Document type	Description
Add Dependent/Beneficiary	This page determines what information displays when a user selects to add a beneficiary in the *Benefits/My Beneficiarie*s menu option or to add a dependent in the *Benefits/My Dependents* menu option.
Change Address*	This page determines what information displays in the *Personal/Address* menu option. This document type is country specific when you are configuring web pages.
Change Dependent/Beneficiary	This page determines what information displays when a user selects to change a beneficiary in the *Benefits/My Beneficiarie*s menu option or to change a dependent in the *Benefits/My Dependents* menu option.
Current Information	This page determines what information displays in the Current Information section of each *Manager/Employee Changes* page.
Demotions	This page determines what information displays on the *Manager/Employee Changes* Demotion page.
Direct Deposits	This page determines what information displays in the *Payroll/Direct Deposits* menu option
Employment Action	This page determines what information displays on the *Manager/Employee Changes* Employment Action page.
Layoff	This page determines what information displays on the *Manager/Employee Changes* Layoff page.
Leave of Absence	This page determines what information displays on the *Manager/Employee Changes* Leave of Absence page.

Document type	Description
New Employee*	This page determines what information displays on the *Manager/New Employee* page. This document type is country specific when you are configuring web pages.
Performance Review	This page determines what information displays on the *Manager/Employee Changes* Performance Review page.
Personal Change	This page determines what information displays on the *Manager/Employee Changes* Personal Change page.
Personal Information*	This page determines what information displays in the *Personal/Personal Information* menu option. This document type is country specific when you are configuring web pages.
Position Change	This page determines what information displays on the *Manager/Employee Changes* Position Change page and is only available to our UK Infinium HCM customers.
Position Requisitions	This page determines what information displays on the *Manager/Position Requisitions page.*
Promotion	This page determines what information displays on the *Manager/Employee Changes* Promotion page.
Rehire*	This page determines what information displays on the *Manager/Rehire Employee* page. This document type is country specific when you are configuring web pages. Because the transaction uses the originator's country settings, you should rehire employees only within the same country as the originator.
Salary Change	This page determines what information displays on the *Manager/Employee Changes* Salary Change page.
Status Change	This page determines what information displays on the *Manager/Employee Changes* Status Change page.
Tax Changes	This page determines what information displays in the *Payroll/Tax Information* menu option

Document type	Description
Termination/End Employment	This page determines what information displays on the *Manager/Employee Changes* Termination page.
Transfer	This page determines what information displays on the *Manager/Employee Changes* Transfer page.

*These document types are set up by country (Canada and USA).

Working with web page settings

To work with web page settings, complete these steps.

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *Web Page and Payroll Settings*.

4 Select *Web Page Settings* [WPS] to display the *Web Page* Settings user group selection screen.

5 Type any character in the *Select* field next to the user group for which you are working with form settings.

6 Press Enter to display the selection screen.

7 Type any character in the *Opt* field next to the document type for which you are maintaining web page settings. For this example, we use the Change Address document type.

   You can also press F23 on this screen to restore the default web page settings for all document types. However, when used it restores the settings based on the default values as shipped with the application.

8 Press Enter to display the Country selection screen.

9 Type any character in the *Sel* field next to the Country for which you are maintaining web page settings for this document type and the Press Enter.

   Since there are different settings based on country, this selection screen is displayed only for the following web pages.

- Change Address

- New Employee

- Personal Information

- Rehire Employee

10 Specify the user access level for each field on this screen. Valid values are:

U	Allow update capability for the field
R	Allow the employee to view the field (read only)
N	Do not display this field
M	Mandatory entry. This value enables you to set non-required fields to mandatory entry for your organization. The web page displays an asterisk (*) next to the field to indicate that the field is required.

The column titled "Required in HCM" identifies those fields that must be completed before the transfer program updates Infinium HCM. The final approver should have the authority to edit the workflow document and to make sure that all required fields have been completed before approving and sending off to Infinium HCM.

Note: Since attachments can contain sensitive data, be advised that you are responsible for the security of your attachment records. As a result, the default value of the *Attachment* field is set to **N** for non-display on all document types that allow for attachments.

When you change the default value of this field, a warning message is displayed to notify you that the value has been changed. "*WARNING – You are responsible for the security of your attachments if U or M*"

- U for Update

- M for Mandatory

Note: If a document type has been set up through Web Page Settings to allow users to attach documents, be advised that there are certain special characters in file names that are not supported by all browsers, such as / \ : * ? " < > | & ! ^ [ ], so the document that is being attached should not include the special characters in the name.Otherwise, errors will occur and the user may not be able to attach or view the document.

11 Press F3 to save your information and return to the main menu.

Notes

Chapter 5 Payroll and PTO Settings

5

The Self Service functions discussed in this chapter are located within the *Web Page and Payroll Settings* menu option on the Self Service Administration main menu.

These options provide functions that allow the Self Service application to work with Infinium Payroll:

- Configuring time sheets
- Maintaining timekeeper controls
- Maintaining project codes
- Closing web time sheet data to Infinium Payroll
- Viewing pay history
- Mapping direct deposit deductions to Infinium PY
- Uploading direct deposit changes to Infinium PY
- Uploading tax changes to Infinium PY
- Maintaining holiday and non-work day calendars
- Maintaining paid time off information

The chapter consists of the following topics:

Configuring time sheets

You use the *Time Sheet Configuration* function to add, change or delete time sheet configuration information. You create time sheet configuration information for each user group. A user group may have multiple time sheet configurations, one for each employer in the Infinium database. For each time sheet configuration you specify the employer, the income reporting group and the week ending day. You can specify whether selected time sheet fields are visible and available to the employees in the user group.

If you are using Infinium Payroll, you must set up an income reporting group for time sheet configuration. This income reporting group allows the time sheet to display the incomes that you want an employee to see. If you do not authorize the employee to an income in the income reporting group, then the employee does not see that income in the list.

To configure time sheets, complete these steps.

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *Web Page and Payroll Settings*.

4 Select *Time Sheet Configuration* [TSC] to display the Time Sheet user group selection screen.

5 Type any character in the *Select* field next to the user group for which you are configuring time sheets.

6 Press Enter to display the selection screen.

On this screen you can do the following:

■ Add a time sheet configuration for the selected user group

To add a configuration, type the information for the new configuration in the fields at the top of the screen.

■ Change a time sheet configuration for the selected user group

To change a configuration, type **2** in the *Opt* field next to the configuration you want to change. Then, press Enter to display information in the fields at the top of the screen.

- Delete a time sheet configuration for the selected user group

  To delete a configuration, type **4** in the *Opt* field next to the configuration you want to delete. Then, press Enter to delete the selected configuration from the list at the bottom of the screen.

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

Employer

Specify the employer for the selected user group.

Income Rep Group

Specify the income reporting group for the selected user group.

You use the Infinium HR/PY *Update Employer Codes* function and code type IRG to set up income reporting groups.

Project, Position, Job Code, Shift Code, Level 1, Level 2, Level 3, Level 4, GL Acct

Type **1** to indicate that this information displays on the employee's time sheet. Otherwise, type **0**.

To display the job code on an employee's time sheet you must use Infinium PY *Update Job Authorizations* or Infinium PY(I) *Update Job Authorisations* to authorize the employee to the job code.

Show GL Acct Desc

Specify whether to display the general ledger account number or description. Valid values are:

D	Display the description
N	Display the account number

Week Ending Day

Specify the week-ending day. Valid values are:

Sun	Sunday
Mon	Monday
Tue	Tuesday
Wed	Wednesday

Thu   Thursday

Fri   Friday

Sat   Saturday

Show Level Code Desc

Specify whether to display the level code description or level code. Valid values are:

D   Display the description.

L   Display the code.

8 Press Enter to save your information.

9 Press F3 twice to return to the main menu.

Maintaining timekeeper controls

You use the *Maintain Timekeeper Controls* function to identify one or more employees as a timekeeper to use the Self Service *Payroll/Timekeeper Time Sheets* menu option to enter work hours for other employees.

You also use the *Maintain Timekeeper Controls* function to assign employees to the timekeeper.

1 From the Self Service main menu select *Web Page and Payroll Settings*.

2 Select *Maintain Timekeeper Controls* [MTC] to display the selection screen.

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

Group

Specify the user group of the timekeeper for whom you are maintaining timekeeper controls.

User Profile

Specify the user profile of the timekeeper for whom you are maintaining timekeeper controls.

Employer

Specify the employer from which you want to display a list of employees to assign to the timekeeper.

Level 1

Specify the level 1 associated with one or more employees that you want to assign to the timekeeper. Leave blank to include all level 1 employees within the timekeeper's employer. When you prompt on the field, only active levels are displayed. To display and select inactive levels change *the Include Inactive* field to **1** (yes).

Level 2

Specify the level 2 associated with one or more employees that you want to assign to the timekeeper. Leave blank to include all level 2 employees within the selected level 1. To display and select inactive levels change *the Include Inactive* field to **1** (yes).

Level 3

Specify the level 3 associated with one or more employees that you want to assign to the timekeeper. Leave blank to include all level 3 employees within the selected level 2. To display and select inactive levels change *the Include Inactive* field to **1** (yes).

Level 4

Specify the level 4 associated with one or more employees that you want to assign to the timekeeper. Leave blank to include all level 4 employees within the selected level 3. To display and select inactive levels change *the Include Inactive* field to **1** (yes).

Location

Specify the location associated with one or more employees that you want to assign to the timekeeper. Leave blank to include all locations within the selected criteria.

Position

Specify the position associated with one or more employees that you want to assign to the timekeeper. Leave blank to include all positions within the selected criteria.

4 Press Enter to display the selection screen.

5 Type **X** next to one or more employees to assign to the selected Self Service timekeeper.

6 Press F3 to save your information and return to the main menu.

Maintaining project codes

Use the *Maintain Project Codes* function to maintain the project codes to display on a time sheet when a user uses one of the following Self Service menu options to enter hours worked.

- *Manager/Time Sheet Tracking*, for managers

- *Payroll/My Time Sheets*, for all employees

- *Payroll/Timekeeper*, for timekeepers

You use the *Time Sheet Configuration* function to specify whether to display project codes on time sheets.

1 From the Self Service main menu select *Web Page and Payroll Settings*.

2 Select *Maintain Project Codes* [MPC] to display the selection screen.

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

Group

Specify the user group for which you are maintaining project codes.

Employer

Specify the employer for whom you are maintaining project codes.

4 Press Enter to display the *Maintain Project Codes* screen.

On this screen you can do the following:

- Add a project code for the selected user group

  To add a project code, press F6, and press Enter to display the entry screen.

- Change project code information for the selected user group

  To change project code information, type **2** in the *Opt* field next to the project code you want to change, and press Enter to display the entry screen.

- Delete a project code for the selected user group

  To delete a project code, type **4** in the *Opt* field next to the project code you want to delete, and press Enter.

5 Press Enter to display the selection screen.

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

Project Code

Type the value for the project code you are creating.

Project Description

Type a description of the project code you are creating or maintaining.

7 Press F3 to save your information and return to the main menu.

Closing time to Infinium Payroll

You use the *Close Time To Infinium PY* function to close to Infinium Payroll the time sheet data entered by users from the Self Service application on the web. After you close the time sheets, users can no longer access them from the web. The *Close Time To Infinium PY* function closes only time sheets that the users submit. Time sheets that are saved but not submitted remain in the Self Service application.

When you use the *Close Time To Infinium PY* function, Self Service generates a report of the time sheet data that you are closing.

To close time sheet data to Infinium Payroll complete these steps.

1 From the Self Service main menu select *Web Page and Payroll Settings*.

2 Select *Close Time To Infinium PY* [CWTTIP] for Infinium HCM users or [CWTTIPI] for Infinium IHCM users to display the selection screen.

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

Employer

Specify the employer for whom you are closing the time sheet data to Infinium Payroll.

Cycle

Specify the payroll cycle for which you are closing the time sheet data to Infinium Payroll.

Beginning Date

Specify the earliest time sheet period date for which you are uploading data from the web.

Ending Date

Specify the latest time sheet period date for which you are uploading data from the web.

4 Press Enter to close the data and return to the main menu.

Closing PTO to Infinium Payroll

Self Service updates the calendar file with paid-time-off request information if you set the value of the *Update Employee Calendar* field to **1** (yes) in the Self Service administration *Group Attributes Maintenance* function.

Self Service can also transfer approved paid time-off requests to the Infinium Payroll Time Entry file, PYPWK, to process the paid time-off incomes and accruals during payroll cycle processing. The employee must be authorized to the income in Infinium PY. Otherwise, the employee's paid time-off requests are not closed to the PYPWK file, and the entries remain in the Self Service PTO history file.

The Self Service administrator uses the *Use PTO Mapping to Payroll* field in the *Group Attributes Maintenance* function under the *Security* main menu option to activate the transfer of approved paid time-off information from Self Service to update employee payroll data in the Infinium Payroll Time Entry file, PYPWK.

When you specify yes in the *Use PTO Mapping to Payroll* field, the PTO program uses the Infinium HCM mapping table to validate the transferred values in the Employee Calendar file, PEPAT. Infinium PY then uploads the absences to the Time Entry file, PYPWK.

Caution: If you do not set up a direct deposit mapping table and you process updates automatically, the program writes a record to the employee deduction file, PYPDE, with a blank deduction code because it cannot determine which deduction code to use.

The administrator uses the *Close Time to Payroll* function to close the entries to the PYPWK file in the Infinium Payroll system after successful completion of any defined workflow approvals.

The Infinium HCM administrator uses the *Update Absence Mapping* function under the *Update Calendar Data* menu option under the *Personnel Calendar Operations* main menu option to define the Infinium Payroll absence, income, and accrual codes to map hours associated with the paid time-off that Self Service users request to the Infinium Payroll Time Entry file, PYPWK.

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

- Method 2 - Hours Extension incomes

- Method 4 - Base Hours Extension incomes

- Method 6 - Custom Calculation incomes

If mapping hours to income codes and accrual codes, the administrator can map the paid time-off to any Infinium PY income method.

Loading current year payroll information

Self Service provides the ability for employees to view their current year pay history. You run the *Load Current Year Payroll Info* function to make detailed pay history available to your employees.

You use the *Load Current Year Payroll Info* function to upload pay history from January 1 of the current year up to a specific pay period ending date. If you leave the *To Check End Date* field blank, Self Service processes pay history from January 1 of the current year through December 31 of the current year. For customers using the IHCM product, the program loads the payroll details using the tax year on the employer controls.

When you run this function, Self Service submits an IBM i job that reads the Infinium pay history file and creates a file for use by the Self Service application. You must run the *Load Current Year Payroll Info* function after each pay period so that employees can access their latest pay information if the value in the *Payroll History Method* field in the *Group Attributes Maintenance* function is **1**.

This function displays all pay history for an employee, including on-demand checks. Since this function reads the entire pay history file, the job can require considerable time. Schedule to run this function during off-hours.

If you do not plan to use the *Load Current Year Payroll Info* function and you want to access the Infinium PY payroll files directly from the IBM i, you can use the *Group Attributes Maintenance* function on the Self Service Security Options screen to configure Self Service by user group to read Infinium check summary or detailed information. Specify **0** in the Payroll *History Method* field for summary information or specify **2** or **3** for detailed information.

Refer to the "Maintaining User Group Attributes" section in the "Security" chapter of this guide for information about the *Payroll History Method* field settings.

To upload pay information for the current year to the web, complete these steps.

1 From the Self Service main menu select *Web Page and Payroll Settings*.

2 Select *Load Current Year Payroll Info* [LCYPI] for Infinium HCM users of [LCYPII] for the U.K. version of Infinium HCM users to display the selection screen.

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

Employer or *Employer Group*

Specify the employer or the employer group for which you are uploading current year pay history to the web.

Cycle

Specify the cycle for which you are uploading current year pay history to the web.

To Check End Date

Specify the latest date for which to load pay history to the web. Leave blank to load all pay history to the web. For customers using the U.K. version of Infinium HCM, this represents the pay history records for the tax year rather than the calendar year.

Years To Be Deleted

Specify up to four years of payroll records to delete from Self Service.

Self Service deletes the payroll records from the following files:

- Check Ledger, AHPCLS
- Income Ledger, AHPILS
- Deduction Ledger, AHPDLS

Include Prior Year

For customers using the U.S. version of Infinium Self Service, when you use *Load Current Year Payroll Info* function, the program typically checks the system date to determine what the current year is for uploading the pay history records. If you want to include the prior year pay history records in the upload, typically at the beginning of each year, set the value for this field to yes. Otherwise, set the field value to no.

4 Press Enter to submit an IBM i job to QBATCH. When the job is completed, pay history details are available to employees on the web.

5 Press F3 to return to the main menu.

Working with employee pay history

Pay history

This is a view-only menu option. No files are updated.

You use the Self Service Administration *Group Attributes Maintenance* function on the *Security* menu to determine one of four ways in which an employee can view check history details.

Payroll History Method

When you set the value for the *Payroll History Method* field, GPUCHKSUM, to **0**, Self Service uses the following Infinium check files to display check information.

- PYPCZ – check work file

- PYPIZ – check income work file

- PYPDZ – check deduction work file

   Self Service retrieves summary payroll history directly from the IBM i cycle work files. Self Service does not use the files created by the *Load Current Year Payroll Info* function on the *Web Pages and Payroll Settings* menu and does not display on-demand checks. Self Service users can view the same summary information that displays on their pay stubs. For example, the method 0 summary payroll history does not display employer expense or liability deductions such as federal unemployment tax.

Caution: If the Infinium Payroll option "*Reorganize Cycle Work files*" is run, then the data is not be available to the employee's on the Self Service web if this method is used.

When you set the value for the *Payroll History Method* field to **1**, Self Service uses the following custom files to display check information:

- AHPCLS – check ledger, with data retrieved from PYPCL

- AHPILS – summarized income ledger, with data retrieved from PYPIL

- AHPDLS – summarized deduction ledger, with data retrieved from PYPDL

Self Service uses the check summary file created by the *Load Current Year Payroll Info* function on the *Web Pages and Payroll Settings* menu each time a user requests to access check information. Self Service displays on-demand checks. Method 1 allows you to control the time period of the check history information that the employee can view.

When you set the value for the *Payroll History Method* field to **2**, Self Service uses the following Infinium files to display check information:

- PYPCL – check ledger

- PYPIL – summarized income ledger

- PYPDL – summarized deduction ledger

- PYPIC – income controls file

- PYPDC – deduction controls file

Self Service retrieves detailed payroll history directly from the IBM i including on-demand check information. Self Service does not use the files created by the *Load Current Year Payroll Info* function on the *Web Pages and Payroll Settings* menu. Retrieved information is displayed by income and deduction code.

Method 2 detailed payroll history includes employer expense or liability deduction information such as federal unemployment tax.

You must select option **2** or **3** to display year-to-date totals on the Self Service web *Payroll/Payroll History* menu option.

When you set the value for the *Payroll History Method* field to **3**, Self Service uses the following Infinium files to display check information:

- PYPCL – check ledger

- PYPIL – summarized income ledger

- PYPDL – summarized deduction ledger

- PYPIS – income check summarization file

- PYPDS – deductions check summarization file

Self Service retrieves detailed payroll history directly from the IBM i including on-demand check information. Self Service does not use the files created by the *Load Current Year Payroll Info* function on the *Web Pages and Payroll Settings* menu. Retrieved information is summarized by income and deduction code.

Method 3, detailed payroll history, includes employer expense or liability deduction information such as federal unemployment tax.

You must select option **2** or **3** to display year-to-date totals on the Self Service web *Payroll/Payroll History* menu option.

Pay History Records Displayed

On the group attributes page you can set the number of pay history records that Self Service should display initially when a user views their payroll history on the web.

This field controls only the initial number of records displayed. If the user enters a *From* and *To* date on the Payroll History screen then more (or fewer) records can be displayed. If you leave this field blank the system displays all pay history records for a user.

Note: If you change the value of this field, you should clear your PC cache in order to see the changes take place within the Pay History page.

Prior year pay

This is a view-only menu option. No files are updated. This menu option uses the PYPPQ, PYPIQ and PYPDQ Infinium PY files.

Mapping direct deposit deductions

You use the *Map Direct Deposit Deductions* function to associate direct deposit payroll deductions to valid Infinium Payroll deduction code values to store direct deposit amounts or percentages in the Infinium PY employee direct deposit deduction records, PYPDE and PYPDD, which Infinium PY uses to calculate and generate employee paychecks. Employees use the Self Service web application *Payroll/Direct Deposit Change* menu option to submit changes to their direct deposit information.

The mapping option enables you to identify up to 13 deduction codes to use within the direct deposit update feature. You can define up to six flat amount deductions, up to six percentage amount deductions, and one deduction for the balance of the employee paycheck. For example, if your company allows only two deductions to be used, then you need to set up only those two mappings. If you allow employees only one direct deposit deduction, use the *Balance Of Check Deduction* field to map the deduction.

Every entry is mapped to a deduction type. Deduction types are either an amount, percent, or balance. There are a fixed number of predetermined deduction type mappings. Once a line exists, it is assigned to one of these mappings and its type cannot be changed. This is why the 100% deduction cannot be changed to the balance of the check (or a flat amount) after the deduction has been created.

There are many edits for the Change Direct Deposit page, as noted below:

- You can select **Balance of Check** for one entry only.

- If you enter **100%**, you are instructed to select **Balance of Check** instead.

- When you enter **Balance of Check**, *Amount* must be blank or **0**.

- When you enter **Balance of Check**, *Percent* must be blank or **0**.

- If you enter a value in both the *Amount* and *Percent* fields, you are instructed to enter one or the other.

- If *Amount* and *Percent* are blank or **0** and **Balance of Check** is not selected, you are instructed to enter one.

Before you can use this function to map and upload deductions to Infinium PY, you must first set the value for the *Update Direct Deposits* field to yes in the Self Service Administration *Security/Group Attributes Maintenance* function. Refer to the "Maintaining User Group Attributes" section in the

"Security" chapter of this guide for information about the *Update Direct Deposits* field settings.

You use the Self Service Administration *Upload Direct Deposit Changes* function, described later in this chapter, to upload the changes to Infinium PY. You can upload the direct deposit changes to Infinium PY upon successful completion of defined workflow approvals.

The use of the *Map Direct Deposit Deductions* function is optional. If you set the value for the *Update Direct Deposits* field in the *Group Attribute Maintenance* function to no, users submit the Self Service direct deposit information changes to a payroll administrator for manual input into Infinium PY. Self Service sends a workflow notification message for any defined workflow approvals.

Caution: If you do not set up a direct deposit mapping table and you process updates automatically, the program writes a record to the employee deduction file, PYPDE, with a blank deduction code because it cannot determine which deduction code to use.

To map direct deposit deductions, complete these steps.

1 From the Self Service main menu select *Web Page and Payroll Settings*.

2 Select *Map Direct Deposit Deductions* [MDDD] to display the entry screen.

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

Employer

Specify the employer for whom you are mapping direct deposit deductions.

Flat Amount Deduction 1

Specify the Infinium PY flat amount deduction code value to use to map to direct deposit payroll deductions that employees request from Self Service.

If you use multiple flat amount deductions, you must specify a value in the *Flat Amount Deduction 1* field to use as the default flat amount deduction code value.

If you allow employees only one direct deposit deduction, use the *Balance Of Check Deduction* field to map the deduction.

Flat Amount Deduction 2, 3, 4, 5, 6

Specify additional Infinium PY flat amount deduction code values to use to map to direct deposit payroll deductions that employees request from Self Service.

You can allow an employee to specify up to six direct deposit accounts for flat amount deductions. You must specify a value in the *Flat Amount Deduction 1* field before you can use these fields.

Percentage Deduction 1

Specify the Infinium PY percentage deduction code value to use to map to direct deposit payroll deductions that employees request from Self Service.

If you use multiple percentage deductions, you must specify a value in the *Percentage Deduction 1* field to use as the default percentage deduction code value.

If you allow employees only one direct deposit deduction, use the *Balance Of Check Deduction* field to map the deduction.

Percentage Deduction 2, 3, 4, 5, 6

Specify additional Infinium PY percentage deduction code values to use to map to direct deposit payroll deductions that employees request from Self Service.

You can allow an employee to specify up to six direct deposit accounts for percentage deductions. You must specify a value in the *Percentage Deduction 1* field before you can use these fields.

Balance of Check Deduction

Specify the Infinium PY deduction code value to use to map the balance of an employee's paycheck to a direct deposit deduction.

If you allow employees only one direct deposit deduction, use the *Balance Of Check Deduction* field to map the deduction.

Note: If you set up a balance of check direct deposit deduction in Infinium Payroll, you do not enter 100 percent on the employee deduction record. If you do, then the line item in Self Service does not allow you to select the *Balance of Check* checkbox on the page. You must remove the 100% from the employee direct deposit deduction record to update the line item.

4 Press F3 to save your information and return to the main menu.

Direct deposit changes

The Self Service administrator uses the *Map Direct Deposit Deductions* function under the *Web Pages and Payroll Settings* main menu option to map

the direct deposit payroll deductions to valid Infinium Payroll deduction code values to store direct deposit amounts or percentages in the Infinium PY employee direct deposit deduction records, PYPDE and PYPDD.

Object	Type	Description
AHPDDR	PF	This file holds direct deposit requests until workflow is completed
AHPDDRH	PF	Direct deposit request history file

Self Service transfers direct deposit account changes that users enter on the Direct Deposit Change form to the Infinium PY employee Direct Deposit Deduction files, PYPDE and PYPDD, to process the direct deposit deductions during payroll cycle processing.

The Self Service administrator uses the *Update Direct Deposits* field in the *Group Attributes Maintenance* function under the *Security* main menu option to authorize users to update the direct deposit information in their Infinium PY employee Direct Deposit Deduction records, PYPDE and PYPDD, by using the Self Service web application *Direct Deposit Change* menu option. Self Service stores the changes in a staging table upon successful completion of defined workflow approvals. The administrator uses the new Self Service Administration *Upload Direct Deposit Changes* function described below to upload the changes from the staging table to Infinium PY.

If the administrator selects not to allow the direct deposit update, Self Service allows users to submit the direct deposit information changes to a payroll administrator for manual input into Infinium PY. Self Service sends a workflow notification message for any defined workflow approvals.

Caution: If you do not set up a direct deposit mapping table and you process updates automatically, the program writes a record to the employee deduction file, PYPDE, with a blank deduction code because it cannot determine which deduction code to use.

Uploading direct deposit changes

You use the *Upload Direct Deposit Changes* function to upload any direct deposit payroll deduction changes that employees request from Self Service to the Infinium PY employee direct deposit deduction records, PYPDE and PYPDD, which Infinium PY uses to calculate and generate employee paychecks. Employees use the Self Service web application *Payroll/Direct Deposits* menu option to submit changes to their direct deposit information.

When you use the *Upload Direct Deposit Changes* function, Self Service generates a report of the uploaded direct deposit payroll deduction changes.

If you have defined workflow approval steps for direct deposit changes, the upload process transfers only approved records to Infinium PY.

Before you can upload deductions to Infinium PY, you must do the following:

- Set the value for the *Auto Update Direct Deposits* field to no in the Self Service Administration *Security/Group Attributes Maintenance* function. Refer to the "Maintaining User Group Attributes" section in the "Security" chapter of this guide for information about the *Auto Update Direct Deposits* field settings.

- Use the Self Service Administration *Map Direct Deposit Deductions* function, described earlier in this chapter, to define the deduction code values to use when you upload the changes to Infinium PY. You can upload the direct deposit changes to Infinium PY upon successful completion of defined workflow approvals.

Caution: If you do not set up a direct deposit mapping table and you process updates automatically, the program writes a record to the employee deduction file, PYPDE, with a blank deduction code because it cannot determine which deduction code to use.

To upload direct deposit changes, complete these steps.

1 From the Self Service main menu select *Web Page and Payroll Settings*.

2 Select *Upload Direct Deposit Changes* [UDDC] to display the selection screen.

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

Employer

Specify an employer to limit the transfer of updated direct deposit information, from Self Service to Infinium PY, to records associated with the selected employer. You must specify a value in the *Employer* field.

