Customizing Reporting Administration

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PART 1

Introduction

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CHAPTER 1

About This Manual

Welcome

This training class has been designed to guide you through the complexities of customizing Reporting Administration for your organization's needs.

This manual has been designed as a reference document. It is also used as a manual for classroom training. You will find sufficient detail in this manual for self-study, after classroom training. This guide will only be available to participants in the Customizing Reporting Administration certification class offered by Cyborg Systems.

Who should use this manual?

Since customizing Reporting Administration will involve using multiple skill sets, you may find that more than one person must be involved in order to fill the skill gap. The support materials for Reporting Administration are designed to be used by a number of different users.

- HR and Payroll subject matter experts
  HR and Payroll experts within your organization will focus on other materials Cyborg delivers, such as the Administering Reporting Administration guide, rather than this guide. Their skills and input, however, are extremely valuable during the planning and testing stages of a customization project, since they can best determine whether the effort required to enhance the delivered product provides a good return on investment. They will also be able to test the outcome to ensure the data retrieved from the data mart is the data you require for your organization's reporting needs.
- Software developers
  Software developers within your organization, or consultants outside your organization, will focus on Part 3 of this guide. They will be responsible for reviewing any enhancements or customizations you have made to your implementation of the administrative solutions, then editing Cyborg Scripting Language extraction subroutines to include any data you want to report upon (in addition to the data already reportable with Reporting Administration, as delivered).

- Database administrators/Impromptu administrators
  Because the data mart is a collection of relational tables, it will be necessary to involve someone with database skills during the customization project. This person may also be someone who is able to configure and update the delivered Impromptu catalogs. These administrators will focus on Part 3 of this guide and the Reporting Administration Workforce Data Mart Data Model reference guide.

- System administrators
  System administrators will be performing the actual data extractions, once Reporting Administration is installed. They will likely edit and schedule the jobs that will launch the extraction and table insertion activities for your organization. For the most part, system administrators will find the Administering Reporting Administration guide and Reporting Administration II Release Guide of most interest. During the customization project, system administrators will be able to help you set up environments and test your customizations.

Prerequisite skills

Users of this manual should possess a variety of technical skills and authorities, depending on the roles they will play in the customization process.

HR and Payroll subject matter experts

- In-depth understanding of the data
- Ability to identify custom data
- Ability to create Impromptu reports to verify correct data extraction and insertion

Software developers

- Cyborg Scripting Language programming skills
- Report Generator programming skills
- Knowledge of the OS's scripting language (for example, MS DOS)

Database administrators/Impromptu administrators

- SQL programming experience
- Specific relational database knowledge, such as an understanding of the files associated with a specific relational database (for example, SQL scripts)
- Data model interpretation
- Knowledge of bulk load utilities

System administrators

- Knowledge of bulk load utilities
- Specific platform (operating system) knowledge, such as using system utilities

Additional documentation and training courses

The following documentation and training courses are available from Cyborg Systems to help you understand the basic usage of Reporting Administration.

Documentation

Document	Description
Reporting Administration II Release Guide	This guide will assist installation specialists and customers installing Reporting Administration to add its functionality to an existing implementation of The Solution Series or eCyborg.
Administering Reporting Administration	This guide includes: ■ an overview of Reporting Administration that provides a conceptual understanding of the product. ■ important information in the form of Key Concepts. ■ detailed instructions for performing technical tasks in regard to administering Reporting Administration. ■ useful reference information in the form of appendices.
Reporting Administration Data Mart Data Model	This guide will provide an overview of the data mart structure and its relationship to the delivered Impromptu catalogs.

If you do not have a copy of this document, you can obtain one from Customer Support.

Training Courses

Related Course	Description
Impromptu Administration	Hands-on training provided by Cognos Corporation for catalogs, prompts, and user security setup.
PowerPlay Administration	Hands-on training provided by Cognos Corporation for building PowerCubes for PowerPlay users.
Technical Administration	Everything you need to know to successfully administer The Solution Series or eCyborg on a day-to-day basis.
Using Reporting Administration	Hands-on training for creating new reports using Cyborg's delivered catalogs and data mart.
PowerPlay Explorer	Hands-on training using PowerPlay to explore and analyze your data.

If you wish to attend any of these courses, contact Customer Support or visit our website www.Cyborg.com for details of course dates and availability.

How this manual is organized

This manual has been organized to make it as easy to use as possible. The chapters are grouped accordingly into the following parts:

Part	Chapters	Description
1. Introduction	1–3	This Part will provide an overview of this manual and the class it is associated with. It will also offer a brief overview of the delivered Reporting Administration to 'set the stage' for customization.
2. Planning	4–5	This Part will address the necessary activities involved in planning for a customization, including obtaining the correct people with the correct skill sets and software tools, and performing an analysis of your MAINTO to determine the customization elements.
3. Customizing	6–10	This Part focuses on the specific tasks required to produce and test a customization of Reporting Administration. Troubleshooting tasks will also be detailed to assist you to find solutions for common errors or let you know about specific trouble areas.
4. Appendices	A–H	This Part will provide the answers to the questions raised during the class presentation, as well as quick references about the option lists used by Reporting Administration and file locations of the components.

Following are descriptions of the chapters within the parts:

Part 1: Introduction

The chapters in Part 1 describe this manual and provide an overview of Reporting Administration.

Read this chapter		To learn about
1	About This Manual	How the manual is organized Where to find what you are looking for Who should use the manual Where to get help

Read this chapter		To learn about
2	Data Structures	Overview of data structures in the administrative solutions Pointers Segments
3	Overview of Reporting Administration	Reporting options available The third party database reporting process Features of Reporting Administration Security issues

Part 2: Planning

The chapters in Part 2 describe the activities your organization should perform prior to initiating specific customization activities.

Read this chapter		To learn about
4	Planning for your Customization Project	Skill sets required Software tools required Decision-making about the return on investment issues
5	Analyzing your MAINTO	Locating customizations

Part 3: Customizing

The chapters in Part 3 describe the technical concepts that must be understood and the tasks that must be performed in order to customize the delivered solution.

Use this appendix		To learn about
6	The Extraction Process	Relationships between components of Reporting Administration The extraction forms Extraction routines
7	Customizing a Field	Direct load format files Modifying a field
8	Customizing a Data Mart	An overview of the data mart Adding a table to the Cognos catalog Deleting a data mart table
9	Customizing the Extract Parameters	Identifying customization components Adding a component Deleting a component

Use this appendix		To learn about
10	Troubleshooting a Customization	Correcting errors Working around known problems

Part 4: Appendices

The appendices in Part 4 contain the following:

Use this appendix		To learn about
A	Practice and Review Answers	Answers and explanations of the questions posed and practice exercises performed during the class presentation.
B	Option Lists for Reporting Administration	Quick reference about the option lists used by Reporting Administration.
C	Components of Reporting Administration	Quick reference that provides the file locations of the components of Reporting Administration.
D	Extract Programs by Class	Quick reference that shows the extract programs by class.
E	Reporting Administration Tax Field Map	Quick reference that shows the fields used for tax purposes.
F	Reporting Administration CSL Extract Frameworks	Quick reference that shows the three CSL frameworks used for extracting data.
G	Reporting Administration Control Table Quick Reference	Quick Reference that summarizes the fields of Reporting Administration Table Properties form.
H	MAINTO for Extended Practice Exercises	Print-out of the two MAINTO samples used for the Extended Practice exercised during the class.

How to use this manual

This manual has been designed as a reference manual as well as a training manual. It has been written to facilitate self-study before and after classroom training.

Table of contents

The manual has been carefully designed for ease of use. All our manuals are written to be task oriented to help you complete your business tasks using our software.

The table of contents lists all the tasks and their respective chapters.

Glossary of Terms

A Glossary of Terms section is provided to explain terms used in the documentation.

Index

An index is provided to help you locate specific information.

This document was designed to reduce your need for an index. You should find the table of contents sufficient.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 ensures you get the most out of the information we have provided. Chapter 2 provides a high level overview. Read it to get the big picture before reading the detailed instructional chapters.

Instructional chapters

All chapters, other than the introductory chapters, are instructional chapters. They contain detailed instructions on how to complete the business tasks. Each instructional chapter has the following distinct sections:

Key Concepts

Always read the conceptual information first. This will help you understand why you have to perform certain tasks. It will also help you make decisions about your options and help you understand the importance of performing certain tasks. Exercises to help you apply the concept to a business task are included at the end of most concepts.

Apply the Concept

To be certain that you have understood the key concepts in a chapter, complete the Apply the Concept exercises provided. The answers to these exercises can be found in the appendices.

Detailed Directions

When you are ready to perform a task, review the Detailed Directions, which provide guidance, as well as the specific steps, to complete a task.

Guided Practice

The Guided Practice within the Detailed Directions offers you an opportunity to practice a task with step-by-step instructions. It takes you through the various steps, providing detailed examples so you can gain a comfort level with the task. Guided Practice is easy to locate.

For practice, type 'ABC Solutions'.

Note: *To successfully follow the Guided Practice, you must have completed all the previous Guided Practice exercises in the manual. The Guided Practice uses the test data installed with our software. For the Guided Practice exercises to work, this test data must not have been altered.*

All users who complete the Guided Practice must either have their own copies of the test data or have the test data restored for them.

Extended Practice

To be certain that you have understood the tasks in a chapter, complete the Extended Practice provided. The Extended Practice gives you the opportunity to complete one or

more tasks without step-by-step guidance. The answers to these exercises can be found in the appendices.

Note: To be able to complete the Extended Practice exercises in the manual, you must have completed all the previous exercises. You must also be using the test data delivered with the software. This test data must not have been altered.

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the review questions provided at the end of a chapter. The answers to these questions can be found in the appendices.

Conventions used in this manual

The underlying page layout and design of this manual are meant to be as intuitive as possible for you. Our intent is to make it easy to navigate through the manual and concentrate on learning and doing.

Cross-references

Wherever appropriate, we provide cross-references to help you find additional information or further discussion of a specific topic.

☞ *Refer to a cross-reference to find more detail or more discussion on a given topic.*

Notes

Whenever there is important information you should be aware of, we provide a note.

Note: You will find tips or quick techniques covered in notes.

How to get additional help

If you can not find the answers to your questions in this manual, contact Customer Support, who will be able to answer specific questions and give you general advice on training.

Please visit our web site ***www.Cyborg.com*** (see "Cyborg Home - http://www.Cyborg.com") for the latest schedule of available courses and course descriptions.

Suggestions and feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to Customer Support.

CHAPTER 2

Data Structures

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Introduction

This chapter explains the physical and logical structures of the administrative solutions files for both the indexed and relational versions.

Questions answered

The following questions are answered in this chapter:

1. What are the major files used in the indexed version?
2. What are the physical structures of those files?
3. What is the purpose of those files?
4. What record types do those files contain?
5. How is the relational version organized?

The indexed version

This section explains the physical and logical structures used in the indexed version of The Solution Series and eCyborg.

Your system Database consists of two files: The System Control Repository and the Employee Database. Most processing involves the use of these files.

System Control Repository

Purpose

The System Control Repository serves as the Control file for The Solution Series and eCyborg. In job streams, it is named FILE01. It specifies how you will process human resource and payroll data.

Contents

The System Control Repository (Control File; FILE01) contains the following data:

- All application programs (source and object code)
- Field Name Table and Field Table Menu records (data dictionary)
- Documentation
- Option lists
- Application tables
- Other system information

Organization

The System Control Repository uses an indexed sequential organization. Records are 80 bytes, fixed length.

The physical record key is 24 bytes. It consists of a 1–3 position record type code and 21–23 additional characters of key information.

☞ *Refer to the Technical Administration guide for a complete list of the System Control Repository (Control File; FILE01) key record structures.*

Object Codes

The System Control Repository contains several record types. Some records have subsidiary record types. Each record type can be identified by a unique Object Code. For example, the Object Code for the ‘C’ records are as follows:

Object Code(s)	
Object	Object description
C	Option lists
C/D	Option list description
C/V	Option list values

They are required for several of the administrative solutions programs to select specific System Control Repository records for processing. Programs that require an Object Code are DISPLY, COPY, EDIT, PURGE, and EXPORT.

☞ *Refer to the Technical Administration guide for a complete list of the System Control Repository Object Codes.*

Employee Database

Purpose

The Employee Database serves as the Master File for The Solution Series and eCyborg. In job streams, it is named FILE02.

Contents

The Employee Database (Master File; FILE02) contains the following data:

- Report generators
- Company data
- Tax data
- Employee data
- Copies of object code from The System Control Repository
- Audit records
- 'Other' records (Pointer 39)

Object code is copied from the System Control Repository to improve program response time.

Organization

The Employee Database uses an indexed sequential organization. Records are variable length, with a maximum length of 3060 bytes. The record key is 32 bytes, which follows a 3-byte record length.

Record types

The Employee database contains several record types. Some records have subsidiary record types.

☞ *Refer to the Technical Administration guide for a complete list of the Employee Database (master File; FILE02) key record structures.*

Record segments

Company (record type D), employee (record type M), and tax (record type H) records are divided into logical subdivisions called segments. Each segment contains a particular type of information. They are sequentially ordered within a master record.

Type of segments

There are two types of segments:

- Single-occurrence—only one occurrence of the data exists for a particular master record. For example, company name and address will occur only once.

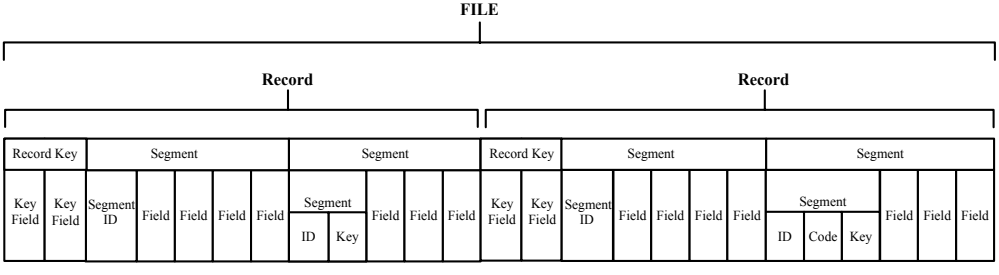
- Multiple-occurrence (stacked)—multiple occurrences of the segment type can exist for a particular master record. For example, there can be multiple occurrences for employee earnings and deductions segments.

How segments are identified

Each segment is identified by a unique one-character code called a Segment ID. For example, the Segment ID F identifies an employee's name and address segment.

Some multiple-occurrence segments (C, E, and L) are further divided by Segment Codes. For example, Segment Code EEA represents history hours, rate, and so forth, from the last payment.

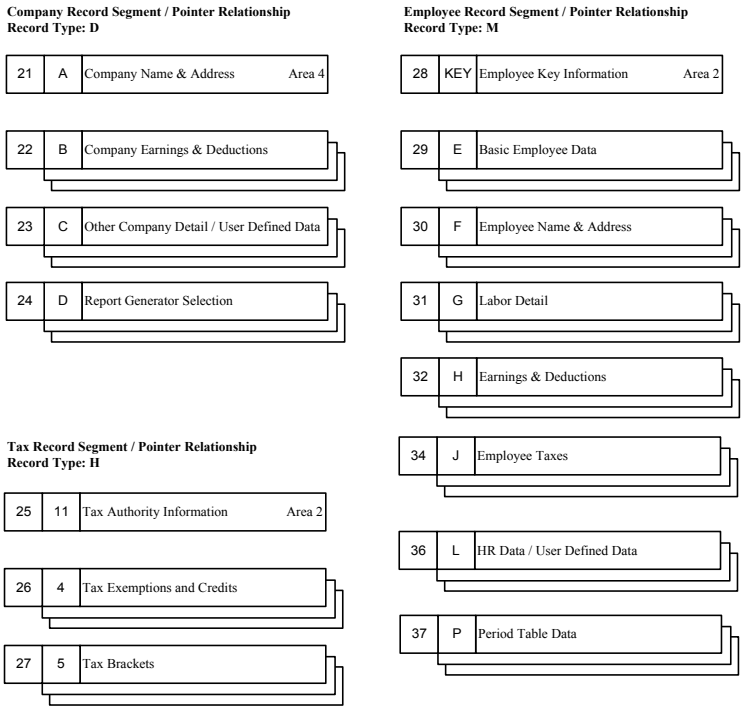
A Segment Key is further information that identifies a particular segment occurrence. The Segment ID (and possibly Segment Code) is always part of the segment key.



How segments are located by programs

Segments are located by a pointer. The Employee Name and Address segment (Segment F) is located by addressing Pointer 30.

☞ *Refer to Working Storage later in this section for more information on addressing data.*



☞ *Refer to the Technical Administration guide for a complete list of the Employee Database key record structures.*

Master File utility

A utility, DSP02, is provided for displaying Employee Database records.

Working Storage

Working storage resides in the CBSV COBOL programs. There are four main areas of working storage, as shown in the following figure—AREA1, AREA2, AREA3, and AREA4 are accessible to Cyborg Scripting Language (CSL) programs:

AREA1	**AREA2**
Pointer Table	Work (data from terminal/monitor)
Time Entries	Tax Master Record
Screen (data to terminal/monitor)	Employee Master Record
I/O buffer	
‘Other’ records	

AREA3	AREA4
Cyborg Scripting Language (CSL) Object Code Report Extract	Company Master Record

Each of the four main areas is subdivided into a number of work spaces. These work spaces are called ‘pointer spaces’ or simply ‘pointers’.

Data addresses

Pointers are a way to address data. The system uses pointers as an indexing technique to address every data element in working storage.

Each subdivision of working storage (each pointer space) can be viewed as a two-dimensional table. Each entry, or ‘occurrence’, in a table has a length defined by the Pointer Table that contains the address of each pointer.

To determine the location of a field in working storage, the system manipulates the Pointer Table by adding together a field’s displacement, as specified in the data dictionary, and the value of the pointer’s address. The system uses the result as a displacement within the specific area in which the field resides.

When writing CSL programs, the address of the pointer must be manipulated to point to the proper occurrence of the data.

Segment/pointer relationship

Employee Database records (company, tax, and employee) can contain many different types of data, divided into several segments. For example, the table below displays the different kinds of data in a master record for an employee. Each segment has one pointer used to address the location of the data within working storage:

Record	Pointer	Segment	Description
EMPLOYEE	28	Key	Employee Key information
	29	E	Basic employee data
	30	F	Employee name and address
	31	G	Labor detail
	32	H	Earnings and Deductions (HEDs)
	34	J	Employee taxes
	36	L	Human Resources data/user-defined data
	37	P	Period Table data

The relational version

This section explains physical and logical structures of the relational version of The Solution Series and eCyborg. It also explains the relationship between the indexed and relational versions.

General notes

The indexed and relational versions of The Solution Series and eCyborg look identical to the end user.

System Control Repository

System Control Repository replication

All option lists and certain application tables stored in the System Control Repository are also stored as relational tables and views. This data is available for reporting by third-party tools. For example, you can include both an option list code and its description on a report.

The Employee Database

In the relational version, company, tax, and employee data are stored in relational database tables. Each company and employee segment equates to a relational table. Stacked segments become multiple rows in a table.

The following table describes where the data from the Employee Database is physically located:

This component	Is stored
Organization Control Number and Employee Number	In the Employee Database.
Index (secondary key)	In a relational database table. Provides cross-reference tables where the actual data resides.
Employee and company data	In relational database tables.

☞ *Refer to the Technical Administration guide for information on the keys to the different record types.*

The data dictionary and DDL/DML

The data dictionary—the Field Name Table (F records) and Field Table Menu (RFM records)—serves as the basis for the generation of all data definition language (DDL) and data manipulation language (DML). The data dictionary contains information about each field used in the system. All option lists, and certain application tables, from the System Control Repository are replicated into relational tables. All Employee Database record segments are stored in relational tables.

CHAPTER 3

Overview of Reporting Administration

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Introduction

You have a great deal of flexibility when you want to report on data in the system. This chapter first provides a brief overview of all your reporting options, then concentrates on introducing the functionality provided by Reporting Administration.

Cyborg provides several tools to help you analyze and report on information about your organization, employees, and payroll. These tools are suited for different reporting purposes, and you will achieve the best results by using the tool that best suits your reporting requirement.

Reporting options available

Options for reporting on information in your system include:

- Packaged reports
- Solution View (online queries and batch reports)
- Reporting Administration

Packaged reports

Cyborg delivers hundreds of packaged reports developed using Cyborg's Fourth Generation scripting language, Cyborg Scripting Language (CSL). You can schedule the reports to be run using the Report Group Activities form. These reports are available for use as delivered, or for customization. You can also use CSL to create your own reports.

Note: You can locate the reports provided by Cyborg by launching the Report Group Activities form (RGMSTR) and adding a report group.

☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more detailed information about using The Report Group Activities form.*

☞ *Refer to the Cyborg Scripting Language training materials for details on how to customize and create Cyborg Scripting Language packaged batch reports.*

Solution View

Solution View is a delivered user tool for developing forms, fields, on request queries, extracts, and reports. Solution View consists of two main components:

- Query Writer is used to write programs that are run online by the QUERY program.
- Report Writer is used to write programs that are run in batch processing.