If you have defined workflow approval steps for direct deposit changes, the upload process transfers only approved records to Infinium PY.

Cycle

Specify a pay cycle code to limit the transfer of updated direct deposit data, from Self Service to Infinium PY, to employees associated with that cycle code.

Leave blank to transfer updated direct deposit records for employees in all pay cycles.

If you have defined workflow approval steps for direct deposit changes, the upload process transfers only approved records to Infinium PY.

Effective Date

Specify a date to limit the transfer of updated direct deposit data, from Self Service to Infinium PY, to records dated before or on the specified effective date.

Leave blank to transfer updated direct deposit records for all effective dates.

If you have defined workflow approval steps for direct deposit changes, the upload process transfers only approved records to Infinium PY.

Employee

Specify an employee number to limit the transfer of updated direct deposit data from Self Service to Infinium PY, to records containing that employee number.

Leave blank to transfer updated direct deposit records for all employees.

If you have defined workflow approval steps for direct deposit changes, the upload process transfers only approved records to Infinium PY.

4 Press Enter to select the changes to upload to Infinium PY.

5 Specify Submit in the Sel column next to each record to submit and press Enter.

6 Press F3 to return to the main menu.

Uploading tax changes

You use the *Upload Tax Changes* function to upload any tax changes that employees request from Self Service to the Infinium PY payroll master record, PYPMS, and employee deduction record, PYPDE. Employees use the Self Service web application *Payroll/Tax Information* menu option to submit tax information changes.

When you use the *Upload Tax Changes* function, Self Service generates a report of the uploaded tax information changes.

If you define workflow for tax information changes, the upload process transfers only approved tax information records to Infinium PY.

To upload tax changes, complete these steps.

1   From the Self Service main menu select *Web Page and Payroll Settings*.

2   Select *Upload Tax Changes* [W4UPL] to display the selection screen.

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

   Employer

   Specify an employer to limit the transfer of updated tax information, from Self Service to Infinium PY, to records associated with the selected employer.

   If you define workflow for tax information changes, the upload process transfers only approved tax information records to Infinium PY.

   Cycle

   Specify a pay cycle code to limit the transfer of updated tax information, from Self Service to Infinium PY, to employees associated with that cycle code.

   Leave blank to transfer updated tax changes for employees in all pay cycles.

   If you define workflow for tax information changes, the upload process transfers only approved tax information records to Infinium PY.

   Effective Date

   Specify a date to limit the transfer of updated tax information, from Self Service to Infinium PY, to records dated before or on the specified effective date.

Leave blank to transfer updated tax information records for all effective dates associated with the selected employers.

If you define workflow for tax information changes, the upload process transfers only approved tax information records to Infinium PY.

Employee

Specify an employee to limit the transfer of updated tax information, from Self Service to Infinium PY, to a record for the specified employee.

Leave blank to transfer updated tax information records for all employees associated with the selected employers and effective dates.

If you define workflow for tax information changes, the upload process transfers only approved tax information records to Infinium PY.

4 Press Enter to display the selection screen.

5 Specify Submit in the Sel column next to each record to submit and press Enter.

6 Press F3 to return to the main menu.

Maintaining exception calendars

Use the *Maintain Exception Calendars* function to identify the non-work days that Self Service uses to calculate an employee's time off when the employee uses the Self Service web *Time Off Request* menu option.

For example, if an employee requests to take off two weeks from Monday, August 1, through Friday, August 12, and if you define Saturday, August 6, and Sunday, August 7, as non-work days on the exception calendar, Self Service calculates the total number of requested days as ten. If you do not define the two days as non-work days on the exception calendar, Self Service calculates the total number of days as twelve.

You can set up one default exception calendar for all Self Service users, or you can set up calendar code values and assign users to the calendar codes based on the similarity of the users' work calendars. Your HR administrator uses the CAL code type with the Infinium HR *Update Employer Codes* function to set up calendar code values. The Infinium HR administrator uses the *Update Personnel Data* function to assign the calendar code values to employees.

To maintain exception calendars, complete these steps.

1 From the Self Service main menu select *Web Page and Payroll Settings*.

2 Select *Maintain Exception Calendars* [MES] to display the selection screen.

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

Employer

Specify the employer for whom you are maintaining the exception calendar.

Calendar Code

Specify the value of the calendar code that represents the group of users for which you are maintaining the exception calendar. Leave blank to maintain the default exception calendar for all users.

Year

Specify the year for which you are maintaining the exception calendar.

Month Number

Type the number of the month of the exception calendar you are maintaining. For example, type **12** for December.

4 Press Enter to display the selection screen.

5 Type **X** next to all non-work day for the selected month.

6 Press F3 to save your changes and return to the main menu.

Working with paid time off settings

For users to access the Self Service web *Manager/Employee Time Off* and *Personal/Time Off Request* menu options, your human resources administrator must set up absence codes and accrual category names.

Mapping incomes to PTO accruals

On the Group Attributes Maintenance page, you set the *Use PTO Mapping to Payroll* field for each group. Set the field to yes if you want to validate approved paid time-off information that Self Service users request from the web *Personal/Time Off Request* menu option against the absence mapping table in Infinium HCM. Otherwise, specify no.

When you specify yes for the *Use PTO Mapping to Payroll* field, the PTO program uses the Infinium HCM mapping table to validate the transferred values in the Employee Calendar file, PEPAT. Infinium PY then uploads the absences to the Time Entry file, PYPWK. You must specify yes for this field if the value in the *PTO Earned Override* field value is **1** or **2**. Also, when you specify yes for this field, you must specify yes for the *Update Employee Calendar* field.

Refer to the Infinium HCM *Personnel Calendar Operations/Update Calendar Data/Update Absence Mapping* menu option for specific details.

Annual calendar

This is a view-only menu option. No files are updated. This menu option displays data from the Infinium HCM PEPHU and PEPAT files in a calendar format.

Self Service updates the calendar file with paid-time-off request information if you set the value of the *Update Employee Calendar* field to **1** (yes) in the Self Service administration *Group Attributes Maintenance* function.

Monthly calendar

This is a view-only menu option. No files are updated. This menu option displays data from the Infinium HCM PEPHU and PEPAT files in a calendar format. Self Service updates the calendar file with paid-time-off request information if you set the value of the *Update Employee Calendar* field to **1** (yes) in the Self Service administration *Group Attributes Maintenance* function.

The monthly calendar provides a hyperlink to the PTO Request so that you can see the details of the request at a glance. The hyperlink is color coded so that you know which transaction is Pending (orange) and which is Approved (green).

Multiple employee records are visible to the manager per day. If there are more employees that have requested the time off on a specific day, More… is automatically added to the day and the window that shows all employees on that calendar day presents hyperlinks, maintaining the appropriate status color.

The calendar displays the non-work days and the company holidays based on the set up within the exception calendar settings on both the employee personal monthly calendar and the manager employee time off monthly calendar view.

The manager's monthly calendar has an online PTO report for the manager to view and use to track PTO for multiple employees. The view provides details of the days that employees have requested paid time off. When the manager selects the View PTO Report button, the list contains all of the paid time off details for the selected employee(s) and the manager can sort the columns in ascending or descending or as well as print the contents of the view.

Employees have the ability to cancel a PTO request that is still pending approval. They do this by selecting the in process PTO request link on the Monthly Calendar to get to the detail, and then press the Cancel PTO Request button. An e-mail notification is sent to any approvers in the workflow that have already approved the request notifying them that the employee has canceled the PTO. The employee also receives a notification that the request has been canceled. The request is removed from the Monthly Calendar.

Note: If you are not receiving e-mail messages, check your Junk Mail folder before contacting your administrator.

Employee time-off requests

Employees have the ability to submit PTO requests for approval and they can view their requests using the monthly calendar view. Use the *Personal/Time Off Request* menu option on the web to submit the request. From the initial screen the employee's current paid time off balances are displayed. Select the Create Request action to enter the details of the PTO. If you have exception calendars set up for the employer, the program automatically calculates the days off and skips any non-working days.

Manager time-off requests

Managers have the ability to enter PTO requests on behalf of their employees however they do not have the authority to cancel PTO requests. Cancellations of pending requests can be initiated only by the employee. In addition to submitting paid time off on behalf of employees, managers also have the ability to view an online report of employee paid time-off requests. In addition, the monthly calendar provides the manager with a quick view of who has time off.

Chapter 6 Menu Structure

6

The Self Service functions discussed in this chapter are located within the *Menu Structure* menu option on the Self Service Administration main menu.

The chapter consists of the following topics:

Maintaining menu structures

You use the *Menu Maintenance* function to specify the Self Service menu options available to each user group on the web. This function allows you to customize Self Service to meet your organizational requirements by designing individual menus for each user group.

By identifying users as managers and employees, you also specify by employee type what menu options are available. A user designated as an employee can use only the functions associated with employee type E, employee. A user designated as a manager can use the functions associated with employee type M, manager, and functions associated with employee type E, employee.

To maintain menu structures, complete these steps.

1   Start an IBM i interactive session, either at the system console or at a workstation.

2   Sign in as **AM2000**.

3   From the Self Service main menu select *Menu Structure.*

4   Select *Menu Maintenance* [MM] to display the Menu Maintenance user group selection screen.

5   Type any character in the *Select* field next to the user group for which you are maintaining menu structures.

6   Press Enter to display the Select SHCM Language screen.

7   Type any character in the *Sel* field next to the language that the employees in the selected user group use.

8   Press Enter to display the entry screen.

Self Service assigns a default menu to each user group that you create. The default menu consists of a standard main menu and several sub-menus. You can add, delete and change both main menu and sub-menu options. Press F23 at any time to restore the default menus and sub-menus to the selected user group.

If the group has been designated as a Terminated Employees group, then the following limited menu options are automatically added to the designated termination group:

- Address

- Sign-in Preferences to change password

- Pay History

- Prior Year Pay

- T-4 Information for Canadian employees

- W-2 Information

- W-4 Form

- Benefit Changes

- My Benefits

- My Benefit Statement

- My Beneficiaries

- My Dependents

- Help

- Sign Out

If you create a new security group or update an existing security group and change the *Terminated Employees Group* field to yes, then the security maintenance group program automatically updates the menu for the group with the menu options noted above. However, if you update an existing group initially designated as a terminated employees group and change the *Terminated Employees Group* field to no, then you must manually update the menu using the *Menu Maintenance* function.

On this screen you can do the following:

- Add a menu option for the selected user group

  To add a menu option, type the information for the new menu option in the fields at the top of the screen.

- Change a menu option for the selected user group

  To change a menu option, type **2** in the *Opt* field next to the menu option you want to change. Then, press Enter to display information in the fields at the top of the screen.

- Delete a menu option for the selected user group

To delete a menu option, type **4** in the *Opt* field next to the menu option you want to delete. Then, press Enter to delete the selected menu option from the list at the bottom of the screen.

Caution: When you delete a main menu option, you also delete any sub-menu options under the main menu option.

- Display the sub-menu options for a selected main menu option

  To display sub-menu options, type **8** in the *Opt* field next to the main menu option whose sub-menu options you want to display.

9 Use the information below to complete the fields on this screen

Sequence

Type the number that represents the position in the menu sequence where this menu option is placed.

When you add a menu option, Self Service assigns new sequence numbers to the existing menu options when you press Enter, but it maintains the menu options in the specified sequence.

For example, the default menu displays sequence number 10, Manager and sequence number 20, Personal. To add a company website menu option between the Manager and Personal menu options, type a number between 10 and 20 in the *Sequence* field. When you complete your entries on this screen and press Enter, Self Service adds the company website menu option between Manager and Personal and assigns it sequence number 20. Self Service reassigns the Personal menu option a sequence number of 30 and reassigns each subsequent sequence number incrementally.

Menu Item Name

Type the name of the menu option as you want it displayed on the web menu.

Employee Type

Type the value for the type of employee assigned to the selected user group. Valid values are:

E   Employee

M   Manager

Roll Over Text

To customize the default roll-over text for this menu option, type the text that you want to display on the web page when the user rolls the mouse pointer over the menu option. Use the codes in the table below for special characters.

Character	Code
exclamation mark (!)	
copyright symbol (©)	©
single open quotation mark (')	‘
single close quotation mark (')	’
double open quotation mark (")	“
double close quotation mark (")	”
ellipsis (...)	…

URL

Type the URL for the file for this menu option if it is different from the default value for the URL. You can press F23 on the Menu Maintenance screen to restore the default values for all menu options.

WARNING! The document examples that we provide on our standard menu are there to illustrate the URL structure. We suggest that only non-secured documents use this option. You are responsible for the security of your data and any documents that you add to any group menu.

Target

Type a value to indicate how Self Service displays the web page associated with the menu option URL. Leave this field blank for main menu options. Valid values are:

_Blank   Display the web page associated with the menu option in a new browser window

_Top   Display the web page associated with the menu option on top of the existing browser

mainarea   Display the web page associated with the menu option in the current browser window and retain the menu frame

The Infor Ming.le™ Enterprise menu supports a multiple tab metaphor for display-only pages and customer-defined URLs, PDFs, and documentation menu items within Infor Ming.le Enterprise workspace and standalone mode.

WARNING! You are responsible for the security of your data and any documents that you add to group menus. We provide examples on our menu to illustrate the URL structure.

- Self Service was not designed to have multiple update programs open at the same time; therefore, we restrict the ability to have multiple tabs open for programs that perform updates to a single tab only.

- If a user has multiple display or document tabs open and then selects a menu option that is an update program, the page is displayed in the first tab to perform the update process and replaces any other update page that might have been previously selected.

- Display-only pages open up multiple tabs within the user's workspace.

- All metadata menu items that are designated as read only or document links use a **_blank** default value for the target area field.

- All metadata menu items that are designated as update programs use **mainarea** as the default value for the target area field.

- A **Refresh** action changes the field back to the metadata table values for all menu options within the custom group.

Caution: If the default metadata value of this field is changed within the user's custom group, the user takes responsibility for possible processing errors and unpredictable results.

10 Press Enter to save your changes.

11 Press F3 to return to the Menu Structure Menu screen.

12 Press F3 to return to the main menu.

Maintaining sub-menu structures

If you type **8** in the *Opt* field next to a main menu option on the Menu Maintenance screen and then press Enter, the system displays the sub menu screen.

On this screen you can do the following:

- Add a sub-menu option for the selected user group

To add a sub-menu option, type the information for the new sub-menu option in the fields at the top of the screen.

- Change a sub-menu option for the selected user group

  To change a sub-menu option, type **2** in the *Opt* field next to the sub-menu option you want to change. Then, press Enter to display information in the fields at the top of the screen.

- Delete a sub-menu option for the selected user group

  To delete a sub-menu option, type **4** in the *Opt* field next to the menu option you want to delete. Then, press Enter to delete the selected menu option from the list at the bottom of the screen.

Use the information for the Menu Maintenance screen to complete the fields on this screen.

After you add, change or delete the sub-menu options, press Enter to save your changes. Then, press F3 to return to the Menu Maintenance screen.

Listing menu options

You use the *List Menu Options* function to create a print file containing the information in your *Menu Options*. The report is sorted by user group and country, and the report includes menu name, roll over text description, the menu type and the URL address.

To list menu options, complete these steps.

1 From the Self Service main menu select *Menu Structure.*

2 Select *List Menu Options* [LMO], to display the selection screen.

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

Group

Type the user group for which to generate a menu report. Leave blank to include all user groups or prompt and select a list of valid values.

Country Code

Type the Country for which to generate a menu report. Leave blank to include all countries or prompt and select a list of valid values

4 Press Enter to generate the *List Menu Options* report.

5 Press F18 to work with the report file, which is the most recently created spool file.

6 Type **5** in the *Opt* field next to the file to display the contents of the file.

7 Press F3 to exit the file and return to the main menu.

Accessing menu options

Employee

An employee can change the following information:

- Address

- Emergency contacts

- Personal Information

- Password

- Dependent information

- Beneficiary information

An employee can also:

- Request time off

- Choose from a daily total method or a time clock method to enter time sheet data and submit the data for approval

- Request direct deposit changes

- Update tax information

  Note: When selecting the *Tax Change* menu option for which the employee has already submitted a transaction, the employee is presented with a protected view of the submitted form with an informational message:

  > **You have submitted a tax change on xx/xx/20xx. Until the change is approved, you will not be able to submit another form.**

- Print W-4 forms

- Complete an open enrollment form and submit the form for approval

- Make changes to benefit plans resulting from lifestyle changes such as marriage, childbirth, or divorce

- Request training

  When employees have a training group on their Basic Data record, either from New Hire, Position Change in PE Actions, or Update Basic Data, training requests (TRPEM) are created for the employees for the courses

in the training group. Employees can enroll in training from SHCM if training requests exist for a course.

- Send & receive internal Self Service messages

An employee can view but not change the following information:

- Education
- Company property
- Vehicle
- License and certification
- Direct deposit (the employee can use a separate option to change direct deposit information)
- Monthly and annual paid time-off calendars
- Year-to-date pay history for the current year
- Pay history for previous years
- Tax information
- W-2 information, for U.S. users and T4 information for Canadian users

  This information is available to users for prior years only. Your Self Service administrator can use the Self Service Administration *Security/Group Attributes Maintenance* function to restrict user access to the most recent prior year at the start of each calendar year.

- Current benefits
- Benefit Statement
- Flexible benefits confirmation (available only to users who use Infinium Flexible Benefits)
- Training history, including training requests, enrolments, and courses completed

Your Self Service administrator can restrict employee access to any of these transactions.

Manager

A manager can change/initiate the following information:

- Enter new employee information
- Rehire a terminated employee

- Complete the employee work-event changes listed below

  - Personal changes, such as address, telephone, and marital status

  - Salary change

  - Promotion

  - Demotion

  - Transfer

  - Employment actions

  - Termination

  - Status change, including layoff and leave of absence

  - Performance review

- Approve employee work-event change requests

- View employee work-event change history

- View selected employee personal information, including address, emergency contact, company property, education, license, and vehicle information. Your Self Service administrator can restrict manager access to one or more categories.

- View and submit employee time-off requests and view and update the approval status of employee time-off requests

- View documents and their approval status

- Enter and approve time sheets for their employees

- Request training for their employees

- Create salary plans and mass create salary change transactions from the salary plans

- View performance reviews that are due

- View employee benefit statements

Your Self Service administrator can restrict manager access to any of these transactions.

Notes

Chapter 7 Workflow Implementation

7

The Self Service functions discussed in this chapter are located within the *Workflow* menu option on the Self Service Administration main menu.

The chapter consists of the following topics:

Overview

You use the *Workflow* menu options to automate notification and approval processes through the use of workflow controls. Self Service routes a document through your organization according to preset or custom routing instructions. You can link Self Service workflow processing to your current e-mail system to notify a routing recipient that the recipient's Self Service mailbox contains a document that requires action.

The workflow email URL comes from WORKFLOWEMAILURL in the SHCMBundle.properties file. If that value is blank or missing, then the URL usually comes from the request, by calling getRequestURL() on the request object.

The "/ahess/ess0.jsp?startPage=/ahess/Messaging.jsp" piece is hard-coded in WorkflowBean.java (in the send() method). This is also the place where the rest of the message text is composed. Note that there are two ways the message can be formatted: HTML and non-HTML. That determination is made by the SENDHTMLEMAIL setting in SHCMBundle.properties. The default is false.

Terminated users

If a user is terminated from the system and is part of the workflow routing, you must manually remove the terminated employee so that the workflow continues successfully. You must remove the user from any workflow setup related to these functions.

- *Document Routing Maintenance*
- *Global Workflow Users*
- *Alternate Approvers*
- *Global E-mail Users*

In addition, you must remove the terminated user from the web security file unless you terminated the user from Infinium Self Service through the *Manager* web option or you manually transfer the terminated user to the terminated employee group.

Maintaining the global workflow users file

You use the *Global Workflow Users* function to set up routing to a group of users for workflow routing.

When you use a global user as the document recipient, you route the document to all users assigned to the global group. When one recipient approves or rejects the document, Self Service removes the document from other recipients' mailboxes. For a time-sensitive document, you ensure that the document is acted upon in a timely manner.

Caution: When a transaction, such as an address change, is approved, ordinarily the transaction is removed from the approver's list of approvals. However, if an approver keeps the list of approvals open while another user in the same workflow user group is approving transactions, an error can result. All approvers should get into the habit of refreshing the list prior to submitting an approval if the list is kept open. This prevents errors when multiple approvers are trying to approve the same documents.

If a user is terminated from the system and is part of the workflow routing, you must manually update the Global Workflow Users file to remove the terminated employee so that the workflow continues successfully. If you use the *Purge Terminated Employees* function or if you delete the user from the Web Security file, the program automatically removes the terminated employees from the Global Workflow Users file.

It is suggested that you add an IT or Administrator to the workflow routing of terminated employees so that they can update the global workflow user groups accordingly.

Caution: If the employee number in the position changes, the workflow goes to the new person. This may cause an issue if the change occurs while workflow is in process because a document could be rejected but flows back to the new person who was not involved in the original workflow. Since data in the files may become out of sync, you should run the *Mass Update Positions Corrections* function in HCM on a regular basis to assist in correcting data issues.

The Global E-mail Users and the Global Workflow Users are printed on the List Web Security report.

The Self Service application includes the pre-defined global users listed below. You can use these global users or add your own.

- *SUPER

  When you select this global user, the Self Service application directs workflow documents to each user's supervisor or to the employee assigned to the position to which the user reports. The supervisor field on the HCM employee basic data file is used.

  If the supervisor field is blank, or the supervisor field contains a terminated employee or the supervisor contains an employee that does not have a web security file record, the user's reports-to position is used. If the reports-to position is blank, an error is logged in AHPTRACKH. The workflow document is either sent back to the originator, skipped, or an e-mail sent to the administrator. This is based on the settings in the *Workflow Time-Out/Error Settings* file.

  Example 1: Workflow is set up with *SUPER and there is a supervisor identified in an employee record that has a valid e-mail and user in the web security file.

  Result: Workflow and e-mail are sent to the designated supervisor for approval.

  Example 2: Workflow is set up with *SUPER and there is a supervisor identified in an employee record that does not have a valid e-mail and user in the web security file.

  Result: The user receives an exception error, and workflow is sent to the Workflow in Error file because there is no web security file record.

  Example 3: Workflow is set up with *SUPER and there is no supervisor identified in the employee record. The *REPORTSTO position processing is invoked. There is a single user assigned to the *REPORTSTO position.

  Result: The user assigned to the *REPORTSTO position receives the workflow approval.

  Note: If the *REPORTSTO user does not have a web security file record, an invalid workflow error is generated.

  Example 4: If there are multiple users assigned to the *REPORTSTO position, then the first user (alphabetically by employee last name) assigned to the *REPORTSTO position receives the workflow approval provided the user has a web security file record.

  Note: We only select the first *REPORTSTO user when the *SUPER condition fails because *REPORTSTO tries a preconfigured iteration when there is no employee in a position (with the reporting level field in the *REPORTSTO group file). Trying all positions can create recursive

scenarios with many branches and add huge complexity to the workflow processing.

- *REPORTSTO

When you select this global user, the Self Service application directs workflow documents to each user's position to which the originator/user (or approver) reports.

If it is a single position and that position is blank, then an error occurs and it is logged in AHPTRACKH (also depends on how the reporting level is set for the *REPORTSTO global user). The workflow document is either sent back to the originator, or skipped, or an e-mail sent to the administrator. This is based on the settings in *the Workflow Time-Out/Error Settings* file.

If there are multiple people assigned to the Reports to Position of the originator, the workflow/notification is sent to each user that is assigned to that reports-to position and has a record in the web security file. The first user to take action is the approver of the transaction and the other requests are removed from the remaining users Self Service mail box.

Example 1: Workflow is set up with *REPORTSTO and there are multiple valid users in the reports-to position.

Result: All valid users assigned to the *REPORTSTO position are sent a workflow approval message. The first user to take action on the transaction becomes the approver of the workflow.

Example 2: Workflow is set up with *REPORTSTO with the reporting level set to **0** and there are no users assigned to the reports-to position.

Results: The user receives an error exception because the *REPORTSTO position is blank, and a record is written to the Workflow in Error file.

Example 3: Workflow is set up with *REPORTSTO with the reporting level set to **1**; there are no users assigned to the immediate reports-to position (the position is vacant); however, there are valid users in the reports-to position, one reporting level up.

Results: Al valid users assigned to the *REPORTSTO position (one level up) are sent a workflow approval message. The first user to take action on the transaction becomes the approver of the workflow.

Note: The same processing occurs if the reports-to level is set from **1** to **9**.

- *EMPLOYEE

When you select this global user, the Self Service application directs workflow documents to the employee that the employee change transaction is for.

If *EMPLOYEE is used for document types other than employee changes, the notification is sent to the originator and the document history is updated accordingly. Since the user that is submitting the document is the originator then that user receives two e-mail notifications if you use the *EMPLOYEE in any document types other than the employee changes. A notification e-mail is sent to the users In Box as well as the e-mail address identified on the web security file record.

It is highly recommended that the *EMPLOYEE global user should only be used for Notifications and not for workflow approval processing.

- *ORIGINATOR

    When you select this global user, the Self Service application directs workflow documents to each user initiating a request.

- *CUSTOMSUPER

    When you select this global user, the Self Service application directs workflow documents to users' supervisors listed in the custom file, AHPELCST.

To maintain the global workflow user routing file:

1   Start an IBM i interactive session, either at the system console or at a workstation.

2   Sign in as **AM2000**.

3   From the Self Service main menu select *Workflow*.

4   Select *Global Workflow Users* [WUM] to display the entry screen.

    On this screen you can do the following:

    - Add a global workflow user

        To add a global workflow user, type the information for the new workflow user in the fields at the top of the screen.

    - Change information for a global workflow user

        To change information for a global workflow user, type **2** in the *Opt* field next to the workflow user whose information you want to change. Then, press Enter to display the information in the fields at the top of the screen.

- Delete a global workflow user

  To delete a global workflow user, type **4** in the *Opt* field next to the workflow user you want to delete. Then, press Enter to delete the selected global user from the list at the bottom of the screen.

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

Workflow User

Type the name of the global workflow user. This name must begin with an asterisk (*). Consider names such as **APPROVER* that are descriptive of the workflow user's role.

User ID

Specify the user ID of the employee whom you are designating a workflow user.

Reports To Level (0-9)

This field is visible only for the *REPORTSTO global user. It is used to identify how many levels the workflow approval program goes up through the reporting level organization structure if the *REPORTSTO field is blank.

Valid values are from **0** to **9** where **0** indicates that you do not want the program to use this feature. If you do not have vacant positions within your workflow setup, enter a value of **0** in this field.

Values **0** to **9** go up the reporting structure as many times as indicated in this field. If the workflow approval program goes up the reporting level structure based on the field set on the control and the program does not find a valid user to whom to send the workflow approval, then an error is written to the Workflow in Error file. The administrator must reject the transaction back to the originator or redirect the transaction to a valid user.

This processing is also invoked if the supervisor field on the employee basic data record is blank. Current processing goes to the reports-to position when this occurs.

This processing is applied to all workflow document types that use the *REPORTSTO global user.

6 Press Enter to save your information.

7 Repeat steps 5 and 6 for additional global users whom you want to add, change or delete.

8 Press F3 to return to the main menu.

Maintaining the global e-mail users file

You use the *Global E-mail Users* function to set up routing to a group of users for message routing within the Self Service application.

The *Global E-mail Users* function is used for setting up groups of users for sending and receiving e-mail between users of Infinum HCM Self Service web application.

This enables you to send Self Service e-mails to user defined global e-mail users within the *My Messages* menu option. These messages are only sent and received by users of Self Service and are not used as part of the workflow approval process. The Global E-mail Users are on the top of the list when you prompt on the To user or CC user for easy selection. When you use a global user as the document recipient, you route the document to all of the users assigned to the global group.

If a user is terminated from the system and is part of the workflow routing, you must manually update the Global E-Mail Users file to remove the terminated employee so that the workflow continues successfully. If you use the *Purge Terminated Employees* function or if you delete the user from the Web Security file, the program automatically removes the terminated employees from the Global E-Mail Users file.

The Global E-mail Users and the Global Workflow Users are printed on the List Web Security report.

To maintain the global e-mail users routing file:

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *Workflow*.

4 Select *Global E-mail Users* [GEU] to display the entry screen.

On this screen you can do the following:

- Add a global e-mail user

  To add a global e-mail user, type the information for the new e-mail user in the fields at the top of the screen. The global e-mail user name must start with an '*' asterisk.

- Change information for a global e-mail user

  To change information for a global e-mail user, type **2** in the *Opt* field next to the e-mail user whose information you want to change. Then, press Enter to display the information in the fields at the top of the screen.

- Delete a global e-mail user

  To delete a global e-mail user, type **4** in the *Opt* field next to the e-mail user you want to delete. Then, press Enter to delete the selected global user from the list at the bottom of the screen.

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

Global E-mail User

Type the name of the global e-mail user. This name must begin with an asterisk (*). Consider names such as ***ALLEMPLOYEES** that are descriptive of the e-mail intent.

User ID

Specify the user ID of the employee whom you are designating an e-mail user.

6 Press Enter to save your information

7 Repeat steps 5 and 6 for additional global users whom you want to add, change or delete.

8 Press F3 to return to the main menu.

Configuring time-out/error settings

You use the *Workflow Time-Out/Error Settings* function to maintain global workflow time-out and error settings for all approvers defined for the Self Service workflow process. You use this function to specify the number of days available to approvers to approve a pending document and to indicate one of the following actions to take when an approver does not respond to a workflow request within the specified number of days:

- Reject the document and notify the originator of the rejection.

- Send a reminder to the approver.

- Approve the document and continue to route it through the workflow process. This option is not available if the approver is the final approver.

The Workflow Time-Out/Error Settings apply to all employers and user groups that you set up within Self Service.

You can also override the settings for individual document types for specific user groups, employer/level/location/position combinations, or users. You use the *Time Limit (days)* and *Time-out Option* fields in the *Document Routing Maintenance* function to override the global time-out settings. Refer to the "Routing documents" topic in this chapter for information about using the *Document Routing Maintenance* function to override time-out settings.

You can also use the *Workflow Time-Out/Error Settings* function to schedule a review of documents whose scheduled approvers did not respond within the required time limit. Every day at a scheduled time specified in the settings, you can run the automated workflow processing program. The program checks all documents that are pending approval. Documents pending approval for more than the number of time-out days specified on either the document routing step or on the global time-out settings receive a time-out status. The system performs the action that you specify for the time-out option. As an alternative to the scheduled job, you can select to run workflow time-out processing immediately.

The workflow time-out program produces a report of all documents with a time-out status and the related action that the system takes. The workflow time-out program also generates the workflow e-mails for the action taken and in-box notification messages to the user who originates the documents.

To configure Workflow Time-Out/Error Settings:

1 From the Self Service main menu select *Workflow*.

2 Select *Workflow Time-Out/Error Settings* [GLOBTIMUPD] to display the entry screen.

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

Use Workflow Time-outs

Specify yes to use global workflow time-outs for Self Service workflow processing.

Time Limit (days)

Type the number of days to use as the time limit for all designated approvers who must respond to a workflow document.

This field is applicable only for these workflow timeout notification types:

- WTREJ – Reject to Originator

- WTREM – Reminder to Action

- WTAPR – Automatic Approval

- WTNOT – Approval Notification

Time-out options

Specify a value to indicate what action to take if an approver does not respond to a workflow request within the number of days entered in the *Time Limit (days)* field. Valid values are:

0   Reject the document and notify the originator of the rejection.

1   Send a reminder to the approver.

2   Approve the document, and continue to route it through the workflow process.

                   When you select this value, Self Service displays **[AUTOAPPROVE]** in the From User column on the Document Tracking page in the *Manager/Document Tracking* web menu option when an approver does not respond to a workflow request within the number of days entered in the *Time Limit (days)* field.

If Final Approver

Specify a value to indicate what action to take if an approver designated as the final approver does not respond to a workflow request within the number of days entered in the *Time Limit (days)* field. Valid values are:

0   Reject the document, and notify the originator of the rejection. When *Final Approver* is **0**, the document is rejected back to the originator when the error occurs on the first (and only) stage.

1   Send a reminder to the approver.

2   Continue to wait for the approver to approve the document.

Workflow Error Settings

Error Options

Specify a value to indicate what action to take if an error is encountered in the workflow process. Valid values are:

0   Reject the document and notify the originator of the rejection. This occurs if the first step in workflow approval process ends in error. Otherwise, the error is written to the file and you use the *Workflow in Error* function to correct it. (Applicable to manager options, employee time sheets and PTO documents at this time.)

For newly submitted manager options, timesheets, and PTO, the program writes an Invalid Workflow record to AHPTRACKH with THERR set to **2** (processed). The document is rejected to the originator and AHPTRACKH updated accordingly with THERR=0 on the rejection record.

For other employee options, and for manager options, timesheets, and PTO already in workflow the program writes an Invalid Workflow record to AHPTRACKH with THERR set to **1** (error). The administrator must use the Workflow in Error tool to send the document on its way.

1   Send an e-mail to the administrator to notify them of the workflow error.

For all document types, the program writes an Invalid Workflow record to AHPTRACKH with THERR set to **1** (error). An e-mail is sent to the Administrator E-mail address provided on the Workflow Timeout Settings screen. The administrator must use the Workflow in Error tool to send the document on its way.

2   Approve the document, and continue to route it through the workflow process.

If this is not the final stage, workflow skips to the next stage.

If this is the final stage, consult If Final Approver setting and behave as described in options 0 and 1 above.

If Final Approver

Specify a value to indicate what action to take if an approver designated as the final approver encounters a workflow error trying to process the transaction. Valid values are:

0   Reject the document, and notify the originator of the rejection. When Final Approver is 0, we'll reject the document back to the originator when the error occurs on the first stage.

1   Send an e-mail to the Administrator to notify them of the workflow error.

Administrator E-mail

Specify the SHCM administrator e-mail address to be used for notification of any workflow errors

4 Press F3 to save your information and return to the main menu.

Workflow time-outs

If the Self Service administrator selects to schedule the workflow time-out checks, the AHGATOM program uses the ADDJOBSCDE command to create a job schedule entry in the IBM i job scheduler. Before adding a new entry, the program uses the RMVJOBSCDE command to remove any existing entry.

The system creates the job scheduler entries with the name format, **SHCMWTOnnn**, where **nnn** is the version number. The job schedule entries are database dependent, and each version requires a unique job entry. The system creates the job entry in one of the following two formats:

If the user selects to schedule the workflow time-out check, the system creates the job schedule entry with the following parameters:

- Derives the time from the scheduled time-to-run field in AHDATOM

- Derives the Self Service library name from the interactive library list

- Calls the AHCWEMAIL program

- The *Parm* field is system (always SS), version, platform library and **0**

- The job name is always SHCMWKFLOW

If the user selects not to schedule the workflow time-out check but to run it now, the system creates a job schedule entry as a once-only job and immediately submits the job for processing. The system does not save the job.

Setting up workflow notifications

You use the *Workflow Notification Settings* function to define workflow notification settings for the Self Service application. There are standard notification settings, and we provide a sample custom user exit template program for you to expand the notification settings for your organization.

The following pre-defined notification types are available for your use:

- New Employees (NEBEN) – The program uses the employee's date of hire

- License Expiration (ELEXP) - The program uses the employee's license expiration date

- Passport Expiration (PPEXP) - The program uses the employee's passport expiration date

- Visa Expiration (VSEXP) - The program uses the employee's Visa expiration date

- US Employment Eligibility (I9EXP) - The program uses the employee's verification expiration date

- Performance Review Alerts (PERFR) - The program uses the employee's next review date

- Example custom program (CEXIT)

- EOI Documentation (EORIM) The program checks the employee's benefit enrollment EOI Approval Date, If the date is blank and the EOI Approval Status equals **0**, then a notification is sent.

- Workflow Timeouts

    - (WTREJ – Reject to Originator)

    - (WTREM – Reminder to Action)

    - (WTAPR – Automatic Approval)

    - (WTNOT – Approval Notification)

To configure workflow notification settings:

1 From the Self Service main menu select *Workflow*.

2 Select Workflow Notifications *Settings* [WNS] to display the selection screen.

On this screen you can do the following:

- Change a workflow notification

  To change a workflow notification, type **2** in the *Opt* field next to the notification you want to change. Then, press Enter to display the information in the fields on the entry screen.

- Delete a workflow notification

  To delete a workflow notification, type **4** in the *Opt* field next to the notification you want to delete. Then, press Enter to delete the selected workflow notification from the list at the bottom of the screen.

- Run Reminders

  To submit workflow notifications to process, type **7** in the *Opt* field next to the notification you want to process. Then, press Enter to submit the reminder program to run. At the completion of the job a report for the notification selected is generated.

  Note: When you use option 7 for Performance Review Reminders, the notifications that are generated are subject to the performance review day of the week setting in the group attributes file. If you want to run the Performance Review Reminders on demand, you must change the group attributes setting to **8** prior to submitting the notification job.

- Add a workflow notification

  To add a new workflow notification, select the Add action from the menu and enter the required fields on the entry screen.

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

Subject

Type the subject title that you want to display on the e-mail notification. The system displays the e-mail subject based on the document and transaction type that you select.

From E-mail Address

Type the e-mail address of the sender of the e-mail notification. If the notification requires a response, use an e-mail address of the intended recipient of the responses.

To emphasize to the recipient that a message is system generated and no response is required, consider entering an impersonal e-mail address such as:

- no-reply@yourcompany.com

- autogenerated@yourcompanyname.com

Introduction Text

Type information that explains the purpose of the e-mail notification to the intended recipients

Notification Period

Enter the number of days used in determining when the notification should be sent. For example, in the case of license expirations, enter 60 days if you want reminders to be sent to employees with licenses that expire within 60 days. Similarly, you enter the number of days for passport, visa, and employment eligibility notification settings.

In the case of new employees benefit enrollment reminders, the notification period is the number of days from date of hire.

Note: This field is ignored for the workflow time-out types WTREJ, WTREM, WTAPR, and WTNOT. This field is used only for the application and custom notification types. The four workflow time-out types are included in the notification settings so that the administrator can set the email address and the introduction text of the email when the notification is sent.

Sequence Number

Use this field to control the sequence in which the notification appears in the list of notifications.

User Exit Program

Use this field to identify your user exit program for custom notifications. This field is only available for Notification Type CEXIT. A generic job control titled EMAILCUST is available for custom notifications. This job control is used when you run option 7 against any custom notifications. A task coupling record is written to AHPLZ with the value of NSUPGM (exit program) in field LZDOCTYPE. It provides the link to AM to submit the job EMAILCUST to batch and call the workflow notifications driver program AHGNSDRV, passing it the notification type. This program retrieves the AHPLZ record based on the passed job key and calls the program in LZDOCTYPE. This supports unlimited custom notifications.

Scheduled Job

If you require the notification program to be run on a regular scheduled basis, enter in this field the name of the AM Scheduled Job that should be used.

AM scheduled jobs can be set up to run at different frequencies, for example daily, weekly, monthly etc. So if you want a notification type to be processed each week, you would set up an AM scheduled job called WEEKLY and enter WEEKLY in this field.

Note: If you are not receiving e-mail messages, check your Junk Mail folder before contacting your administrator.

4 Press F3 to save your information and return to the notification settings menu.

5 Press F3 return to the main menu.

Configuring performance review e-mail settings

You use the *Workflow/Workflow Notification Settings/Performance Review Alerts* function to configure e-mail notifications to managers whom you set up to receive notifications that performance reviews are due. You use the *Group Maintenance Attributes* function to set up all managers within a user group to receive notifications. You then can use the Maintain Manager Authority page in the *Maintain Web Security File* function to customize the notification information for each manager.

When you use the *Performance Review Alerts* function, Self Service generates a report of the e-mail notifications sent.

Some e-mail services may provide an option to include the return path of the e-mail sender in the heading of the e-mail. Refer to your e-mail services documentation for instructions if you want to disable this setting.

If the user selects to schedule the e-mail reminders, the AHGRVM program uses the ADDJOBSCDE command to create a job schedule entry in the IBM i job scheduler. Prior to adding a new entry, the program uses the RMVJOBSCDE command to remove any existing entry.

The system creates the job scheduler entries with the name format, SHCMREMnnn where nnn = the version number. The job schedule entries are database dependent, and a unique job entry is required per version. The job entry is created in one of two formats:

If the user selects to schedule the reminders, the job schedule entry is created with the following parameters:

- The time is derived from the field on AHDRVM.

- The library name is derived from the interactive library list. The system checks where the AHCREMAIL library resides.

- The program to be called is AHCREMAIL.

- The *Parm* field is system (always **SS**), version, platform library and 0

If the user selects not to schedule the e-mail reminders but to run the reminders now, the system creates a job schedule entry as a once only job, which is immediately submitted for processing and is not saved.

Routing documents

You use the *Document Routing Maintenance* function to specify the routing for the workflow document for a given transaction or document type.

If you set up workflow routing for individual document types, you can also define conditional workflow rules for the document type. Refer to the "Setting up conditional workflow" topic later in this section for detailed information.

WARNING! You can use the *Document Routing Maintenance* function to change existing workflow document rules; however, do not change the workflow document if you have documents in progress. Run the *List Workflow Docs in Progress* function to identify any pending documents for the document type whose workflow rules you want to change.

If a user is terminated from the system and is part of the workflow routing, you must manually update the Document Routing file to remove the terminated employee so that the workflow continues successfully. You cannot delete a user from the Web Security file if the user is part of the document routing process. You must delete the user from workflow first.

Before you begin setting up document routing, you should review your organizational requirements and consider the following:

- What are the routing requirements for each transaction or document type that meet the needs of your organization?

- Is the process best served by routing a document type by user group or by position?

- Who is responsible for routing the document?

- Who should be the recipients of the document type and what are the routing steps or roles for each user or user group?

- Does the routing process require workflow or notification only?

   Workflow routing forwards a document to one or more recipients who can accept or reject the document.

   Notification routing forwards a notification to recipients that a specific transaction occurred. To send notification to the document originator when the request receives final approval, you set up the last routing step by typing ***ORIGINATOR** in the *To User* field and **N** for notification in the *Routing Type* field on the Document Routing screen.

Note: If a document type has been set up through *Web Page Settings* to allow users to attach documents, be advised that there are certain special characters in file names that are not supported by all browsers, such as / \ : * ? " < > | & ! ^ [ ], so the document that is being attached should not include the special characters in the name. Otherwise, errors will occur and the user may not be able to attach or view the document.

Using pre-defined user profiles

Self Service uses the following pre-defined user profiles that you can use in your workflow routing setup.

- *ORIGINATOR

  Use to route a document to the originator of the transaction when the final step in the workflow process requires the originator be notified when the request receives final approval.

- *SUPER

  For Infinium HCM users only, use to route a document to an employee's supervisor, as defined in the Infinium HR employee supervisor file, PRPSP. You can verify the employee's supervisor in the employee's basic data record in Infinium HR.

- *REPORTSTO

  Use to route a document to the employee's Reports to Position, as defined in the Infinium HR employee basic data file PRPMS. If there are multiple people assigned to the Reports to Position of the originator, the workflow/notification is sent to each user that is assigned to that reports-to position. The first user to take action is the approver of the transaction and the other requests are removed from the remaining users Self Service mail box.

- *EMPLOYEE

  Use to route a document to the employee that the workflow transaction is for. For example: send a notification to the employee that a salary change transaction has been initiated. It is highly recommended that you use this global user only for workflow notifications and not for approvals.

- *CUSTOMSUPER

  Use to route a document to an employee designated as a supervisor in the custom file, AHPELCST, which you activate for use on the Maintain Manager Authority screen in the *Security/Maintain Web Security File* function.

You can reference these profiles in any sequence step in your workflow routing setup.

Workflow document types

Document type	Description
AH-BC	Benefit Changes (Infinium HCM)
AH-CA	Change Address
AH-DD	Direct Deposit Change (Infinium HCM)
AH-DEPENDENT ADD	Add Dependent/Beneficiary
AH-DEPENDENT CHANGE	Change Dependent/Beneficiary
AH-EC-DM	Employee Changes Demotion (Infinium HCM)
AH-EC-EA	Employee Changes Employment Action
AH-EC-LO	Employee Changes Lay Off
AH-EC-LV	Employee Changes Leave of Absence
AH-EC-PC	Employee Changes Personal Absence
AH-EC-PR	Employee Changes Promotion (Infinium HCM)
AH-EC-PS	Employee Changes Position Change (Infinium IHCM)
AH-EC-RE	Employee Changes Review
AH-EC-SC	Employee Changes Salary Change
AH-EC-ST	Employee Changes Status Change
AH-EC-TE	Employee Changes Termination/End Employment
AH-EC-TR	Employee Changes Transfer (Infinium HCM)
AH-LSC	Lifestyle Change Request (Infinium HCM)
AH-NH	New Hire/New Employee
AH-OE	Open Enrollments (Infinium HCM)
AH-POSITION REQUISITION	Position Requisitions
AH-PR	Personal Information
AH-PT	Request Time Off

Document type	Description
AH-RH	Rehire (Infinium HCM)
AH-TAX	Update Employee Tax Changes (Infinium HCM)
AH-TE	Training Enrollment
AH-TIMESHEET	Timesheet
AH-TR	Training Request

Setting up document routing

To set up document routing:

1 From the Self Service main menu select *Workflow*.

2 Select *Document Routing Maintenance* [DRM] for Infinium HCM users or [DRMI] for Infinium IHCM users to display the selection screen.

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

Document Type

Specify a value to indicate the type of document to be routed from a user group, employer/level/location/position combination or user. The document type represents a specific transaction, such as a new hire transaction, an address change or a time sheet submission.

Leave the *Document Type* field blank to set up document routing for all document types.

4 Press Enter to display the FROM screen.

On this screen you can do the following:

▪ Add a user, group or employer/position/location combination that is the originator of the selected document type.

To add a user group, press F6 to display the entry screen.

▪ Select the user, group or employer/position/location combination to change

To select a user, type any character in the *Opt* field next to the user, group or employer/position/location combination who is the originator of

the selected document type you want to change. Then, press Enter to display the entry screen.

5 Press F6 to display the entry screen.

6 Use the information below to complete the fields on this screen. You can enter a value in only one of the following fields or field combinations:

- *From Group*
- *From Employer* or *Level 1, 2, 3, 4* or *Location* or *Position*
- *From User*

From Group

Specify a value that represents the user group from whom the specified document type originates.

From Employer

Specify the employer from whom the specified document type originates.

Level 1

Specify the level 1 of the employer from whom the specified document type originates. Only active levels can be selected for workflow routing.

Level 2

Specify the level 2 within level 1 of the employer from whom the specified document type originates. Only active levels can be selected for workflow routing.

Level 3

Specify the level 3 within levels 1 and 2 of the employer from whom the specified document type originates. Only active levels can be selected for workflow routing.

Level 4

Specify the level 4 within levels 1, 2 and 3 of the employer from whom the specified document type originates. Only active levels can be selected for workflow routing.

Location

Specify the location of the employer from whom the specified document type originates.

Position

Specify the position of the employer from whom the specified document type originates.

From User

Specify the Self Service user ID of the individual employee from whom the specified document type originates.

If you press F4 to display valid values for this field, you can press F7 on the resulting Display Web Security screen to specify the sorting criteria for the display as employee name or employee number. You can also press F9 to display a Position To window that you use to define criteria for positioning the display to a specific employee within an employer and user group.

7 Press Enter to display the selection screen.

On this screen you can do the following tasks:

- Create document routing information for the selected user group, employer/level/location/position combination, or user

  To create a document routing information record, press F6 to display the entry screen.

- Change document routing information for the selected user group, employer/level/location/position combination, or user

  To change a document routing information record, type **2** in the *Opt* field next to the record you want to change. Then, press Enter to display the entry screen.

- Delete document routing information for the selected user group, employer/level/location/position combination, or user

  To delete a document routing information record, type **4** in the *Opt* field next to the record you want to delete. Then, press Enter to delete the selected record from the list at the bottom of the screen.

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

Sequence Number

Type the number that represents the place in the routing sequence for this rule.

When you add an entry to an existing document routing record, Self Service may assign new sequence numbers to the entries when you press Enter, but it maintains the entries in the specified sequence.

For example, an existing document routing record displays sequence number 10 for Position 110140 and sequence number 20 for *ORIGINATOR. To add Position 110150 between Position 110140 and *ORIGINATOR, type a number between 10 and 20 in the *Sequence Number* field. When you complete your entries on this screen and press Enter, Self Service adds Position 110150 between Position 110140 and *ORIGINATOR and assigns it sequence number 20. Self Service reassigns *ORIGINATOR a sequence number of 30.

During the workflow process, Self Service writes a record to the Document Tracking History file, AHPTRACKH, for each transaction entry. Self Service includes the corresponding sequence number to each record added to the history file. You can use the sequence numbers to track where a transaction is in the workflow process at a given time.

To Employer

Specify the employer associated with the position you are designating to receive this document type in the routing process. If you specify an employer, you must specify a position.

To Position

Specify the position associated with the employer you are designating to receive this document type in the routing process. All employees in the specified position as defined in Infinium HR receive this document type in the routing approval process.

To User

Specify the global user ID or the Self Service user ID of the individual employee you are designating to receive this document type in the routing process.

Routing Type

Specify a value that represents the role of the specified user or employer/position in the document routing process. Valid values are:

W Workflow: The recipient of this document can approve or reject the request. Rejection by any recipient results in the return of the document to the originator with a rejection notice. No special setup is required.

N Notification: The specified user or employer/position receives notification that a transaction occurred.

Time Limit (days)

Specify the number of days that an approver who is responsible for this document type has to approve a document.

You use this field to override the value in the *Time Limit (days)* field in the *Global Time-out Settings* function for the selected document type. Refer to the "Configuring global time-out settings" topic in this chapter for information about using the *Global Time-out Settings* function to configure global time-out settings.

Time-out Option

Specify a value to indicate what action to take if an approver does not respond to a workflow request within the number of days entered in the *Time Limit (days)* field. Valid values are:

blank	Use the time-out option from the global document setting.
0	Reject the document and notify the originator of the rejection.
1	Send a reminder to the approver.
2	Approve the document and continue to route it through the workflow process.

You use this field to override the value in the *Time-out Option* field in the *Global Time-out Settings* function for the selected document type. Refer to the "Configuring global time-out settings" topic in this chapter for information about using the *Global Time-out Settings* function to configure global time-out settings.

9 Press F3 to save your information and to return to the main menu.

Workflow resolution

Use the table below for examples of how the Self Service application resolves the information you enter in these fields.

Workflow requirement	From Group	From Employer/ Level/ Location/ Position	From User
To set up rules for a specific document or for any document type regardless of who originates the request	Leave blank	Leave blank	Leave blank
To route documents originating from one user group for a specific document type	Specify a value	Leave blank	Leave blank
To route documents originating from one employer, level, location or position combination for a specific document type	Leave blank	Specify a value	Leave blank
To route documents originating from a single user for a specific document type	Leave blank	Leave blank	Specify a value

The workflow program uses the following hierarchy to resolve workflow rules:

From User with Doc Type

From User with Blank Doc Type

Employer and Position with Doc Type

Employer and Position with Blank Doc Type

Employer and Location with Doc Type

Employer and Location with Blank Doc Type

Employer and 4 Levels with Doc Type

Employer and 3 Levels with Doc Type

Employer and 2 Levels with Doc Type

Employer and 1 Level with Doc Type

Employer and 4 Levels with Blank Doc Type

Employer and 3 Levels with Blank Doc Type

Employer and 2 Levels with Blank Doc Type

Employer and 1 Level with Blank Doc Type

Employer with Doc Type

Employer with Blank Doc Type

Group with Doc Type

Group with Blank Doc Type

Doc Type Only

All Blanks

Setting up conditional workflow

If you set up workflow routing for individual document types, you can use the *Document Routing Maintenance* function to define and maintain conditional document routing information for a selected user, group, or employee/position combination for a selected document type.

To set up conditional workflow rules for a document type, complete the required fields on the Maintain Document Routing Steps screen and press F9 to display the conditional workflow entry screen.

Use the information below to complete the fields on this screen. You enter information in either the *User Exit Pgm* field or the *Where* field but not both.

User Exit Pgm

Type the name of a user exit program that defines the conditional workflow rule to apply. The user exit program must exist in the custom library in the group library list that you maintain with the *Group Library Maintenance* function.

The table below lists examples of specific business requirements where it is appropriate to create a user exit program.

Requirement	Example
Salary change transactions for amount increases	When a salary change increase exceeds five percent, your company requires an additional approval level to approve the transaction. However, a manager can enter an increase amount for an employee instead of a percent. The user exit program calculates the increase amount as a percentage. If the amount increase exceeds five percent, the user exit program activates the additional approval level for the transaction.
Salary change transactions with specific field requirements	When a manager submits a salary change transaction for an employee and the *Union Code* field (PRUCD) is not blank in the PRPMS file, your company requires a conditional approver to approve the transaction.

Where

Type an SQL (Structured Query Language) query statement that defines the conditional workflow rule to apply. You must enclose the SQL statement within open and close parentheses.

Caution: Do not use this field unless you are knowledgeable of SQL statements and the database fields.

The table below lists examples of SQL statements for specific business requirements.

Requirement	Example
Salary change	When a salary change increase exceeds five percent, your company requires an additional approval level to approve the transaction. To define the conditional rule for the salary change document type, enter the SQL statement below.
	(ECSCPERC > 5 OR (ESCAMT > 0 AND 100*(ECSCAMT-PRBRT)/PRBRT > 5))

Requirement	Example
Salary change	When a salary change increase exceeds five percent or $50,000, your company requires an additional approval level to approve the transaction after the employee's supervisor but before the final approver. To define the conditional rule for the salary change document type, enter the SQL statement below. **(ECSCPERC > 5_OR (ECSCAMT > 0 AND 100*(ECSCAMT-PRBRT) /PRBRT_>_5) OR ECSCAMT > 50000 OR (ECSCPERC > 0 AND PRBRT*ECSCPERC+PRBRT >_ 50000))**
Salary change	When the effective date of a salary change transaction precedes today's date, your company requires a general manager's approval after the employee's supervisor's approval but before the final approver's approval. **(CHAR(ECSCEFF8) < (SUBSTR(CHAR(CURDATE()),1,4) CONCAT_SUBSTR(CHAR(CURDATE()),6,2) CONCAT SUBSTR(CHAR(CURDATE()),9,2)))**
Termination	When a termination transaction has a reason for leaving that is equivalent to a defined set of values, your company requires a vice president or an HR representative to approve the transaction before other approvers. To define the conditional rule for the termination document type, enter the SQL statement below. **(ECTETEC = 'I200' or ECTETEC = 'I201' or ECTETEC = 'I202' or ECTETEC = 'I203')**
Promotion	Promotions to certain positions require the approval of your company's CEO before other approvers. To define the conditional rule for the promotion document type, enter the SQL statement below. **(ECPRPOS = 'DEVMGR' or ECPRPOS = 'SPTMGR' or ECPRPOS = 'MISMGR')**

After you complete the information on the screen, press F3 to save your information and return to the Maintain Document Routing screen.

Note: When you use conditional workflow for Position Requisitions, document type AH-POSITION REQUISITION, the field names are the same for AHPPR and PRPMS so a qualifier must be used for the field name. For example A.PRER='xxx' where xxx equals your employer code.

Using user-exit programs to define conditional workflow

Function performed

You use the *Document Routing* function to specify the routing for the workflow document for a given transaction or document type.

If you set up workflow routing for individual document types, you can also define conditional workflow rules for the document type. Refer to the "Workflow Implementation" chapter in the *Guide to Administration* for detailed information.