☞ *Refer to the Using Solution View training material for comprehensive information about this facility.*

Reporting Administration

This reporting option combines the power of the business intelligence tools from Cognos Corporation, a Cyborg strategic partner, with a value-added relational database (data mart) package from Cyborg. Reporting Administration includes the following:

- Additional functionality in the administrative client so you can launch the Cognos reporting tools directly from your work area.
- Cyborg-specific Impromptu catalogs for the delivered data mart, which promote intuitive user access to the data extracted from your system and placed in the data mart.
- Cognos reporting tools (Impromptu, PowerPlay).
- Support for Cognos' PowerPlay Online Analytical Processing (OLAP) package and the delivered Workforce Planning models.

Impromptu

The Impromptu tool is an integrated part of Reporting Administration. It simplifies on-request reporting for data extracted from your system.

Impromptu uses catalogs, LAN-based repositories of business knowledge and data-access rules, to allow an end user to capture and report on information without having to know SQL syntax or understand cryptic field names. The data in the catalog is organized for business use, as well as for system efficiency.

PowerPlay

The PowerPlay tool is a layer removed from Reporting Administration. It allows you to perform multi-dimensional analysis of your data. This is called Online Analytical Processing (OLAP) and provides a means to view data in terms of business trends. You can automatically build structures that summarize data for use in PowerPlay. The delivered Cyborg Workforce Data Mart can be accessed and utilized by this tool.

When using PowerPlay, you examine compiled data that is presented in PowerPlay 'cubes'. To support the cube presentation of data, you must have an appropriate catalog, Impromptu reports, and additional parameters (dimension maps, measurements, and banding definitions), in a compilation 'template' known as a PowerPlay model. Each PowerPlay model must be designed to support data analysis for a specific area of interest, such as workforce planning. Cyborg delivers two PowerPlay models: one Workforce Planning model for organizations using Position Administration, and one Workforce Planning model for organizations that do not use Position Administration.

Selecting the reporting tool

The following figure shows examples of when a user would typically use which reporting tool:

Type of report	CSL	Solution View	Impromptu	PowerPlay
Monthly summary report of current data	X			
Quick query for current data		X		
Quick data reports			X	
Statutory reporting	X		X	
Summary reporting	X			X
Subject matter expert (such as HR manager) reports to define up-to-date activity	X			

Type of report	CSL	Solution View	Impromptu	PowerPlay
Subject matter expert (such as HR manager) reports to define and report on activities during a defined time frame			X	
Subject matter expert (such as HR manager) reports to help plan future activities				X
Trend data on defined subject matter				X
New form		X		
Create form field		X		
On request query		X		
Create data extract		X		
Update live data	X			

Note: Reports created using Impromptu and PowerPlay use data which is only as current as the last data mart extract.

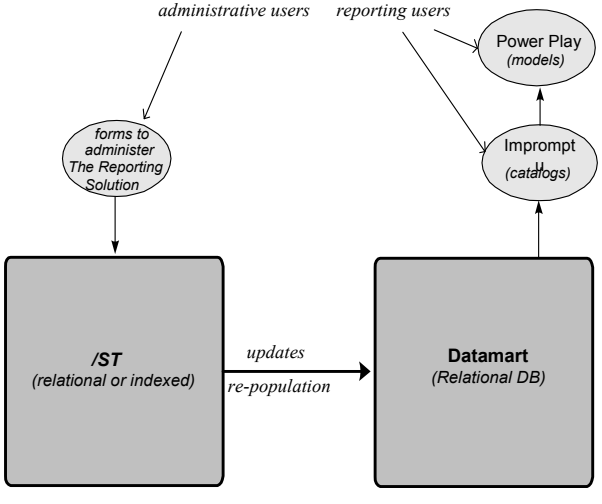
Third party database reporting process

Reporting Administration is primarily concerned with providing a refreshable, off-line copy of your system's data in a relational database format for user reporting purposes.

The major components in Reporting Administration are:

- Extracts—the entities and activities associated with (re)populating the data mart with your system's data.
- Data model—the layout of The Solution Series or eCyborg data within data mart tables.
- Cognos Tools—the third-party applications that support user reporting purposes.

The basic inter-relationship of Reporting Administration components is shown in the following figure:



Extracts, represented by the left side of the figure, include forms to administer and control updates to Reporting Administration, Cyborg Scripting Language extensions, and other entities that support (re)population of the data mart.

The data mart (and database) is shown in the lower right. Value added components are shown in the upper right of the figure and include the use of the Cognos applications Impromptu and PowerPlay.

Features of Reporting Administration

Reporting Administration provides everything you need to perform easy and meaningful reporting on your organization's data. Cyborg has successfully integrated all the pieces necessary to deliver a full featured reporting solution. It is easy to use and incredibly powerful.

Features of Reporting Administration include:

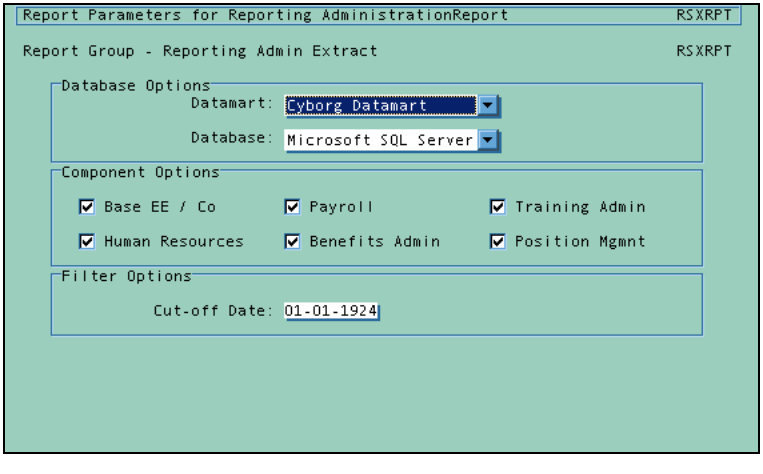
- Extraction routines
  - CSL data extraction routines
  - RG data extraction routine
- The data model
- Cognos reporting tools
- Cyborg catalogs
- Delivered PowerPlay models
- Enhanced data

Extraction routines

You are provided with the value-added capability to easily extract data and load it into the data mart. The data mart populated during the extract/import process seamlessly integrates with the Cyborg catalogs used by the Impromptu reporting tool. You create and run new reports containing your data selections from the catalog.

CSL data extraction routines

The extract process is based on the standard system functionality of the Report batch process. 'Reporting Administration Table Properties' and 'Report Parameters For Reporting Administration Extract Report' forms are used to maintain the pre-determined extract task list for the data mart. The Report Parameters For Reporting Administration Extract Report form (RSXRPT) allows you to choose the modules for which data will be extracted and to choose a cut-off date to help limit the amount of data extracted.



The table created by this form is primarily used as a task list for the extract process. In this capacity, any entry on this table that is enabled for extract is marked as 'turned on to run', enabling the associated Cyborg Scripting Language (CSL) extraction routine to be executed. The CSL routines are designed to extract all the data necessary to populate target Reporting Administration tables, and write it to the Data Mart Extract File.

☞ *Refer to Customizing the Extract Parameters (on page 169) for information on customizing this form.*

Report Generator data extraction routine

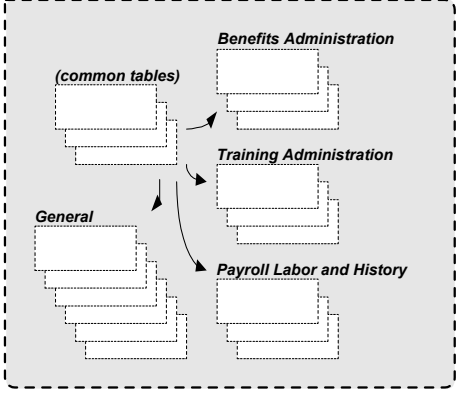
Rather than extracting Labor and History data from the Employee Database, it is extracted from the Batch Master File (P20) using the Report Generator (RG) routine: The data mart Labor and History Extract (7E7E).

The Data Model

Reporting Administration Data Model is a metadata representation of the data mart. It consists of over 170 tables organized into four subject areas and a collection of common areas. The four subject areas are:

- General
- Payroll Labor and History
- Training Administration
- Benefits Administration

The following figure shows the Data Model organization:



A spreadsheet is delivered with Reporting Administration, showing the data elements of the data mart and catalogs. This spreadsheet is delivered in an electronic format so you can add data elements or re-sort it to meet your needs.

☞ *Refer to the Reporting Administration Data Mart Data Model Guide for more details on the data elements.*

Cognos reporting tools

Cognos provides a suite of tools that support your business reporting needs. These tools include:

- Impromptu for on request and standard reporting
- PowerPlay for Online Analytical Processing (OLAP)

You may license a variety of these tools when you purchase The Solution Series or eCyborg, but an administrator's version of the Impromptu tool will always be licensed to you. The added functionality of the administrator tool (security configuration and catalog create/update authority) allows you to control user access to information.

☞ *Cognos provides extensive documentation and customer training programs for all of their tools. If you have a question about these products, contact Cognos Corporation (http://www.cognos.com).*

Cyborg catalogs

Cognos Impromptu users write reports that include both database and formatting data for a pleasing, informative presentation. An Impromptu catalog (one or more) is required before reports can be written. The catalog presents a filtering of the raw database organization that allows easy, quick report generation.

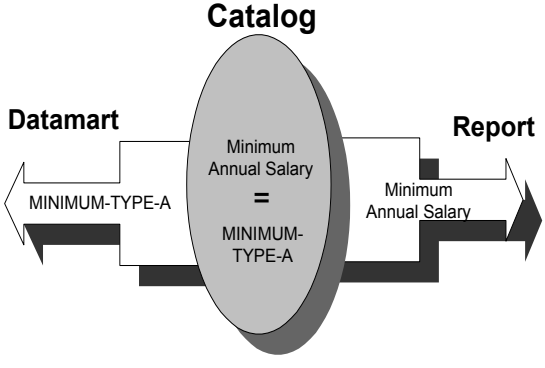
The Cyborg catalogs delivered with Reporting Administration are essential for Cognos Impromptu use. The following catalogs are delivered:

- General catalog (contains information most commonly used by the HR generalist)
- Payroll catalog (includes Labor and History)
- Training Administration catalog
- Benefits Administration catalog

Each catalog is a file containing the information Impromptu needs to present data logically, in a way that makes sense to users creating and running reports. In short, the catalogs provide logical views of the data. For example, if one relational table contains employee and salary data and a second table contains employee and department data, the catalog presents the logical view: employee data, salary data, and department data. Because the data is presented logically, the Impromptu user running a report does not need to know that the employee data is actually available from two sources (tables).

A catalog consists of LAN-based repositories of business knowledge and data-access rules (for example, table joins) that allow an end user to capture and report on information without having to know SQL syntax, or understand cryptic field names. By delivering the catalogs as part of Reporting Administration, Cyborg has eliminated the time-consuming task of interpreting and organizing the vast amount of data extracted from your system.

The catalogs provide a gateway between the user and the database, providing data links from the database standpoint, and providing meaningful field and table aliases from the user point of view. The Impromptu user can simply point and click to add information to a report, rather than search for database table joins and segment records. For example, if you want to include minimum annual salary information on a report, you do not need to know that the correct information is accessed from the MINIMUM-TYPE-A field; you need only access the information by selecting it from the relevant catalog. The catalog locates the correct data for your report from the data mart.



Each Cyborg catalog consists of one file that contains several folders, within which the fields (known as ‘columns’ in Impromptu) reside. Each of these folders may also have additional folders nested within it.

General catalog

Top level folders in the General catalog include:

Folder Name	Contains
Company Information	Organization information fields available for use in your reports.
Job Table Information	Job-level and salary-level fields available for use in your reports.
Employee Personal Information	Personal employee-level fields available for use in your reports.
Employment Information	Employment-level fields available for use in your reports.
Compensation & Salary Administration	Compensation and salary administration fields available for use in your reports.
Employee Attendance Information	Employee attendance fields available for use in your reports.

Folder Name	Contains
Employee Skills and Training	Employee skills and training fields available for use in your reports.
PM-Org Unit Information	Position Administration organization unit information fields available for use in your reports.
PM-Job Information	Position Administration job information fields available for use in your reports.
PM Position Information	Position Administration position information fields available for use in your reports.
PM Incumbencies	Position Administration incumbency-level fields available for use in your reports.
Requisition/Applicant Tracking	Requisition and applicant tracking fields available for use in your reports.
EEO/AAP Reporting Data	Equal Employment Opportunity and Affirmative Action Program reporting data fields available for use in your reports.

☞ *Refer to your Cognos Impromptu training documentation or the Using Reporting Administration documentation for information about accessing data from the catalog.*

Payroll catalog

Top level folders in the Payroll catalog include:

Folder Name	Contains
Company Information	Organization information fields available for use in your reports.
Employee Personal Information	Personal employee-level fields available for use in your reports.
Employment Information	Employment-level fields available for use in your reports.
Compensation and Salary Administration	Compensation and salary administration fields available for use in your reports.
Employee Payroll Information	Employee payroll information fields available for use in your reports.
Employee HED and Tax Summary Data	Hours, Earnings, and Deductions (HEDs) and tax summary data fields available for use in your reports.

☞ *Refer to your Cognos Impromptu training documentation or the Using Administration documentation for information about accessing data from the catalog.*

Training Administration catalog

Top level folders in the Training Administration catalog include:

Folder Name	Contains
Course Administration	Course administration-level fields available for use in your reports.
Class Administration	Class administration-level fields available for use in your reports.
Program Administration	Program administration-level fields available for use in your reports.
Employee Personal Information	Personal employee-level fields available for use in your reports.
Employment Information	Employment-level fields available for use in your reports.
Employee Training Administration	Employee training administration fields available for use in your reports.
Employee Skills, Education and Certs	Employee skills, education and certification fields available for use in your reports.

☞ *Refer to your Cognos Impromptu training documentation or the Using Reporting Administration documentation for information about accessing data from the catalog.*

Benefits Administration catalog

Top level folders in the Benefits Administration catalog include:

Folder Name	Contains
Company Information	Organization information fields available for use in your reports.
Employee Personal Information	Personal employee-level fields available for use in your reports.
Employment Information	Employment-level fields available for use in your reports.
EE Benefits Eligibility	Employee benefits eligibility fields available for use in your reports.
EE Benefits Enrollment, Coverage & Cost	Employee benefits enrollment, coverage, and cost fields available for use in your reports.
Employee Plan Details	Employee plan detail fields available for use in your reports.
Non-Discrimination Test Info	Non-discrimination test information fields available for use in your reports.
Dependents, Beneficiaries & Bond Holders	Dependant, beneficiary, and bond holder fields available for use in your reports.
Plan Name and Basic Rules	Plan name and basic rule fields available for use in your reports.
Plan Coverage & Contribution Rules	Plan coverage and contribution rule fields available for use in your reports.
Plan Contribution HED Set Up	Plan contribution-level fields available for use in your reports.
Plan Eligibility Rules	Plan eligibility rule fields available for use in your reports.
Plan Activity and Option Rules	Plan activity and option rule fields available for use in your reports.
Plan Flex Rules, Definitions & Formulas	Plan flex rule, definition, and formula fields available for use in your reports.
Deferred Plan Rules	Deferred plan rule fields available for use in your reports.
Plan Search Arguments & Co to Bene X Ref	Plan search argument and company to benefit cross-reference fields available for use in your reports.

☞ *Refer to your Cognos Impromptu training documentation or the Using Reporting Administration documentation for information about accessing data from the catalog.*

Delivered PowerPlay models

PowerPlay users examine compiled data in PowerPlay cubes that have been 'transformed' using a PowerPlay model (template). Users must have an appropriate catalog, specialized reports, and additional parameters (dimension maps, measurements, and banding definitions). Two models are delivered by Cyborg: the Workforce Planning Model with Position Administration and the Workforce Planning Model without Position Administration. Cognos PowerPlay tools are used to compile cubes that can then be used for OLAP.

Enhanced data

Derived data

Reporting Administration allows you to report on derived data. A straight extract from your system does not give you easy access to all the employee information you may need for reporting. Derived data would not be in the extract. For example, there are fields for employee age in the Catalog that can be used in reports to show the employee age in years, in years and months, or in years, months, and days. These fields are derived from the employee's birth date data. A derived data field avoids repeated calculations and simplifies reporting, giving you direct and easy access to employee information.

Effective dating

In order to perform as-of reporting on your data, the database must know the time period when the data in a table was effective (or if it still is effective). Each dated data record is extracted into the data mart with an effective begin date and an effective end date. The effective begin date is the effective date of the record in your system and the effective end date is derived during the extract process. These dates are then stored along with the data in the data mart so that it is date stamped for any kind of as-of reporting you may want to perform.

Note: This does not apply to Position Administration data.

Filtering data

The Cyborg-delivered catalogs contain some commonly used pre-defined filters. Filters select information by some single or multiple criteria. For instance, if you want to display a list of active employees, you want to enter a condition statement in a filter to more specifically request employees with an active status.

In addition, filters can be used to restrict access to sensitive data. Filters can also help improve performance as the number of retrieved records are limited.

Types of extracts

There are three class of extracts:

- Regular
- Position Administration
- Payroll, Labor and History

The baseline of activities necessary to (re)populate the data mart for each of these classes can be logically divided into three stages:

- Extracting all necessary data from The Solution Series or eCyborg

- Splitting the extracted data into per-table groupings (files)
- Loading the data for each table individually into Reporting Administration data mart

There are two extract/import processes performed, depending on the type of data you want—core system or Labor and History. The core system extraction copies data from the System Control Repository and Employee Database and places the copied data in the Data Mart Extract File (FILE36), a temporary system file. A COBOL program, the Data Mart Extract File Splitter (RSPLIT), creates separate files for every representative table, with the Data Mart Extract File as input. An SQL script generated by the extract process truncates (empties) the target data mart table via an SQL interpreter and a bulk loader then loads the data from the tables created by the splitter program into the data mart table.

The Labor and History extraction is a payroll-related process. It employs an incremental extraction strategy by accessing the Batch Master File (P20) twice, the first time to extract records into the Data Mart Extract File and the second time to mark the extracted records so they will not be extracted again. The Data Mart Extract File Splitter creates separate files for every representative table, with the Data Mart Extract File as input. A bulk loader then loads the data from these tables into the data mart table.

Reporting Administration client/server requirements

Before you can perform reporting tasks, you must have a client and a server. Clients and servers are not mutually exclusive; you can install both on the same machine. Reporting Administration requires that:

- The Solution Series or eCyborg be installed with the server on a supported relational environment.
- Cognos Impromptu be installed with the client on an environment compatible with the relational server environment.

In order to support the full functionality of Reporting Administration, your installation of The Solution Series or eCyborg could be either relational or indexed.

Security issues

The Solution Series or eCyborg

The Solution Series and eCyborg provides multilevel security. Your Security Officer should be aware of some additional security issues raised because of Reporting Administration.

For instance, only the system or database administrator should be able to launch Impromptu Administrator from the administrative client work area.

File level and operating system level security

Additionally, you need to use your standard operating system security to make sure only those authorized to do so can access, move, or copy the files resulting from the extract process. For example, you may decide that for your implementation, you only want an assigned database administrator to have edit authority over the Data Mart Extract File and only a system administrator to have the authority to move or copy files from the server.

Data Mart security

The security facilities provided by Impromptu do not protect the database. If a user can access the database through Impromptu, that user can also send straight SQL commands to the database. In addition, the file and record security of your system is not extracted to the data mart. You should therefore consider setting up database security on your information, as well as through Impromptu user classes.

You may wish to ensure the security of the data mart resulting from the extract process. These tables are located on the server after the extract/import operation is complete. Once created, you can move these tables anywhere. If they remain in the server at the location they were extracted to, they will be overwritten each time an extract is performed, which means these files (if not moved) always contain the most current extract data.

Note: Discuss the implications of moving the data mart from the default location on the server with your database administrator.

Note: If you move the data mart from the default location on the server, be sure the catalog on the client computer accesses the database in its new location.

Cognos Impromptu

Cognos Impromptu provides a security scheme that allows the Security Officer to assign different information access privileges to different user classes. Security within Impromptu is handled by Impromptu.

Cognos PowerPlay

The power cube can be compiled in such a way as to allow different user classes to view different levels of information.

PART 2

Planning

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CHAPTER 4

Planning for your Customization Project

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Introduction

As you have seen, Reporting Administration provides a powerful means of reporting on Human Resources and Payroll that will answer your end users' questions. The workflow of producing the reports belongs now to the user posing the questions. The workflow of keeping the reporting data up-to-date belongs to the system administrator. So what happens if the data available does not address an area your end users want to report upon? This chapter will help you determine what to do when this scenario arises.