Where specified

On the Maintain Conditional Workflow screen shown in Figure 1-1 in the Self Service Administration *Workflow Menu*/*Document Routing* function, use the *User Exit Pgm* field to specify a user-exit program to define the conditional workflow rules for the selected document type.

Program provided

Self Service provides the AHGWFUE1 sample conditional workflow user-exit program. You can use this program as shipped, or you can copy or modify it if you have special routing requirements.

Parameters passed

You should set up your program to contain the following parameters:

```
0058.00 * Entry Parameters
0059.00 D EntryParm DS
0060.00 D Key 25
0060.01 D FrmSeqNum 3 0
0060.02 D ToSeqNum 3 0
0060.03 D FrmUser 50
0060.04 D ToUser 50
0060.05 D Stage 3 0
0061.00 *
0062.00 D Errds DS
0063.00 D ##Msg1 64
0064.00 D ##Msg2 64
0065.00 D ##Msg3 64
0066.00 D ##Msg4 64
0068.00 *
```

Identifying workflow in error

The *Workflow In Error* function is used to diagnose workflow errors so that the administrator or the originator of the document can take action to correct the error. Once the error has been identified, the administrator can choose to reject the document back to the originator or redirect the document to another user for approval.

To maintain the workflow in error file:

1   Start an IBM i interactive session, either at the system console or at a workstation.

2   Sign in as **AM2000**.

3   From the Self Service main menu select *Workflow*.

4   Select *Workflow In Error* [WIE] to display the entry screen.

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

Document Type

Specify a document type to select workflow documents of that type which are in error.

Group

Specify a user group to select workflow documents created by those users which are in error.

Originator

Specify a user ID to select workflow documents which were created by that user and which are in error.

From Date

Specify a 'from' date to select workflow documents created after and including that date which are in error.

To Date

Specify a 'to' date to select workflow documents created up to and including that date which are in error.

Press Enter to retrieve your information from AHPTRACK where THERR = 1 and presents page 2 based on the selections.

On this screen you can do the following:

- Select a document in error

  Enter a 1 in the Opt field to select a specific workflow document in error to review additional details about the workflow error.

- Reject a document in error

  Enter **2** in the *Opt* field to cancel the workflow process; send the workflow request back to the originator and mark the status as Rejected in document history. A rejection confirmation window is displayed to the user before the action is committed.

- Redirect a document in error

  Enter **3** in the *Opt* field to display the *Reassign Documents* screen so that the administrator can redirect the workflow to a valid user for approval. A redirect confirmation window is displayed to the user before the action is committed.

6 Press F3 to return to the main menu.

Setting up alternate approvers

Use the *Alternate Approvers* function to set up alternate approvers for one or more document type. You can use *List Alternate Approvers* to generate a report of alternate approvers.

Before you can set up a user as an alternate approver, you must authorize the appropriate user group or the individual user to be eligible as an alternate approver.

- For information on authorizing all users within a user group to be eligible as alternate approvers, refer to the "Maintaining user group attributes" topic in the "Security" chapter in this guide.

- For information on authorizing individual users to be eligible as alternate approvers, refer to the "Maintaining the web security file" topic in the "Security" chapter in this guide.

To set up an alternate approver:

1 From the Self Service main menu select *Workflow*..

2 Select *Alternate Approvers* [AA] to display the Maintain Alternate Approvers approver user ID selection screen.

3 Specify the approver user ID of the approver for whom you are selecting an alternate approver.

4 Press Enter to display the selection screen.

On this screen you can do the following:

- Add an alternate approver

   To add an alternate approver, press F6 to display the entry screen.

- Change information for an alternate approver

   To change information for an alternate approver, type **2** in the *Opt* field next to the alternate approver whose information you want to change. Then, press Enter to display the entry screen.

- Delete an alternate approver

   To delete an alternate approver, type **4** in the *Opt* field next to the alternate approver you want to delete. Then, press Enter to delete the selected alternate approver from the list at the bottom of the screen.

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

Begin Date

Specify the date on which the alternate approver's availability begins for the selected document types.

End Date

Specify the date on which the alternate approver's availability ends for the selected document types.

Use Alternate Approver

Specify the alternate approver for the selected document types.

If you enter a value in the *Use Alternate Approver* field, you must leave the *Skip This Approval* field blank.

Skip This Approval

Specify whether to skip the original approver for the selected document types if the approver does not respond to the approval request within the allotted approval period.

If you enter a value in the *Skip This Approval* field, you must leave the *Use Alternate Approver* field blank.

Mark the Documents to Be Approved

Type any character next to one or more document types for which the alternate approver is responsible for approving.

6 Press F3 to save your information and return to the main menu.

Reassigning documents

You use the *Reassign Documents* function to reassign documents that are pending approval from the original designated approver to a new approver. You can use the *List Workflow Docs in Progress* function to identify documents pending approval beyond a specific date or time period.

To reassign documents:

1 From the Self Service main menu select *Workflow*.

2 Select *Reassign Documents* [RD] to display the Reassign Documents pending approver selection screen.

3 Specify the approver whose pending documents you want to reassign.

4 Press Enter to display the selection screen.

5 Type any character in the *Opt* field next to one or more pending documents that you want to reassign to a new approver.

6 Press Enter to display the entry screen.

7 Specify a value in the *New Approver* field for the selected pending documents.

8 Press Enter to reassign the documents to the new approver and return to the Reassign Documents selection screen.

9 Press F3 to return to the main menu.

Listing workflow documents in progress

You use the *List Workflow Docs in Progress* function to generate a report of documents submitted for workflow processing but that have not completed the workflow process as of a specific date. You can use the *Reassign Documents* function to assign any documents with an "in process" status to a different approver.

To list workflow documents in process:

1   From the Self Service main menu select *Workflow*.

2   Select *List Workflow Docs in Progress* [LWDIP] to display the selection screen.

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

Employer

Specify the employer for which to generate a report of workflow documents in process. Leave blank to include all employers.

Group

Specify the user group for which to generate a report of workflow documents in process. Leave blank to include all user groups.

Approver

Specify the approver for which to generate a report of workflow documents in process. Leave blank to include all approvers.

Document Type

Specify the document type for which to generate a report of workflow documents in process. Leave blank to include all document types.

Unapproved as of

Specify the date before which the workflow documents that you want to include in the report have an in-process status.

Include Errors?

Specify if workflow documents in error should be included in the report.

Valid values are:

0 = Do not include errors on the report

1 = Include errors on the report

2 = Only report errors on the report

Note: When you select to include errors on the report or only errors on the report, any selection criteria entered is ignored when the records in error are selected. The selection criteria processing is applied only to the workflow approvals in process that are not in error.

4 Press Enter to generate the report and return to the main menu.

Listing global user file information

You use the *List Global User File* function to create a print file containing some or all of the information for your workflow global users.

To list global user routing file information:

1 From the Self Service main menu select *Workflow*.

2 Select *List Global User File* [LGUF] to display the selection screen.

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

Global User

Specify the global user for whom to generate a report of information from the global user file. Leave blank to include all global users.

User

Specify the Self Service application user for whom to generate a report of information from the global user file.

4 Press Enter to generate the report and return to the main menu.

Listing document routing file information

You use the *List Document Routing File* function to create a print file containing some or all of the information about your document routing setup.

The program sorts by the hierarchy that is in place when setting up workflow processing. If conditional workflow has been defined on the workflow step (either field RTGUEX or RTGCON is not blank) then that routing sequence is marked for that workflow definition with an asterisk (*) and a message is printed on the report that the asterisk (*) indicates a conditional workflow.

To list document routing file information:

1 From the Self Service main menu select *Workflow*.

2 Select *List Document Routing File* [LDRF] to display the selection screen.

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

Document type

Specify the document type for which to generate a report of information from the document routing file. Leave blank to include all document types.

Group

Specify the user group for which to generate a report of information from the document routing file. Leave blank to include all groups.

User

Specify the user ID of the user for whom to generate a report of information from the document routing file.

Employer

Specify the employer for whom to generate a report of information from the document routing file.

Position

Specify the position for which to generate a report of information from the document routing file.

4 Press Enter to generate the report and return to the main menu.

Listing alternate approvers

You use the *List Alternate Approvers* function to generate a report of alternate approvers. You can use the *Alternate Approvers* function to set up alternate approvers for one or more document types.

To list alternate approvers:

1 From the Self Service main menu select *Workflow*.

2 Select *List Alternate Approvers* [LAA] to display the selection screen.

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

Employer

Specify the employer for which to generate a report of alternate approvers. Leave blank to include all employers.

Group

Specify the user group for which to generate a report of alternate approvers. Leave blank to include all user groups.

User

Specify the user for which to generate a report of alternate approvers. Leave blank to include all approvers.

Document Type

Specify the document type for which to generate a report of alternate approvers. Leave blank to include all document types.

Begin Date

Specify the beginning date of the approval periods for the alternate approvers to include on the report.

End Date

Specify the end date of the approval periods for the alternate approvers to include on the report.

4 Press Enter to generate the report and return to the main menu.

Setting up benefit enrollment e-mail notifications

You use the *Benefit Enrollment Settings* function to configure e-mail notifications for the benefit enrollment events below.

- Announcement of the open enrollment period

- Enrollment confirmations

- Reminder of open enrollment to non-respondents

- Enrollment of non-respondents

You configure the e-mail notifications for all users. You can then override the e-mail notifications for individual enrollment groups.

Some e-mail services may provide an option to include the return path of the e-mail sender in the heading of the e-mail. Refer to your e-mail services documentation for instructions if you want to disable this setting.

To set up e-mail notifications:

1 From the Self Service main menu select *Workflow*.

2 Select *Benefit Enrollment Settings* [BEES] to display the selection screen.

   On this screen you can do the following:

   - Change e-mail notification settings for an e-mail notification type for all enrollment groups

   - Override e-mail notification settings by enrollment group for a specific e-mail notification type

3 To change an e-mail notification type for all enrollment groups, type **2** in the *Opt* field next to the e-mail notification type to change.

4 Press Enter to display the entry screen.

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

   Subject

   Type the subject title that you want to display on the e-mail notification.

From E-Mail Address

Type the e-mail address of the sender of the e mail notification. If the notification requires a response, use an e-mail address of the intended recipient of the responses. To emphasize to the recipient that a message is system-generated and no response is required, consider entering an impersonal e-mail address such as:

- no-reply@yourcompany.com

- autogenerated@yourcompanyname.com

Introduction Text

Type information that explains the purpose of the e-mail notification to the intended recipients. For example, type an announcement of an upcoming open enrollment period.

6　Press F3 to save your information and return to the Benefit Notification Settings selection screen.

7　To override e-mail notification settings by enrollment group for a specific e-mail notification type, type **6** in the *Opt* field next to the e-mail notification type to override and press Enter to display the Benefit Enrollment Settings definition screen.

On this screen you can do the following tasks:

- Change e-mail notification settings for an e-mail notification type for the specified enrollment group

  To change e-mail notification type settings for a specific enrollment group, type **2** in the *Opt* field next to the enrollment group whose settings you want to change. Press Enter to display the Benefit Notification Settings definition screen. Complete the information on the screen as described earlier in this section. Press F3 to save your information and return to the Benefit Enrollment Settings screen.

- Remove override e-mail notification settings for an e-mail notification type for the specified enrollment group

  To remove override e-mail notification type settings for a specific enrollment group, type **4** in the *Opt* field next to the e-mail notification type whose settings you want to remove and press Enter.

8　Press F3 to save your information and return to the Benefit Notification Settings notification type screen.

9　Press F3 to return to the main menu.

Generating open enrollment e-mail notifications

You use the *Open Enrollment Notifications* function to send e-mail notifications to employees by enrollment group. You use the Open Enrollment Notification type in the *Benefit Enrollment Settings* function to configure the e-mail notifications.

When you use the *Open Enrollment Notification* function, Self Service generates a report of the e-mail notifications sent.

To send open enrollment e-mail notifications:

1 From the Self Service main menu select *Workflow*.

2 Select *Open Enrollment Notifications* [OEN] to display the selection screen.

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

   Employer

   Specify the employer for which you are sending e-mail notifications.

   Plan Year

   Specify the plan year for which you are sending e-mail notifications.

   Enrollment Group

   Specify the enrollment group for which you are sending e-mail notifications.

4 Press Enter to send the e-mail notifications and return to the main menu.

Using your Self Service In Box

You use the Self Service web application *In Box* menu to view and take action on workflow approvals, read and send internal e-mail messages, and to initiate alternate approvers while you are away.

Using Alternate Approvers

Use the Self Service web application *Alternate Approvers* menu option to maintain a list of alternate approvers for the Self Service document types that you are responsible for approving.

You can select one or more alternate approvers for the period when you are unavailable to approve workflow documents. If you select more than one alternate approver for a specified period, you cannot assign the approvers to the same document types.

To maintain alternate approvers:

1 From the *In Box* menu, click *Alternate Approvers* to display the Alternate Approvers page.

2 Review your alternate approvers and complete the action below to add, change, or delete an alternate approver.

- To add an approver, click Add to display the Alternate Approver Detail page and continue with the steps below.

- To change information for an approver, click the check box next to the approver's start date and click Change to display the Alternate Approver Detail page. Continue with the steps below.

- To delete an approver, click the check box next to the approver's start date and click Delete.

3 Select the start and end dates for the period when you are unavailable to approve workflow documents.

4 Select one alternate approver for all documents types within the period, or select multiple approvers. Approvers must be responsible for different document types if you assign the approvers to the same periods or overlapping periods.

5 Specify yes in *Skip Me* if you do not plan to use an alternate approver but you do not want to delay the workflow process. Self Service routes the selected document types to the next scheduled approver.

6 Click Submit to save your information and return to the Alternate Approvers page.

Using For My Approval

Use the Self Service web application *For My Approval* menu option to view a list of documents that are pending your approval. From the list you can access the documents and take action to approve or reject a document or, if you have authorization, you can direct it to a new approver.

To view and work with documents pending your approval:

1 From the *In Box* menu, click *For My Approval* to display the For My Approval page.

2 Review a list of documents pending your approval and complete the action below to approve, reject, or redirect a pending document.

- To approve a document, click the check box next to a document entry in the Subject column and click Approve. To approve all listed documents, click Select All and then click Approve.

- To reject a document, click the check box next to a document entry in the Subject column and click Reject. To reject all listed documents, click Select All and then click Reject.

- If you have authority to redirect a document to another approver, click the check box next to a document entry in the Subject column and click Redirect to display the Approval Redirection List page. To redirect all listed documents, click Select All and then click Redirect. Specify a new approver for the selected document. Click Submit to return to the For My Approval page.

You can also click an entry in the Subject column on the For My Approvals page to view the document details. From the detailed view, you can approve or reject the document or, if you have authorization, redirect the document to a new approver.

Caution: When a transaction, such as an address change, is approved, ordinarily the transaction is removed from the approver's list of approvals. However, if an approver keeps the list of approvals open while another user in the same workflow user group is approving transactions, an error can result. All approvers should get into the habit of refreshing the list prior to submitting an approval if the list is kept open. This prevents errors when multiple approvers are trying to approve the same documents.

Employees unable to approve their own SHCM documents

You are prevented from using the browser back button for specific transactions. You cannot access your own SHCM transactions to approve them by pressing the browser back button and going back into input forms that are still in workflow. This restriction applies to these transactions:

- AH-BC - Benefit Changes

- AH-OE - Open Enrollment

- AH-DEPENDENT ADD - Add Dependent/Beneficiary

- AH-DEPENDENT CHANGE - Change Dependent/Beneficiary

- AH-DD - Direct Deposits

- AH-TAX - Tax Changes

- AH-TIMESHEET - Timesheet

Using My Messages

Use the Self Service web application *My Messages* menu option to work with your messages from other Self Service users, create and send messages, or delete messages. Recipients must be users of your company's Self Service product. The *My Messages* menu option does not generate external e-mails.

To work with messages:

1 From the *In Box* menu, click *My Messages* to display the Messages page.

2 If you have a message in your in box, click it to open it.

3 Use one of the options below to respond to an item in your in box.

- Documents that you initiate:

    - Cancel

    - Resubmit

- - Delete
- Documents that require an approval response:
    - Edit

        You have access to this action only to edit *Workflow Comments*, or if you have authority to edit documents, to edit specific information on the document.

    - Approve
    - Redirect

        You have access to this action only if you have authority to redirect a document to another approver.

    - Reject
    - Reset

        You use this action to clear information from *Workflow Comments*.

    Caution: When a transaction, such as an address change, is approved, ordinarily the transaction is removed from the approver's list of approvals. However, if an approver keeps the list of approvals open while another user in the same workflow user group is approving transactions, an error can result. All approvers should get into the habit of refreshing the list prior to submitting an approval if the list is kept open. This prevents errors when multiple approvers are trying to approve the same documents.

- Notifications
    - View Document

4 To create a message, click Compose New Message on the Messages page, complete the information on the Message Composer page and click Send.

5 To delete a message, click the check box next to the message you want to delete from the Messages page. Click Delete Selected Items.

   You can delete only those notifications and messages created with Compose New Message. You cannot delete messages that require your approval or rejection.

Notes

Chapter 8 Help Text Maintenance

8

The Self Service functions discussed in this chapter are located within the *Help Text* menu option on the Self Service Administration main menu.

The chapter consists of the following topics:

Maintaining help text for web page headers

You use the *Page Header Maintenance* function to customize the default help text in the header of each web page. You can customize the help text for each user group and for a specific language. The header recognizes HTML tags that you can use to customize the appearance of the help text. The header also recognizes HTTP links so that you can add links to any HTTP address.

When a new user group is created, the program copies the Infor supplied help text (header, footer, and page attributes) from the metadata tables AHPAHEADM, AHPAFOOTM, and AHPAPAGEM into the customer-maintained help text files AHPAHEAD, AHPAFOOT, and AHPAPAGE, allowing for customized help text by user group.

Caution: The installation program for new releases does not automatically update the customer help text files. You can use a Restore Defaults action within the Self Service Administration *Help Text* functions to copy the system-supplied help text into your user group help text files. If you customize the help text on any of the pages, you must copy your files before doing the restoration. You can use a utility to compare the differences or re-enter your custom changes manually.

You have the option to display the header and footer help text in a separate window or on each web page. This is a configuration setting within the bundles properties file. When the SHOWPAGEHELPINLINE is set to true, then the header and footer help is displayed on the web page. When set to false, the user clicks the help icon to display the header and footer help in a separate pop-up window. If the configuration setting is left blank, the default value of false is used.

When your help text header information is set up for a group, you can use the *Copy Help Text* function under the *Copy Functions* main menu to copy the help text from one group to one or more groups.

To customize the help text for the web page headers, complete these steps.

1   Start an IBM i interactive session, either at the system console or at a workstation.

2   Sign in as **AM2000**.

3   From the Self Service main menu select *Help Text.*

4 Select *Page Header Maintenance* [PHM] to display the Page Header Maintenance user group selection screen.

5 Type any character in the *Sel* field next to the user group for which you are maintaining page header help text.

6 Press Enter to display the Page Header Maintenance language selection screen.

7 Type any character in the *Sel* field next to the language of the help text that you are maintaining.

8 Press Enter to display the selection screen.

9 Type **2** in the *Opt* field next to one or more web page files whose header help text you want customize.

10 Press Enter to display the entry screen.

11 Type new text or edit the existing text for the header.

12 Press Enter.

If you select more than one page on the Heading Maintenance selection screen, the system displays the help text for the next selected page. Continue updating the help text for each selected page and press Enter to advance to the help text for the next selected page. When you complete the help text for the last selected page and press Enter, the system returns you to the *Header Maintenance* selection screen.

13 Press F3 to save your changes and return to the main menu.

Maintaining help text for web page footers

You use the *Page Footer Maintenance* function to customize the default help text in the footer of each web page. You can customize the help text for each user group and for a specific language. The footer recognizes HTML tags that you can use to customize the appearance of the help text. The footer also recognizes HTTP links so that you can add links to any HTTP address.

You have the option to display the header and footer help text in a separate window or on each web page. This is a configuration setting within the bundles properties file. When the SHOWPAGEHELPINLINE is set to false, then the header and footer help is displayed on the web page. When set to true, the user clicks the help icon to display the header and footer help in a separate pop-up window.

When your help text header information is set up for a group, you can use the *Copy Help Text* function under the *Copy Functions* main menu to copy the help text from one group to one or more groups.

To customize the help text for the web page footers, complete these steps.

1 From the Self Service main menu select *Help Text.*

2 Select *Page Footer Maintenance* [PFM] to display the Page Footer Maintenance user group selection screen.

3 Type any character in the *Sel* field next to the user group for which you are maintaining page footer help text.

4 Press Enter to display the Page Footer Maintenance language selection screen.

5 Type any character in the *Sel* field next to the language of the help text that you are maintaining.

6 Press Enter to display the selection screen.

7 Type **2** in the *Opt* field next to one or more web pages whose footer help text you want to customize.

8 Press Enter to display the entry screen.

9 Type new text or edit the existing text for the footer.

If you select more than one page on the Footer Maintenance selection screen, the system displays the help text for the next selected page. Continue updating the help text for each selected page and press Enter to advance to the help text for the next selected page. When you complete the help text for the last selected page and press Enter, the system returns you to the Footer Maintenance selection screen.

10 Press F3 to save your changes and return to the main menu.

Maintaining page attributes for web pages

You use the *Page Attributes Maintenance* function to specify the tool bar functions for each web page. You can customize the page attributes for each user group and for a specific language. The functions available for the tool bar are:

Function	Use to…
Help	Invoke online help in a new window
Print	Format and print the current page to the user's default printer

The default setting for the task bar control is to show both functions.

When your page attribute information is set up for a group, you can use the *Copy Help Text* function under the *Copy Functions* main menu to copy the page attributes from one group to one or more groups.

To customize page attributes, complete these steps.

1 From the Self Service main menu select *Help Text.*

2 Select *Page Attributes Maintenance* [PAM] to display the Page Attributes Maintenance user group selection screen.

3 Type any character in the *Sel* field next to the user group for which you are maintaining page attributes.

4 Press Enter to display the Page Attributes Maintenance language selection screen.

5 Type any character in the *Sel* field next to the language for the page attributes that you are maintaining.

6 Press Enter to display the selection screen.

7 Type **2** in the *Opt* field next to one or more web pages whose attributes you want customize.

8 Press Enter to display the entry screen.

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

Title

Type a title to display in the title bar at the top of the selected web page.

Self Service also uses this title for the Self Service web pages when you use the Self Service Administration Help Text/Page Header Maintenance and Page Footer Maintenance functions to customize page header and footer help text.

Task Bar Print

Type **1** (yes) to display the Print function in the tool bar at the top of the selected web page. Otherwise, type **0** (no).

Task Bar Help

Type **1** (yes) to display the Help function in the task bar at the top of the selected web page. Otherwise, type **0** (no).

10 Press Enter.

If you select more than one page on the Page Maintenance selection screen, the system displays the attribute settings for the next selected page. Continue updating the attributes for each selected page and press Enter to advance to the attributes for the next selected page. When you complete the attribute settings for the last selected page and press Enter, the system returns you to the Page Maintenance selection screen.

11 Press F3 save your changes and return to the main menu.

Notes

Chapter 9 Copy Functions

9

The Self Service functions discussed in this chapter are located within the *Copy Functions* menu option on the Self Service Administration main menu.

These copy functions help to expedite the setup process so that you do not need to repeat the same setup steps for each employer, user group, manager or employee, benefit plan year, benefit enrollment group, or document type.

The chapter consists of the following topics:

Copying group attributes

You use the *Copy Group Attributes* function to copy user group attributes from a user group to one or more user groups. You can copy attributes to existing user groups or you can create users groups to which you can copy the information.

You use the *Group Attributes Maintenance* function to set up and maintain user group attributes for the original user group. Refer to the "Security" chapter in this guide for more information.

To copy group attributes, complete these steps.

1   Start an IBM i interactive session, either at the system console or at a workstation.

2   Sign in as **AM2000**.

3   From the Self Service main menu select *Copy Functions.*

4   Select *Copy Group Attributes* [CGA] for Infinium HCM users or [CGAI] for Infinium IHCM users to display the selection screen.

5   Specify the user group from which you are copying the library settings and attributes.

6   Press Enter to display the selection screen.

7   Type **X** in the *Opt* field next to each user group to which you want to copy library settings and attributes from the source user group selected on the previous screen.

You can press F15 to select all user groups. You can press F16 to deselect all user groups.

You can also create a group from this screen by pressing F6, typing the name of the new user group in the *Group* field and then pressing Enter to return to the Copy Group Libraries destination screen.

8   Press Enter to copy the user group libraries.

9   Press F3 to return to the main menu.

Copying approver authority

You use the *Copy Approver Authority* function to copy approver authorization settings from an approver to one or more approvers.

You use the *Maintain Web Security File* function to set up and maintain approver authorization settings for the original approver whose authority information you want to copy. Refer to the "Security" chapter in this guide for more information.

To copy approver authority, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Approver Authority* [CAA] for Infinium HCM users or [CAAI] for Infinium IHCM users to display the selection screen.

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

Group

Specify the user group of the approver from whom you are copying the authorization settings.

Employer

Specify the employer of the approver from whom you are copying the authorization settings.

User ID

Specify the user ID number of the approver from whom you are copying the authorization settings.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to each approver to whom you want to copy approver authority information from the source approver selected on the previous screen. You can press F15 to select all approvers. You can press F16 to deselect all approvers.

6 Press Enter to copy the approver authority information.

7 Press F3 to return to the main menu.

Copying manager authority

You use the *Copy Manager Authority* function to copy manager authorization settings from a manager to one or more managers.

You use the *Maintain Web Security File* function to set up and maintain manager authorization settings for the original manager whose authority information you want to copy. Refer to the "Security" chapter in this guide for more information.

To copy manager authority, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Manager Authority* [CMA] for Infinium HCM users or [CMAI] for Infinium IHCM users to display the selection screen.

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

Group

Specify the user group of the manager from whom you are copying the authorization settings.

Employer

Specify the employer of the manager from whom you are copying the authorization settings.

Manager

Specify the manager from whom you are copying the authorization settings.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to each manager to whom you want to copy manager authority information from the source manager selected on the previous screen.

You can press F15 to select all managers. You can press F16 to deselect all managers.

6 Press Enter to copy the manager authority information.

7 Press F3 to return to the main menu.

Copying level security

You use the *Copy Level Security* function to copy the level security settings from a manager to one or more managers.

You use the *Maintain Level Security* function to set up and maintain user level security settings for the original user whose level security information you want to copy. Refer to the "Security" chapter in this guide for more information.

To copy level security, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Level Security* [CLS] for Infinium HCM users or [CLSI] for Infinium IHCM users to display the selection screen.

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

Group

Specify the user group of the user from whom you are copying the level security settings.

Employer

Specify the employer of the user from whom you are copying the level security settings.

User Profile

Specify the user profile of the user from whom you are copying the level security settings.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to each employer to which you want to copy the level security information from the source user profile selected on the previous screen.

You can press F15 to select all employers. You can press F16 to deselect all employers.

6 Press Enter to display the selection screen.

7 Type **X** in the *Opt* field next to each user ID to which you want to copy the level security information from the source user profile selected on the previous screen.

You can press F15 to select all user IDs. You can press F16 to deselect all user IDs.

8 Press Enter to copy the level security information.

9 Press F3 to return to the main menu.

Copying web page settings

You use the *Copy Web Page Settings* function to copy the Self Service web application page settings from a user group to one or more user groups.

You use the *Web Page Settings* function to set up and maintain web page settings for the original user group. Refer to the "Web Page and Payroll Settings" chapter in this guide for more information.

To copy web page settings, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Web Page Settings* [CWPS] for Infinium HCM users or [CWPSI] for Infinium IHCM users, and press Enter to display the selection screen.

3 Specify the user group from which you are copying web page settings.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to each user group to which you want to copy web page settings from the source user group selected on the previous screen.