Tasks

This chapter explains the following:

- Determining if a customization is necessary
- Determining the customization level
- Defining the customization requirement
- Planning for the implementation of your custom Reporting Administration

Questions answered

The following questions are answered in this chapter:

1. When is a 'customization' a customization to Reporting Administration?
2. How do you know when a customization is a requirement?
3. What are some alternatives to removing elements from the data mart?

Minimum requirements for a customization

Before you contemplate a customization project, be sure your organization is ready and able to perform the tasks to be done.

Required environment

You should set up development and test environments separate from your live system. During the project, alterations will be applied to your system, the data mart, and the catalogs, so none of the versions worked on must be the same as those on the live network.

Required software

To support an installation of Reporting Administration in the first place, you should have installed and configured the appropriate software environment (for example, NT server with SQL Server database management).

The Solution Series or eCyborg

All people involved in the alteration of Reporting Administration must be using a mirror image of the administrative solutions system you have live, including the installation and implementation of Reporting Administration.

The data mart

The person altering the delivered data mart must have an additional software tool for use when performing data modeling functions—System Architect, a data modeling tool. This is the tool Cyborg used to create the data model. Alternatively, you may use another tool, and use the delivered data definition language we provide when we deliver Reporting Administration, but the fit may not be not exact.

The catalog

The person altering the catalog must use the Impromptu Administrator software.

Required skills

It is rare when you find a single person with the varied skills required to perform a customization to Reporting Administration, which is why you will see references throughout this document to the ‘people’ who perform customization tasks. The people who work on a customization for Reporting Administration will need the following skills:

- Currently use or be familiar with The Solution Series or eCyborg
- Cyborg Scripting Language programming skills
- Report Generator programming skills
- SQL programming experience
- Knowledge of bulk load utilities
- Specific platform (operating system) knowledge, such as using system utilities
- Specific relational database knowledge, such as what files are include with the relational database being worked with
- Data model interpretation skills (generic)
- Cognos Impromptu knowledge

When is a customization a Reporting Administration customization

Technically, Reporting Administration is composed of a series of unrelated components that each perform a prescribed activity that just happens to support the activity another component performs. There are three distinct types of customization you can perform:

- Level 1—End user—an end user can use Impromptu to create custom reports solely for his or her use, or for the use of a group of people
- Level 2—Catalog administrator—an Impromptu catalog administrator can customize the Cyborg-delivered catalogs to limit or expand the information made available to specific users or user classes
- Level 3—Reporting Administration—a technical team can customize the back-end components and catalogs in order to allow the end user to report on additional data

There are all kinds of ways to customize Reporting Administration that do not involve touching the back-end components. Only when a back-end customization is required do we consider it a customization to Reporting Administration.

Any time you want to disallow reporting on a subject, it can be easily handled by having a Cognos administrator assign a higher level of security to a catalog or field within a catalog so the end user does not see the element as an option to report upon. The catalog can be changed so it does not reference specific data in the data mart at all. These activities are not considered customizations to Reporting Administration. For example, if you want only one person to have access to salaries, try setting up a new user class with authority to view salaries and add that person to the user class, thus preventing all other users from viewing the data. On the other hand, if you decide you must remove a field completely from the catalog/data mart, that is considered a customization requirement.

When you wish to add functionality in the form of additional data for reporting purposes, we consider this a Reporting Administration customization. This is because such an endeavor requires alterations to several back-end components. For example, if your organization has customized a Cyborg-delivered form (screen) to add a field and your end users need to report on this data, this would constitute a customization requirement. As part of the customization activity, changes would have to be made to at least one extraction routine, direct load format file, SQL script, and catalog.

Apply the Concept

An end user has been trying to report on Position Administration data, but has been unsuccessful. You quickly realize that the problem is that your organization has not implemented Position Administration. What level of customization would you consider first?

A. Level 1

B. Level 2

C. Level 3

Balancing requests and requirements

There is a delicate balance between a request and a requirement. Every item customized in Reporting Administration must be considered thoroughly and approved, because any customization can prove to be a complex activity and once you have made the customization, you must maintain it.

In order to prevent needless rework later, it makes sense to research your end users' needs before tackling any kind of customization. Your research may even reveal that a customization is not necessary to achieve their reporting requirements—it may mean they just need a more complex standard report created for them by a Cognos expert. A review of the data model by an experienced user and a DBA can often lead to the discovery of data in the data mart that may actually meet your end user needs.

Because future releases of Reporting Administration from Cyborg Systems may provide additional functionality, you should also look at each request in terms of whether it reflects a customization you have made to your system or whether the effort required to support this reporting will prove redundant. Considering the different types of skilled resources you must have for a single customization, it also makes sense to pool the customization requirements and formally plan a project to address a single customization effort.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this chapter.

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custom Reporting 47

Determining if a customization is necessary

To determine whether or not a customization is actually necessary, follow these steps:

1. Research the request

You have received a request for a customization. The first step is to research the request. Exactly what is it that needs to be reported upon? Meet with the requestor to get a good idea of what the request is about. Create an initial draft written requirement, so others are able to consider the request, as well. If the request is denied, you will have a record of the request.

2. Review the catalog and data model

Have an experienced Solution Series or eCyborg user review the catalog online and the Reporting Administration Data Mart Data Model reference guide to see if the end user can obtain the information via an alternative route. The findings should be documented.

3. Analyze your MAINTO

Review the output of a MAINTO operation on your current production environment, to see which customizations have been applied to your system. Analyze these changes to determine the impact on Reporting Administration and determine the customization tasks required.

4. Review the documentation for the request

Look through the documentation accumulated to be sure it is thorough and easy to understand.

See also:

- *Balancing requests and requirements (on page 44)*

For more suggestions for handling requests.

Determining the customization level

Once you have determined through your research that the delivered Reporting Administration does not support the end user need, you can scope the proposed customization for the type of effort that will be required.

Scope the work required

The following table provides examples of an easy way to determine the level of work that must be performed for these sample customizations.

Customization	Extraction routines	Direct load format file	SQL	Catalog	User Report
Add all the data from a custom form or table	X	X	X	X	
Need to filter data differently				X	X
Remove references to an application component (such as Training Administration) not supported by our organization				X	
Adding, modifying, deleting a field in the data mart	X	X	X	X	
Make a field in the catalog unavailable to end users				X	
Adding, deleting a table	X	X	X	X	

If the request involves any additional data, as a rule, it is a Level 3 effort.

If the request involves work that may be limited to customizing the catalog, it is a Level 2 effort.

If the request involves work that may be limited to the end user reporting tool, it is a Level 1 effort.

See also:

- *When is a customization a Reporting Administration customization (on page 42)*

For more information about scoping the work effort required to accomplish a customization.

Defining the customization requirement

Make a decision about whether or not the request should become a requirement and document your decisions.

1. Meet and discuss the request

Call a meeting when either a very important request has been researched or when some smaller requests have accumulated. This is where the end users must make the case that the return on investment is worthwhile for going through a customization project.

2. Determine the requirement from the MAINTO

Analyze the output from a MAINTO operation. Determine the nature and extent of the customizations to your system, and decide from this the extent of customizations needed for Reporting Administration.

3. Approve, deny, or postpone the request

4. Create a Requirements document

A Requirements document will help define exactly what it is you hope to achieve from your customization effort. It will help you in the planning stages of the project, as well as in the design phases, where the people responsible for performing the customizations and testing to ensure they are effective can scope out their own work.

5. Review and approve the requirements for your project

See also:

- *Balancing requests and requirements (on page 44)*
For more suggestions for handling requirements.

- *Analyzing your MAINTO (on page 51)*
For more detailed information on MAINTO analysis.

Planning for the implementation of your custom Reporting Administration

Once you have an approved Requirements document, you can proceed to the actual implementation of your customization project.

1. Create your team

The people who will be performing the customization activities must be comfortable with the tasks they will perform. They must have the appropriate skills and levels of expertise.

2. Create your environment

You must have a mirror image environment of the environment you have live. Coordinate with any other project teams performing customizations or planning software upgrades.

3. Provide detailed requirements

You must provide written documentation that is clear and easy for developers and testers to understand so they can ensure the customization's success when it reaches the end user.

4. Produce detailed technical designs

Because you will have to maintain any customizations you make, it is imperative that your developers create detailed technical designs, such as General Design and Detailed Design documents, that specify exactly what changes were made.

5. Customize Reporting Administration

☞ *Refer to the chapters later in this manual for more information on completing the tasks for customizing Reporting Administration.*

6. Test the customizations

Unless you thoroughly test a customization, you cannot ensure the end user will be satisfied. Any technical alterations made must be unit tested by the developers. System testing should be performed by assigned testers. Additionally, end user testing is a good way to ensure success.

7. Roll out your customizations

See also:

- *Minimum requirements for a customization (on page **41**)*

For more information about required team skills, as well as software requirements.

Review of Questions Answered

1. When is a ‘customization’ a customization to Reporting Administration?

2. How do you know when a customization is a requirement?

3. What are some alternatives to removing elements from the data mart?

CHAPTER 5

Analyzing your MAINTO

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Introduction

There may have been customizations made to your system, which need to be reflected in your Reporting Administration installation. This chapter explains how you can establish what customizations have been performed so that you can determine the actions you will need to perform to alter Reporting Administration.

Tasks

This chapter explains the following:

- Performing a MAINTO operation
- Locating customizations

Questions answered

The following question is answered in this chapter:

How is the MAINTO output interpreted? What does it mean?

Change Control Facility (MAINTO) interpretation

A great deal of the analysis you will be performing will be done while reviewing the output of a MAINTO operation on your current production environment. When you run the Change Control Facility (MAINTO), an output listing is produced in FILE10, which you can then use to locate areas of customized code. The following table describes the columns of the listing you would need to consider when customizing Reporting Administration:

Column	Description	Notes
23–24	Documentation id	
25	Macro id	
26–27	Pointer	Not all pointers in the system are used to hold data that is part of the data mart. Some pointers are used as working storage for your system to operate and as temporary working storage that CSL programs can use for data manipulation.
31–33	Displacement	
38–39	Edited length	
44–45	Segment	
76–79	PTF number	
80	Change code	This field indicates the type of difference between the original System Control Repository and the customized System Control Repository. Change Codes: ■ Blank = Record was added ■ A = Record was added ■ C = Content of the record was changed ■ D = Record was deleted

Program temporary fixes

Program temporary fixes (PTFs) will also display in your MAINTO output. These are identified by the PTF number in positions 76–79. Disregard these lines; the PTFs have already been applied to the delivered version of Reporting Administration code.

Output example:

```
         1         2         3         4         5         6         7         8
1...5....0....5....0....5....0....5....0....5....0....5....0....5....0....5....0
F BENEFIT-MAX-AGE     B4enter 650000.                                          C
F RETRO-START         B2format.                                                A
F RM-BEGIN-DATE       A4WRITER process.                                        D
B042750/B/  01    FILE24-RECORD.                                          5003
B042760/B/   05    FILLER          PIC X(512).                            5006C
C043000/C/+I   05      COMM-U              PIC(X)     VALUE `_'.          5007D
.
.
.
```

Obviously, you cannot simply look at this output and locate the required modifications; you must review the program code surrounding each and every modified line in order to perform an analysis of the customizations you have made and fully identify the impact of them on your system.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this chapter.

Task

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Performing a MAINTO operation

To locate any and all revisions to your System Control Repository (FILE01), you must use the Change Control Facility to perform a MAINTO operation in batch. This operation compares your current random System Control Repository (FILE01) with the original delivered sequential System Control Repository (FILE05). Any information that does not match with that in the delivered DEMO0105 file is identified on a per-line basis.

Execute the utility in batch

Execute this utility in batch as follows:

INPUT	FILE01	Custom System Control Repository (Control File)
	FILE02	Employee Database (Master File)
	FILE04	Control Record File
	FILE05	Delivered sequential control (DEMO0105)
OUTPUT	FILE03	Audit/Message File
	FILE10	System Control Repository Change File
EXECUTE	CBSVB	

The control record on FILE04 has the following syntax:

In these positions	Enter	Description
23–28	MAINTO	program name

Control record example:

```
         1         2         3         4         5
1...5....0....5....0....5....0....5....0....5....0....5
                      MAINTO
```

Locating customizations

There are several steps you can perform to identify the customizations you have made to the delivered system.

1. Remove all non-field records

The MAINTO file produced from Task 1 is an 80 character text file. Open the MAINTO file with a text editor and remove all lines that:

- Do not start with an 'F' in column 1
- Have documentation id data
- Have a macro id

Generally speaking, any change or addition to Cyborg segments will be an F record.

2. Sort fields

The file will initially be arranged in name order. Sort the file in ascending order by pointer, segment, displacement, and edited length.

Unless you have a sort utility that enables you to sort by multiple columns, you would probably have to sort the file manually. For example, you could use the NT SORT command to sort the file first by pointer, then manually sort the file by the remaining columns.

See also

- *Change Control Facility (MAINTO) interpretation (on page 53)*

For more information on identifying the appropriate MAINTO fields.

3. Remove fields out of pointer range

You will generally be looking for those records which are in the System Control Repository, Employee Database, Master File, or Employee Master. Fields such as Timecards are not part of the data mart and, as such, will not need customizing in Reporting Administration.

Remove fields with pointers of a value of:

- Less than 19, or
- Greater than 40

4. Remove fields that are not intended to be in the data mart

Not every segment and table record that is defined to the System Control Repository has been included in the data mart. Some segments and tables are legacy or have been used for conversion of data. Remove the fields which belong to segments or tables that are not included as part of the data mart. These should have been identified in the planning stage of the customization.

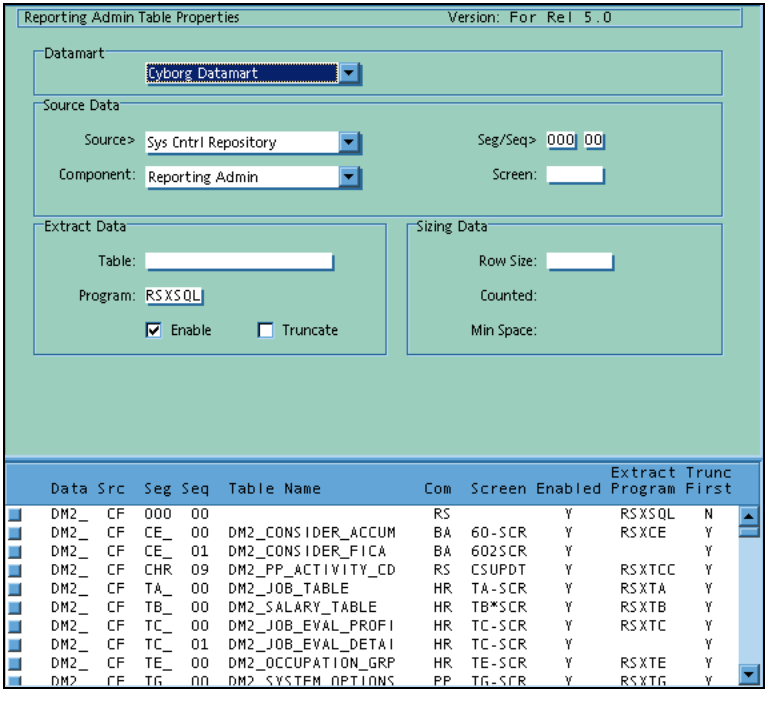
See also

- *Planning for your Customization Project (on page 39)*

For further details on planning tasks.

If you are uncertain if a segment is included in the data mart, you can examine the VRST table.

This is most easily done by clicking the Select button on the toolbar while displaying Reporting Admin Table Properties (RSXSCR) form:



Note: The VRST table does not contain any information for Position Administration or Labor and History extracts.

5. Remove PTFs

Any fields that were changed as a result of Program Temporary Fixes (PTF's) should already be taken care of in the data mart. Remove those belonging to required PTF's.

6. Remove redundant or non-material redefines

Sometimes fields get added which are synonyms for other fields. They may be used to display or print a field slightly differently. Remove any fields that are redundant or non-material redefinitions of fields intended for the data mart.

7. Remove non-atomic fields

Atomic fields are fields that cannot be broken apart into other fields. Non-atomic fields are those that concatenate or combine multiple pieces of data together into a single larger piece.

Sometimes fields get added as a method to concatenate multiple fields together. This new field is not atomic and should be removed as part of the data mart. All fields in the data mart should be atomic. If you find a field that is not atomic, you should consider decomposing it into its atomic components.

8. Remove fields based on standard data modeling techniques

The data mart was designed to follow the data model in first normal form (with a couple of exceptions). Remove fields which would otherwise violate first normal form, that is, remove repeating groups and make separate tables for them.

9. Validate option list descriptions

Option list descriptions should exist as pairs. The value field is bound to the option list for domain validation and the description field for displaying the matching description. All option list values should have a matching option list description. If an option list value field is bound to a new option list then the matching description field must be bound to this option list set as well. The edited length of all option list descriptions should be 20 characters. It may be necessary to add or modify option list description fields to match the correct option list and/or length of 20 characters.

10. Add foreign key columns

Foreign keys allow for the joining of rows in one table to another. Organization and Employee Master records contain segments. Each segment in an organization record must have the CONTROL_1 and CONTROL_2 columns added to represent the organization for which this row belongs. Similarly each segment in the Employee Master must have CONTROL_1, CONTROL_2, and EMPLOYEE_NUMBER columns to record which employee that row of data belongs to.

11. Add Until Dates for any effective dates

The system has many rows of data with an effective date. While this single date is adequate for ISAM retrieval of the correct row, it is not convenient for SQL queries. Any segment or table row of data that has an effective date must have an until date to indicate the date range that this row was in effect for. It is this effective date range that allows for the quick and easy retrieval of the correct row of data within a SQL query.

Note: An effective date is not the same as an event date. An event date is the actual date on which an event occurred.

12. Consolidate all segments about the same entity into a single table

Since each segment is a fixed length, sometimes a logical entity cannot fit on one single segment. When there are multiple segments used to hold all of the properties about a single logical entity, segments will need to be brought back together to form a single table about that logical entity. For example, the dependent entity will not fit in the required 72 bytes as it has several fields (L01, L02, L03), so these need to be concatenated into a single entity.

13. Review your system documentation

Most major program changes to a system are performed as a result of end user requests or location-specific requirements. Most systems have documentation that tracks revisions made to code. Use this documentation as part of your analysis of the system and the impact of your customizations on Reporting Administration.

See also:

■ *Data Structures (on page 11)*

For detailed information on segments and pointers.

Extended Practice

1. Looking at MAINTO Sample 1 in Appendix H, identify the customizations you would need to make.

2. Looking at MAINTO Sample 2 in Appendix H, identify the customizations you would need to make.

3. Examine MAINTO Sample 3 in Appendix H, and determine what customizations you would need to do to Reporting Administration.

Review of Questions Answered

1. How is the MAINTO output interpreted? What does it mean?

PART 3

Customizing

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CHAPTER 6

The Extraction Process

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Introduction

When your organization decides to customize Reporting Administration, it means you have to scope out the work and the tasks you must perform to achieve this end. This chapter will help you to ensure you understand the processes involved in extracting data from your system so that you can correctly plan for your customization.

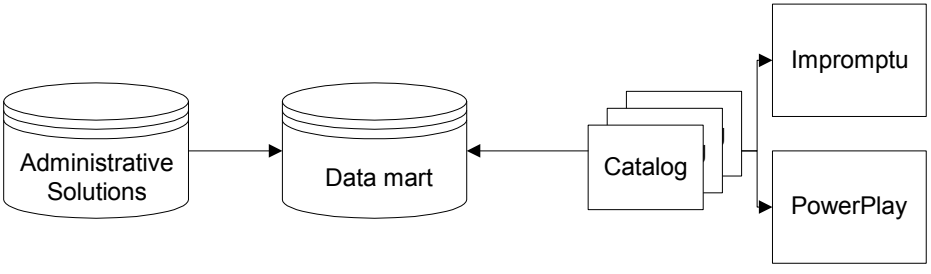
Questions answered

The following questions are answered in this chapter:

1. Which extraction routines are used for extracting Labor and History data?
2. Why would you want to restrict extraction to some system components?

Reporting Administration and the extraction process

At a high level, the extraction process for Reporting Administration looks like this:



Data is extracted and then loaded into the data mart. The data is then available for access by the Cognos tools, Impromptu and PowerPlay, through the catalogs.

How your data gets into the data mart

The goal

The goal is to make your system data available for reporting by the Cognos tools. To do this, the data must be stored in a data mart.

Getting the data out of your system

To set up an extraction, you use the Report Group Activities form (RGMSTR) to produce a task list of what data should be extracted. This task list tells the extraction routines what data to extract.

Looking at the extraction output

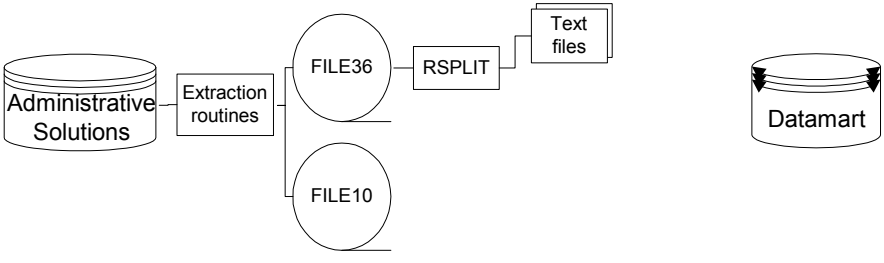
The two main files produced by the extraction are FILE36 and FILE10.

The extracted data cannot be directly loaded into the data mart tables. It is first stored in FILE36.

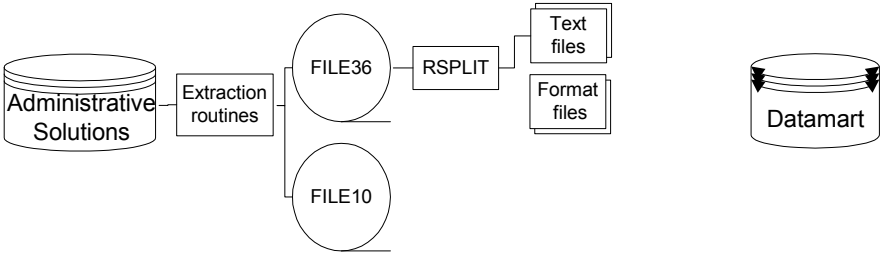
FILE10 contains the SQL necessary to truncate the data mart tables.

Prepping for the data load

FILE36 is sorted, and then a COBOL program, RSPLIT, produces a separate file for each data mart table to be loaded. These text files contain the extracted data in a format ready to be bulk loaded into the data mart.

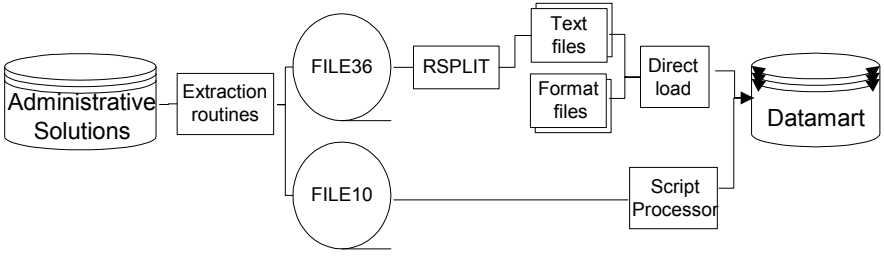


A direct load utility (for example, MS SQL Server's Bulk Copy Program [BCP]) is used to insert the data into the data mart. The direct load utility requires not only the data files, but also a format file for each of them that describes their content and the content of their target—the data mart. We deliver a set of format files.



Updating the data mart tables and loading the data

The Script Processor causes the SQL truncate commands to be executed. The direct load is then initiated, and the data is bulk loaded into the data mart.



When this is completed, an impromptu user with access to the data mart and the catalogs can begin reporting on data in the data mart.

Note: *This process differs for Payroll, Labor and History data, since payroll data is loaded incrementally. Instead of executing SQL truncate commands, the script processor will execute an SQL deletion script.*

See also

- *Extraction routines for Labor and History data (on page 78)*

For more detailed information on Labor and History extraction.

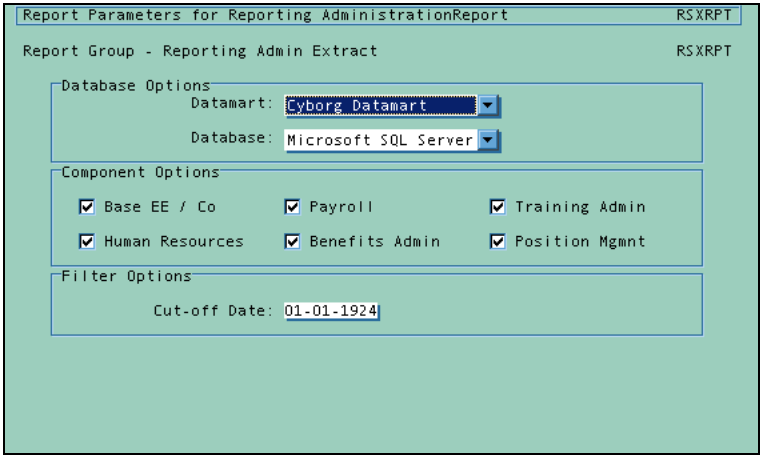
Extraction forms

The data extraction is set up using standard Report Group Activities (RGMSTR) and REPORT features. Two forms are provided that allow you to customize which data will reside in the data mart:

- Report Parameters for Reporting Administration Extract Report form (RSXRPT)
- Reporting Administration Table Properties form (RSXSCR)

Report Parameters For Reporting Administration Extract Report form (RSXRPT)

Perhaps the easiest way to customize what data will reside in the data mart is to use the options on the Report Parameters for Reporting Administration Extract Report form (RSXRPT) form:



Data mart

You can specify a particular data mart to which the extracted data should be written. There are two delivered data marts: the Cyborg Workforce Data Mart and the Test Data Mart. You could have multiple data marts, for example based on organization, or job function, and so forth.

Database

You can specify the target database type which will receive the extracted data.

Component Options

Not all organizations use all modules of The Solution Series or eCyborg. And not all modules are implemented at the same time. Restricting extraction to only those modules that are used can save time during the extraction process. For example, if a module has, say, 50 tables then there will be 50 subroutine calls per employee.

By default, data from all the modules is extracted. To indicate that the data for a particular module should not be extracted, simply clear the module selection.

Note: *Do NOT switch off module Base EE / Co.*

Filter Options

Using the Cut-off Date option, you can exclude the extraction of any data superceded prior to the date specified. For example, suppose you were interested in salary figures, and used a cut-off data of 05/06/1995 (US and Canada, excluding Quebec, or 06/05/1995 elsewhere). The only salary data extracted will be that accrued after May 6, 1995. As a performance-enhancing measure, you may want to consider setting the date such that data for only the last few years is extracted and reported on.

Note: *This text box should not be left blank.*

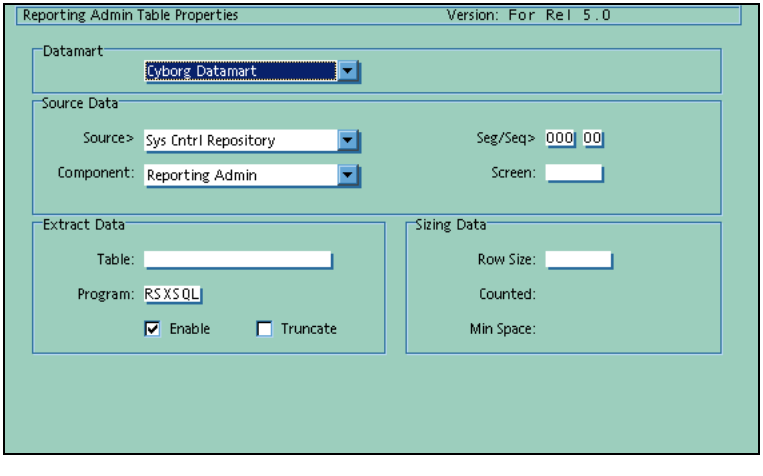
Note: *The Cut-Off Date option does not apply to Position Administration data.*

☞ *Refer to Customizing the Extract Parameters (on page 169) for further information on customizing Reporting Administration components.*

Reporting Admin Table Properties form (RSXSCR)

Use this form to define the task list for the extraction, including the name of the data mart you want the data inserted into. There is one entry for each table in each data mart. The information is stored in Reporting Administration Control Table (RSXVPT).

☞ *Refer to Reporting Administration Control Table Quick Reference (on page 267) for an example of the output from RSXVPT.*



Datamart

You can specify a which data mart will receive the extracted data.

Source Data

You can define the data extracted by specifying the following:

- Source—the source of the data you want to include
- Component—the group to which the table in the data mart belongs
- Seg/Seq
  - Seg—describes which segment within this data mart table the data is coming from
  - Seq—this is used when a segment feeds separate tables
- Screen—system ID of the form used to maintain this data

Extract Data

Then define where you want the data extracted to:

- Table—the table in the data mart
- Program—the name of the CSL extract program used to extract data for this table
- Enable—enable the extraction
- Truncate—truncate the data prior to loading it into the table

Sizing Data

Given the maximum row size, the sizing data will help you determine the number of rows used and the minimum space requirements for the data mart table. This is not a truly accurate figure, but indicates how big a row is in the Extract file (FILE36).

Overhead tasks

There are two entries that must be included in every data mart: RSXSQL (on an NT SQL Server environment), which extracts data and writes to FILE10, and RSVRS, which creates a table that is used later as a task list.

DM2_	CF	U2_	01	DM2_FLEX_PLAN_HED	BA	TKFSCR	Y		Y
DM2_	CF	URT	00	DM2_REQUIS_BASIC	PM	R10SCR	Y	RSXUT0	Y
DM2_	CF	URT	10	DM2_REQUIS_CANDID	PM	R11SCR	Y	RSXUT1	Y
DM2_	CF	VRS	00		RS	RSXSCR	Y	RSXVRS	N
DM2_	DF	H__	00	DM2_COMPANY_TAX	PR	T1-SCR	Y	RSXDFH	Y
DM2_	DF	H__	01	DM2_COM_TAX_QTR	PR	T1-SCR	Y		Y
DM2_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
DM2_	D_	B__	00	DM2_COMPANY_HED	PR	A8-SCR	Y	RSXB	Y
DM2_	D_	CAF	00	DM2_PAY_OPTIONS	PR	AF-SCR	Y	RSXCAF	Y
DM2_	D_	CAJ	00	DM2_PAY_FREQUENCY	PR	AJ-SCR	Y	RSXCAJ	Y
DM2_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
DM2_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
DM2_	M_	G__	00	DM2_EMP_LOCATION	PR	GG-SCR	Y	RSXG	Y

Learning about the extraction process

The extract process (RSXRPT) is based on the standard system functionality of REPORT, and uses the standard parameter passing and organization (Control 1-2) selection capability found with The Report Group Activities (RGMSTR) process. REPORT cycles through all of the data containers (control file, organization, and employee records) on the Employee Database (FILE02). For each data container, RSXRPT calls a pre-determined set of extract tasks. Each defined data mart has its own pre-determined set of extract tasks to perform.

Multiple data marts and multiple database vendors are supported from the parameters passed via RGMSTR. A subroutine-level tracing method allows tracing at the subroutine call level if needed.

Note: *Separate processes are used to extract Position Administration data and Labor and History data.*

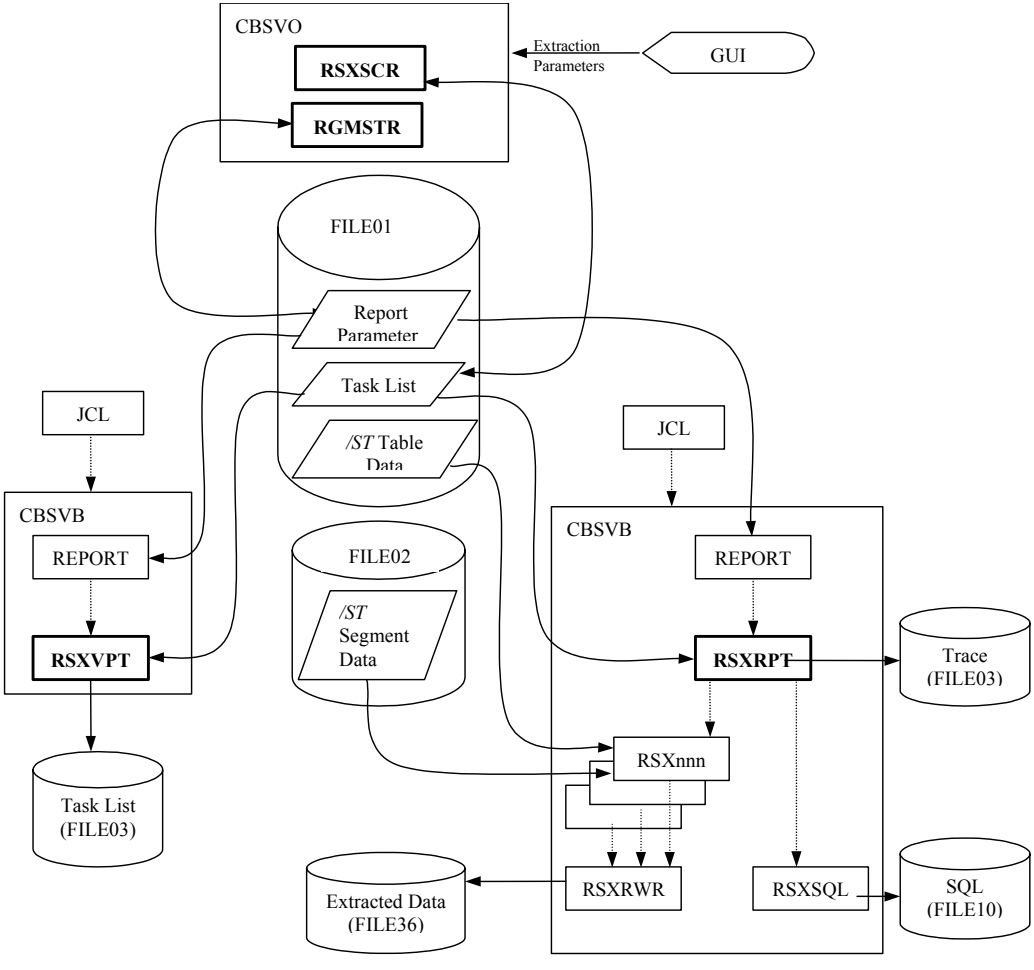
A standard System Control Repository (FILE01) table (RSXSCR) is used to maintain the pre-determined extract task list for each data mart. This extract task list is based on the container, segment, and sequence of the data to be extracted. Separate subroutines for each enabled item on the task list are loaded and called during a run of the extract process.

Reporting Administration Control Report (RSXVPT) lists the data mart task list for verification and maintenance. The following sample shows an example of this report:

DATA	SRC	SEG	SEQ	MODULE	TABLE NAME	SCREEN	EXTRACT	ENABLED	TRUNCATE
DM2_	M_	LPM	00	PM	DM2_EMP_INCUMBENCY	M40SCR	RSXLPM	Y	Y
DM2_	M_	LPR	00	HR	DM2_INJURY	PR-SCR	RSXLPR	Y	Y
DM2_	M_	LQ0	00	BA	DM2_EMP_RETIREMENT	65-SCR	RSXLQ0	Y	Y
DM2_	M_	LQ1	00	BA	DM2_EMP_PLAN	55-SCR	RSXLQ1	Y	Y

☞ *Refer to Customizing the Extract parameters (on page 169) for detailed information on Reporting Administration Control Report (RSXVPT).*

The following diagram shows the process flow for the extraction process:



RSXSCR: Table Properties form
RSXRPT: Report main program
RSXRWR: Writer for creating FILE36 records
RGMSTR: Report Group form
RSXVPT: Task List Maintenance report
RSXnnn: Extract subroutines

Extraction routines

There are three types of extraction routines:

- Extraction routines that extract System Control Repository and Employee Database data
- Extraction routines that extract Position Administration data
- Extraction routines that extract Labor and History data

Extraction routines for System Control Repository and Employee Database data

RSXRPT is the main program used to extract System Control Repository and Employee Database data. It writes extract data to FILE36 and the appropriate SQL script to FILE10. To accomplish these tasks, it uses CSL subroutines, including the following:

- RSXSQL SQL subroutine
- RSXnnn extract subroutines
- RSXRWR Writer subroutine

RSXSQL SQL subroutine

This subroutine writes all Structured Query Language required by the downstream process of loading the data into the data mart. It varies the syntax of the SQL by database type, as needed. It creates SQL script to use or open the appropriate database, truncate tables, or any other commands required. A command terminator follows all SQL commands issued. This command terminator is placed in the alternate language column (44) of the RS01 option list (codeset). This allows for dynamic usage of command terminators. All SQL script is written to FILE10.

After any initial commands are written, the extract task list (VRST table) is read and all tables that are enabled for both extraction and truncation will receive a ‘truncate table <table name>’ command.

RSXnnn extract subroutines

Each logical unit of data has an extraction subroutine associated with it. The name of each subroutine is a segment name or a System Control Repository/Employee Database table name. These subroutines are detailed on a task list on Reporting Administration Table Properties form (RSXSCR) and are called from the main extraction program, RSXRPT, when it is run.

☞ *Refer to Reporting Administration Control Table Quick Reference(on page 267) for a summary of the task list on Reporting Administration Table Properties form.*

The layout of the data extracted by each of these subroutines will match with the structure of its recipient data mart table. There will frequently be a one-to-one correspondence between the extract routines and database tables. On occasion, the data in the data mart will be more normalized than the data in your system, which will result in a single subroutine feeding multiple data mart tables. In some cases there may be two subroutines generating data for the same data mart table.

Each subroutine is coded using the same overall methods and architecture to minimize development, training, and customization time. All fields bound to an option list will have both the value and the description extracted.

Naming conventions for the extract subroutines

The ‘nnn’ in the extract subroutine name is the segment or table identifier for that data. For example, company name and address information is stored in the AA segment; the extract subroutine for the company name and address is named RSXAA. Similarly, the Job Code table in the System Control Repository (FILE01) is the TA table; the extract subroutine for the Job Code table is named RSXTA.

Coding tips

Do not use absolute pointer displacement references when field names can be used. Use delivered code when handling any non-atomic fields. Atomic fields are fields that cannot be broken apart into other fields. Examples of non-atomic fields are:

```
Last, First M Name          EDTFML
City and State              CSTEDT
```

RSXRWR Writer subroutine

The Writer subroutine encapsulates the writing of all extract data to a single subroutine called from every other extract subroutine. It performs any required prefix or postfix packaging prior to writing to FILE36.

The data output to FILE36 is not in an appropriate form for the bulk loaders. Therefore, FILE36 must be split into separate files, one for each table in the data mart. To support this post-extract processing, each line of extract data is prefixed with the information outlined below.

The following prefix pattern is used:

a	Length of extract record not including this field (this should be 19 bytes bigger than the figure shown in the Row Size text box of RSXSCR)
b	Data mart ID (option list RS03)
c	Container ID (option list RS02)
d	Segment or table ID
e	Child table sequence number
f	Extract row sequence number

For example, this is the prefix pattern used for the Company data, AA segment.

```
aaaabbbbccdddeeffffffff
0254DM2_D_AA_0000001041
```

To perform this service, RSXRWR will assume the following upon being called:

- The data to be written is in the SCREEN area
- The first position of the data in SCREEN is 1601
- The current position of SCREEN is at the end of the data

After the extract record has been prefixed, it is right-padded with spaces until the length of the extract record is met. The length of the extract record is stored in PERM-10. If the length of FILE36 changes, only one line of code will need to be changed to alter the length of the extract record.

Some data fields in the extract record end in spaces. Though these spaces are significant, some COBOL compilers will truncate trailing spaces from records. To prevent this, RSXRWR postfixes the records with a '.'.

Classes of Extraction routines

There are a few major classes of extract subroutines. A subroutine's class will be determined by the following variables:

- Target Tables
- Source Segments
- Repeating Groups
- Derived Until Date
- Direct File Reads (IO)

Target Tables

This is a Single or Multiple value, based on whether the extract program must extract data from your system to more than one table in the data mart. Some segments or tables contain data for more than one logical entity that needs to be split up in the data mart.

Source Segments

This is a Single or Multiple value, based on whether the extract program must concatenate data from multiple segments in order to extract a row of data for the data mart. Some entities in your system will not fit in a single segment or table record and, as such, more than one record must be read in or looked at during the extract.

Repeating Groups

This is a Yes or No value, based on whether the extract program must convert repeating data elements from your system to more than one row in the data mart. Some segments or tables contain repeating groups of data that must be converted to multiple rows in a single table.

Derived Until Date

This is a Yes or No value, based on whether the extract program must derive an until-date for segments or tables that have an effective date. All segments and tables containing an effective date are also given an until-date.

Direct File Reads (IO)

This is a Yes or No value, based on whether the extract program must control its own file input. All System Repository and some Employee Database extracts will have to control their own file input.