   You can press F15 to select all user groups. You can press F16 to deselect all user groups.

6 Press Enter to copy the web page settings.

7 Press F3 to return to the main menu.

Copying time sheet configuration

You use the *Copy Time Sheet Configuration* function to copy the time sheet configuration settings from an employer to one or more employers.

You use the *Time Sheet Configuration* function to set up and maintain time sheet configuration settings for the original employer. Refer to the "Payroll Settings" chapter in this guide for more information.

To copy time sheet configurations, complete these steps.

1   From the Self Service main menu select *Copy Functions.*

2   Select *Copy Time Sheet Configuration* [CTSC] for Infinium HCM users or [CTSCI] for Infinium IHCM users to display the selection screen.

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

   Group

   Specify the user group associated with the employer from which you are copying the time sheet configuration settings.

   Employer

   Specify the employer from which you are copying the time sheet configuration settings.

4   Press Enter to display the selection screen.

5   Type **X** in the *Opt* field next to each user group to which you want to copy time sheet configuration settings from the source employer selected on the previous screen. You can press F15 to select all user groups. You can press F16 to deselect all user groups.

6   Press Enter to display the selection screen.

7   Type **X** in the *Opt* field next to each employer to which you want to copy time sheet configuration settings from the source employer selected on the previous screen. You can press F15 to select all employers. You can press F16 to deselect all employers.

8   Press Enter to copy the time sheet configuration settings.

9   Press F3 to return to the main menu.

Copying benefit plan settings

You use the *Copy Benefit Plan Settings* function to copy the benefit plan settings from:

- One employer to another
- A previous plan year to a new plan year, or
- One benefit enrollment group to another

You use the *Benefit Settings* functions to set up and maintain the original benefit plan settings. Refer to the "Benefit Settings" chapter in this guide for more information.

The *Copy Benefit Plan Settings* function applies only if you use Self Service with Infinium HCM.

To copy benefit plan settings, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Benefit Plan Settings* [CBPS] to display the selection screen.

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

From Employer

Specify the employer from which you are copying the benefit plan settings.

To Employer

Specify the employer to which you are copying the benefit plan settings.

From Plan Year

Specify the plan year from which you a copying the benefit plan settings.

To Plan Year

Specify the plan year to which you are copying the benefit plan settings.

From Enrollment Group

Specify the benefit enrollment group from which you are copying the benefit plan settings.

Enter a value in the *From Enrollment Group* field only if you assign benefit plans to enrollment groups by using option **9**, Benefit Plans for Enrollment Group, in the *Open Enrollment Settings* function. If you assign benefit plans by using option **8**, Benefit Plans in the *Open Enrollment Settings* function, leave the *From Enrollment Group* field blank to copy from one employer/plan year combination to another.

To Enrollment Group

Specify the benefit enrollment group to which you are copying the benefit plan settings.

Enter a value in the *To Enrollment Group* field only if you assign benefit plans to enrollment groups by using option **9**, Benefit Plans for Enrollment Group, in the *Open Enrollment Settings* function. If you assign benefit plans by using option **8**, Benefit Plans in the *Open Enrollment Settings* function, leave the *To Enrollment Group* field blank to copy from one employer/plan year combination to another.

4 Press Enter to copy the benefit plan settings.

5 Press F3 to return to the main menu.

Copying project codes

Use the *Copy Project Codes* function to copy project codes from one group to one or more user groups.

You use the *Maintain Project Codes* function to set up and maintain project code values. Refer to the "Payroll Settings" chapter in this guide for more information.

To copy project codes, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Project Codes* [CPC] for Infinium HCM users or [CPCI] for Infinium IHCM users to display the selection screen.

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

   Group

   Specify the user group whose project codes you are copying.

   Employer

   Specify the employer whose project codes you are copying.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to each user group to which you want to copy project codes from the source user group selected on the previous screen.

   You can press F15 to select all user groups. You can press F16 to deselect all user groups.

6 Press Enter to copy the project codes.

7 Press F3 to return to the main menu.

Copying timekeeper controls

Use the *Copy Timekeeper Controls* function to copy timekeeper controls from one timekeeper to one or more additional timekeepers.

You use the *Maintain Timekeeper Controls* function to set up and maintain timekeeper controls. Refer to the "Payroll Settings" chapter in this guide for more information.

To copy timekeeper controls, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Timekeeper Controls* [CTC] to display the selection screen.

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

   Group

   Specify the user group of the timekeeper whose timekeeper controls you are copying.

   Employer

   Specify the employer of the timekeeper whose timekeeper controls you are copying.

   User Profile

   Specify the user profile of the timekeeper whose timekeeper controls you are copying.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to the timekeeper to whom you want to copy timekeeper controls from the source timekeeper selected on the previous screen.

   You can press F15 to select all timekeepers. You can press F16 to deselect all timekeepers.

6 Press Enter to copy the timekeeper controls.

7 Press F3 to return to the main menu.

Copying position security

Use the *Copy Position Security* function to copy position security from one manager to all managers in one or more employers.

You use the *Maintain Position Security* function to set up and maintain position security for managers. Refer to the "Security" chapter in this guide for more information.

To copy position security, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Position Security* [CPS] to display the selection screen.

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

Group

Specify the user group of the manager whose position security information you are copying.

Employer

Specify the employer of the manager whose position security information you are copying.

User Profile

Specify the user profile of the manager whose position security information you are copying.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to each user to whom you want to copy position security from the source manager selected on the previous screen.

You can press F15 to select all managers. You can press F16 to deselect all managers.

6 Press Enter to copy the position security.

7 Press F3 to return to the main menu.

Copying menu structures

You use the *Copy Menu Structure* function to copy Self Service web application menu settings from a user group to one or more user groups.

You use the *Menu Maintenance* function to set up and maintain menu settings for the original user group. Refer to the "Menu Structure" chapter in this guide for more information.

To copy menu maintenance settings, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Menu Structure* [CMS] for Infinium HCM users or [CMSI] for Infinium IHCM users to display the selection screen.

3 Specify the user group from which you are copying the menu structure settings.

4 Press Enter to display the selection screen.

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

6 Type **X** in the *Opt* field next to each user group to which you want to copy the menu structure settings from the source user group selected on the previous screen.

You can press F15 to select all user groups. You can press F16 to deselect all user groups.

7 Press Enter to copy the menu structure settings.

8 Press F3 to return to the main menu.

Copying help text

You use the *Copy Help Text* function to copy Self Service web application help text settings from a user group to one or more user groups.

You use the *Help Text Maintenance* function to set up and maintain help text settings for the original user group. Refer to the "Help Text Maintenance" chapter in this guide for more information.

To copy help text settings, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Help Text* [COPYHELP] for Infinium HCM users or Infinium IHCM users to display the selection screen.

3 Specify the user group from which you are copying the help text settings.

4 Select Yes if you want to copy the page attributes, otherwise select No.

5 Select Yes if you want to copy the header help text, otherwise select No.

6 Select Yes if you want to copy the footer help text, otherwise select No.

7 Press Enter to display the selection screen.

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

9 Type **X** in the *Opt* field next to each user group to which you want to copy the help text settings from the source user group selected on the previous screen.

   You can press F15 to select all user groups. You can press F16 to deselect all user groups.

10 Press Enter to copy the help text settings.

11 Press F3 to return to the main menu.

Copying document routing

You use the *Copy Document Routing* function to copy workflow document routing settings from a workflow document type to one or more document types. You can copy the document routing settings for a specific user group, employer or user. Within an employer, you can copy the settings for a specific organizational level, location or position.

You use *Document Routing* to set up and maintain the original workflow document routing settings. Refer to the "Workflow Implementation" chapter in this guide for more information.

To copy workflow documents, complete these steps.

1 From the Self Service main menu select *Copy Functions.*

2 Select *Copy Document Routing* [CDR] for Infinium HCM users or [CDRI] for Infinium IHCM users to display the selection screen.

You can enter a value in only one of the following fields or field combinations:

- *Group*

- *Employer* or *Level 1, 2, 3, 4* or *Location* or *Position*

   You must select an employer before you can select a level, location or position.

- *User*

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

Document type

Specify the document type from which you are copying routing settings.

Group

Specify the user group from which the specified document type originates.

Employer

Specify the employer from which the specified document type originates.

Level 1

Specify the level 1 of the employer from which the specified document type originates.

Level 2

Specify the level 2 within level 1 of the employer from which the specified document type originates.

Level 3

Specify the level 3 within levels 1 and 2 of the employer from which the specified document type originates.

Level 4

Specify the level 4 within levels 1, 2 and 3 of the employer from which the specified document type originates.

Location

Specify the location of the employer from which the specified document type originates.

Position

Specify the position of the employer from which the specified document type originates.

User

Specify the Self Service user ID of the individual employee from whom the specified document type originates.

4 Press Enter to display the selection screen.

5 Type **X** in the *Opt* field next to each document type to which you want to copy the workflow document settings from the source document type selected on the previous screen.

   You can press F15 to select all document types. You can press F16 to deselect all document types.

6 Press Enter to copy the workflow document settings.

7 Press F3 to return to the main menu.

Notes

Chapter 10 Purge Functions

10

The Self Service functions discussed in this chapter are located within the *Purge and Reorganize Files* menu option on the Self Service Administration main menu.

The chapter consists of the following topics:

Overview

The Self Service files can accumulate large numbers of records that eventually affect system performance.

To improve system performance, you can use the Self Service administrative functions on the *Purge and Reorganize Files* menu to delete records in the files listed in the table below. You can also select to reorganize the files after Self Service purges the records from the files. Reorganizing the files further reduces the size of the files.

File name	File description	Source of file records	Purge function
AHPTRACKH	Web Document Tracking History	All transactions submitted within the workflow process	*Purge Web Doc Tracking History*
AHPESLT	Audit Log for Employee Selections	Any Self Service web menu options that users access	*Purge Audit Log - EE Selections*
AHPSOSO	Audit Log for Sign-in/ Sign-out Info	All instances that Self Service web users sign on and sign off a Self Service web session	*Purge Audit Log Sign In/ Sign Out*
AHPDPH	Dependent Additions/ Changes History	*Benefits/Beneficiaries* *Benefits/Dependents*	*Purge Dependent Change History*
AHPTAH	Web Time History	*Manager/Time Sheet Tracking* *Payroll/My Time Sheets*	*Purge Web Time History*
AHPTRECH	Employee Changes History	*Manager/Employee Changes*	*Purge Employee Changes History*
AHPTRHIH	New Employee History	*Manager/New Employee*	*Purge New Employee History*
AHPTRRHH	Rehire History	*Manager/Rehire Employee*	*Purge Rehire History*

File name	File description	Source of file records	Purge function
AHPDDRH	Direct Deposit Requests History	*Payroll/Direct Deposit Change*	*Purge Direct Deposit Req History*
AHPPTOH	Personnel Absences History	*Personal/Time Off Request*	*Purge Absences History*
AHPLSCH	Req for Lifestyle Changes History	*Benefits/Benefit Changes*	*Purge Lifestyle Changes History*
AHPBEH,	Open Enrollment History	*Benefits/Open Enrollment*	*Purge Benefit Enrollment History*
AHPBCH	Benefit Changes History	*Benefits/Benefit Changes*	*Purge Benefit Enrollment History*
AHPWEBA	Web Security File	*Manager/Employee Changes*	*Purge Terminated Employees*
AHPR and AHPPRH	Position Requisitions and History	*Manager/Position Requisitions*	*Purge Position Requisitions*

This chapter explains how to use each purge function listed in the table.

Purging web document tracking history

You use the *Purge Web Doc Tracking History* function to generate a list of selected records to purge from the Web Document Tracking History file, AHPTRACKH, or to purge the selected records from the file.

The Web Document Tracking History file contains records that Self Service creates each time Self Service web users submit a transaction or respond to a submitted transaction within the Self Service workflow process.

To purge web document tracking history, complete these steps.

1   Start an IBM i interactive session, either at the system console or at a workstation.

2   Sign in as **AM2000**.

3   From the Self Service main menu select *Purge and Reorganize Files.*

4   Select *Purge Web Doc Tracking History* [PWDTH] to display the selection screen.

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

Document Type

Specify the document type for the records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

6 Press Enter to display the selection screen.

7 Confirm your selection criteria.

8 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

9 Press F3 to return to the main menu.

Purging the audit log for employee selections

You use the *Purge Audit Log - EE Selections* function to generate a list of selected records to purge from the Audit Log for Employee Selections file, AHPESLT, or to purge the selected records from the file.

The Audit Log for Employee Selections file contains records that Self Service creates to track the menu options Self Service web users access.

To purge the audit log for employee selections, complete these steps.

1   From the Self Service main menu select *Purge and Reorganize Files*.

2   Select *Purge Audit Log – EE Selections* [PALES] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4   Press Enter to display the selection screen.

5   Confirm your selection criteria.

6   Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7   Press F3 to return to the main menu.

Purging the audit log for sign-in/sign-out information

You use the *Purge Audit Log Sign In/Sign Out* function to generate a list of selected records to purge from the Audit Log for Sign In/Sign Out Info file, AHPSOSO, or to purge the selected records from the file.

The Audit Log for Sign In/Sign Out Info file contains records that Self Service creates to track each time Self Service web users sign in and sign out a Self Service web session.

To purge the audit log for sign-in and sign-out information, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Audit Log Sign In/Sign Out* [PALSOSO] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging dependent additions/changes history

You use the *Purge Dependent Change History* function to generate a list of selected records to purge from the Dependent Additions/Changes History file, AHPDPH, or to purge the selected records from the file.

The Dependent Additions/Changes History file contains records that Self Service creates when Self Service web users access the *Benefits/Beneficiaries* or *Benefits/Dependents* menu options to submit changes to their beneficiary or dependent information.

To purge dependent additions and changes history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Dependent Change History* [PDCH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging web time history

You use the *Purge Web Time History* function to generate a list of selected records to purge from the Web Time History file, AHPTAH, or to purge the selected records from the file.

The Web Time History file contains records that Self Service creates when S Self Service elf Service web users access the *Manager/Time Sheet Tracking* or *Payroll/My Time Sheets* menu options to submit time sheet records.

To purge web time history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Web Time History* [PWTH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging employee changes history

You use the *Purge Employee Changes History* function to generate a list of selected records to purge from the Employee Changes History file, AHPTRECH, or to purge the selected records from the file.

The Employee Changes History file contains records that Self Service creates when Self Service web users access the *Manager/Employee Changes* menu option to submit employee change transactions.

To purge employee changes history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Employee Changes History* [PECH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

Attachment Path

Type the path that represents the location where you store files associated with employee records. The default path is /SHCM.

When you run this function, Self Service purges all attachment files in this location that are associated with the records specified by your purge criteria.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging new employee history

You use the *Purge New Employee History* function to generate a list of selected records to purge from the New Employee History file, AHPTRHIH, or to purge the selected records from the file.

The New Employee History file contains records that Self Service creates when Self Service web users access the *Manager/New Employee* menu option to submit new employee transactions.

To purge new employee history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge New Employee History* [PNEH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

Attachment Path

Type the path that represents the location where you store files associated with employee records. The default path is /SHCM.

When you run this function, Self Service purges all attachment files in this location that are associated with the records specified by your purge criteria.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging rehire history

You use the *Purge Rehire History* function to generate a list of selected records to purge from the Rehire History file, AHPTRRHH, or to purge the selected records from the file.

The Rehire History file contains records that Self Service creates when Self Service web users access the *Manager/Rehire Employee* menu option to submit rehire employee transactions.

The *Purge Rehire History* function applies only if you use Self Service with Infinium HCM.

To purge rehire history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Rehire History* [PRH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

Attachment Path

Type the path that represents the location where you store files associated with employee records. The default path is /SHCM.

When you run this function, Self Service purges all attachment files in this location that are associated with the records specified by your purge criteria.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging direct deposit request history

You use the *Purge Direct Deposit Req History* function to generate a list of selected records to purge from the Direct Deposit Requests History file, AHPDDRH, or to purge the selected records from the file.

The Direct Deposit Requests History file contains records that Self Service creates when Self Service web users access the *Payroll/Direct Deposit Change* menu option to submit requests to change direct deposit information.

The *Purge Direct Deposit Req History* function applies only if you use Self Service with Infinium HCM.

To purge direct deposit request history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Direct Deposit Req History* [PDDRH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging personnel absences history

You use the *Purge Absences History* function to generate a list of selected records to purge from the Personnel Absences History file, AHPPTOH, or to purge the selected records from the file.

The Personnel Absences History file contains records that Self Service creates when Self Service web users access the *Personal/Time Off Request* menu option to submit paid-time-off requests.

The *Purge Absences History* function applies only if you use Self Service with Infinium HCM.

To purge personnel absences history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Absences History* [PAH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging request for lifestyle changes history

You use the *Purge Lifestyle Changes History* function to generate a list of selected records to purge from the Req for Lifestyle Changes History file, AHPLSCH, or to purge the selected records from the file.

The Req for Lifestyle Changes History file contains records that Self Service creates when Self Service web users access the *Benefits/Benefit Changes* menu option to submit a request to change benefit plans because of a lifestyle change.

The *Purge Lifestyle Changes History* function applies only if you use Self Service with Infinium HCM.

To purge requests for lifestyle changes history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Lifestyle Changes History* [PLCH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging benefit enrollment history

You use the *Purge Benefit Enrollment History* function to generate a list of selected records to purge from the Open Enrollment History file, AHPBEH, and the Benefit Changes History file, AHPBCH, or to purge the selected records from the files.

These files contain records that Self Service creates when Self Service web users access the *Benefits/Open Enrollment* and *Benefit/Benefit Changes* menu options to submit enrollment requests and changes to benefit plans.

The *Purge Benefit Enrollment History* function applies only if you use Self Service with Infinium HCM.

To purge benefit enrollment history, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Benefit Enrollment History* [PBEH] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

Attachment Path

Type the path that represents the location where you store files attached to employee records. The default path is /SHCM.

When you run this purge function, Self Service purges all attachment files in this location that are associated with the records specified by your purge criteria.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

Press F3 to return to the main menu.

Purging terminated employees

You use the *Purge Terminated Employees* function to generate a list of selected records to purge from the web security file, AHPWEBA, or to purge the selected records from the file.

The *Purge Terminated Employees* function removes the terminated employees from all global workflow users and global user e-mail groups.

To purge terminated employees, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Terminated Employees* [PTE] to display the selection screen

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Purging position requisitions

You use the *Purge Position Requisitions* function to generate a list of selected records to purge from the Position Requisition History Files, AHPPR and AHPPRH, or to purge the selected records from the file.

To purge position requisitions, complete these steps.

1 From the Self Service main menu select *Purge and Reorganize Files.*

2 Select *Purge Position Requisitions* [PPR] to display the selection screen.

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

You must specify a value in the *Employer* field or in the *Employer Group* field.

Employer

Specify the employer whose records to list or purge from the file.

Employer Group

Specify the employer group whose records to list or purge from the file.

Group

Specify the user group whose records to list or purge from the file.

From Date

Specify the starting date for the period in which records to list or purge from the file were created.

To Date

Specify the ending date for the period in which records to list or purge from the file were created.

List/Purge Option

Specify list only to generate a list of selected records to review before you purge the file.

Specify list and purge to generate the list and purge the selected records from the file.

Reorganize File

Specify yes to reorganize the file after the system purges the selected records from the file.

4 Press Enter to display the selection screen.

5 Confirm your selection criteria.

6 Press Enter to submit the job for processing, or press F12 to return to the previous screen to change your selection criteria.

7 Press F3 to return to the main menu.

Notes

Chapter 11 System Operations

<div style="text-align: right">**11**</div>

The Self Service functions discussed in this chapter are located within the *System Operations* menu option on the Self Service Administration main menu.

The chapter consists of the following topics:

Job Scheduler Maintenance

You use the *Job Scheduler Maintenance* function to set up the Infinium Self Service workflow processing. Assign the job schedule to the notification types defined in the *Workflow/ Workflow Notification Settings* menu. Refer to the "Workflow Implementation" chapter for additional information.

This is an AM2000 menu option that we've added to Self Service to make it easier for the Administrator to change if they need to.

To maintain the AM job scheduler, complete these steps.

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *System Operations.*

4 Select *Job Scheduler Maintenance* [JOBSCHEDLR] to display the Job Scheduler Maintenance selection screen.

On this screen you can do the following:

- Set up and define IBM i system controls.
- Set up and define job scheduler controls

5 Select *System i Setup* and press Enter.

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

JDBC Driver Name

Specify the JDBC driver name to use when connecting to the IBM i.

Database URL

Specify the name of the database to use when connecting to the IBM i.

User

Specify the user ID to use when connecting to the IBM i.

Password

Specify the user ID and password to use when connecting to the IBM i.

Platform Library

Specify the Infinium platform library that runs the external program API call, AMGLNG.

System and Version

Specify the IBM i version using the job scheduler.

System i Host name

Specify the IBM i host name to use as the parameter to run commands using the IBM i.

Sleep Interval (Seconds)

6 Press Enter to save your changes.

7 Press F3 to return to the main menu.

8 Select *Job Scheduler Maintenance* [JOBSCHEDLR] to display the Job Scheduler Maintenance selection screen.

9 Select *Job Timer Settings* and press Enter.

On this screen you can do the following:

- Change job timer settings
- Delete a job timer
- Display the job timer settings
- Submit to run the job timer manually

For additional information, refer to *the Infinium Application Manager Technical Guide*.

Job Scheduler Startup

You use this function to start the job scheduler. A job timer activates batch jobs at specific intervals from a start date and time, unless the job is already running.

This is an AM2000 menu option that we've added to Self Service to make it easier for the Administrator to change if they need to.

Complete the steps below to start the job scheduler.

1   Start an IBM i interactive session, either at the system console or at a workstation.

2   Sign in as **AM2000**.

3   From the Self Service main menu select *System Operations.*

4   Select *Job Scheduler Startup* [JOBSCHSTRT]. The system starts the batch job called UpdateSchedulerJob

   For additional information, refer to *the Infinium Application Manager Technical Guide.*

Job Scheduler End

You use this function to end the job scheduler. A job timer ends batch jobs at specific intervals from a start date and time, unless the job is already running.

This is an AM2000 menu option that we've added to Self Service to make it easier for the Administrator to change if they need to.

Complete the steps below to start the job scheduler.

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *System Operations.*

4 Select *Job Scheduler End* [JOBSCHEND]. The system waits for any current batch jobs to complete and then ends the job scheduler batch job.

For additional information, refer to *the Infinium Application Manager Technical Guide.*

Object Creation

You use the *Object Creation* function to regenerate the object for tax ID masking if your Self Service program library is not named SS2000.

This is an AM2000 menu option that we've added to Self Service to make it easier for the Administrator to change if they need to.

Complete the steps below to update the object creation program.

1 Start an IBM i interactive session, either at the system console or at a workstation.

2 Sign in as **AM2000**.

3 From the Self Service main menu select *System Operations.*

4 Select *Object Creation* [OBJCRT] to display the Object Creation Maintenance screen.

On this screen you can do the following:

- Change an existing object
- Delete an existing object
- Display an existing object
- Create a new object
- Drop an object
- Run an object

For Self Service you use the Drop, Change and Run an object selections if your program library is named anything other than SS2000.

For additional information, refer to *the Infinium Application Manager Technical Guide.*

Appendix A Employee Benefit Statement

<div style="text-align: right">

A

</div>

This chapter explains the SQL statements used in the creation of the Employee Compensation Report template and the processing logic to generate the report in Self Service. The report is available from the Managers menu to gain access to their direct reports information. It is also available to the employee under the Benefits menu option.

The report template can be used "out of the box"; however, it is highly recommended that you contact the Infor Consulting Services (ICS) group for information on how to customize the Employee Compensation Report BIRT template. This report was designed using a Windows server. The report may be slower on an IBM i server versus a Windows server.

The code for most of these steps can be readily adapted from the Eclipse BIRT Report Engine API documentation located on the following website: (http://www.eclipse.org/birt/phoenix/deploy/reportEngineAPI.php) and the Web Report sample.

Report Template

The Self Service web application has incorporated the BIRT Reporting Engine, plus a servlet to employ the Report Engine API to run generic reports. This allows the Self Service web menu item to invoke the servlet and generate an individual total compensation statement.

The servlet performs the following steps:

- Retrieve the user's Employee bean

- Retrieve the report name from the HTTP request

- Validate that this employee is authorized to run this report

  - Validate that the employee is signed in

  - For any report in the mss/reports folder, the servlet checks that the employee has manager authority

  - If this request provides employee parameters ('er' and 'en') other than the employee's ID, checks that this employee is a manager and that this manager has authority over the employee requested.

- Access the BIRT Report Engine instance, creating it for the application if necessary.

  - Add the servlet context to the Report Engine instance

  - Set the Report Engine home to the empty string (""), which should associate it with the web application's root folder

- Open the named report design file with the Report Engine instance

- Provide a database connection to the Report Engine.

- Create a BIRT Report Engine "task" to retrieve the report parameters from the report design

  - Call engine.createGetParameterTask(reportDesign) → getParmTask

  - Call getParmTask.getParameterDefinitions()

- Create a BIRT Report Engine "task" to run and render the report

  - Call engine.createRunAndRenderTask(reportDesign) → runReportTask

- Iterate over report parameters (including nested parameters)

  - Retrieve any matching HTTP request parameter for the report parameter name (translating blanks in report parameter names into underscores); otherwise skip to the next report parameter and let the

report's default take effect (unless this parameter is required, in which case fail informatively)

- Perform type conversion if the report parameter type is not a string

    - Call IScalarParameterDefn.getDataType() and compare to IScalarParameter.TYPE_BOOLEAN, TYPE_DATE, TYPE_DATE_TIME, TYPE_DECIMAL, TYPE_FLOAT, TYPE_INTEGER, TYPE_STRING, and TYPE_TIME to determine appropriate conversion. (Note: The HCM date format must be considered in date conversions unless HYF dates are available.)

    - Call runReportTask.setParameterValue(parameterName, parameterValue)

- Close the get report parameter task

- Validate the report parameters, and if they are invalid, fail informatively

- Set the report rendering options, based on HTTP request parameters

    - Specifically, set up for HTML or PDF results to be returned in the HTTP response. (Note: Use the HTMLServerImageHandler, not the default, if emitting HTML.)

- Run the report

- Close the run and render task

Report Template Definition

benefitStatement.rptdesign

benefitStatementIntl.rptdesign

Company Name and Location

Query – Company Master

Select PRPCO.CONAME, PRPCO.COADR1, PRPCO.COADR2, PRPCO.COCITY,PRPCO.COSTA,PRPCO.COZIP

from PRPCO

where COER **=** ?