Extraction Class Summary Chart

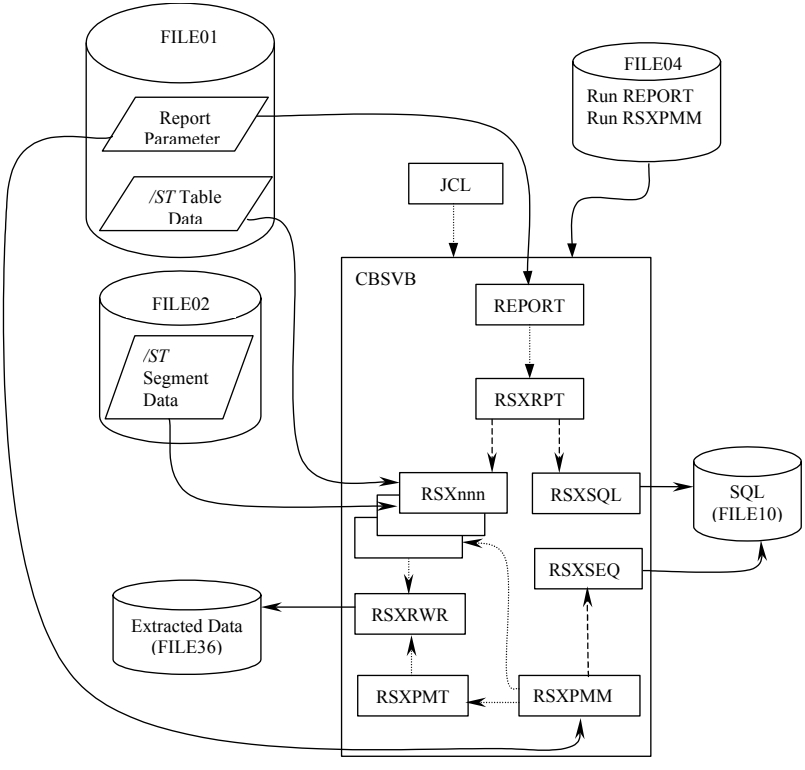
The following table shows a summary of classes of extraction routines:

Targets	Segments	Repeat Grp	Until Date	File IO	Count
Multiple	Multiple	Yes	No	Yes	3
Multiple	Multiple	Yes	Yes	Yes	6
Multiple	Single	No	No	No	3
Multiple	Single	No	No	Yes	1
Multiple	Single	Yes	No	Yes	1
Multiple	Single	Yes	Yes	No	2
Multiple	Single	Yes	Yes	Yes	4
Single	Multiple	No	No	No	3
Single	Multiple	No	Yes	No	21
Single	Multiple	No	Yes	Yes	11
Single	Multiple	Yes	Yes	Yes	1
Single	Single	No	No	No	34
Single	Single	No	No	Yes	5
Single	Single	No	Yes	No	23
Single	Single	No	Yes	Yes	9
Single	Single	Yes	No	No	3
Single	Single	Yes	Yes	No	5
Single	Single	Yes	Yes	Yes	4

☞ *Refer to Extract Programs by Class (on page 253) for a complete list of the delivered extract programs by class.*

Extraction routines for Position Administration data

RSXPMM is the main program that extracts Position Administration data. Similar to RSXRPT, it uses subroutines to extract data to FILE36 and to write SQL script to FILE10. The flow of this process is shown in the following figure:


FILE01
Report Parameter
/ST Table Data
FILE04
Run REPORT
Run RSXPMM
JCL
CBSVB
REPORT
FILE02
/ST Segment Data
RSXRPT
RSXnnn
RSXSQL
SQL (FILE10)
RSXSEQ
Extracted Data (FILE36)
RSXRWR
RSXPMT
RSXPMM

Position Administration extract subroutines

Data is extracted from Position Administration tables in the System Control Repository (FILE01). To determine which subroutine to modify for a customization, consult the following table:

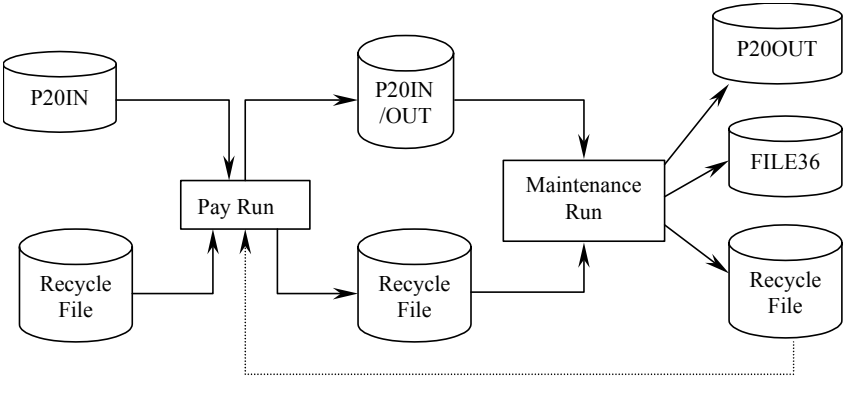
This routine	Extracts these records
RSXTB1	T0B01
RSXTB2	T0B02
RSXTB3	T0B03
RSXTBX	T0B10
RSXT0E	All T0E records are produced from the T0A and T0D records.
RSXT0X	T0X
RSXT0Y	T0Y
RSXT0D	T0D

Extraction routines for Labor and History data

Rather than extracting Labor and History data from the Employee Database (FILE02), it is extracted from the P20 file using a new Report Generator routine: The data mart Labor and History Extract (7E7E). Labor and History extraction uses an incremental strategy by accessing the P20 file twice during extraction activities; the first time to extract records, and the second time to mark the accessed records so that they are not extracted again.

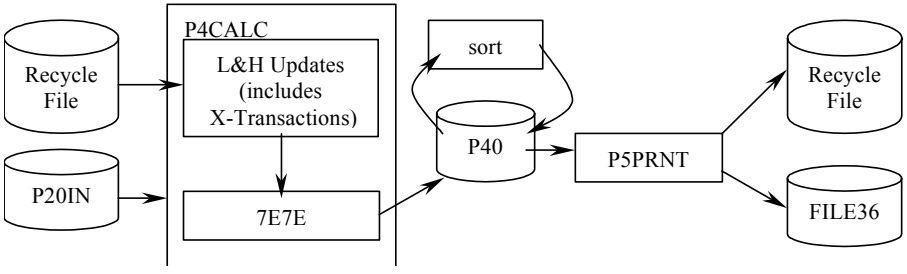
The Pay Run process and data extraction

The following figure shows the Pay Run process. The actual extraction process occurs as part of the ‘Maintenance Run’; this subprocess creates FILE36.



The flow from the Recycle File back to the Pay Run process indicates that this file can be applied on the next pay-run, or it could be applied in a second maintenance run, depending on the your organization’s procedures and preferences.

This next figure provides more detail on the Maintenance Run:



Note: If you did not use the Recycle File in your previous Payroll processes, you must now do so.

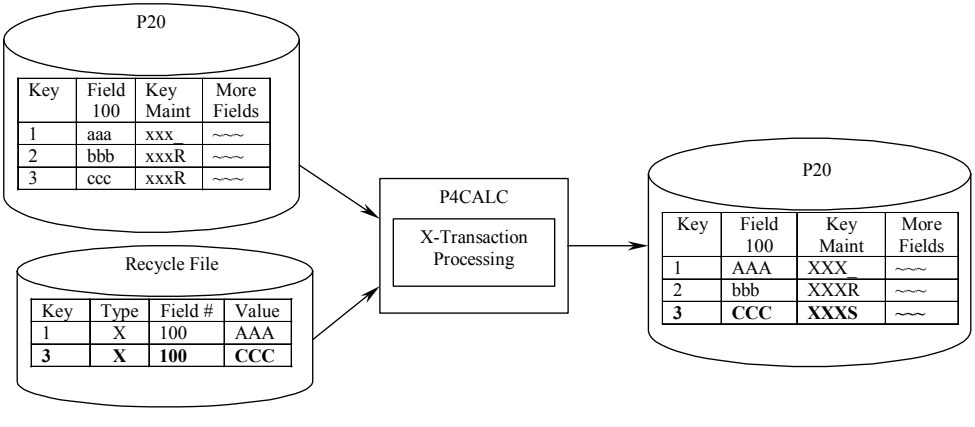
P4CALC and extract status

To support the Labor and History incremental extract, the fourth KEY-MAINT field is used as an indicator of extract status, as follows:

Value	Description
R	The data has been extracted.
S	The data has been changed since being extracted.

In the relational version, Paragraph 049-396-TEST once had logic to flag the KEY-MAINT fields with the value ‘P000’, if Labor or History records are changed. This has been altered to use only the first three 3 positions (‘P00’). In addition, logic has been added to test for a previously extracted record. If a change is made to such a record, it is flagged with the value ‘S’ to show that is has been altered after the data mart extraction. This permits the extract report Generator (RG) to identify it as an update to the data mart and RSPLIT to place these updates into a separate series of files.

The following figure illustrates an ‘X’ transaction causing a change to a record that has been previously extracted (record 3). In this example, Field 400 of the record gets changed from ‘R’ to ‘S’ in the resulting P20 file.



Data Mart Labor and History Extract Report Generator (7E7E)

7E7E is the Report Generator (RG) program that extracts the Labor and History data from the Batch Master File (P20). It also creates a Recycle File record to flag the fourth KEY-MAINT field with the value 'R', indicating that the record has been extracted. If the record is updated after extraction, P4CALC will flag the record with an 'S' in the fourth KEY-MAINT field, indicating that is should be extracted as an update. 7E7E will again generate the transaction to flag the record with an 'R'. The extracted records will contain a Group name with the prefix 'DM2_'.

Note: *The use of this generator requires that the Recycle File be controlled very carefully. It must be processed in the next run. If you schedule a series of partial pay runs, this implies that 7E7E is run on the normal maintenance run, and another maintenance run be used to apply the recycle file.*

7E7E will inspect FIELD 400 (the last position of the Key Maintenance field), and process according these rules:

Value	Processing action
R	The Labor or History record has already been extracted for the data mart and should be bypassed in this run.
S	The Labor or History record has been changed since being extracted, and must be extracted as an update.
Other	The Labor and History record has not yet been extracted and should have the appropriate records written to the P40OUT file, the format based upon whether a Labor or History record is being processed.

Re-extraction

To provide the ability to re-extract records that have already been flagged as extracted, the generator checks the USER FIELD on the Report Requests (DD-SCR) form for this generator. If the first three positions of the USER FIELD equals 'ALL', all records should be re-extracted for the organization (Control 1-2) with that entry. The assumption here is that once the re-extracted data makes its way through the process and is ready to be loaded to the data mart, the data mart tables are dropped via a Cyborg-provided truncation script, and a reload of the Labor and History part of the data mart will take place. This provides a simple re-create facility for the Labor and History portion of the data mart. To prevent possible problems during bulk loading of data extracted with 'ALL', the output records will have 50 added to their sequence numbers as in the update case, regardless of their disposition (never extracted, already extracted, or updated).

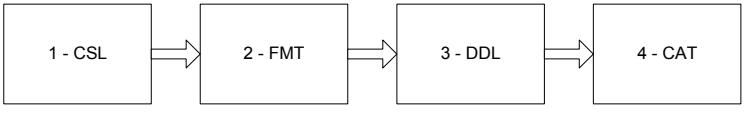
Note: *7E7E will extract any 'LG' occurrence that it detects—not just the now-available 'LG1', 'LG2', and 'LG3'.*

RPT24

Field 400, as defined by sequence number 400 in Table Generator RPT24, has been changed to enable the 'E[space]' transaction, by putting E space in positions 31 and 32 of the defining record. On CYBMST, or as an override, these are positions 34 and 35.

Extract flow

As discussed, there are four main process in the extract process—running the extract script (1), splitting the data (2), bulk copying the data (3), loading the data into a catalog (4). Any customizations you make to Reporting Administration have to be reflected in each of these four processes. This can be summarized in the following figure:



This depicts modifications that need to be made to Cyborg Scripting Language (CSL) subroutines (1), direct load format files (2), DDL statements (3), and finally, the catalogs (4).

It is not important in which order the changes are made, but you need to be sure that all four areas are customized.

Directory structure for Reporting Administration

The following table shows an example of the directory structure (for the NT/SQL Server environment) for Reporting Administration, showing the new folders added for Reporting Administration.

Folder	Description	Example
bcperr/ lderr	Contains the errors and bad data detected during the bulk load process. There will be one bad data file for each data file loaded.	cfta_00.bad—TA table errors file
fmt/ ctl	Contains the bulk loader format files.	cfta_00.fmt—TA table BCP format file
logrs	Contains the log information from running the bulk loader. There will be one log file for each bulk load control file. It may also contain other Reporting Administration specific log files.	cfta_00.log—TA table BCP log file
prog	Contains the executable programs.	rsplit—FILE36 splitter
runs	Contains the script files.	jrsxrpt.bat—script for populating data mart with non labor and history data jrsxpay.bat—script for populating data mart with Labor and History data
sql	Contains the SQL scripts for database execution.	rsxrpt.10—SQL script generated from rsxsql subroutine r2_working_sql.sql—SQL script to create the working tables for updates r2_purge_sql.sql—SQL script to purge existing data prior to loading r2_datamart_sql.sql—SQL script for creating data mart objects r2_alter_sql.sql—SQL script for altering data mart objects r2_purge_lh_sql.sql - SQL script to purge existing data
txt	Contains Reporting Administration data extracted from your system in text format.	cfta_00—TA table text data

Review of Questions Answered

1. Which extraction routines are used for extracting Labor and History data?

2. Why would you want to restrict extraction to some system components?

CHAPTER 7

Customizing a Field

In This Chapter

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Extended Practice 112
Review of Questions Answered.....113

Introduction

This chapter will help you to ensure you perform the appropriate tasks for customizing fields in Reporting Administration.

Tasks

This chapter explains the following:

- Adding the DDL statements to the override file
- Modifying a field in the direct load format file
- Modifying a field in the CSL RSXnnn subroutine
- Modifying a field in the Cognos catalog(s)
- Testing your customization

Prerequisites

Before you can customize Reporting Administration, you must:

- Determine if customization will provide a good return on investment
- Identify the items you wish to customize

☞ *Refer to Planning for your Customization Project (on page 39) for more information on creating project requirements.*

☞ *Refer to Analyzing your MAINTO (on page 51) for information on using your MAINTO to determine required customizations.*

Questions answered

The following question is answered in this chapter:

Under which circumstances must you customize a CSL program when you add a field to the data mart?

Direct load format files

A direct load program format file is a map of the data being added to a database table. A direct load format file is a text file that uses a columnar format.

Note: Each database management system has a direct load facility. For example, in MS SQL Server, it is the Bulk Copy Program.

There is one direct load format file for each database table that will receive data via the direct load utility. Each direct load format file must match exactly with the table structure as defined by that table's Data Definition Language (DDL).

If you add, modify, or delete a field from the extract process, you must edit the corresponding direct load format file. To determine which format file to edit, use either Reporting Administration Table Properties (RSXSCR) form or Reporting Administration Control Report (RSVPT).

Note: If your organization is not using a particular module—for example, Training Administration—you do not need to delete the direct load format files.

☞ *Refer to The Extraction Process (on page 63) for more detailed information on Reporting Administration Table Properties or Reporting Administration Control Report.*

A set of direct load format files are delivered with the system. They are named using the following convention:

Position	Explanation	Example
1–2	Container	CF
3–5	Segment	CE_
6–7	Sequence number	01

Valid values for the containers (record sources) are contained in the Record Source option list (RS02). Valid values are as follows:

Code	Option List Name
CF	Sys Control Repository
DF	Employee Database
D_	Company Data
MH	Employee History
ML	Employee Labor
M_	Employee Data

☞ *Refer to Option Lists for Reporting Administration (on page 231) for further information on option lists for Reporting Administration.*

Following is a sample direct load format file from an NT/SQL server environment.

```
Col 1   Col 2         Col 3   Col 4   Col 5     Col 6   Col 7
6.0
7
1       SQLCHAR       0       2       ""        1       CONTROL_1
2       SQLCHAR       0       4       ""        2       CONTROL_2
3       SQLCHAR       0       10      ""        3       EMPLOYEE_NUMBER
4       SQLCHAR       0       10      ""        4       PERIOD_TABLE
5       SQLCHAR       0       6       ""        5       PERIOD_WEEKS
6       SQLCHAR       0       8       ""        6       PERIOD_HOURS
7       SQLCHAR       0       12      ".\r\n"   7       PERIOD_AMOUNT
```

The following table explains the columns in the file:

Line number	Column number	Contains
1	1	Direct load version number
2	1	Number of columns of data in the table
3–9	1	Host file field order
	2	Host file field data type
	3	Host file field prefix length
	4	Host file field maximum length
	5	Host file field terminator
	6	Table column order
	7	Table column name

At a minimum, a direct load format file will contain three lines.

AS/400

Unlike on the other platforms, the format files for AS/400 systems could change frequently, depending on the change to the table structures, and these format files are based on created system names. Every column name and table name is translated to a 10-character name following a specific naming convention. This naming convention takes the first 5 characters of a field or file name and then adds a unique 5-position number to the end.

The command to load data into DB2 tables on AS/400 systems is CMPFRMIMPF. This command uses a format file to understand the positioning of data to be loaded. Each table in the database will receive data via the CMPFRMIMPF command and will have its own format file. Each format file will match exactly the layout of the data being copied. This layout is similar to the table structure as defined by the table's DDL with some exceptions. The system-generated short filenames and short column names are used in the format file.

The following sample shows the import format file for DM2_CONSIDER_ACCUM:

```
1)                      COUNTRY_ID                1        1        0
2)                      SSN_OR_SIN                2       13        0
3)                      ACCUM00001               14       16        0
4)                      ACCUM00002               17       26       27
5)                      CE_H_00001               28       28        0
6)                      CE_H_00002               29       48        0
```

```
7)                          CONSI00001                  49        59        0
8)                          CONSI00002                  60        66        0
9)                          CONSI00003                  67        73        0
10)                         CE_H_00003                  74        83       84
11)                         *END
```

Lines 1–10 define the column, starting position, ending position, and the position for the null identifier. Line 11 indicates the end of the format file.

EXCEPTS table

If a field to be changed is a date field, and there is the possibility that this field would contain no information (that is, all blanks), then an additional space would need to be included after the date to indicate whether or not the field was null. If this is the case, then the EXCEPTS table would need to have a row inserted to accommodate this. If the characters being printed in the extract do not match the size of the field in the database, then this, too, will need to be reflected in the EXCEPTS table.

The following sample shows an example of the EXCEPTS table:

```
*...+....1....+....2....+....3....+....4....+....5....+....6...
CYBDM3    DM2_ABSENCES        ABSENT_POINTS       NN        004
CYBDM3    DM2_APPRAISAL       ACT_RETURNED_DATE   NY        000
CYBDM3    DM2_APPRAISAL       AP_DISTRIB_DATE     NY        000
CYBDM3    DM2_APPRAISAL       RETURN_DT_EXPECTED  NY        000
CYBDM3    DM2_ASSOCIATION     ASSOCIATION_EXPIRE  NY        000
CYBDM3    DM2_AUTH_TIME_OFF   REMAIN_AS_OF_DATE   NY        000
CYBDM3    DM2_AVG_DEFERR_PCT  ADP_DATE_CREATED    NY        000
CYBDM3    DM2_BENEFICIARY     BENEF_BIRTH_DATE    NY        000
CYBDM3    DM2_BONUS           DATE_BONUS_PAID     NY        000
CYBDM3    DM2_CAN_EM_TAX_QTR  TAX_QTR             NN        001
CYBDM3    DM2_CITIZENSHIP     VISA_EXPIRE         NY        000
CYBDM3    DM2_CLASS_SCHEDULE  COURSE_END_DATE     NY        000
CYBDM3    DM2_CLASS_SCHEDULE  GROUP_AVERAGE       NN        003
CYBDM3    DM2_COBRA_QUALIFY   NOTIFIED_EE_RIGHTS  NY        000
CYBDM3    DM2_COBRA_QUALIFY   NOTIFIED_HR         NY        000
```

If this table is changed, then it must be sorted.

Detailed Directions

This section provides detailed instructions for completing the tasks required to customize a field.

Note: In order to complete the customization of a field, you would need to complete all the tasks in this section in the order presented.

Task

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Modifying a field in the CSL RSXnnn subroutine..... 95
Modifying a field in the Cognos catalog(s)..... 99
Testing your customization..... 107

Note: The Guided Practice exercises in these tasks are based on an SQL Server environment. They use, as an example, a system where the USER_FIELD_E field in the employee table will be replaced by two fields, XEE_USER_CLASS_CD and XEE_USER_CLASS. This simply requires a redefinition of the USER_FIELD_E, which includes an option list description. The basic task is to delete USER_FIELD_E and replace it with XEE_USER_CLASS_CD and XEE_USER_CLASS.

Adding the DDL statements to the override file

To add the DDL statements to the override file, follow these steps:

1. Open the override file

Use a text editor to edit or create r2_alter_xxx.xxx, where ‘xxx’ signifies the database type used. This file will result in the necessary script to drop and recreate tables in the data mart. For ease, open both the r2_datamart_xxx.xxx file and the r2_alter_xxx.xxx at the same time.

For practice, open sql\r2_alter_sql.sql and sql/r2_datamart_sql.sql.

2. Copy the DDL statements

Search for the table drop statement for the appropriate field and copy and paste that section of DDL statements from the r2_datamart_xxx.xxx into r2_alter_xxx.xxx. Also copy the table definition statement for that field. You can find the table name for the field by using the RSXSCR form.

Note: You should append all amendments to the end of the r2_alter_xxx.xxx file. Do not delete previous entries.

For practice, copy and paste the DM2_EMPLOYEE table drop and table definition DDL statements from r2_datamart_sql.sql into the end of r2_alter_sql.sql.

3. Amend the override file

Amend the r2_alter_xxx.xxx file to reflect the required customization changes. If you are deleting a field then it is recommended that you comment out the field definition statement rather than deleting it. When adding new field definitions, the field name should be in upper case. When adding option list information, the standard is that the field definition is first, followed by the option list definition. It is recommended that the field names chosen for the new fields are the same as they are in your system, replacing the dashes (-) with an underscore (_).

For practice, comment out the line associated with USER_FIELD_E and add 'XEE_USER_CLASS_CD char(001) null' followed by a next line of 'XEE_USER_CLASS varchar(020) null', as in the following sample:

```
/* ========================================================== */
/*   Table: DM2_EMPLOYEE                                      */
/*          Date: MM/DD/YYYY  Author: Your Name Here          */
/*          Drop USER_FIELD_E                                 */
/*          Add  XEE_USER_CLASS_CD                            */
/*          Add  XEE_USER_CLASS                               */
/* ========================================================== */

if exists (select 1
            from  sysobjects
           where  id = object_id('DM2_EMPLOYEE')
            and   type = 'U')
   drop table DM2_EMPLOYEE
go

create table DM2_EMPLOYEE
(
    CONTROL_1           char(2)              not null,
    CONTROL_2           char(4)              not null,
    EMPLOYEE_NUMBER     char(010)            not null,
    SSN_OR_SIN          varchar(012)         null    ,
    PAY_FREQUENCY_CODE  char(001)            null    ,
    PAY_FREQUENCY       varchar(020)         null    ,
    PAYMENT_CODE        char(001)            null    ,
    PAYMENT_TYPE        varchar(020)         null    ,
    STATUS_CODE         char(002)            null    ,
    STATUS              varchar(020)         null    ,
    SEX_CODE            char(001)            null    ,
    SEX                 varchar(020)         null    ,
    RACE_CODE           char(002)            null    ,
    EEO_RACE            varchar(020)         null    ,
    LANGUAGE_CODE       char(2)              null    ,
    LANGUAGE            varchar(20)          null    ,
    UNION_CODE          char(005)            null    ,
    UNION_NAME          varchar(020)         null    ,
    WORKERS_COMP_CODE   char(005)            null    ,
    BIRTH_DATE          datetime             null    ,
    EMPLOYMENT_CODE     char(002)            null    ,
    EMPLOYMENT_SOURCE   varchar(020)         null    ,
    EMPLOYMENT_DATE     datetime             null    ,
    TERMINATION_CODE    char(002)            null    ,
    TERM_CAUSE          varchar(020)         null    ,
    DATE_OF_TERM        datetime             null    ,
    SHIFT_CODE          char(001)            null    ,
    SHIFT_CODE_DESC     varchar(020)         null    ,
```

```
SPLIT_CODE          char(001)          null    ,
SPLIT_CODE_DESC     varchar(020)       null    ,
JOB_CATEGORY_CODE   char(004)          null    ,
JOB_CATEGORY        varchar(020)       null    ,
/* USER_FIELD_E        char(001)          null    ,*/
XEE_USER_CLASS_CD   char(001)          null    ,
XEE_USER_CLASS      varchar(020)       null    ,
FAIR_LABOR_CODE     char(001)          null    ,
FAIR_LABOR_CD_DESC  varchar(020)       null    ,
COMMISION_FLAG      char(1)            null    ,
COMMISION_DESC      varchar(20)        null    ,
PERIOD_OVERRIDE     numeric(02,0)      null    ,
EMPLOYEE_SECURITY   char(002)          null    ,
KEY_FIELD_1         char(001)          null    ,
```

4. Execute the script

In order for the alter script to take effect, you will need to execute it using your database query program.

For practice, execute the script by performing the following steps:

a. Launch ISQL
b. Login as sa
c. Select R2_Test as the database
d. Open r2_alter_sql.sql
e. Click the Execute Query button on the launchbar
f. The message 'This command did not return data, and it did not return any rows' should be displayed in the Results tab

Modifying a field in the direct load format file

AS/400

This task does not apply to AS/400 systems. If you are running Reporting Administration on an AS/400 system and you need to modify a field, follow these steps:

1. Modify database

Make the appropriate changes to modify the field in the database.

Note: You may need to involve your DBA when making changes to the database.

2. Run RSXCOLNMS

This program creates the format files. It is run originally during the installation process and does not need to be run again unless there is a database change.

To modify a field in the direct load format file, follow these steps:

Note: These steps apply to non-AS/400 systems only.

1. Open the Reporting Admin Table Properties form (RSXSCR)

To determine the correct format file to work with, you would use the Reporting Admin Table Properties (RSXSCR) form. Open this form by making the following selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Administration Task List

For practice, open the Reporting Admin Table Properties form.

2. Select the field

Examine the VRST table to identify the appropriate field.

This is most easily done by clicking the Select button on the toolbar while displaying Reporting Admin Table Properties (RSXSCR) form:

Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
DM2_	D_	B__	00	DM2_COMPANY_HED	PR	A8-SCR	Y	RSXB	Y
DM2_	D_	CAF	00	DM2_PAY_OPTIONS	PR	AF-SCR	Y	RSXCAF	Y
DM2_	D_	CAJ	00	DM2_PAY_FREQUENCY	PR	AJ-SCR	Y	RSXCAJ	Y
DM2_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
DM2_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
DM2_	M_	G__	00	DM2_EMP_LOCATION	PR	GG-SCR	Y	RSXG	Y
DM2_	M_	H__	00	DM2_EMPLOYEE_HED	PR	HH-SCR	Y	RSXH	Y
DM2_	M_	H__	01	DM2_EMP_HED_QTR	PR	HT-SCR	Y		N
DM2_	M_	H__	02	DM2_DIRECT_DEPOSIT	PR	H9-SCR	Y		Y
DM2_	M_	JCA	00	DM2_CAN_EMPLOYEE_TAX	PR	JJ-SCR	Y	RSXJCA	Y
DM2_	M_	JCA	01	DM2_CAN_EMP_TAX_QTR	PR	JT-SCR	Y		N

You can identify the correct format file to work with using this form by interpreting the combination of Source and Seg/Seq. For example, with a source of Employee Data, a Segment of EE_, and a sequence of 00, the name of the format file can be identified as M_EE_00.fmt.

Refer to Reporting Administration Control Table Quick Reference (on page 267) for a list of source, sequence and segment codes.

For practice, open the VRST table, search for, and select the DM2_EMPLOYEE table.

3. Make a copy of the format file

Make a copy of the format file. You can use this copy later on to do a file compare if you need to evaluate the changes between the two versions.

For practice, make a copy of fmt\M_EE_00.fmt and name this copy fmt\M_EE_00.000.

4. Open the format file

Use a text editor to edit the format file, found in the fmt directory.

For practice, open fmt\M_EE_00.fmt.

5. Edit the format file

Make the relevant changes to the format file, as identified in the customization requirement. This file will end up with the necessary mapping information to load text data into the altered table.

For practice, find the line for USER_FIELD_E and replace it with definitions for the XEE_USER_CLASS_CD option list and XEE_USER_CLASS field, as in the following sample:

```
27      SQLCHAR      0      1      ""       27      SHIFT_CODE
28      SQLCHAR      0      20     ""       28      SHIFT_CODE_DESC
29      SQLCHAR      0      1      ""       29      SPLIT_CODE
30      SQLCHAR      0      20     ""       30      SPLIT_CODE_DESC
31      SQLCHAR      0      4      ""       31      JOB_CATEGORY_CODE
32      SQLCHAR      0      20     ""       32      JOB_CATEGORY
33      SQLCHAR      0      1      ""       33      XEE_USER_CLASS_CD
34      SQLCHAR      0      20     ""       34      XEE_USER_CLASS
35      SQLCHAR      0      1      ""       35      FAIR_LABOR_CODE
36      SQLCHAR      0      20     ""       36      FAIR_LABOR_CD_DESC
37      SQLCHAR      0      1      ""       37      COMMISION_FLAG
38      SQLCHAR      0      20     ""       38      COMMISION_DESC
39      SQLCHAR      0      2      ""       39      PERIOD_OVERRIDE
40      SQLCHAR      0      2      ""       40      EMPLOYEE_SECURITY
41      SQLCHAR      0      1      ""       41      KEY_FIELD_1
42      SQLCHAR      0      1      ""       42      KEY_FIELD_2
43      SQLCHAR      0      1      ""       43      KEY_FIELD_3
44      SQLCHAR      0      1      ""       44      KEY_FIELD_4
45      SQLCHAR      0      1      ""       45      CLEAR_ANNIV
46      SQLCHAR      0      30     ""       46      EMPLOYEE_NAME
47      SQLCHAR      0      20     ""       47      PREFIX_NAME
48      SQLCHAR      0      20     ""       48      FIRST_NAME
49      SQLCHAR      0      20     ""       49      MID_NAME
50      SQLCHAR      0      20     ""       50      LAST_NAME
51      SQLCHAR      0      20     ".\r\n"  51      SUFFIX_NAME
```

6. Resequence

You may need to resequence the file if you have added or removed fields. Be aware that there are two columns of sequence numbers, both of which will require resequencing.

For practice, resequence both sequence columns.

7. Amend line count

Alter the count on line 2 of the format file to equal the number of columns in the BCP file. This should match the number of lines in the format file.

For practice, change the count from 50 to 51.

8. Save the file

Save and close the format file.

For practice, save and close M_EE_00.fmt.

See also:

- *Direct load format files (on page **87**)*
  For more detailed information on direct load format files.
- *Reporting Administration and the extraction process (on page **65**)*
  For further information on the format file.
- *Extraction forms (on page **68**)*
  For detailed information on the Reporting Admin Table Properties form (RSXSCR).

Modifying a field in the CSL RSXnnn subroutine

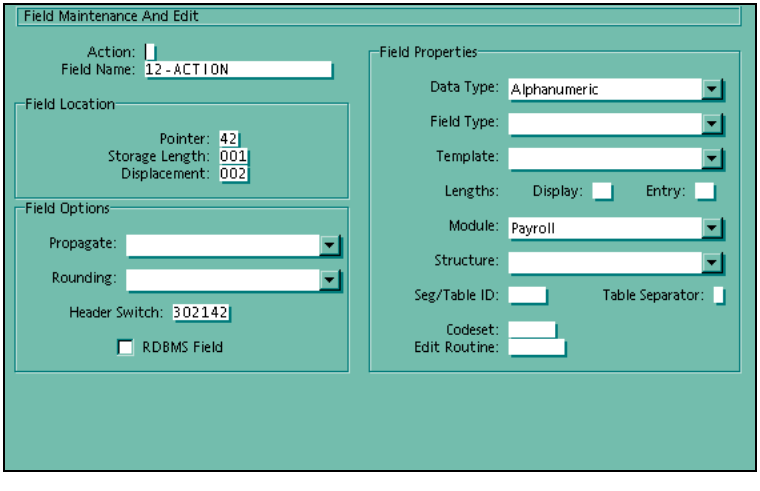
To modify a field in the CSL subroutine, follow these steps:

1. Open the Field Maintenance And Edit form (F-NAME)

Open the Field Maintenance And Edit form by making the following selection:

Component: Development Tools
Process: Fields and Verbs
Task: Define A Field

For practice, open the Field Maintenance And Edit form:



2. Add new fields

Add any new fields by entering the details in the text boxes and pressing Enter.

For practice, add XEE-USER-CLASS-CD and XEE-USER-CLASS fields by completing the forms as shown in the following examples:

Field Maintenance And Edit

Action: A
Field Name: XEE_USER_CLASS_CD

Field Location
Pointer: 29
Storage Length: 001
Displacement: 060

Field Options
Propagate:
Rounding:
Header Switch: 100410
RDBMS Field

Field Properties
Data Type: Alphanumeric
Field Type: (None)
Template:
Lengths: Display: Entry:
Module: Payroll/HRMS
Structure: Seg has ID and Code
Seg/Table ID: E Table Separator:
Codeset: PP00
Edit Routine:

Field Maintenance And Edit

Action:
Field Name: XEE-USER-CLASS

Field Location
Pointer: 29
Storage Length: 001
Displacement: 060

Field Options
Propagate:
Rounding:
Header Switch: 100410
RDBMS Field

Field Properties
Data Type: Alphanumeric
Field Type: Codeset Description
Template:
Lengths: Display: 20 Entry:
Module: Payroll/HRMS
Structure: Seg has ID and Code
Seg/Table ID: E Table Separator:
Codeset: PP00
Edit Routine:

3. Open the Edit Utility

Open the Edit Utility by making the following selection:

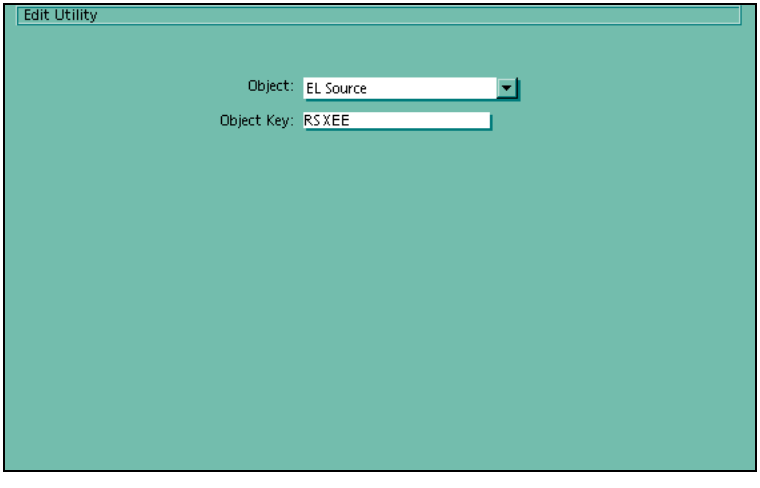
Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

For practice, open the Edit Utility.

4. Open the RSXnnn extract program

Open the RSXnnn extract program, where 'nnn' is the segment for the field, as identified in Task 2. This file will end up with the necessary CSL to extract text data for the altered table.

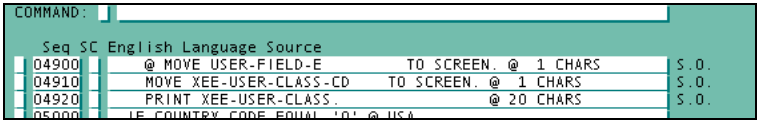
For practice, open the RSXEE extract program.



5. Edit the RSXnnn extract program

Modify the RSXnnn extract program.

For practice, edit the extract file as in the following sample:



AS/400

Field lengths must match the number of characters in the extract. If this is not the case, you must edit the EXCEPTS table. If this table is amended, it must be sorted.

If the field being added is a date, and there is the possibility that the date could be null, then an additional space must be added after the date field.

The following sample shows an example of the required extract file modifications:

```
COMMAND:

   Seq SC English Language Source
 03800   PRINT W8-06-711/WHOLE '.' W8-02-717. @  9 CHARS
 03900   PRINT DATE-BONUS-PAID.               @ 10 CHARS
 03910 @ IF SPACE EQUALS DATE-BONUS-PAID      @ @S38**          S.O.
 03920 @ PRINT 'Y'                            @ @S38**          S.O.
 03930 @ ELSE PRINT ' '.                      @ @S38**          S.O.
 04000   MOVE AUTHORIZE-LOCATION   TO SCREEN. @  4 CHARS
 04100   PRINT AUTHORIZING-LOC-DESC.          @ 20 CHARS
 04200   MOVE AUTHORIZED BY        TO SCREEN. @ 30 CHARS
```

See also

- *EXCEPTS table (on page 89)*

For more information on the EXCEPTS table.

6. Open RELOAD

Open the RELOAD form by making the following menu selection:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

7. Reload RSXnnn

Reload RSXnnn by typing the name of the program in the MODULE NAME text box and pressing Enter.

For practice, reload RSXEE.

```
Compile a Source Program                                          RELOAD

        The RELOAD program compiles a given program's source
        code.  When executed, RELOAD reads the source program
        and checks for syntax errors and validates field names.
        If no errors are found an object module is created.

                 Complete the text boxes below, then hit enter:  X

                 Enter MODULE NAME: RSXEE
```

The following message will display if the changes were successful:

```
RSXEE  99999E   RELOAD IS OK.  Ver-4.0 LENGTH  1,592 03-31-00 14:26:54
```

See also:

- *Extraction routines (on page 73)*

For more information on the RSXnnn extract subroutine.

AS/400

When a field is being changed/added/deleted, then the following things need to be considered:

- CSL extract program—this will need to be amended as indicated in this task.
- RSPLIT (COBOL) and JRSXSPLIT (CSL program)—the associated file needs to have the length changed to correspond with the change.
- Database—the appropriate table will need to be changed to reflect the field modifications.
- Format file—this will need to be amended to reflect the change, and you will need to rerun the RSXCOLNMS program.

Modifying a field in the Cognos catalog(s)

Identify all of the catalogs you will have to change. This can most easily be done using the Content Overview Report produced from Cognos Impromptu.

☞ *Refer to your Cognos Impromptu documentation for details on producing the Content Overview Report.*

For each catalog to be changed you will have to perform the following steps:

1. Launch Impromptu Administrator

If the Impromptu Administration icon has been added to the administrative client Launch Toolbar then select it to launch the application.

If there is no Impromptu icon on the Launch Toolbar, then make the following selection from your Windows desktop:

Start ▶ Programs ▶ Cognos ▶ Impromptu Administrator

For practice, launch the Impromptu Administrator application.

2. Close Welcome dialog

The Welcome dialog may display as Impromptu opens. Close this dialog.

For practice, close the Welcome dialog if it displays.

3. Open the catalog

You can identify which catalog contains the relevant tables by examining the Impromptu Content Overview Report. Open the relevant catalog by selecting the following menu option:

Catalog ▶ Open

Select the catalog and click Open.

For practice, open the General catalog and click Open.

4. Log in as Creator

Select Creator from the User class: option list, and click OK.

For practice, select Creator from the User class: option list, and log in with the user id of sa, password of master. Click OK.

5. Open the Tables dialog

Open the Tables dialog by making the following menu selection:

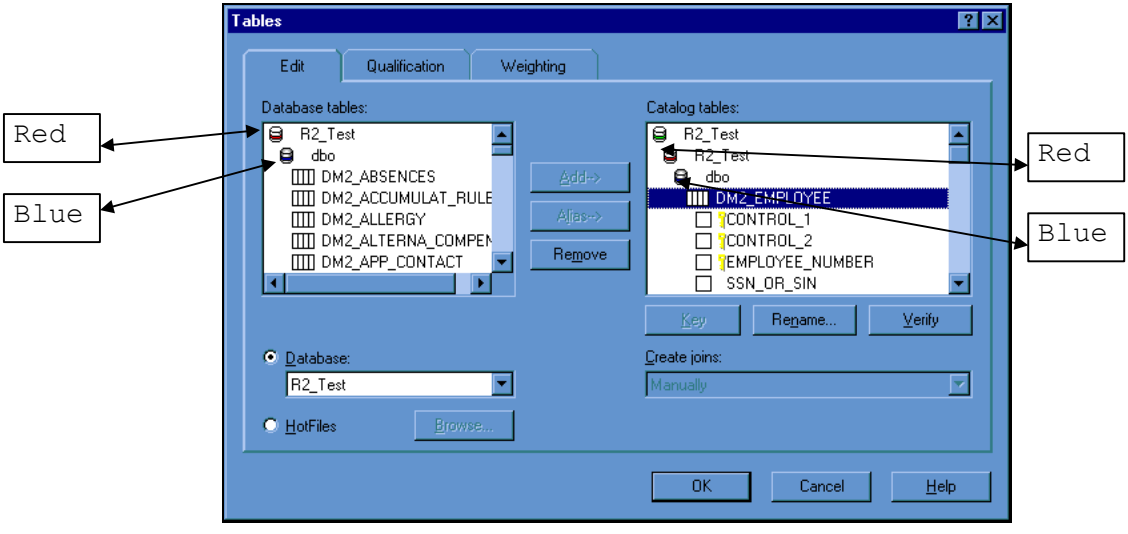
Catalog ▶ Tables…

For practice, select the Catalog ▶ Tables… menu option.

6. Select the table in the Catalog tables dialog

Note: Before you begin amending the tables, ensure that the Catalog table and the Database table names match both in name and color. Select the table in the Catalog tables dialog. If they do not match, you may need to use the Rename button located below 'Catalog tables'

For practice, expand the R2_Test catalog table, then dbo, and then double-click DM2_EMPLOYEE table in the Catalog tables dialog.



7. Select the column

Select the column within the table to be deleted.

For practice, click the USER_FIELD_E column.

8. Click Remove

Click Remove to delete the Cognos column. A warning dialog will display:

For practice, click Remove to delete the USER_FIELD_E column.