Personal Data

Query – Single Employer Master Data

Select PRER,PREN,PRCNM,PRDOHE,PRDHAE,PRSTR1, PRSTR2, PRCTY1,PRSTA1,PRZIP1,PRTL1,PREML1, SSNAPPLYMASK('*USER', PRSS,' ')

AS PRSS, PRDOBE, PRTITL, PRBRT, trim(PRBRTF)

AS PRBRTF, PRRHR, PRWSCN, PRPAY, PEMART, PEMAJM, PYBRT

from PRPMS, PEPMS, PYPMS

where PRPMS.PRER=? **and** PRPMS.PREN=? **and** PRPMS.PREN **=** PEPMS.PEEN **and** PRPMS.PREN=PYPMS.PYEN **and** PRPMS.PRER **=** PEPMS.PEER **and** PRPMS.PRER **=** PYPMS.PYER

PRPMS_ANNUAL_COMP - calcAnnualSalary(BirtStr.trim (row["PRPAY"]=='H') ? (row["PRRHR"] * row["PRWSCN"] * row["PYBRT"]) : (row["PYBRT"] * row["PRWSCN"])

```
//Calculate Annual Salary
function calcAnnualSalary(payType, hours, schPayPrd,
basePaRate) {
    var sal = 0;
    var annualHrs;
    if (payType == 'H') {
        annualHrs = hours * schPayPrd;
        //Cap 2080 Hrs
        if (annualHrs > 2080) {
            annualHrs = 2080;
        }
        sal = annualHrs * basePaRate
    }
    if (payType == 'W') {
        sal = 52 * basePaRate;
    }
    if (payType == 'B') {
        sal = 26 * basePaRate;
    }
    if (payType == 'S') {
        sal = 24 * basePaRate;
    }
    if (payType == 'M') {
        sal = 12 * basePaRate;
    }
    if (payType == 'A') {
        sal =  basePaRate;
    }
    if (payType == 'D') {
        sal = 260 * basePaRate;
```

```
        }
        if (payType == '10') {
            sal = 10 * basePaRate;
        }
        if (payType == '13') {
            sal = 13 * basePaRate;
        }
        if (payType == '22') {
            sal = 22 * basePaRate;
        }
        // For HCMi
        if (payType == '26') {
            sal = 26 * basePaRate;
        }
        if (payType == '27') {
            sal = 27 * basePaRate;
        }
        if (payType == '53') {
            sal = 53 * basePaRate;
        }

        return sal;
    }
```

Total Value of Annual Compensation

Query – Single Employer Master Data, Education Data

select SUM(PEPED.EDTREF)AS EDTREF

from PEPED

where (PEPED.EDER) **=** ? **and** (PEPED.EDEN) **=** ? **and**

PEPED.EDGRAD **=** ? **group by** PEPED.EDGRAD

Company Provided Benefits

Note: There are many steps involved in retirement annual calculation. TotalWeekWorked is computed from PYPMS

Query – Benefits_Life_Medical_Disability –

```
SELECT BEID, BEPLAN, BECBER, BEERCP, BPDESC,BEAMT1, BEFREQ,
BEEFRQ, BPOFR6, BPOFRW, BPOFRB, BPOFRS, BPOFRM, BPOFR1,
BPOFR2, BPOFR3, BPOFR4, BPOFR5, BEENCP, DEYDCD, (PYWW1 +
PYWW2 + PYWW3 + PYWW4) AS TotalWeekWorked FROM PRPBE,PRPBP,
PYPMS, PYPDE  WHERE BPER = BEER AND BPID = BEID AND BPYEAR
```

```sql
= BEYEAR AND BPPLAN = BEPLAN AND BEER = PYER AND BEEN =
PYEN AND BEER = DEER AND BEEN = DEEN AND BEDEDC = DEDEDC
AND (BEER) = ? AND (BEEN) = ? AND BEYEAR = ?
AND (BECBER >0 OR BEERCP > 0) AND (BECADH=0 OR BECADH > ?)
AND (BEDCLH=0 OR BEDCLH > ?) AND  BETYPE IN
('01','02','03','04','05','06','07','09','11','17','18')
ORDER BY BETYPE, BEID, BEPLAN,BEYEAR
```

Plan frequency is retrieved with following logic.

PLANFREQ

getPlanFreequency(row["BEFREQ"],row["BEEFRQ"],row["BPOFR1"],row["BPOFR2"],row["BPOFR3"],row["BPOFR4"],row["BPOFR5"],row["BPOFR6"],row["BPOFRB"],row["BPOFRM"],row["BPOFRS"],row["BPOFRW"])

EMPLOYERAMT =

row["BECBER"] > 0 ? calculateAnnualAmount(row["BECBER"], BirtStr.trim(row["PLANFREQ"])) : row["WEEKLYAMOUNT"]

```javascript
//Get plan freequency.
function
getPlanFreequency(BEFREQ,BEEFRQ,BPOFR1,BPOFR2,BPOFR3,BPOFR4
,BPOFR5,BPOFR6,BPOFRB,BPOFRM,BPOFRS,BPOFRW) {
   freq='';
   if (BEFREQ != ' ' && BEFREQ != '*') {
      //specific frequency
      freq = BEFREQ;
   } else {
      //Check for override
      switch (BEEFRQ)
      {
      case 'D':
         freq = BPOFR6;
        break;
      case 'W':
         freq = BPOFRW;
        break;
      case 'B':
         freq = BPOFRB;
        break;
      case 'S':
         freq = BPOFRS;
        break;
      case 'M':
         freq = BPOFRM;
        break;
      case '10':
```

```
            freq = BPOFR1;
          break;
        case '13':
            freq = BPOFR2;
          break;
        case '22':
            freq = BPOFR3;
          break;
        case '27':
            freq = BPOFR4;
          break;
        case '53':
            freq = BPOFR5;
          break;
        }
        // Still blank return last calculated
        if (freq == '') {
            freq = BEEFRQ;
        }
    }
    return freq;
}
```

Weekly amount is calculated

WEEKLYAMOUNT

row["TOTALWEEKWORKED"] > 0 ? (row["DEYDCD"] /
row["TOTALWEEKWORKED"]) * 52 : 0

Annual amount is calculated based on frequency and per pay period amount.

EMPLOYERAMT

row["BECBER"] > 0 ? calculateAnnualAmount(row["BECBER"],
BirtStr.trim(row["PLANFREQ"])) : row["WEEKLYAMOUNT"]

```
function calculateAnnualAmount(perPayPrd, freq) {
    annAmt=0;
    if (freq == 'W') {
        annAmt = 52 * perPayPrd;
    }
    if (freq == 'B') {
        annAmt = 26 * perPayPrd;
    }
    if (freq == 'S') {
        annAmt = 24 * perPayPrd;
    }
```

```
    if (freq == 'M') {
        annAmt = 12 * perPayPrd;
    }
    if (freq == 'A') {
        annAmt =  perPayPrd;
    }
    if (freq == 'D') {
        annAmt = 260 * perPayPrd;
    }
    if (freq == '10') {
        annAmt = 10 * perPayPrd;
    }
    if (freq == '13') {
        annAmt = 13 * perPayPrd;
    }
    if (freq == '22') {
        annAmt = 22 * perPayPrd;
    }
    if (freq == '27') {
        annAmt = 27 * perPayPrd;
    }
    if (freq == '53') {
        annAmt = 53 * perPayPrd;
    }
    return annAmt;

}
```

Query – Benefits_Retirement

```
SELECT BEID, BEPLAN, BECBER, BEERCP, BPDESC,BEAMT1, BEFREQ,
BEEFRQ, BPOFR6, BPOFRW, BPOFRB, BPOFRS, BPOFRM, BPOFR1,
BPOFR2, BPOFR3, BPOFR4, BPOFR5, BEENCP, DEYDCD, (PYWW1 +
PYWW2 + PYWW3 + PYWW4) AS TotalWeekWorked FROM PRPBE,PRPBP,
PYPMS, PYPDE  WHERE BPER = BEER AND BPID = BEID AND BPYEAR
= BEYEAR AND BPPLAN = BEPLAN AND BEER = PYER AND BEEN =
PYEN AND BEER = DEER AND BEEN = DEEN AND BEDEDC = DEDEDC
AND (BEER) = ? AND (BEEN) = ? AND BEYEAR = ?
AND (BECBER >0 OR BEERCP > 0) AND (BECADH=0 OR BECADH > ?)
AND (BEDCLH=0 OR BEDCLH > ?) AND  BETYPE IN
('08','10','19')
ORDER BY BETYPE, BEID, BEPLAN,BEYEAR
```

EMPLOYERAMT =

```
row["BECBER"] > 0 ? calculateAnnualAmount(row["BECBER"],
BirtStr.trim(row["PLANFREQ"])) : row["WEEKLYAMOUNT"]
```

Plan Frequency and Weekly amount is calculated as above.

Query – EmployerEmployeeSSNDed_*FICA_*FMHI –

```sql
SELECT A.DEYDCD AS FICA, B.DEYDCD AS FMHI, A.DEYDCD +
B.DEYDCD AS EMPSSNDED, A.DEYDED + B.DEYDED AS
EMPLOYEESSNDED, (PYWW1 + PYWW2 + PYWW3 + PYWW4) AS
TotalWeekWorked  FROM PYPDE A JOIN PYPDE B ON (A.DEER =
B.DEER AND  A.DEEN = B.DEEN AND A.DEDEDC = '*FICA'  AND
B.DEDEDC = '*FMHI') JOIN PYPMS ON (A.DEER = PYER AND A.DEEN
= PYEN)

WHERE (A.DEER) = ? AND (A.DEEN) = ?
```

FicaAnnualAmount = row["FICA"] > 0 ?
(checkFicaLimit(row["FicaWeeklyAmount"],ficaLimit,ficaPct)): 0

```javascript
//Check Fica limit
function checkFicaLimit(calcAmount, wageLimit, pct) {
   ficaAnnAmt = 0;
   ficaLimitAmt= 0;
   //Packages.java.lang.System.out.println ("calcAmount is:
" + calcAmount);
   //Packages.java.lang.System.out.println ("wageLimit is:
" + wageLimit);
   //Packages.java.lang.System.out.println ("pct is: " +
pct);

   ficaLimitAmt = (pct/100) * wageLimit;
   if (calcAmount > ficaLimitAmt) {
      ficaAnnAmt = ficaLimitAmt;
   } else {
      ficaAnnAmt = calcAmount;
   }
   return ficaAnnAmt;
}

//Check Fmhi limit (Not used currently as there is no FMHI
limit)
function checkFmhiLimit(calcAmount, wageLimit, pct) {
   fmhiAnnAmt = 0;
   ficaLimitAmt= 0;
   fmhiLimitAmt = (pct/100) * wageLimit;
   if (calcAmount > fmhiLimitAmt) {
      fmhiAnnAmt = fmhiLimitAmt;
   } else {
      fmhiAnnAmt = calcAmount;
   }
   return fmhiAnnAmt;

}
```

Components of Your Total Compensation (Pie Chart)

Query – ScriptedDataSetForTotalCompensation

```
if (recordCount < 4) {
   if (recordCount == 0) {
      row["CompComponent"] =
reportContext.getMessage("SALARY",
reportContext.getLocale());
      if (annualCompensation > 0) {
         //Packages.java.lang.System.out.println
("annualCompensation is: " + annualCompensation);
         //Packages.java.lang.System.out.println
("totalHealthBenefits is: " + totalHealthBenefits);
         //Packages.java.lang.System.out.println
("totalEducation is: " + totalEducation);
         //Packages.java.lang.System.out.println
("totalSsnAndRetirementBenefits is: " +
totalSsnAndRetirementBenefits);
         perc = Math.round((parseFloat(annualCompensation)
* 100)/ (parseFloat(annualCompensation) +
parseFloat(totalEducation) +
parseFloat(totalHealthBenefits) +
parseFloat(totalSsnAndRetirementBenefits)));
         if (perc >= 1) {
            row["Amount"] = annualCompensation;
            row["Percentage"] = perc;
         }
      }
   }
   if (recordCount == 1) {
      row["CompComponent"] =
reportContext.getMessage("TUTION_REIMBURSEMENT",
reportContext.getLocale());
      if (totalEducation > 0) {
         perc = Math.round((parseFloat(totalEducation) *
100)/ (parseFloat(annualCompensation) +
parseFloat(totalEducation) +
parseFloat(totalHealthBenefits) +
parseFloat(totalSsnAndRetirementBenefits)));
         if (perc >= 1) {
            row["Amount"] = totalEducation;
            row["Percentage"] = perc;
         }
      }
   }
   if (recordCount == 2) {
```

```
        row["CompComponent"] =
reportContext.getMessage("LIFE_HEALTH_DISABILITY_AND_OTHER_
BENEFITS", reportContext.getLocale());
        if (totalHealthBenefits > 0) {
            perc = Math.round((parseFloat(totalHealthBenefits)
* 100)/ (parseFloat(annualCompensation) +
parseFloat(totalEducation) +
parseFloat(totalHealthBenefits) +
parseFloat(totalSsnAndRetirementBenefits)));
            if (perc >= 1) {
                row["Amount"] = totalHealthBenefits;
                row["Percentage"] = perc;
            }
        }
    }
    if (recordCount == 3) {
        row["CompComponent"] =
reportContext.getMessage("RETIREMENT",
reportContext.getLocale());
        if (totalSsnAndRetirementBenefits > 0) {
            perc =
Math.round((parseFloat(totalSsnAndRetirementBenefits) *
100)/ (parseFloat(annualCompensation) +
parseFloat(totalEducation) +
parseFloat(totalHealthBenefits) +
parseFloat(totalSsnAndRetirementBenefits)));
            if (perc >= 1) {
                row["Amount"] = totalSsnAndRetirementBenefits;
                row["Percentage"] = perc;
            }
        }
    }
    recordCount++;
    return true;
}

else return false; else return false;
```

Optional Benefits

Query – Benefit_Life_Medical_Disability_PerPayAmount

```
SELECT BEID, BEPLAN, BPDESC,BEAMT1,BECBEN,BEENCP FROM
PRPBE,PRPBP, PRPMS WHERE BPER = BEER AND BPID = BEID AND
BPYEAR = BEYEAR AND BPPLAN = BEPLAN AND BEER = PRER AND
BEEN = PREN AND (BEER) = ? AND (BEEN) = ? AND BEYEAR = ?
AND (BECADH=0 OR BECADH > ?) AND (BEDCLH=0 OR BEDCLH > ?)

ORDER BY BETYPE, BEID, BEPLAN,BEYEAR
```

Survivor Benefits

Query – Employee_Benefit_LIFE_ADD_COVERAGE

```
SELECT BEER, BEEN, BEYEAR, BEID, BEPLAN, BPDESC,BEAMT1 FROM
PRPBE,PRPBP WHERE BPER = BEER AND BPID = BEID AND BPYEAR =
BEYEAR AND BPPLAN = BEPLAN AND (BEER) = ? AND (BEEN) = ?
AND BEYEAR = ?
AND  BETYPE IN ('01','02') AND (BECADH=0 OR BECADH > ?) AND
(BEDCLH=0 OR BEDCLH > ?)

ORDER BY BETYPE, BEID, BEPLAN,BEYEAR
```
Query –

Query - Attached_Dependents_Information

```
SELECT BMDNM, BMLNM,BMFNM,BMCONT,BMBENC,CDDESC FROM
PRPBM, PRPCD WHERE CDER = BMER AND CDFIVE = BMBENC AND
BMER = ? AND BMEN = ? AND BMID = ? AND BMPLAN = ?  AND
BMYEAR = ?
```

Your Dependents and Beneficiaries

Query – Dependents and Beneficiaries

```
SELECT DPDNM, DPDAG, SSNAPPLYMASK('*USER', DPSS,' ') AS
DPSS,DPDBE, CDDESC

FROM PEPDP, PRPCD

WHERE    CDER = DPER AND  CDFIVE = DPREL AND

DPER = ? and (DPEN) = ?
```

Insurance for your Dependents

Query – Benefits_Dependent_Type_LIFE_ADD_Plans,

```
SELECT BEER, BEEN, BEYEAR, BEID, BEPLAN, BPDESC,BEAMT1
FROM PRPBE,PRPBP WHERE BPER = BEER AND BPID = BEID AND
BPYEAR = BEYEAR AND BPPLAN = BEPLAN AND (BEER) = ? AND
(BEEN) = ? AND BEYEAR = ?

AND  BPFLG5 = '1'

ORDER BY BETYPE, BEID, BEPLAN,BEYEAR
```

Query – Dependent_Coverage_For_Dependent_Type_Plans

SELECT BXER, BXEN, BXID, BXPLAN,

BXYEAR, BXSEQ, BXRATE, BXCOV, BMBENC,

BMDNM , CDDESC **FROM** PRPBX, PRPBM, PRPCD

WHERE BMER **=** BXER **AND** BMEN **=** BXEN **AND**

BMID =BXID **AND** BMPLAN **=** BXPLAN **AND** BMER **=** CDER **AND** BMBENC **=** CDFIVE

AND BMYEAR **=** BXYEAR **AND** BXSEQ **=**

BMSEQ **AND** BMER **=** ? **AND** BMEN **=** ? **AND** BMID **=** ? **AND** BMPLAN **=** ? **AND** BMYEAR **=** ?

Medical Plans

Query – Employee_Benefits_Medical

SELECT BMBENC, BMDNM , BMDBE, CDDESC **FROM** PRPBM, PRPCD

WHERE BMER **=** CDER **AND** BMBENC **=** CDFIVE **AND** BMER **=** ? **AND** BMEN **=** ? **AND** BMID **=** ? **AND** BMPLAN **=** ? **AND** BMYEAR **=** ?

Query – Benefits_Dependent_Medical

SELECT BEER, BEEN, BEYEAR, BEID, BEPLAN, BPDESC,BEAMT1 **FROM** PRPBE,PRPBP **WHERE** BPER **=** BEER **AND** BPID **=** BEID **AND** BPYEAR **=** BEYEAR **AND** BPPLAN **=** BEPLAN **AND** (BEER) **=** ? **AND** (BEEN) **=** ? **AND** BEYEAR **=** ?

AND BETYPE **=** '03'

ORDER BY BETYPE, BEID, BEPLAN,BEYEAR

Dental Plans

Query – Employee_Benefits_Dental

SELECT BEER, BEEN, BEYEAR, BEID, BEPLAN, BPDESC,BEAMT1 **FROM** PRPBE,PRPBP **WHERE** BPER **=** BEER **AND** BPID **=** BEID **AND** BPYEAR **=** BEYEAR **AND** BPPLAN **=** BEPLAN **AND** (BEER) **=** ? **AND** (BEEN) **=** ? **AND** BEYEAR **=** ?

AND BETYPE **=** '04'

ORDER BY BETYPE, BEID, BEPLAN,BEYEAR

Query – Benefits_Dependent_Medical

SELECT BMBENC, BMDNM , BMDBE, CDDESC **FROM** PRPBM, PRPCD

WHERE BMER **=** CDER **AND** BMBENC **=** CDFIVE **AND** BMER **=** ? **AND**
BMEN **=** ? **AND** BMID **=** ? **AND** BMPLAN **=** ? **AND** BMYEAR **=** ?

UK Benefits

```
row["BECBER"] > 0 ? (row["BECBER"] * row["PRWSC#"]) :
  calcAnnualSalary(BirtStr.trim(row["PRBRTF"]), row["PRRHR"],
  row["PRWSC#"], row["PRBRT"]) * row["BEERCP"]/100
```

Social Security Year to Date

Query – EmployerEmployeeSSNDed_*FICA_*FMHI

SELECT A.DEYDCD **AS** FICA, B.DEYDCD **AS** FMHI, A.DEYDCD **+**
B.DEYDCD **AS** EMPSSNDED, A.DEYDED **+** B.DEYDED **AS**
EMPLOYEESSNDED, (PYWW1 **+** PYWW2 **+** PYWW3 **+** PYWW4) **AS**
TotalWeekWorked **FROM** PYPDE A **JOIN** PYPDE B **ON** (A.DEER **=**
B.DEER **AND** A.DEEN **=** B.DEEN **AND** A.DEDEDC **=** '*FICA' **AND**
B.DEDEDC **=** '*FMHI') **JOIN** PYPMS **ON** (A.DEER **=** PYER **AND** A.DEEN
= PYEN)

WHERE (A.DEER) **=** ? **AND** (A.DEEN) **=** ?

401K Saving Plans

Query – 401K Savings Plan

```
 SELECT BEER, BEEN, BEYEAR, BEID, BEPLAN,
BPDESC,BEERCP,BEENCP FROM PRPBE,PRPBP WHERE BPER = BEER AND
BPID = BEID AND BPYEAR = BEYEAR AND BPPLAN = BEPLAN AND
(BEER) = ? AND (BEEN) = ? AND BEYEAR = ?
AND  (BETYPE = '08' OR BETYPE = '10' OR BETYPE = '19') AND
(BECADH=0 OR BECADH > ?) AND (BEDCLH=0 OR BEDCLH > ?) AND
(BEENCP >0 OR BEERCP > 0)
```

ORDER BY BETYPE, BEID, BEPLAN,BEYEAR

Paid Time off

Query – Employee_Paid_Time_off

```sql
SELECT  CASE WHEN PRACV <> '' THEN (SELECT CDDESC FROM
PRPCD WHERE CDER =A.PRER AND CDTYPE = 'ACR' AND CDFIVE =
A.PRACV) ELSE '' END AS PRACV, PRVACA, PRVAC, PRVAT, PRVADE,

CASE WHEN PRACS <> '' THEN (SELECT CDDESC FROM PRPCD
WHERE CDER =A.PRER AND CDTYPE = 'ACR' AND CDFIVE = A.PRACS)
ELSE '' END  AS PRACS, PRSDA, PRSDAA,  PRSDT, PRSDDE,

CASE WHEN PRAC2 <> '' THEN  (SELECT CDDESC FROM PRPCD
WHERE CDER =A.PRER AND CDTYPE = 'ACR' AND CDFIVE = A.PRAC2)
ELSE '' END  AS  PRAC2, PRSHA, PRSHAA, PRSHT, PRSHDE,

CASE WHEN PRAC4 <> '' THEN  (SELECT CDDESC FROM PRPCD
WHERE CDER =A.PRER AND CDTYPE = 'ACR' AND CDFIVE = A.PRAC4)
ELSE '' END AS  PRAC4, PRAC4E, PRAC4A, PRAC4T, PRA4DE,

CASE WHEN PRAC5 <> '' THEN  (SELECT CDDESC FROM PRPCD
WHERE CDER =A.PRER AND CDTYPE = 'ACR' AND CDFIVE = A.PRAC5)
ELSE '' END  AS PRAC5, PRAC5E, PRAC5A, PRAC5T, PRA5DE,

CASE WHEN PRAC6 <> '' THEN  (SELECT CDDESC FROM PRPCD
WHERE CDER =A.PRER AND CDTYPE = 'ACR' AND CDFIVE = A.PRAC6)
ELSE '' END  AS PRAC6, PRAC6E, PRAC6A, PRAC6T, PRA6DE

FROM PRPMS A WHERE PRER = ? AND PREN = ?
```

Company Property

Query – Personnel_Property

```sql
SELECT PPCODE, PPDE, PPVAL, CDDESC FROM PEPPP, PRPCD
WHERE PPER = CDER AND PPCODE = CDFIVE AND  CDTYPE = 'PRP'
AND

PPER = ? AND PPEN = ? AND ((PPTDH >= ? AND PPTDH <= ? ) OR
PPTDH = ' ')
```

Important Notice

Query – Important_Notice_Retrieval

```sql
SELECT AHFDESC FROM  AHPAFOOT

WHERE AHFGRP=? and AHFPROD='A' AND AHFKEY =
'EMPLOYEEBENEFITSTATEMENT'
```

Notes

Appendix B Using LDAP with Self Service

B

This chapter explains how you can use Lightweight Directory Access Protocol (LDAP) to maintain Self Service user ID numbers and passwords.

This chapter also provides a detailed example of an LDAP implementation for OpenLDAP. You may already be using LDAP for other web applications. You can use this example to understand how to modify your LDAP implementation so that it works with Self Service.

The chapter consists of the following topics:

Understanding how to use LDAP with Self Service

Self Service uses a default Web Security file, AHPWEBA, to authenticate and store user ID numbers and passwords.

If you are using Self Service with other Internet applications that require a user sign-in access, you may prefer to use Lightweight Directory Access Protocol (LDAP) along with the AHPWEBA file, to maintain user ID numbers and passwords. LDAP is an Internet protocol that e-mail and other programs use to look up information from a server. LDAP can provide single sign-on capabilities where you can maintain one ID and password combination for each user to access multiple applications.

If you plan to use LDAP with Self Service, you must change the AUTHENTICATOR property in your Self Service bundle file and you must make changes to the LDAP.properties file. Refer to the "Implementing LDAP with Self Service" section later in this chapter for detailed information.

You can change the AUTHENTICATOR property to com.infor.shcm.security.LDAPAuthenticator to authenticate users against an LDAP store, such as OpenLDAP or Active Directory. Refer to the "Changing the SHCMBundle.properties file settings" section later in this chapter for detailed information.

If you plan to implement Single Sign-On authentication with Self Service, we recommend that you consult the Infor Consulting Services (ICS) for assistance. The application supports single sign-on authentication with Active Directory using the WAFFLE (Windows Authentication Functional Framework Lite Edition) protocol. This setup does not require users to have IBM i profiles set up.

Note: If you change your Self Service bundle properties to use LDAP, the Self Service Change Password functionality is not available. Similarly, password setting functions in Rehire/New Hire are disabled if you use LDAP for authentication.

Caution: Although LDAP is case sensitive, the AHPWEBA file stores information in uppercase only. If you have multiple users with the same ID, for example, jSmith and JSMITH, the AHPWEBA file stores both as JSMITH.

Understanding Self Service authentication

The primary access into the Self Service security package is the LoginUtility class. The LoginUtility has static sign-in methods: "temporaryLogin" and "getAuthenticator". The function of the Authenticator class is to authenticate an employee ID.

Self Service uses the com.infor.shcm.security sub-package structure shown in the figure below to accommodate an extensible authentication mechanism and to separate responsibilities among Self Service classes.
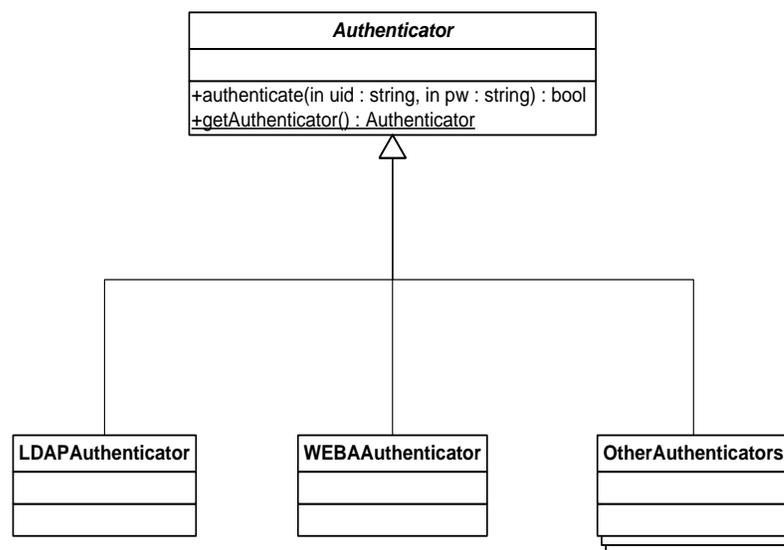
Figure 2-1: Authenticator class structure

When you use LDAP with Self Service, the authentication is a two-step process.

1   The system authenticates user IDs and passwords against LDAP.

2   The system retrieves Self Service authorization from the AHPWEBA file.

The OtherAuthenticators class is intended for future use only.

Authenticating user IDs and passwords against LDAP

To authenticate against LDAP, the system must be able to recognize the following information in the LDAP.properties file.

- PROVIDER_URL, the location of the LDAP server

- ROOTDN/ROOTPW, the user name and password for the individual with authority to search the entire LDAP directory

- USER_ATTRIBUTE, is the value used to locate the user within the LDAP store. It is a unique attribute, such as a user ID number, an e-mail address, or Social Security Number, to use as the user name in LDAP

- PRINCIPAL_ATTRIBUTE is optional. It is the name of the attribute used to authenticate the user. If left blank, as it should be for OpenLDAP, the value specified by USER_ATTRIBUTE is used to authenticate the user.

- SEARCH_CONTEXT, the location within LDAP to search for the USER_ATTRIBUTE user

You set up these properties in the LDAP.properties file in the base Java Source folder. Refer to the "Implementing LDAP with Self Service" section later in this chapter for detailed information.

The steps below illustrate the events that occur for the LDAP Authenticator.

1 The system signs in to the LDAP server as ROOTDN/ROOTPW.

2 The system searches LDAP for the USER_ATTRIBUTE that matches the entered user name. If the search retrieves no results, the entered user name is incorrect.

3 The system constructs the user's LDAP distinguished name, DN, from the information in the user's LDAP entry.

4 The system uses the entered user's distinguished name (DN) and the password and attempts to sign the user into LDAP. If this is successful, the authentication is complete. If this is unsuccessful, the password is incorrect.