9. Click OK

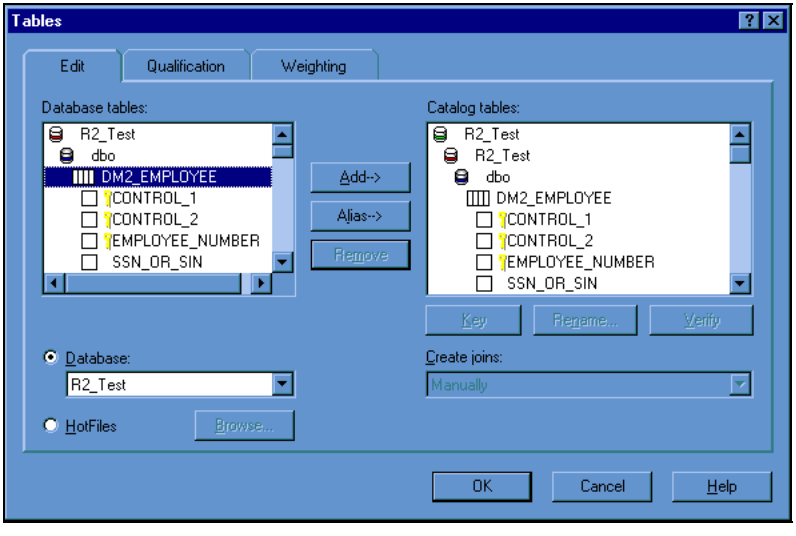
Click OK on the Remove Tables dialog to delete the column.

For practice, click OK.

10. Select the database table

Select the database table in the Database tables box.

For practice, expand the R2_Test database table, then dbo, and then double-click DM2_EMPLOYEE table in the Database tables dialog.



11. Select the new column

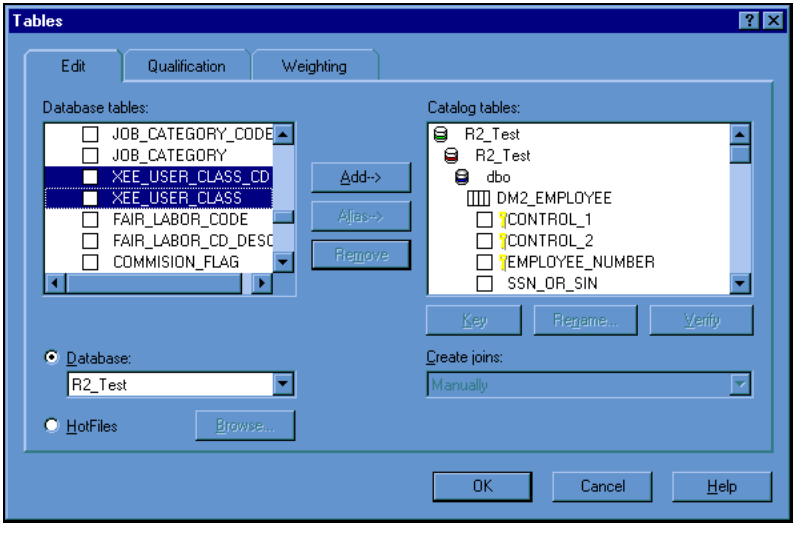
Click the new column to add to the table.

For practice, click XEE_USER_CLASS_CD.

12. Select any subsequent columns

Control-click any subsequent columns to add to the table.

For practice, control-click XEE_USER_CLASS.



13. Click Add—>

Click Add—> to add the columns to the catalog table. This will add the columns to the bottom of the list in the Catalog tables box. The order in which the columns appear is not significant.

For practice, click Add—>.

14. Click OK

Click OK to save your changes. The Joins dialog will display.

For practice, click OK.

15. Click Cancel

Click Cancel on the Joins dialog.

For practice, click Cancel.

16. Open the Folders dialog

Open the Folders dialog by making the following menu selection:

Catalog ► Folders…

For practice, select the Catalog ► Folders… menu option.

17. Click Generate…

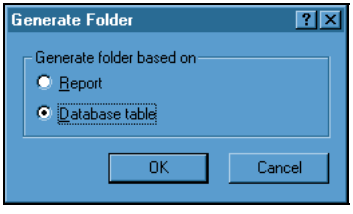
To generate a folder based on the structure of the database, click Generate… on the Folders dialog. The Generate Folder dialog will display.

For practice, click Generate….

18. Select Database table

Select the Database table radio button on the Generate Folder dialog.

For practice, select the Database table radio button.



19. Click OK

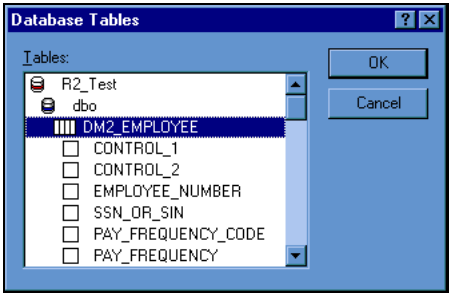
Click OK. The database Tables dialog will display.

For practice, click OK.

20. Select the table

Select the table from the Database Tables dialog.

For practice, expand R2_Test, then dbo, and select the DM2_EMPLOYEE table.



21. Click OK

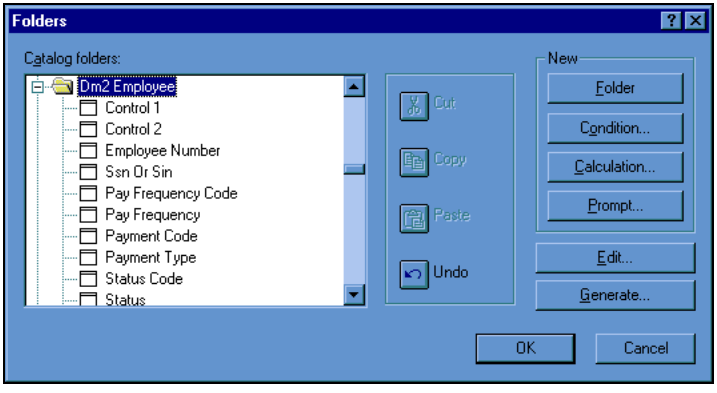
Click OK to create the folder.

For practice, click OK.

22. Expand the folder

Double-click the appropriate folder in the folders dialog to expand it.

For practice, double-click the DM2_employee folder.



23. Select the previously added columns

Select the column added in steps 11 and 12.

For practice, select the XEE_USER_CLASS_CD and XEE_USER_CLASS columns.

24. Click Cut

Click Cut.

For practice, click Cut.

25. Expand the Admin folder

You must add the new columns to the Admin folder. This folder represents an untouched, clean copy of everything in the catalog. Double-click the Admin folder to expand it.

For practice, double-click the Admin folder.

26. Expand the destination folder

Select a folder in which you want to put the new columns. Double-click the folder to expand it.

For practice, double-click the DM2_EMPLOYEE folder.

27. Click the column you want to insert before

When you add the new columns, they will be inserted before the column selected.

For practice, select Fair Labor Code.

28. Click Paste

Click Paste to add the columns to the folder.

For practice, click Paste.

29. Repeat steps 27 and 28 for any other folder to add the columns to

For practice, add the new columns to Employee Personal Information ► Employee Other Personal Information.

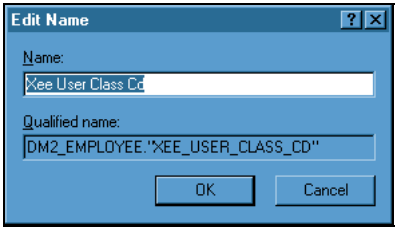
30. Select the new column

The new column name has to be renamed to one that is more meaningful.

For practice, select XEE_USER_CLASS_CD in the Employee Personal Information ► Employee Other Personal Information folder.

31. Click Edit…

Click Edit… to change the name. The Edit Name dialog will display.

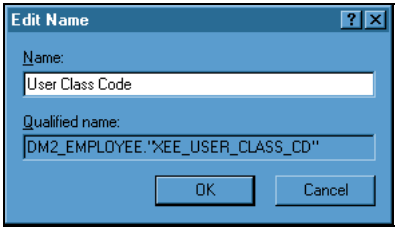


For practice, click Edit….

32. Type the new name

Type the new name in the Name text box in the Edit Name dialog.

For practice, type the new name User Class Code in the edit box.



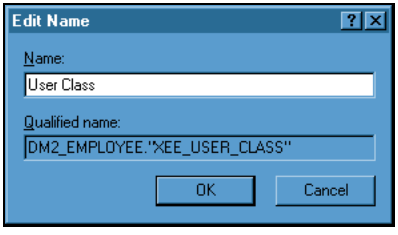
33. Click OK

Click OK to accept the new name.

For practice, click OK.

34. Repeat steps 30 to 33 for any other new columns

For practice, rename XEE_USER_CLASS to User Class.



35. Select the previously created folder

Select the folder that was previously created in order to delete it.

For practice, select DM2_EMPLOYEE folder that was previously created.

36. Click Cut

Click Cut to cut it.

For practice, click Cut.

37. Click OK

Click OK to finish.

For practice, click OK.

Testing your customization

Once you have customized a field in Reporting Administration, you will need to test that the customization was successful. To do so, follow these steps:

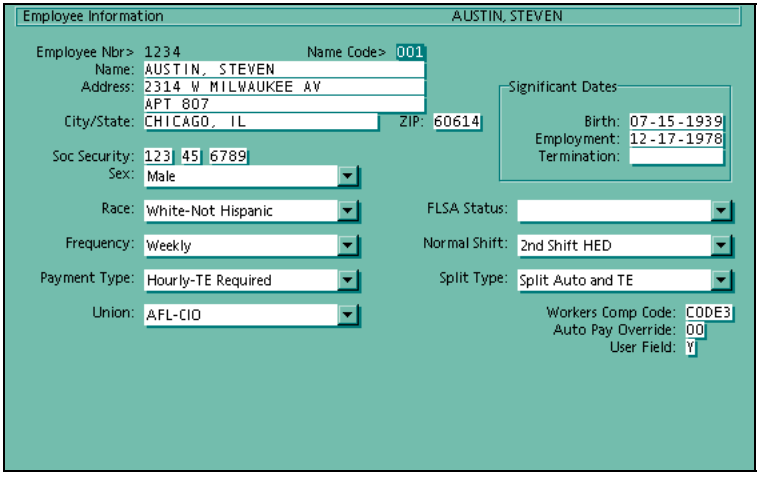
1. Modify a form

Open a form in your system which contains information for the field(s) you have customized. Make a modification appropriate to the customization you made so that the information will be extracted and displayed in an Impromptu report.

For practice, open the Employee Information (EF-SCR) form by making the following menu selection:

Component: Employee Resourcing
Process: Maintain Employee Details
Task: Basic Employee Information

Select the employee Steve Austin. Amend the form by type 'Y' in the User Field text box and press Enter.



2. Access extract scripts

Access the command prompt and go to the *n*:*Cyborg45*\Runs directory, where *n* is the drive, and *Cyborg45* is the directory on which the extract script is stored.

For practice, access the \Runs subdirectory. Ensure that the username and password is set to sa, master in the jrsxrpt.bat.

3. Execute extract

At the command prompt, type:

```
jrsxrpt
```

For practice, type 'jrsxrpt'.

4. Press Enter

Press Enter.

The extract batch file will run, calling the splitter and bulk load programs, and the data mart will be created.

For practice, press Enter.

5. Verify extract

If the batch job has successfully run there will be no errors in the following log files:

- *n*:\Cyborg45\Log\jrsxrpt.log
- *n*:\Cyborg45\Log\jrsxsplt.log
- *n*:\Cyborg45\Log\jrsxload.log

In addition, there should be no .bad files with non-zero sizes in the *n*:\Cyborg45\BCPERR directory.

For practice, open jrsxrpt.log, jrsxsplt.log, and jrsxload.log files and ensure that there are no errors in the files. Check the size of the \bcperr.bad files. Open any with a non-zero size and check for errors.*

6. Launch the Impromptu Administration program

If the Impromptu Administration icon has been added to the Launch toolbar then select it to launch the application.

If there is no Impromptu icon on the Launch toolbar, then make the following selection from your Windows desktop:

Start ▶ Programs ▶ Cognos ▶ Impromptu Administrator

For practice, launch the Impromptu Administrator application.

7. Open the catalog

Open the relevant catalog by selecting the following menu option:

Catalog ▶ Open

Select the catalog and click Open.

For practice, open the General catalog and click Open.

8. Log in as Creator

Select Creator from the User class option list, and click OK.

For practice, select Creator from the User class option list, and click OK.

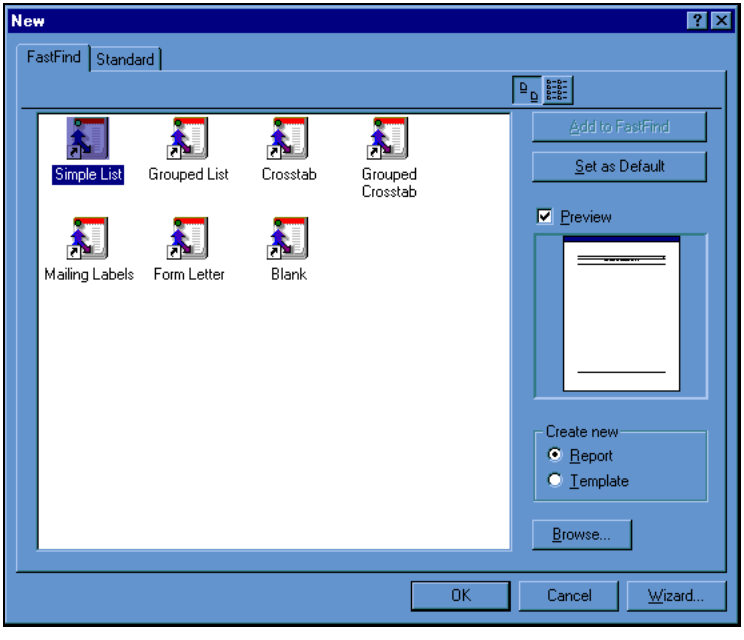
9. Create a Simple List

Create a simple list by making the following menu selection:

File ▶ New

Select Simple List from the New dialog.

For practice, select Simple List.



10. Click OK

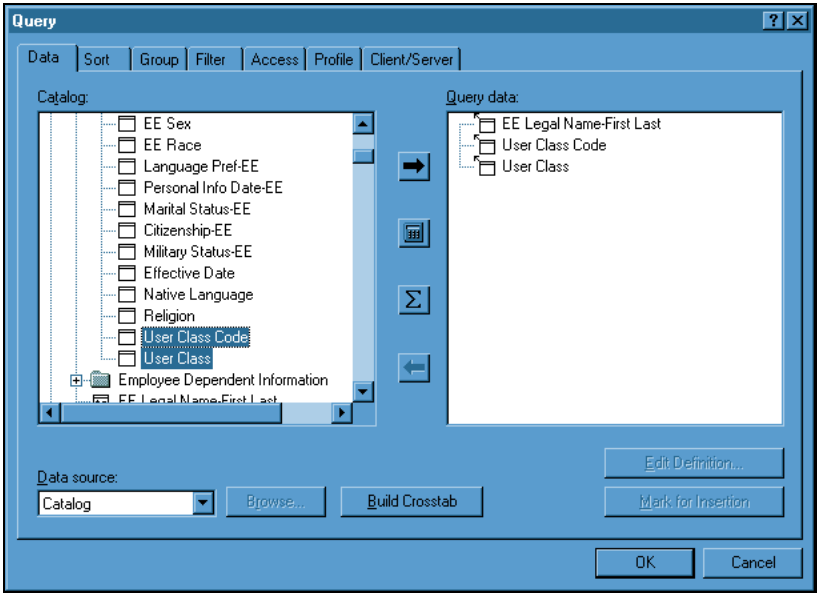
Click OK. The Query dialog will display.

For Practice, click OK.

11. Add report data

Click the data tab and add the data item to the Query data window by double-clicking the items that you have customized.

For practice, select EE Legal Name-First last from the Employee Personal Information folder, and User Class Code and User Class from the Employee Personal Information ► Employee Other Personal Information folder.



12. Click OK

Click OK.

For practice, click OK.

13. Review the query results

Review your customization requirement and ensure that the query displays the desired customized results.

For practice, Steve Austin should be displayed as in the following sample:

EE Legal Name-First Last	User Class Code	User Class
STEVE AUSTIN	Y	Yes

See also

- *Troubleshooting a Customization (on page 211)*

For more detail on error checking.

- *Components of Reporting Administration (on page 235)*

For more detail on the structure and use of the jrsxrpt batch job.

Extended Practice

1. Looking at Sample 1 in Appendix H, identify which, if any, fields have been modified.

2. Make the relevant modifications to customize Reporting Administration.

3. Looking at Sample 2 in Appendix H, identify which, if any, fields have been modified.

4. Make the relevant modifications to customize Reporting Administration.

Review of Questions Answered

1. Under which circumstances must you customize a CSL program when you add a field to the data mart?

CHAPTER 8

Customizing a Data Mart

In This Chapter

Introduction 116
The data mart 117
Detailed Directions 120
Extended Practice 167
Review of Questions Answered 168

Introduction

This chapter will help you to ensure you perform the appropriate tasks for customizing a data mart.

Tasks

This chapter explains the following:

- Adding the DDL to the override file
- Creating a direct load format file
- Creating a new CSL RSXnnn subroutine
- Adding an entry to the RSXSCR task list
- Adding a table to the Cognos catalog(s)
- Deleting a data mart table
- Deleting a data mart table from the Cognos catalog
- Adding a data mart
- Creating a new OS script for a data mart
- Deleting a data mart
- Deleting the OS script for a data mart
- Testing your customization

Prerequisites

Before you can customize Reporting Administration, you must:

- Determine if customization will provide a good return on investment
- Identify the items you wish to customize

☞ *Refer to Planning for your Customization Project (on page 39) for more information on creating project requirements.*

☞ *Refer to Analyzing your MAINTO (on page 51) for information on using your MAINTO to determine required customizations.*

Questions answered

The following question is answered in this chapter:

When would you create multiple data marts?

The data mart

Data is extracted and stored in the data mart, a collection of tables in a relational database. Using Cognos tools, the extracted data in the data mart can be reported on and analyzed.

Contents of the data mart

The data mart contains the following data:

- Company information
- Employee information
- Position Administration information
- Earnings and deductions
- Labor and History
- Training Administration
- Employee Skills, Competencies and Abilities
- Benefits Administration

Normalization/denormalization of the data mart tables

The data mart is in first normal form at a minimum; all repeating groups have been moved into separate tables. To help reduce some redundant data, some multiple tables are used for a segment. This results in small tables with compact rows.

All tables have been normalized up to third normal form according to the application. The following denormalization methods have been used to modify the physical database design in an effort to improve performance:

- Combining tables in a one-to-one relationship case
- Duplicating portions of a table
- Creating derived or summary columns

Combining tables in a one-to-one relationship case

One denormalization technique Cyborg used was to combine tables in a one-to-one relationship. For example, on the Coverage And Contribution Factors (TM-SCR) form, there are three groups of information: Plan Basic information, Plan Coverage (Rule, Factor1, Factor2, Factor3), and Plan Contribution (Rule, Factor1, Factor2, Result Freq), as seen here:

Coverage And Contribution Factors — Control Number> 9999

Plan ID> 101 — Plan Name: MEDICAL INSURANCE

Option> Employee Only/Single — Ctrb Type> Basic Post Tax Contb

Search Argument> — Search Type: NO-SEARCH-ARGUMENT

Effective Date> 01-01-1925 — Plan Type: Health Insurance

Coverage

Rule:

Factor 1: .00
Factor 2: .00
Factor 3: .00

Contribution

Rule: Use Factor 1 As Amt

Factor 1: .0525
Factor 2: .0000
Result Freq: Monthly Amount

Nondiscrimination Value: .00

Flex Cost: .00
Flex Type:

Both Plan coverage and Plan Contribution have a one-to-one relationship with the Plan Basic Information entity. In the data mart we combine these entities together into one entity.

Duplicating portions of a table

The second denormalization technique we employed was to duplicate strategic portions of a table. For example, in the DM2_EMPLOYEE table, EMPLOYEE_NAME, PREFIX_NAME, FIRST_NAME, MID_NAME, LAST_NAME, and SUFFIX_NAME columns have been duplicated from the DM2_EMP_NAME_ADDR table, since employee name will come with the employee information most of the time in the reports.

Creating derived or summary columns

The final denormalization technique used on the data mart is to create derived (or summary) columns. Derived, or summary, columns contain data duplicated for the purpose of avoiding repeated calculations. We have some derived fields in the data mart, such as MIN_ANNUAL_SALARY, MID_ANNUAL_SALARY, and MAX_ANNUAL_SALARY.