Retrieving Self Service authorization from the AHPWEBA file

To retrieve the user's Self Service authorization from the AHPWEBA file, you must establish a link between the LDAP entry that you authenticate against and an authorization record in AHPWEBA. To establish this link, you must set up information in LDAP.properties. You can set up the Self Service link by using the WAUSER field or the WAER/WAEN field combination. The example below illustrates the setup with the use of the WAUSER file. The same procedure, however, applies to the WAER/WAEN field combination.

A WAER_ATTRIBUTE value of *ANY* is permitted when the employer code is not in the LDAP, but the WAEN _ATTRIBUTE (employee number) is unique across all employers.

To authorize a user that you authenticate in LDAP, you must identify the user's equivalent AHPWEBA user, stored on an attribute in the user's LDAP entry. You must set the WAUSER_ATTRIBUTE property in LDAP.properties to the attribute that holds the WAUSER value in LDAP.

> **Caution**: LDAP does not recognize blank characters. If your employee numbers differentiate numbers by blank characters, for example 3343 versus _3343 (where _ represents a blank character), you should not use the WAER/WAEN field combination as the link to AHPWEBA file authorities.

Example

The information below illustrates the steps that occur to set the WAUSER_ATTRIBUTE property in LDAP.properties to the attribute that holds the WAUSER value in LDAP.

1   The web administrator sets up the following properties in the LDAP.properties file:

```
PROVIDER_URL=ldap://localhost:389

ROOTDN=cn=admin,dc=infor,dc=com

ROOTPW=secret

USER_ATTRIBUTE=email

SEARCH_CONTEXT=dc=infor,dc=com

WAUSER_ATTRIBUTE=shcmuser
```

2   A user signs into Self Service with the following credentials:

```
UserID: john.doe@yourcompany.com

Password: password1234
```

3   The system signs in as "cn=admin,dc=infor,dc=com", with "secret" as the password.

4   The system searches in the context "dc=infor,dc=com" for email="john.doe@ yourcompany.com".

5   The system finds the following LDAP entry:

```
dn:uid=jdoe,dc=infor,dc=com

uid:jdoe

cn:John Doe

objectClass:inetOrgPerson

userpassword:password1234

email:john.doe@ yourcompany.com

shcmuser: JXD
```

6 The system gets the uid attribute value and, with the search context, constructs the following DN.

```
uid=jdoe,dc=infor,dc=com
```

7 The system attempts to sign into the constructed DN with the provided password, "password1234".

8 When successful, the system retrieves the value of shcmuser ("JXD").

9 The system loads the authorization information for "JXD" from AHPWEBA to complete the sign-in process.

Implementing OpenLDAP

This section describes how you install, configure, and operate OpenLDAP software to provide directory services for Self Service. This section includes details on how you:

- Configure and run the stand-alone LDAP "slapd" daemon

- Upload the LDIF file to the LDAP server

LDAP exists in many implementations. Therefore, you can configure LDAP in more than one way. To provide you with an understanding of OpenLDAP as it relates to your implementation of Self Service, this section addresses Self Service support for LDAP and all of the related LDAP connections within Self Service.

If you plan to use LDAP with Self Service, you must change the AUTHENTICATOR property in your Self Service bundle file and you must make changes to the LDAP.properties file as described later in this section.

Note: If you change your Self Service bundle properties to use LDAP, the Self Service Change Password functionality is not available. Similarly, password setting functions in New Employee and Rehire Employee are disabled if you use LDAP for authentication.

Caution: Although LDAP is case sensitive, the AHPWEBA file stores information in uppercase only. If you have multiple users with the same ID, for example, jSmith and JSMITH, the AHPWEBA file stores both as JSMITH.

Accessing OpenLDAP

Caution: Before you attempt a new LDAP implementation, we recommend that you consult your Internet network administrator to confirm that an LDAP implementation does not already exist.

For this LDAP implementation example, we use an OpenLDAP implementation for 32-bit Microsoft Windows that you can download for reference from the following website:

http://www.userbooster.de/en/download/openldap-for-windows.aspx

You may already be using LDAP for other web application. Use the example described below to understand what you must modify in your current

implementation so that you can use your LDAP implementation with Self Service.

Installing OpenLDAP

1 Download the installer below to your local system:

   openldapforWindows.exe

2 Double-click the downloaded file to run the installer.

3 Click Next on the Welcome page.

4 Accept the license and click Next.

5 Click Next to install the VC++ and Kerberos prerequisites.

6 Verify the destination folder and click Next.

7 Accept all custom setup defaults and click Next.

8 Accept additional settings and click Next.

9 Select **BDB back end** and click Next.

10 Accept the root user password default and click Next.

11 Click Install to continue. The Installer progress is displayed.

12 Click Close.

Configuring OpenLDAP

1 Use a text editor to open (OpenLDAP installation directory)/slapd.conf.

2 Review the database definition below and modify it if necessary with information that is pertinent for your site.

```
#####################################################################
# BDB database definitions
#####################################################################
database    bdb
suffix      "dc=infor,dc=com"
```

```
rootdn       "cn=admin,dc=infor,dc=com"
```

3 Add the lines below to the {OpenLDAP installation directory}/ schema/ inetorgperson.schema configuration file. You insert this code directly above the code referenced in Step 4.

```
# shcmuser
# Code for shcmuser. This can also be
# strictly numeric (e.g., 1234) or alphanumeric (e.g., ABC/123).
attributetype ( 2.16.840.1.113730.3.1.7
    NAME 'shcmuser'
    DESC 'RFC2798: identifies a shcm user within an organization'
    EQUALITY caseIgnoreMatch
    SUBSTR caseIgnoreSubstringsMatch
    SYNTAX 1.3.6.1.4.1.1466.115.121.1.15 )
# er
# Code for shcmuser.  This can also be
# strictly numeric (e.g., 1234) or alphanumeric (e.g., ABC/123).
attributetype ( 2.16.840.1.113730.3.1.8
    NAME 'er'
    DESC 'RFC2798: identifies a employer within an organization'
    EQUALITY caseIgnoreMatch
    SUBSTR caseIgnoreSubstringsMatch
    SYNTAX 1.3.6.1.4.1.1466.115.121.1.15 )
# en
# Code for shcmuser.  This can also be
# strictly numeric (e.g., 1234) or alphanumeric (e.g., ABC/123).
attributetype ( 2.16.840.1.113730.3.1.9
    NAME 'en'
    DESC 'RFC2798: identifies a employee within an organization'
    EQUALITY caseIgnoreMatch
    SUBSTR caseIgnoreSubstringsMatch
    SYNTAX 1.3.6.1.4.1.1466.115.121.1.15 )
```

4 Add the $ shcmuser $ er $ en under NAME 'inetOrgPerson' to the {OpenLDAP installation directory}/ schema/ inetorgperson.schema configuration file as shown with the shaded text in the example below.

```
MAY (
        audio $ businessCategory $ carLicense $ departmentNumber $
        displayName $ employeeNumber $ employeeType $ givenName $
        homePhone $ homePostalAddress $ initials $ jpegPhoto $
```

```
labeledURI $ mail $ manager $ mobile $ o $ pager $

photo $ roomNumber $ secretary $ uid $ userCertificate $

x500uniqueIdentifier $ preferredLanguage $

userSMIMECertificate $ userPKCS12 $ shcmuser $ er $ en)
```

```
)
```

Stopping and Starting OpenLDAP

As an administrator, open a Windows command prompt and type the commands below.

{OpenLDAP installation directory}/ net stop OpenLDAP-slapd

{OpenLDAP installation directory}/ net start OpenLDAP-slapd

Alternatively, you can stop and start the OpenLDAP service from the Windows Services window.

Creating an organization

1 Create an organizational role. A sample template of the input file is below. Save this file as organization.ldif.

```
dn: dc=infor,dc=com
objectClass: dcObject
objectClass: organization
dc: infor
o: Infor
description: Infor Global Solutions
```

2 From a Windows command window, type the command below to use the ldapmodify program in the LDAP installation folder to import the ldif file.

{OpenLDAP installation directory}\ClientTools\ldapmodify -a -x -D cn=admin,dc=infor,dc=com -w secret -f organization.ldif

Adding a user

1 Create an ldif file to import a user into LDAP. A sample template is below. Save this file as input.ldif.

```
dn:uid=MISAN,dc=infor,dc=com

uid:MISAN

cn:MISAN,DAN

sn:MISAN

objectClass:inetOrgPerson

userPassword:defaultpw

mail:dan.misan@infor.com

shcmuser:MISAN

er:HOL

en:4544
```

2 From a Windows command window, type the command below to use the ldapmodify program in the LDAP installation folder to add the new LDAP entry.

> **{OpenLDAP installation directory}\ClientTools\ldapmodify -a -x -D cn=admin,dc=infor,dc=com -w secret -f input.ldif**

Modifying a user

1 To modify an existing entry, create a new file named modify.ldif. The sample below modifies the userPassword field for the named entry.

```
dn:uid=MISAN,dc=infor,dc=com

changetype:modify

replace:userPassword

userPassword:LDAP1234
```

2 From a Windows command window, type the command below to modify the entry.

> **{OpenLDAP installation directory}\ClientTools\ldapmodify -x -D cn=admin,dc=infor,dc=com -w secret -f modify.ldif**

Deleting a user

1 To delete an entry, create a new file named delete.ldif. The sample below removes the named entry.

```
dn:uid=MANN,dc=infor,dc=com

changetype:delete
```

2   From a Windows command window, type the command below to delete the entry.

> **{OpenLDAP installation directory}\ClientTools\ldapmodify -x -D cn=admin,dc=infor,dc=com -w secret –f delete.ldif**

Changing the SHCMBundle.properties file settings

Complete the steps below to change the settings in the SHCMBundle.properties file.

1   Open a text editor, such as Microsoft Windows Notepad, and then open the SHCMBundle.properties file located in the following folder:

> {drive}:\Websphere_install_dir\AppServer\profiles\{default}\ installedApps\{your_server_node}\SHCM.ear\SHCM_Web.war\ WEB-INF\classes

2   Set the AUTHENTICATOR property to:

> **com.ssaglobal.shcm.security.LDAPAuthenticator**

3   Save and close the file.

Changing the LDAP.properties file setting

Complete the steps below to change the settings in the LDAP.properties file.

1   Open a text editor, such as Microsoft Windows Notepad, and then open the LDAP.properties file located in the following folder:

> {drive}:\Websphere_install_dir\AppServer\profiles\{default}\ installedApps\{your_server_node}\SHCM.ear\SHCM_Web.war\ WEB-INF\classes

2   Make changes to the properties listed in the table below. You must substitute values that apply to your specific configuration requirements.

Example 1: E-mail ID as the sign-in ID

In this example, the USER_ATTRIBUTE is set to **mail**. Therefore, Self Service will use the user's e-mail ID for the sign-in ID. For example, Dan Misan will sign in as **misan.dan@infor.com**.

Property	Value
PROVIDER_URL	ldap://localhost:389
ROOTDN	cn=admin,dc=infor,dc=com
ROOTPW	secret
USER_ATTRIBUTE	mail
SEARCH_CONTEXT	dc=infor,dc=com
WAUSER_ATTRIBUTE	shcmuser

Example 2: User ID as the sign-in ID

In this example, the USER_ATTRIBUTE is set to **uid**. Therefore, Self Service will use the user's user ID for the sign-in ID. For example, Dan Misan will sign in as **MISAN**.

Field	Value
PROVIDER_URL	ldap://localhost:389
ROOTDN	cn=admin,dc=infor,dc=com
ROOTPW	secret
USER_ATTRIBUTE	uid
SEARCH_CONTEXT	dc=infor,dc=com
WAUSER_ATTRIBUTE	shcmuser

3 Save and close the file.

Starting the Self Service application

Restart your Self Service application from the WebSphere administrative console.

Testing the Self Service application

1 Type the following URL in your Internet browser.

http://<your host server>:9080/SHCM

2 Use the LDAP user ID and password to sign in to Self Service.

Appendix C Adding Fields to Self Service Web Pages

<div style="text-align: right">**C**</div>

This chapter explains how you can customize the Self Service web application pages by adding field labels and corresponding values from individual employee records from the Infinium HCM and Infinium TR IBM i applications to the web pages. Self Service uses basic JavaServer pages to build the web pages.

The chapter consists of the following topics:

Overview

The procedure described in this chapter for adding fields to Self Service web pages enables you to customize Self Service JSP pages to retrieve additional field data from the field data tables accessed by Self Service Java beans.

Initially, the Java beans cannot recognize additional fields. Therefore, you must augment the beans with a template of fields to retrieve and a mechanism for accessing the additional field data values. You must provide the bean with a list of field names to be retrieved. Then, when the bean performs a database retrieval, Self Service retrieves the values for these fields. Afterward, Self Service can retrieve these fields from the bean as text strings.

For this customization, you can only display the additional field values. Self Service users cannot modify these values or transfer updated values back to Infinium HCM or Infinium TR. For customization assistance, contact the Infor Consulting Services (ICS) organization.

To add fields to a Self Service JSP page, you perform the following tasks.

1 Determine the JSP to modify.

2 Identify the IBM i table that contains the field data.

3 Modify the JSP to include the additional data.

Each of these tasks is described in detail in this chapter.

Note that in older-style Java beans, separate queries may access multiple database tables.

Determining the JSP to modify

You can use several methods to determine the JSP file name.

- If you are using Self Service with Internet Explorer, you can place your cursor over a menu selection and view the status bar on the browser to determine which JSP file is called.

- Alternatively, if you are viewing a web page that you want to customize, you can right-click and select Properties or View Source to display the name of the JSP file that corresponds to the page you are currently viewing.

For example, if you want to add data to the Personal Information web page, you can use one of the methods described above to display ViewPersonalInfo.jsp as the JSP file name.

Identifying the IBM i table containing the data

After you identify the JSP to modify, refer to the "Self Service Java beans and the field tables they access" table in the "Reference tables" section at the end of this chapter to determine which Infinium HR, PY, or TR tables contain the data you want to add. You can add only data from the specified Infinium HR, PY, or TR tables. Use the *Infinium HCM File Field Reference Guide* or the *Infinium TR File Field Reference Guide* to determine the name of the field that contains the data you want to add to the page.

For example, if you want to add the name of the Self Service users' spouse to the Personal Information web page, the table in the section below indicates that the ViewPersonalInfo.jsp file displays data from the PRPMS, PEPMS, and PYPMS tables. The HCM *File Field Reference Guide* indicates that the spouse's name is stored in the in *Spouse Name* field, PESPS, in the Personnel Data file, PEPMS.

Modifying the JSP to include the additional data

Adding a field to a JSP file requires two fundamental steps:

1 You provide the Java bean with the names of the additional fields that you want to add.

2 After the new fields in the bean are populated with data, you retrieve the additional data values from the bean.

Providing the Java bean with the field names

To provide the Java bean with the names of the additional fields that you want to add, complete the steps below.

1 Locate the place in the JSP file where the Java bean is populated with data.

Refer to the "Self Service Java beans and the field tables they access" table in the "Reference tables" section at the end of this chapter to determine the name of the bean and the method that populates the bean. Eventually, you add code before this data retrieval method to load the names of the additional fields into the bean.

2 The names of the additional fields are stored in an ArrayList. Create a new ArrayList and add the additional fields that you want to display on the JSP to this ArrayList.

3 Use the "setExtraFieldMapTemplate" method to set the ArrayList created above on the Java bean. Self Service uses an "Extra Field Map Template" to communicate the additional fields to the bean.

For example, to add the *Spouse Name* field, PESPS, from the Personnel Data file, PEPMS, to the ViewPersonalInfo.jsp, you add the information with the shaded background to the code below.

```
<%
ArrayList extraFields = new ArrayList();
extraFields.add("PESPS");
changeBasicDataBean.setExtraFieldMapTemplate(extraFields);
changeBasicDataBean.retrieveBasicData();
%>
```

For the ViewPersonalInfo.jsp, the bean name is ChangeBasicDataBean, and the method that populates the bean is retrieveBasicData. The method that

populates the bean references the fields named in the "extraFields" ArrayList and retrieves values from these fields when the rest of the bean is populated.

No additional customization is required to retrieve the field values from the database.

Retrieving the values from the bean

Before you retrieve the additional data values from the bean and display them on the page, you must determine if the page displays a single record or a list of records. The process for retrieving values from pages that display data for a single record, such as the Personal page, is different from the process for pages that display a list of records, such as the Vehicles page.

Retrieving values if the JSP displays a single record

You can use the "getValue()" method for the bean to retrieve the additional value. You can then use whatever method you want to display the value on the page.

For example, to display the spouse's name in the personal information table, you add the information with the shaded background to the code below.

```
<TR>
  <TH align="left"><fmt:message key="TELEPHONE" /></TH>
  <TD colspan="3"><c:out value="${changeBasicDataBean.prtl1}"/></TD>
</TR>

<TR>
  <TH align="left"><fmt:message key="OFFICE_PHONE" /></TH>
  <TD colspan="3"><c:out value="${changeBasicDataBean.proff}"/></TD>
</TR>

<TR>
   <TH align="left">Spouse</TH>
   <TD colspan="3"><c:out value="${null}">
            <%= changeBasicDataBean.getValue("PESPS") %></c:out></TD>
</TR>
```

Retrieving values if the JSP displays multiple records from the same bean

You must access the additional values by index. You can set up a loop of your own or use an existing loop in the JSP to provide the index you need.

For example, to use an existing loop to display the registration number from a list of registration numbers retrieved from the viewAutoInfoBean, you add the information with the shaded background to the code below.

```
<%
    ArrayList extraFields = new ArrayList();
    extraFields.add("AWREGNO");
    viewAutoInfoBean.setExtraFieldMapTemplate(extraFields);

    viewAutoInfoBean.ViewAutoInfo();

    connectionPoolBean.free(connection);
%>

<%
  if(viewAutoInfoBean.getAwauto().size() > 0)
  {
    for(int i = 0; i < viewAutoInfoBean.getAwauto().size(); i++)
    {
%>
    <TR>
      <TD align="left"><c:out value="${null}">
            <%= viewAutoInfoBean.getAwauto().get(i).toString() %>
            </c:out></TD>
      <TD align="left"><c:out value="${null}">
            <%= viewAutoInfoBean.getAwmodl().get(i).toString() %>
            </c:out></TD>
      <TD align="left"><c:out value="${null}">
            <%= viewAutoInfoBean.getAwcolr().get(i).toString() %>
            </c:out></TD>
      <TD align="left"><c:out value="${null}">
            <%= viewAutoInfoBean.getAwayr().get(i).toString()%>
            </c:out></TD>
      <TD align="left"><c:out value="${null}">
            <%= viewAutoInfoBean.getAwlplt().get(i).toString()%>
            </c:out></TD>
      <TD align="left"><c:out value="${null}">
            <%= viewAutoInfoBean.getValue(i, "AWREGNO")%>
            </c:out></TD>
    </TR>
<%
    }
        }
%>
```

Retrieving values if the JSP displays multiple records from a collection of beans

You must access the bean by index and then retrieve the additional value from the bean. These newer-style beans are commonly found in the Self Service Training JSPs.

For example, to display the course duration on the "Assigned Courses" table on the My Training page, you add the information with the shaded background to the code below.

```
<%
String er = request.getParameter("er");
String en = request.getParameter("en");

…

TrainingCourseIDBeanFactory trCourseIDFactory =
        new TrainingCourseIDBeanFactory(sessionDataBean);
ArrayList extraFields = new ArrayList();
extraFields.add("ECDURA");
trCourseIDFactory.setExtraFieldMapTemplate(extraFields);
Collection trAssigneds =
            trCourseIDFactory.findAssignedTrainingCourseIDs(er, en);
pageContext.setAttribute("trAssigneds", trAssigneds);
%>

<TABLE>
   <TR>
      <TH align="left"><fmt:message key="COURSE" /></TH>
      <TH align="left"><fmt:message key="DESCRIPTION" /></TH>
      <TH align="left">Duration (hours)</TH>
   </TR>

   <c:forEach var="trAssigned" items="${trAssigneds}" >
     <TR>
       <c:url var="tcrsURL" value="/ahess/TrainingCourseDetail.jsp">
       <c:param name="er" value='${er}' />
       <c:param name="en" value='${en}' />
       <c:param name="employeeName" value='${employeeName}' />
       <c:param name="courseCode" value="${trAssigned.code}" />
     </c:url>
     <TD><A href='<c:out value="${tcrsURL}" />'>
                 <c:out value="${trAssigned.code}"/></A></TD>
     <TD><c:out value="${trAssigned.description}"/></TD>
     <TD><c:out value="${trAssigned.extraFieldMap.ECDURA}"/></TD>
      </TR>
   </c:forEach>
</TABLE>
```

Displaying data from multiple queries

In older-style beans, separate queries may access multiple database tables. These queries may be within one bean retrieval method or in separate methods. Multiple extra field lists exist for these beans. By adding the field names for the appropriate tables into the appropriate extra field template you can use the appropriate access method to retrieve those values.

The "Self Service Java beans and the field tables they access" table in the "Reference tables" section at the end of this chapter indicates which beans access multiple tables and the extra field template numbers associated with each.

The tables listed below in the "Reference tables" section at the end of this chapter indicate the template and access methods for each of these multiple extra field map templates for older style beans.

- Methods used in single-record (scalar) beans

- Methods used in multiple-record (vector) beans

For example, you want to add the *Check Summ Code* field, IZCHEK, from the Check Printing Income work file, PYPIZ, and the *Check Summ Code* field, DZCHEK, from Check Printing Deduction work file, PYPDZ, to CheckInquiryDetails.jsp. The "Self Service Java beans and the field tables they access" table indicates that these tables are accessed by query #2 and query #3, respectively. The bean uses the retrieveDetails method to execute both queries.

You add the information with the shaded background to the code below to use the version of setExtraFieldMapTemplate appropriate for each query, as shown below:

```
<%
    int s = new Integer(request.getParameter("selected")).intValue();
    checkInquiryBean.setSelected(s);

    ArrayList extraFields2 = new ArrayList();
    extraFields2.add("IZCHEK");
    checkInquiryBean.setExtraFieldMapTemplate2(extraFields2);

    ArrayList extraFields3 = new ArrayList();
    extraFields3.add("DZCHEK");
    checkInquiryBean.setExtraFieldMapTemplate3(extraFields3);

    checkInquiryBean.retrieveDetails();
    connectionPoolBean.free(connection);
%>
```

There are similarly numbered methods to retrieve values from the bean:

```
<%
   for(int i = 0; i < checkInquiryBean.getIzname().size(); i++)
   {
%>
    <TR>
       <TD><c:out value="${null}">
           <%= checkInquiryBean.getIzname().get(i).toString() %>
           </c:out></TD>
       <TD align="left"><c:out value="${null}">
           <%= checkInquiryBean.getValue2(i, "IZCHEK") %>
           </c:out></TD>
       <TD align="right"><c:out value="${null}">
           <%= checkInquiryBean.getIzhrs().get(i).toString() %>
           </c:out></TD>
       <TD align="right"><c:out value="${null}">
           <%= checkInquiryBean.getIzyhrs().get(i).toString() %>
           </c:out></TD>
       <TD align="right"><c:out value="${null}">
           <%= checkInquiryBean.getIzamt().get(i).toString() %>
           </c:out></TD>
       <TD align="right"><c:out value="${null}">
           <%= checkInquiryBean.getIzyamt().get(i).toString() %>
           </c:out></TD>
    </TR>
<%
   }
%>




<%
   for(int i = 0; i < checkInquiryBean.getDzname().size(); i++)
   {
%>
    <TR>
       <TD align="left"><c:out value="${null}">
       <%= checkInquiryBean.getDzname().get(i).toString() %>
       </c:out></TD>
       <TD align="left"><c:out value="${null}">
           <%= checkInquiryBean.getValue3(i, "DZCHEK")%>
           </c:out></TD>
    <TD align="right"><c:out value="${null}">
           <%= checkInquiryBean.getDzamt().get(i).toString() %>
           </c:out></TD>
    <TD align="right"><c:out value="${null}">
           <%= checkInquiryBean.getDzyamt().get(i).toString() %>
           </c:out></TD>
    </TR>
<%
   }
%>
```

Reference tables

This section contains the reference tables listed below that you can use to identify Self Service Java beans and methods available for use when you are adding fields to Self Service web pages.

- Self Service Java beans and the field tables they access

- Methods used in single-record (scalar) beans

- Methods used in multiple-record (vector) beans

Self Service Java beans and the field tables they access

Use the table on the following pages to identify the following information:

- Java beans used in Self Service

- The type of each Java bean, either scalar or vector

- For multiple queries, the number or version of the access methods used to retrieve data.

- The methods available for retrieving the field information from the database tables

- The JSP files associated with the Self Service Java beans

- The Infinium HR, PY, and TR database tables available for retrieving additional fields

Java bean	Type	#	Method name	JSP callers	Available tables
BenefitEnrollmentBean.java	Vector		BenefitEnrollment()	BenefitEnrollmentSelect.jsp	PRPBA PRPBI PRPBP AHPAOEG
BenefitEnrollmentCurrentBean.java	Vector	1	currentBenefits() currentBenefitsFromHR()	BenefitEnrollment.jsp BenefitEnrollmentView.jsp	PRPBE PRPBI PRPBP AHPAOEG
		2	currentBenefits() currentBenefitsFromHR()	BenefitEnrollment.jsp BenefitEnrollmentView.jsp	PRPFE PRPBI PRPBP AHPAOEG
		3	currentDependents()	BenefitEnrollment.jsp BenefitEnrollmentDependent.jsp BenefitEnrollmentView.jsp	PRPBM PRPBP PRPDP AHPAOEG
BenefitEnrollmentFlexCreditBean.java	Vector		BenefitEnrollment()	BenefitEnrollmentConfirm.jsp BenefitEnrollmentSave.jsp	AHPFCR
ChangeBasicDataBean.java	Scalar		ChangeBasicData() retrieveBasicData() retrieveByMailKey()	ChangeBasicData.jsp ViewPersonalInfo.jsp ChangeBasicDataView.jsp	PRPMS PEPMS PYPMS
ChangeEmergBean.java	Scalar		ChangeEmergContact()	ChangeEmergContact.jsp	PEPMS
CheckInquiryBean.java	Vector	1	retrieveChecks()	CheckInquirySelection.jsp	PYPCZ PYPCH
		2	retrieveDetails()	CheckInquiryDetails.jsp	PYPIZ
		3	retrieveDetails()	CheckInquiryDetails.jsp	PYPDZ

Java bean	Type	#	Method name	JSP callers	Available tables
CodeValueBean.java	Vector		ViewCodeValue()	Many	PRPCD
CycleBean.java	Vector		CycleValues()	ManagerNewHireIntl2.jsp ManagerNewHireNA2.jsp ManagerRehire2.jsp	PYPCY
DependentBenefitsBean.java	Vector		DisplayDependents()	BenefitEnrollment.jsp BenefitEnrollmentDependent.jsp BenefitEnrollmentView.jsp	PEPDP
DependentMaintBean.java	Vector		DisplayDependents()	DependentDetail.jsp DisplayDependents.jsp	PEPDP
DirDepositBean.java	Vector		DirDepositEnroll()	DirDepositEnroll.jsp DirectDepositInquiry.jsp	PYPDD PYPDE PYPDC
EmployeeCalendarBean.java **Note:** This bean presents information from PEPHU and PEPAT in a single list; the extra fields are not so combined. They remain in two separate lists; therefore, the index used to access the bean does not work completely to access the extra field lists. If the bean index is greater than or equal to the size of the first extra field array, then subtracting that size from the index should give a value that retrieves properly from the second extra field list.	Vector	1	execute()	EmployeeCalendar.jsp	PEPHU
		2	execute()	EmployeeCalendar.jsp	PEPAT
FlexBenConfirmationBean.java	Vector		DisplayFlexBen()	FlexBenConfirmation.jsp	PRPBI PRPBP PRPFE
FlexBenConfirmationBean2.java	Vector		DisplayFlexBen()	FlexBenConfirmation.jsp	PRPFE PRPBM
FlexBenConfirmationBean3.java	Scalar		DisplayFlexBen()	FlexBenConfirmation.jsp	PRPBY

Java bean	Type	#	Method name	JSP callers	Available tables
GroupBean.java	Vector		retrieve()	ManagerNewHireIntl2.jsp ManagerNewHireNA2.jsp ManagerRehire2.jsp	AHPAGRP
LevelBean.java	Vector		LevelValues()	ManagerTimeSheet.jsp ManagerTimeSheetHandler.jsp ManagerTimeSheetView.jsp	PRPLV
ManagerEmployeeChangesBean.java	Scalar	1	retrieveEmployeePayInfo()	ManagerEmployeeChanges.jsp	PRPMS PYPMS
		2	retrievePybrt()	ManagerEmployeeChanges.jsp	PYPMS
		3	retrieveCurrentWorkSchedule() (for international only)	ManagerEmployeeChanges.jsp	PRPMS
ManagerEmployeeTreeBean.java	Vector		employeeList()	ManagerBuildEmployeeTree.jsp ManagerNewHireNA2.jsp ManagerRehire2.jsp	PRPMS (and AHPELCST if retrieving data from the custom file)
ManagerPerformanceReviewListBean.java **Note:** This bean does not follow standard conventions. Use getEmployeeValue() and getReminderEmployeeValue() instead of getValue().	Vector		addEmployee()	ManagerPerformanceReviewList.jsp	PRPMS
ManagerRehireEmployeeListBean.java	Vector		EmployeeList()	ManagerRehireEmployeeSelect.jsp	PRPMS
ManagerRehireEmployeeSelectedBean.java	Scalar		EmployeeSelected()	ManagerRehire.jsp ManagerRehire2.jsp	PRPMS PEPMS PYPMS
MessagingWebaListBean.java	Vector		generateWebaList()	Message.jsp	AHPWEBA PRPMS

Java bean	Type	#	Method name	JSP callers	Available tables
MyBenefitsBean.java	Vector	1	DisplayCurBen()	MyBenefits.jsp	PRPBI PRPBP PRPBE
		2	retrieveFePrpbm()	MyBenefits.jsp	PRPFE PRPBM
		3	retrievePrpbm()	MyBenefits.jsp	PRPBE PRPBM
		4	retrievePrpfe()	MyBenefits.jsp	PRPBI PRPBP PRPFE PRPKC
OpenPositionBean.java	Vector		displayOpenPosition() retrieveSelectedPositions() **Note:** Whatever extra fields are set for one of these methods must be set for the other. The secondary extra field map list holds the selected position extra field data until mergerOpenAndSelected() is called. As this happens immediately after retrieveSelectedPositions(), this should not pose any issues.	ManagerEmployeeChanges.jsp ManagerEmployeeChangeView.jsp ManagerNewHireIntl1.jsp ManagerNewHireIntlView.jsp ManagerNewHireNA1.jsp ManagerNewHireNA2.jsp ManagerNewHireNAView.jsp ManagerRehire.jsp ManagerRehire2.jsp ManagerRehireView.jsp	PEPOG
PaidTimeOffBean.java	Scalar		retrievePaidTimeOff()	ManagerViewTimeOff.jsp	PRPMS PRPPD (for international only)
PositionDefaultBean.java	Scalar		retrievePositionDefaults()	ManagerNewHireNA2.jsp ManagerRehire2.jsp	PRPDF

Java bean	Type	#	Method name	JSP callers	Available tables
SelectErBean.java	Vector		SelectEmployer()	ManagerEmployeeChanges.jsp ManagerRehire2.jsp	PRPCO
SessionDataBean.java	Scalar	1	ahWebLogIn()	LogIn.jsp	AHPWEBA AHPGRP
		2	executeSQL()	LogIn.jsp	PRPMS PEPMS
		3	executeSQL()	LogIn.jsp	PRPCO
		4	retrieve()	LogIn.jsp	PRPKC
TrainingCodeBean.java TrainingCodeBeanFactory.java	Scalar		findTrainingCodesByType()	TrainingCourseCatalogFilter.jsp TrainingRequest.jsp	TRPCD
TrainingCompletedBean.java TrainingCompletedBeanFactory.java	Scalar		findTrainingCompleted() findTrainingCompleteds()	TrainingCompletedDetail.jsp TrainingSummary.jsp	TRPOJ
TrainingCourseBean.java TrainingCourseBeanFactory.java	Scalar		findTrainingCourse() findAllTrainingCourses() findTrainingCoursesByFilters()	TrainingCourseCatalog.jsp TrainingCourseDetail.jsp TrainingSummary.jsp	TRPEC
TrainingCourseIDBean.java TrainingCourseIDBeanFactory.java	Scalar		findTrainingCourseID() findAllTrainingCourseIDs() findAssignedTrainingCourseIDs()	TrainingEnrollment.jsp TrainingRequest.jsp TrainingCourseCatalogFilter.jsp	TRPEC
TrainingCourseScheduleBean.java TrainingCourseScheduleBeanFactory.java	Scalar		findNonConflictingTrainingCourse SchedulesForEmployeeByCourse()	TrainingEnrollment.jsp TrainingEnrollmentView.jsp	TRPEP
TrainingEnrollmentBean.java TrainingEnrollmentBeanFactory.java	Scalar		findTrainingEnrollment() findTrainingEnrollments()	TrainingEnrollmentDetail.jsp TrainingSummary.jsp	TRPEX
TrainingRequestBean.java TrainingRequestBeanFactory.java	Scalar		findTrainingRequest() findTrainingRequests()	TrainingRequestDetail.jsp TrainingSummary.jsp	TRPEM

Java bean	Type	#	Method name	JSP callers	Available tables
TrainingSkillCompetencyCodeBean.java TrainingSkillCompetencyCodeBeanFactory .java	Scalar		findAllTrainingSkillCompenency Codes()	TrainingCourseCatalogFilter.jsp	PEPSC
TimeSheetEmpBean.java	Vector	1	retrieveDataForConfiguredItems()	TimeSheetEmp.jsp TimeSheetEmpView.jsp ManagerTimeSheet.jsp ManagerTimeSheetView.jsp	PYPIR PYPIE PYPIC
		2	retrieveDataForConfiguredItems() (if the *GL Account* field is configured to display) retrieveGlaccts()	TimeSheetEmp.jsp TimeSheetEmpView.jsp ManagerTimeSheet.jsp ManagerTimeSheetView.jsp	PYPGH (North American) or GLPCH (international)
		3	retrieveDataForConfiguredItems() (if the *Job* field is configured to display) retrieveJobCodes()	TimeSheetEmp.jsp TimeSheetEmpView.jsp ManagerTimeSheet.jsp ManagerTimeSheetView.jsp	PRPJB PYPJO **Note:** Retrieval from PYPJO poses some risks. Distinct jobs are selected in the SQL statement rather than all records. This may produce unexpected results.
ViewAnnualPayBean.java	Vector		viewPayHistory()	ViewAnnualPay.jsp	PYPPQ
ViewAnnualPayDetailsBean.java	Vector		displayAnnualPayDetails()	ViewAnnualPayDetails.jsp	PYPIQ PYPIC
			displayAnnualPayDetails()	ViewAnnualPayDetails.jsp	PYPDQ PYPDC

Java bean	Type	#	Method name	JSP callers	Available tables
ViewAutoInfoBean.java	Vector		ViewAutoInfo()	ViewAutoInfo.jsp	PEPAW
ViewCheckBean.java	Vector	1	viewCheckHistory()	ViewCheck.jsp	AHPCLS or PYPCL (if value in the group's *Use Summary File* flag (AHPAGRP.GPUCHKSUM) is **1** or **2** respectively)
		2	displayCheckDetails()	ViewCheckDetails.jsp	AHPILS & PYPIS or PYPIL (if the *GL Account* field is configured to display)
		3	displayCheckDetails()	ViewCheckDetails.jsp	AHPDLS & PYPDS or PYPDL (if the *GL Account* field is configured to display)
ViewEduInfoBean.java	Vector		ViewEduInfo()	ViewEduInfo.jsp	PEPED
ViewEduInfoIntlBean.java	Vector		ViewEduInfo()	ViewEduInfoIntl.jsp	PEPED

Java bean	Type	#	Method name	JSP callers	Available tables
ViewLicensingInfoBean.java	Vector		ViewLicensingInfo()	ViewLicensingInfo.jsp	PEPLI
ViewPropertyBean.java	Vector		ViewPropertyInfo()	ViewPropertyInfo.jsp	PEPPP
ViewTaxInfoBean.java (for Canadian payroll information)	Scalar		retrieveTaxInfo()	ViewTaxInfo2.jsp	PYPCN PYPMS
W4InfoBean.java (for United States W-4 form data)	Vector	1	retrieveW4Info() **Note:** There is only one entry in this vector.	ViewW4Data.jsp	PYPMS
		2	retrieveTaxFilingInfo()	ViewW4Data.jsp	PYPDE PYPDC

Methods used in single-record (scalar) beans

The table below lists the access methods used in single-record (scalar) beans for multiple extra field map templates for older style beans.

Method
public void clear();
public void clearTemplate();
public void setExtraFieldMapTemplate(List newExtraFieldMapTemplate);
public List getExtraFieldMapTemplate();
public void setValue(String key, String value);
public String getValue(String key);
public int getExtraFieldListSize();
public void clear2();
public void clearTemplate2();
public void setExtraFieldMapTemplate2(List newExtraFieldMapTemplate);
public List getExtraFieldMapTemplate2();
public void setValue2(String key, String value);
public String getValue2(String key);
public int getExtraFieldListSize2();
public void clear3();
public void clearTemplate3();
public void setExtraFieldMapTemplate3(List newExtraFieldMapTemplate);
public List getExtraFieldMapTemplate3();
public void setValue3(String key, String value);
public String getValue3(String key);
public int getExtraFieldListSize3();

Method

public void clear4();

public void clearTemplate4();

public void setExtraFieldMapTemplate4(List newExtraFieldMapTemplate);

public List getExtraFieldMapTemplate4();

public void setValue4(String key, String value);

public String getValue4(String key);

public int getExtraFieldListSize4();

Methods used in multiple-record (vector) beans

The table below lists the access methods used in multiple-record (vector) beans for multiple extra field map templates for older style beans.

Method
public void clear();
public void clearTemplate();
public void setExtraFieldMapTemplate(List newExtraFieldMapTemplate);
public List getExtraFieldMapTemplate();
public void setValue(int index, String key, String value);
public String getValue(int index, String key);
public int getExtraFieldListSize();
public void clear2();
public void clearTemplate2();
public void setExtraFieldMapTemplate2(List newExtraFieldMapTemplate);
public List getExtraFieldMapTemplate2();
public void setValue2(int index, String key, String value);
public String getValue2(int index, String key);
public int getExtraFieldListSize2();
public void clear3();
public void clearTemplate3();
public void setExtraFieldMapTemplate3(List newExtraFieldMapTemplate);
public List getExtraFieldMapTemplate3();
public void setValue3(int index, String key, String value);
public String getValue3(int index, String key);
public int getExtraFieldListSize3();

Method

public void clear4();

public void clearTemplate4();

public void setExtraFieldMapTemplate4(List newExtraFieldMapTemplate);

public List getExtraFieldMapTemplate4();

public void setValue4(int index, String key, String value);

public String getValue4(int index, String key);

public int getExtraFieldListSize4();

Notes

Appendix D Self Service Metadata Files

D

This chapter explains the contents of Infor Infinium Self Service system metadata files, the system files that are used for your custom information and sample programs that are supplied with the application.

Contact the Infor Consulting Services (ICS) organization for implementation assistance.

Metadata files

The tables below list the Self Service files that contain metadata that is updated and shipped with each release and files that contain default SSDBFA metadata that is updated and shipped with each release for new customers.

File name	Description	Comments
AHPADTP	Web Admin Document Type	
AHPAERR	Message	
AHPAGUSR	Web Admin Global User	*SUPER, *ORIGINATOR, *CUSTOMSUPER, *REPORTSTO, *EMPLOYEE
AHPALG	Language	English and Spanish
AHPAMDS	Web Admin Menu Default - Side	
AHPAMDT	Web Admin Menu Default - Top	
AHPAWEEK	Web Admin Time Week Table	SAT = 0 SUN = 1 MON = 2 TUE = 3 WED = 4 THU = 5 FRI = 6
AHPCF	Entity Control Settings	
AHPDCFG	Web Page Settings/Configuration	
AHPEM	Workflow SMTP E-mail	
AHPEV	E-mail Configuration for Open Enrollments	
AHPUVD	User Verification Table	
AHPNS	E-mail Notification Settings	* See list below

File name	Description	Comments
AHPPROP	Payroll Countries	USA, CAN
AHPAFOOTM	Web Administration Footer Help Text Master File	
AHPAHEADM	Web Administration Header Help Text Master File	
AHPAPAGEM	Page Attributes/Tailoring Master File	

* E-mail notification settings

- New Employees (NEBEN) – The program uses the employee's date of hire

- License Expiration (ELEXP) - The program uses the employee's license expiration date

- Passport Expiration (PPEXP) - The program uses the employee's passport expiration date

- Visa Expiration (VSEXP) - The program uses the employee's Visa expiration date

- US Employment Eligibility (I9EXP) - The program uses the employee's verification expiration date

- Performance Review Alerts (PERFR) - The program uses the employee's next review date

- Workflow Timeouts

    - (WTREJ – Reject to Originator)

    - (WTREM – Reminder to Action)

    - (WTAPR – Automatic Approval)

    - (WTNOT – Approval Notification)

- Example custom program (CEXIT)

- EOI Documentation (EORIM) The program checks the employee's benefit enrollment EOI Approval Date. If the date is blank and the EOI Approval Status equals 0, then a notification is sent.

When you install an upgrade version of Self Service, you must save a backup version of the files to retain your customized data for the files listed in the table below.

| File name	Description
AHPAFOOT	Customer Footer Help Text file
AHPAHEAD	Customer Header Help Text file
AHPAPAGE	Customer Page Attributes/Tailoring file
AHPRQ	Security Questions
AHPEW	Global Time-out Settings file
AHPRV	Performance Review Email Settings

Sample programs

We included the following sample programs and source for these programs in our SS2000 library.

- AHGWFUE1 - Sample Conditional Workflow User Exit Program

- AHGWFUE2 - Sample Conditional Workflow User Exit Program

- AHGEEBASIC - Sample user exit program for Workflow Notifications

Notes

Appendix E Using Single Sign On with Self Service

E
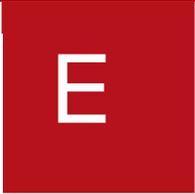
This chapter explains how you can use single sign on to access the Infor Infinium Self Service application.
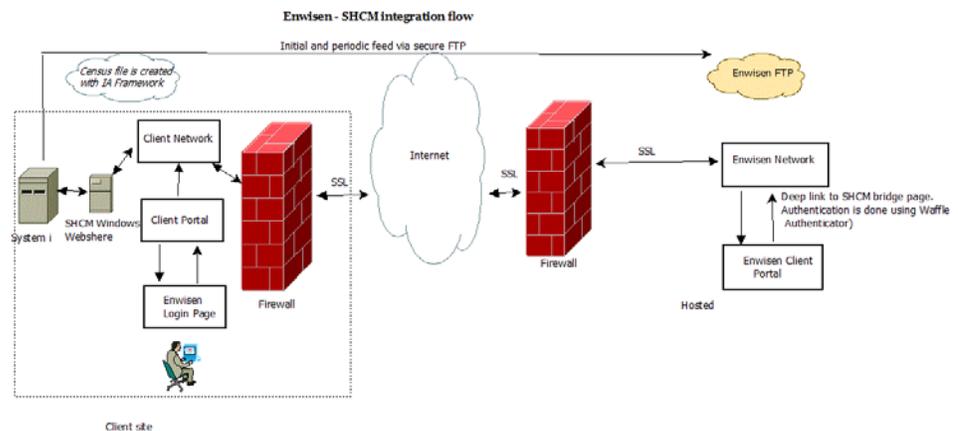
Understanding Single Sign On

Infor Infinium Self Service Single Sign On can be configured two ways when using the integration with the Infor Enwisen HR Knowledgebase application. You can use either the WAFFLE (*Windows Authentication Functional Framework Light Edition)* authentication or the SAML (*Security Assertion Markup Language)* authentication.
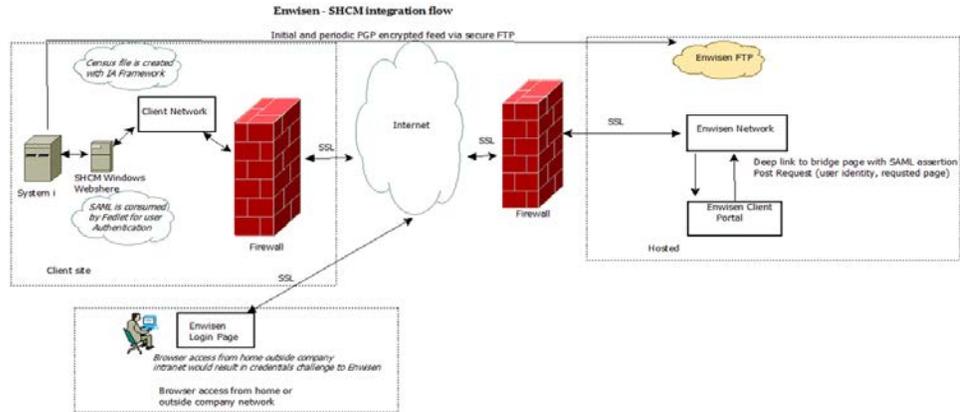
If you are planning on using an intranet-based implementation, the WaffleAuthenticator should be configured for Infor Infinium Self Service. If you are planning on using an Internet-based implementation, then the SAMLAuthenticator should be configured for Infor Infinium Self Service.

In either case, contact Infor Consulting Services (ICS) for detailed information on the Single Sign On implementations.

WAFFLE Authentication

SAML Authentication

Enwisen - SHCM integration flow

Initial and periodic PGP encrypted feed via secure FTP

Census file is created with IA Framework

Client Network

Firewall

SSL

Internet

SSL

Firewall

SSL

Enwisen FTP

Enwisen Network

Deep link to bridge page with SAML assertion Post Request (user identity, requsted page)

Enwisen Client Portal

Hosted

System i

SHCM Windows Webshere

SAML is consumed by Fedlet for user Authentication

Client site

SSL

Enwisen Login Page

Browser access from home outside company intranet would result in credentials challenge to Enwisen

Browser access from home or outside company network

Activating SSO

Infor Infinium Self Service can be set up to implement single sign-on (SSO) authentication with Active Directory using the WAFFLE (Windows Authentication Functional Framework Lite Edition). This setup does not require users to have IBM i profiles set up.

If you choose to implement single sign-on in Infor Infinium Self Service, users cannot use the *Personal > Sign In Preferences* menu option to change their password or use the reset password functionality because the user ID and password information is stored within LDAP, not in the Infinium Web security file.

To activate single sign-on:

1   Change the SHCMBundle.properties file. Add the line:

```
AUTHENTICATOR=com.ssaglobal.shcm.security.WaffleAuthenticator
```

You may want to copy the text from the existing documentation we have for enabling LDAP authentication. It requires a similar change to the SHCMBundle.properties file.

2   Change the web.xml file. This must be done in two places:

- {drive}:\{*WebSphere install dir*}\AppServer\profiles\{*profile name*}\installedApps\{*your server node*}\SHCM.ear\SHCM_Web.war\WEB-INF\web.xml

- {drive}:\{*WebSphere install dir*}\AppServer\profiles\{*profile name*}\config\cells\{*your server node*}\applications\SHCM.ear\deployments\SHCM\SHCM_Web.war\WEB-INF\web.xml

Remove the <!-- --> comments from these sections:

```
<!--
   <filter> <filter-name>SecurityFilter</filter-name>
      <filter-class>waffle.servlet.NegotiateSecurityFilter</filter-class>
   </filter>
-->
…
<!--
   <filter-mapping> <filter-name>SecurityFilter</filter-name>
      <url-pattern>/*</url-pattern>
   </filter-mapping>
-->
```

3 Update the LDAP.properties file with the Active Directory settings.

4 Restart the server.

Notes

Appendix F Enwisen Integration

F

This chapter identifies the integration points between Infor Infinium Self Service and the Infor Enwisen HR Knowledgebase application.

Infor Enwisen HR Knowledgebase integration

Infor delivers additional value for the Infinium applications through its product strategy of changing the way work is done in Infinium, expanding the Infinium applications, and reimagining enterprise software.

Part of expanding the Infinium HCM application includes providing robust integrated solutions to help you lower HR costs and be more strategic. Infor Infinium ION Adapter provides the infrastructure for supporting the initial integration between Infor Infinium Self Service (SHCM) and Infor Enwisen HR Knowledgebase (one of five business solutions within Infor Enwisen HR Service Delivery).

Infor Enwisen HR Service Delivery includes five applications that help reduce the cost of HR:

- Infor Enwisen HR Knowledgebase

- Infor Enwisen HR Case Management

- Infor Enwisen Onboarding

- Infor Enwisen Offboarding

- Infor Enwisen Total Rewards

This comprehensive solution helps customers transform HR into a strategic partner and fully engage employees, while lowering annual HR service delivery costs by an average of 20 to 50%.

This integration with Infor Enwisen HR Knowledgebase enables Infinium customers to benefit from an online, one-stop location for workforce communications and decision support. It delivers a dynamic HR portal around Infor Infinium Self Service for a personalized and searchable knowledgebase that provides relevant information in context with transactions that the employee may be completing. Infor Infinium Self Service users can deep link from Infor Enwisen HR Knowledgebase to the following areas of Infor Infinium Self Service.

Benefits

- My Benefits

- Benefit Changes

- Open Enrollment

- My Beneficiaries
- My Dependents
- My Benefit Statement

Payroll

- Pay History
- View Direct Deposits
- Change Direct Deposits
- W-2 Information
- View Tax Information
- Change Tax Information
- W-4 Form
- My Timesheets
- Payroll Information (CAN)
- T4 Information

Personal

- Address change
- Personal Information
- Contacts
- Time Off Request
- Monthly Calendar
- Annual Calendar

Inbox

- My Messages
- My Requests

Processing triggers

Infor Infinium ION Adapter is used to process the triggers on these Infor Infinium HCM and Self Service files:

- PRPMS – Employee basic data

- PEPMS – Employee personnel data

- PYPMS – Employee payroll data

- PRPUD – Employee user defined data

- PRPBE – Employee benefit enrollments file. This is a subset of the benefit data that includes eligible and current enrollments only for the current plan year.

- AHPWEBA – Self Service web security file. The employee must have a valid user ID in Self Service in order to have access to the Enwisen integrations.

Single Sign On

Infor Infinium Self Service Single Sign On can be configured two ways when using the integration with Infor Enwisen HR Knowledgebase application. You can use either the WAFFLE (*Windows Authentication Functional Framework Light Edition)* authentication or the SAML *(Security Assertion Markup Language)* authentication. Contact an Infor Consulting Services (ICS) representative for details.

Implementation

If you are implementing the Enwisen integration features of this release for the first time, an Infor Consulting Services (ICS) engagement is required. Contact your Infor account executive or customer support to schedule your implementation planning meeting.

Appendix G Standard User Interface

This chapter describes the standard Infor user interface features applied to the Infor Infinium Self Service web application. The standard Infor user interface enables the same look and feel across all Infor applications.

Help text

Help text is displayed in the page headers and footers unless you have the SHCM Bundles property file set not to show help text (SHOWPAGEHELPINLINE). You would then access the header and footer help text via the Help icon on the toolbar.

The page attributes are where you determine if the Help and the Print icons are available on a web page. For various pages, the Print icon is suppressed by default. This is done on pages that typically do not need to be printed and on some pages where the print formatting is not desirable. You have the option to change the default value on any page that it is suppressed by changing the page attributes.

Caution: The installation program does not update your individual group help text files; therefore, we **highly recommend** that you use the **Refresh** option within the Administration application to update your header, footer, and page attributes help text files.

Toolbar
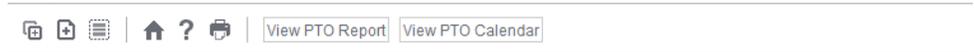
Use the toolbar to navigate through the pages. Hover over a toolbar icon to display a description of the action to be executed when the icon is clicked. In certain cases, such as the For My Approval page, the action buttons are displayed on the page because the page is sectioned, based on the transaction type requiring approval. Page-specific actions are displayed first, then the standard toolbar icons are displayed next, and finally icons that currently do not have an icon to represent the action are displayed as text buttons, as shown in the image above.

The table below lists examples of typical Self Service icons and actions:

Icon	Description
	Home
	Help
	Print
	Continue, Next
	Back, Cancel, Previous, Return
	Cancel, Next
	Submit, Save, Send, Resubmit
	Expand All / Collapse All
	Add, Create, New , Compose New Message
	Select All / Unselect All
	Change, Edit
	Delete
	Clear

Icon	Description
⊞	Recalculate
View Document	
View in PDF	
Return to Transaction Summaries	
View PTO Report	
View PTO Calendar	
Create Mass Salary Changes	
Process Employee(s)	
View Time Off	
Save / Next Employee	
Request	
Paid Time Off Accruals	
Save As Draft	
New Search	
Approve Document	
Redirect Request	
Reject Document	
Approve	
Redirect	
Reject	

Standard toolbar

The standard toolbar typically includes the Home, Help, and Print icons. You can turn the Help and Print icons on or off within the *Page Attributes* Maintenance option within the Administration application.

Icon	Description
🏠	The Home icon brings the user back to the Welcome page.
❔	The Help icon displays the header and footer help page to the user.
🖨	The Print icon enables the user to print the page. For printing large sets of lists, scroll down to the section to print and select the Print icon, or select a subset of the data before printing.

Stationary toolbars

A stationary toolbar is displayed on most of the maintenance pages within Self Service. This enables the user to have the toolbar in view even when the user pages down to update or select information on multiple pages. Note that you must place cursor on the page, not on the white space to the right, to scroll down.

Infor Grid Control

Employer	Employee Name ▲	Employee ID	Status	Hire Date

Most of the lists use the Infor Grid Control, which enables users to sort on any column and to expand or reduce the size of the column width.

Select All action

With the standard user interface, you will notice some differences with the **Select All** action because some pages are using the new Infor Grid Control and some are not.

You will notice a different result with the **My Messages** menu option list when you use the **Select All** action. Although all lines have a check box next to them, only Notification messages can be deleted. Messages requiring workflow approval are not selected when you take this action. This is the same as the previous release; however, with the new Infor Grid Control all lines now have check boxes.

Collapsible page sections

On pages that have multiple sections, you can expand and collapse the sections. This enables users to hide fields of information that they are not interested in viewing or updating. Click the down arrow on the right side of the section to expand the section. Click the up arrow to collapse the section.

Required field indicators

Required field indications are identified with an asterisk (*) to the right of the field label except for the field type noted below:

- Read only fields do not have asterisks even when they are set as required field in the page settings.

- Yes/No check box fields do not have an asterisk because the fields must be either checked or unchecked.

- Conditional fields do not have asterisks because they are dependent on values from other fields. Program edits provide messages to the user when a required field is left blank.

Infor Date Control

All date fields are using the Infor Date Control as noted below. The arrows to the left of the month enable the user to go back and forward by month. The gear to the right of the month enables the user to change the month and year. The user can click a day in the calendar or click **Today** button, and the program refreshes the field on the page.

Next Review Date: 05 31 2013

◀ ▶   May 2013   ⚙

SU	MO	TU	WE	TH	FR	SA
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Today

Sign In

Certain special characters, such as / \ : * ? " < > | & ! ^ [ ], are not supported by all browsers. We strongly recommend that you do not use any special characters in the user ID or password fields. Otherwise, errors will occur and the user may not be able to sign in to Self Service.

Note: We recommend that you add the Infor Ming.le™ Enterprise server URL and your corporate server URL as a trusted site within Internet Explorer in order to avoid trust error messages.