Segments and tables mapping to data mart tables

There are four different mappings between system segments and tables and the data mart tables:

- Multiple segments/tables to one data mart table
- One segment/table to one data mart table
- One segment/table to multiple data mart tables
- Multiple segments/tables to multiple data mart tables

Multiple segments/tables to one data mart table

Because of the size limitation of a segment/table in your system, long data records are stored in multiple segments/tables. In the data mart, these are combined into a single table. For example, three segments (LO1, LO2, and LO3) for dependent data in your system are one dependent table in the data mart. Also, some duplicated segments have been

consolidated into one table in the data mart. For example, the LQ1 segment for Welfare Plan Enrollments (55-SCR) and the LQ4 segment for Deferred Plan Enrollments (64-SCR) are duplicates. In the data mart, the segment data appears once, in a single table.

One segment/table to one data mart table

Usually, we have mapped one segment/table to one data mart table. For example, Segment LZO for professional association membership data has one corresponding table in the data mart.

One segment/table to multiple data mart tables

To normalize the data in the data mart for reporting purposes, one segment/table may be broken into multiple tables in the data mart. For example, segment LQA for T/S Plan Contributions/Fund Allocation data has two tables in the data mart—one is the table for T/S Fund Allocation data; one is the table for Fund Percentage data.

Multiple segments/tables to multiple data mart tables

Because of the size limitation of segments/tables, data stored in multiple segments/tables has been normalized in the data mart. For example, T*C-A, T*C-B, T*C-C, T*C-E, and T*C-E for training course information are in multiple tables in the data mart, (such as a table for Course Offering data, a table for Course Offer Skills data, a table for Course Cost data, and so forth).

Naming conventions for data mart tables and columns

The following naming conventions have been used:

- All data mart tables are prefixed with ‘DM2’, for ‘data mart two’. For example, the Course Offering table is named ‘DM2_COURS_OFFERING’.
- Columns in the data mart tables are named using system names, where possible. This was not possible in the following cases:
  - If the name used characters considered to be illegal by the database management system.
  - If the name contained more than 18 characters.
  - If the name contained dashes. Dashes have been converted to underscores.
  - If the data was normalized.
- Columns in the Cognos catalogs tables are named to be easily understood.

The following table shows an example of the naming conventions from field name to data mart table column name to Cognos catalog field name.

Field name	Data mart table column name	Cognos catalog column name
CD-COURSE-DATE	CD_COURSE_DATE	Course Effective Date

☞ *For a complete list of the data mart tables, refer to the Reporting Administration Data Mart Data Model reference guide.*

Detailed Directions

This section provides detailed instructions for completing the customization tasks.

Task

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Creating a direct load format file 123
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Note: The Guided Practice exercises in these tasks are based on an SQL Server environment. They use as an example a system where a new LL1 segment has been added. The LL1 segment contains the following fields:

XLL1-EFFECTIVE	Date	6 bytes
XLL1-PROD-CLASS_CD	Char	1 byte
XLL1-PROD-CLASS	Char	20 bytes (code set description)
XLL1-PROD-FACTOR	Decimal	10,2

Because this segment has an effective date you will have to add a matching UNTIL date named XLL1-UNTIL-DATE to the data mart table.

Note: You will have to perform the first five tasks to add a data mart table.

Adding the DDL to the override file

AS/400

This task does not apply to AS/400 systems. If you are running Reporting Administration on an AS/400 system and you need to modify a field, follow these steps:

1. Modify database

Make the appropriate changes to modify the field in the database.

Note: You may need to involve your DBA when making changes to the database.

2. Run RSXCOLNMS

This program creates the format files. It is run originally during the installation process and does not need to be run again unless there is a database change.

When a file is being changed/added/deleted, then the following needs to be considered:

- CSL extract program—there is special consideration for dates that can be NULL. The format files are automatically updated to place an additional column, containing a 'Y', placed after the date to indicate the date is NULL.

To add the DDL to the override file, follow these steps:

1. Open the override file

Use a text editor to edit or create the override file, found in the sql subdirectory in the case of an NT/SQL Server environment. This file will result in the necessary script to drop and recreate tables in the data mart. For ease, open both the r2_datamart_xxx.xxx file and the r2_alter_xxx.xxx at the same time.

For practice, open sql\r2_alter_sql.sql and sql\r2_datamart_sql.sql.

2. Name the table

You must first give the table a name. User-defined tables will begin 'DMX_' (Cyborg-delivered tables start 'DM2_').

For practice, the table name DMX_PROD_CLASS will be used. DMX_ indicates this is a user defined table and PROD_CLASS is the subject of the data. Type this table name in r2_alter_sql.sql as in the sample below:

```
/* ========================================================== */
/*   Table: DMX_PROD_CLASS                                    */
/*          Date: MM/DD/YYYY  Author: Your Name Here          */
/* ========================================================== */

create table DMX_PROD_CLASS
```

3. Add the DDL to override file

Copy and paste some default drop DDL and default create DDL from the r2_datamart_xxx.xxx onto the end of r2_alter_xxx.xxx, and amend it for the new table as

identified in the customization requirement. Ensure that where there is an effective date, there is also an UNTIL_DATE field. The effective date fields should be first in the constraint section.

Note: Columns used as a primary key CANNOT be defined as 'null'.

For practice, copy and paste some default drop DDL and the default create DDL from the r2_datamart_sql.sql into the end of r2_alter_sql.sql and amend for DMX_PROD_CLASS as in the sample below:

```
/* ========================================================== */
/*   Table: DMX_PROD_CLASS                                    */
/*          Date: MM/DD/YYYY  Author: Your Name Here          */
/* ========================================================== */

if exists (select 1
            from  sysobjects
           where  id = object_id('DMX_PROD_CLASS')
            and   type = 'U')
   drop table DMX_PROD_CLASS
go

create table DMX_PROD_CLASS
(
    CONTROL_1           char(2)               not null,
    CONTROL_2           char(4)               not null,
    EMPLOYEE_NUMBER     char(010)             not null,
    XLL1_EFFECTIVE      datetime              not null,
    XLL1_UNTIL_DATE     datetime              not null,
    XLL1_PROD_CLASS_CD  char(001)                 null,
    XLL1_PROD_CLASS     varchar(020)              null,
    XLL1_PROD_FACTOR    numeric(10,2)             null,
    constraint PK_DMX_PROD_CLASS primary key
(XLL1_EFFECTIVE,XLL1_UNTIL_DATE,CONTROL_1,CONTROL_2,EMPLOYEE_NUMBER)
)
go
```

4. Save and close script files

Save r2_alter_xxx.xxx and close this and r2_datamart_xxx.xxx files.

For practice, save r2_alter_xxx.xxx and close this and r2_datamart_xxx.xxx files.

5. Execute the script

You will need to execute the script, using your database query program, in order for it to take effect.

For practice, execute the script by performing the following steps:

a. Launch ISQL
b. Login as sa
c. Select R2_Test as the database
d. Open r2_alter_sql.sql
e. Click the Execute Query button on the launchbar
f. The message 'This command did not return data, and it did not return any rows' should be displayed in the Query tab

Creating a direct load format file

1. Create a direct load format file

Use a text editor to create the direct load format file in the fmt directory, using the combination of source, and segment, and sequence to determine the name of the format file. This file will end up with the necessary mapping information to load text data into our new table.

AS/400

The program RSXCOLNMS creates the format files. It is not necessary, therefore, to make amendments to the individual format files on this platform. All that you will need to do is make the appropriate database change and then rerun the program. This program is run initially during the installation of Reporting Administration and does not need to be rerun unless there is a database change.

*For practice, the source of this data is the Employee Data record (**M_**), the segment is the **LL1** segment and there are no repeating groups of data on this segment so there is a single target (**00**). This information can be used to generate a filename of M_LL100.FMT. Create fmt\M_LL100.FMT to resemble the sample below:*

```
6.0
8
1       SQLCHAR       0       2       ""        1       CONTROL_1
2       SQLCHAR       0       4       ""        2       CONTROL_2
3       SQLCHAR       0       10      ""        3       EMPLOYEE_NUMBER
4       SQLCHAR       0       10      ""        4       XLL1_EFFECTIVE
5       SQLCHAR       0       10      ""        5       XLL1_UNTIL_DATE
6       SQLCHAR       0       1       ""        6       XLL1_PROD_CLASS_CD
7       SQLCHAR       0       20      ""        7       XLL1_PROD_CLASS
8       SQLCHAR       0       11      ".\r\n"   8       XLL1_PROD_FACTOR
```

2. Save and close the format file

Save and close the format file

For practice, save and close M_LL100.FMT.

See also:

- *Reporting Administration and the extraction process (on page 65)*
For further information on the format file.

- *Extraction forms (on page 68)*
For detailed information on the Reporting Admin Table Properties form (RSXSCR).

Creating a new CSL RSXnnn subroutine

AS/400

When a file is being changed/added/deleted, then the following things need to be considered:

- RSPLIT (COBOL) and JRSXSPLIT (CSL program)—the associated file needs to be added to both programs so that they are aware of the new file.
- Database—the appropriate table will need to be changed to reflect the file modifications.
- VRST—you will need to add the database name and the associated file name to the VRST table.
- Format file—this will need to be amended to reflect the change, and you will need to rerun the RSXCOLNMS program.

To create a new Cyborg Script program to extract the data, follow these steps:

1. Open the Copy Utility

Open the Copy Utility by making the following selection from the Navigator:

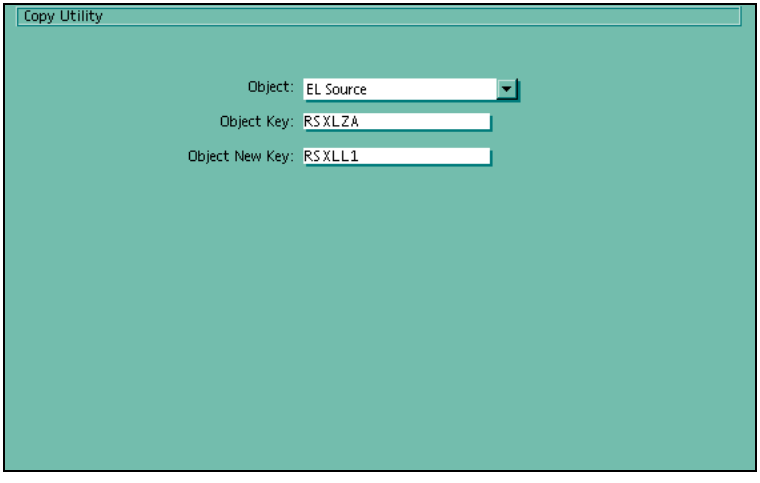
Component: Development Tools
Process: System Control Repository Utilities
Task: Copy

For practice, open the Copy Utility.

2. Copy an existing program

Copy an existing program of the same extract class.

For practice, make a copy of RSXLZA and name the copy RSXLL1.



3. Open the Edit Utility

Open the Edit Utility by making the following selection from the Navigator:

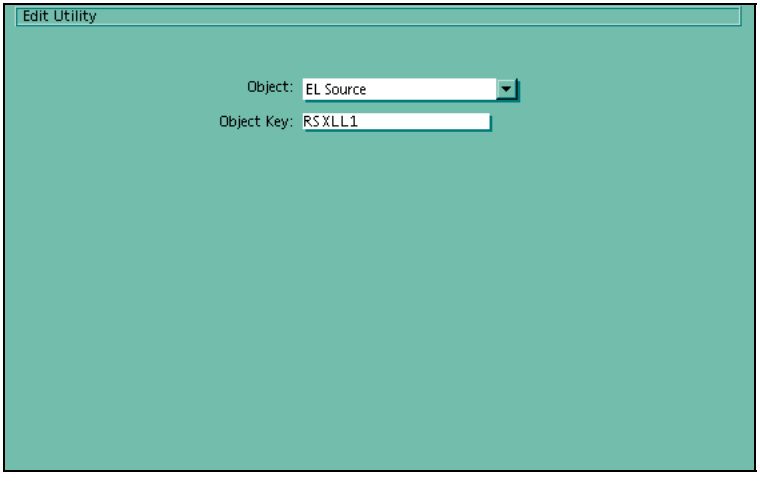
Component:		Development Tools
Process:		System Control Repository Utilities
Task:		Edit Control Repository Object

For practice, open the Edit Utility.

4. Open the new RSXnnn subroutine for edit

Open the new subroutine for amendment.

For practice, open RSXLL1.



5. Amend subroutine

Amend the subroutine to reflect the new field names.

For practice, change the subroutine to match that in the samples below:

```
COMMAND:

  Seq SC English Language Source
00000   SECURITY 'RS'. @ PROD_CLASS TABLE EXTRACT                    SRS
00001   @LAST MODIFIED ON: 12-20-00 BY: S.O. AUTHOR:
00003   @RSXLL1 is an extract subroutine for the Reporting
00004   @Solution. It is set up from RSXSCR and called from RSXRPT.
00005   @It will produce data for the DMX_PROD_CLASS table.
00100     IM-A-SUBROUTINE.
00200   P100-PROCESS-SEGMENT.
00300     MOVE '20991231' TO RING-TO-DATE.
00400     PROCESS XLL1-PROD-CLASS-CD.
00500       IF RING-TO-DATE LESS THAN R-RSX-CUT-OFF-DATE
00600         GO TO P999-RETURN.
00700       PERFORM P200-TABLE-DATA.
00800     END-PROCESS.
00900     GO TO P999-RETURN.
02500   P200-TABLE-DATA.
02600     CALCULATE R-RSX-ROW-COUNTER + :1 = R-RSX-ROW-COUNTER.
02700     SET SCREEN TO :1601.
02800     MOVE R-RSX-TARGET          TO SCREEN. @  5 CHARS
02900     MOVE R-RSX-TABLE-SEQ       TO SCREEN. @  2 CHARS
```

```
COMMAND:

  Seq SC English Language Source
 02900    MOVE R-RSX-TABLE-SEQ      TO SCREEN. @  2 CHARS
 03000    MOVE R-RSX-ROW-COUNTER    TO SCREEN. @  8 CHARS
 03100    MOVE CONTROL-1            TO SCREEN. @  2 CHARS
 03200    MOVE CONTROL-2            TO SCREEN. @  4 CHARS
 03300    MOVE EMPLOYEE-NUMBER      TO SCREEN. @ 10 CHARS
 03400    PRINT LL1-EFFECTIVE.                 @ 10 CHARS
 03500    PRINT RING-TO-DATE.                  @ 10 CHARS
 03600    MOVE LL1-PROD-CLASS-CD    TO SCREEN. @  2 CHARS
 03700    PRINT LL1-PROD-CLASS.                @ 20 CHARS
 03800    MOVE LL1-PROD-FACTOR TO R-RSX-DECIMAL.
 03900    PRINT W8-08-709/WHOLE '.'W8-02-717.  @ 11 CHARS
 04000    CALL 'RSXRWR'.
 05400  P290-CALCULATE-UNTIL.
 05500    MOVE '000001' TO TIME-SPAN.
 05600    CALCULATE XLL1-EFFECTIVE - TIME-SPAN = RING-TO-DATE.
 05700  P299-EXIT.
 05800    EXIT.
 05900  P999-RETURN.
 06000    RETURN.
```

6. Open RELOAD

Open the RELOAD form by making the following selection from the Navigator:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

7. Reload new RSXnnn subroutine

Reload then new RSXnnn subroutine by typing the name of the program in the MODULE NAME text box and pressing Enter.

For practice, reload RSXLL1.

```
Compile a Source Program                                          RELOAD

        The RELOAD program compiles a given program's source
        code.  When executed, RELOAD reads the source program
        and checks for syntax errors and validates field names.
        If no errors are found an object module is created.

                 Complete the text boxes below, then hit enter:  X

                 Enter MODULE NAME: RSXLL1
```

See also:

- *Extraction routines (on page 6:73)*

For detailed information on the RSXnnn extract subroutine.

Adding an entry to the RSXSCR task list

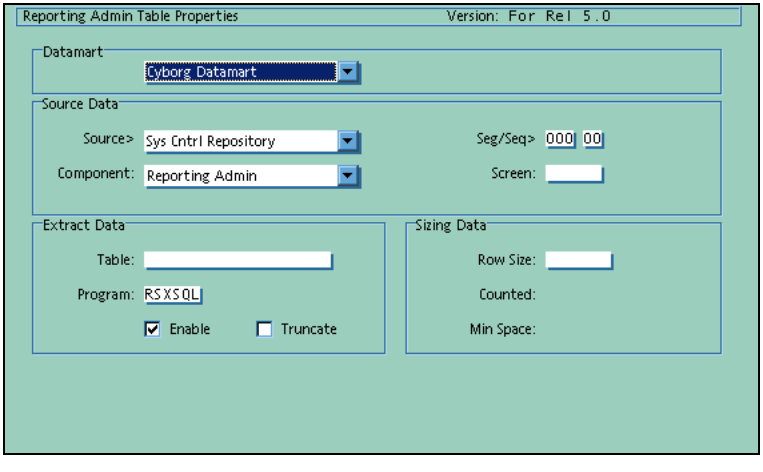
To add an entry to Reporting Administration Table Properties form task list, follow these steps:

1. Open Reporting Admin Table Properties form

Open Reporting Admin Table Properties form (RSXSCR) by making the following selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Administration Task List

For practice, open the Reporting Admin Table Properties form:



2. Select the data mart

Select the name of the data mart to receive the extracted data. There are two delivered data marts—Cyborg Datamart and Cyborg Test Datamart.

For practice, select the Cyborg Datamart in the Datamart option list.

3. Select the Source

Select the source of data for the new table.

For practice, select Employee Data in the Source option list.

4. Type segment and sequence

Type the Segment and Child Sequence of the data in the Seg/Seq text boxes. If you are going to populate more than one table, the entry in the Seq text box could be 00, 01, 02, and so on.

For practice type LL1 in the Seg text box and leave the default value of 00 in the Seq text box.

5. Select component

Select the component from which the data is to be extracted. This field represents the grouping of the data. All of the tables in the data mart are assigned a component, so that entire groups of tables can be disabled with a single switch.

For practice, select Human Resources from the Component option list.

6. Type form name

Type the form id of the data for the table in the Screen text box. This is the form that can be used to view/update the relevant segment in the employee master record.

For practice, type XL1SCR in the Screen text box.

7. Type table name

Type the name of the data mart table to receive the data in the Table text box.

For practice, type DMX_PROD_CLASS in the Table text box. The DMX_ will indicate this is a user defined table and the PROD_CLASS is the subject matter of our table.

8. Type program name

Type the name of the CSL extract program used to extract the data in the Program text box.

For practice, type RSXLL1 in the Program text box.

9. Select Enable

Select the Enable checkbox, so the extract program will run and produce output for the new table.

For practice, select the Enable checkbox.

10. Select Truncate

Select the Truncate checkbox. A TRUNCATE TABLE command will be placed in the FILE10 sql script created as part of the extract process when the Truncate checkbox.

For practice, select the Truncate checkbox.

11. Type row size

Type the length of a row of data in the data mart in the Row Size text box. This could be calculated by adding together the character lengths as specified in the format file.

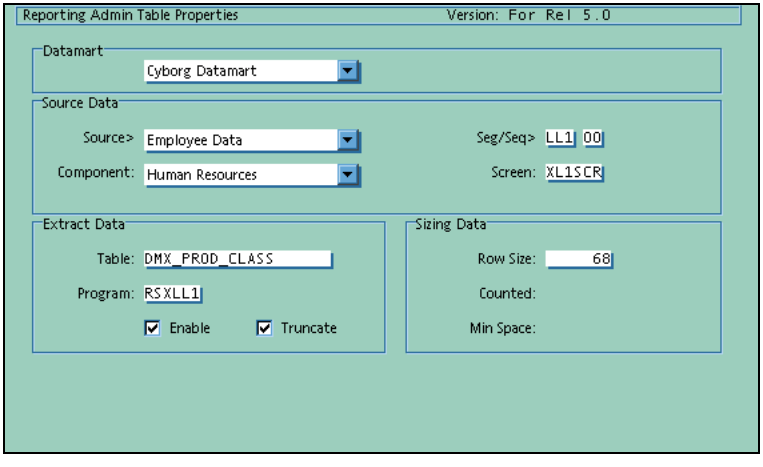
For practice, type 68 in the Row Size checkbox. This is actually the size of the extract record, not the size of the row of data in the database. But since the extract record is larger than the true row size of each record in the database, this a good estimated value to use.

12. Press Enter

Press Enter to accept the changes.

For practice, press Enter.

If you successfully completed all the guided practice in this task, your Reporting Administration Table Properties form will look similar to the following example:



See also:

- *Extraction forms (on page 68)*

For detailed information on the Reporting Admin Table Properties form (RSXSCR).

Adding a table to the Cognos catalog(s)

Identify all of the catalogs you will have to change. This can most easily be done using the Content Overview Report produced from Cognos Impromptu.

Refer to your Cognos Impromptu documentation for details on producing the Content Overview Report.

For each catalog to be changed you will have to follow these steps:

1. Launch the Impromptu Administration program

If the Impromptu Administration icon has been added to the Launch toolbar then select it to launch the application.

If there is no Impromptu icon on the Launch toolbar, then make the following selection from your Windows desktop:

Start ▶ Programs ▶ Cognos ▶ Impromptu Administrator

For practice, launch the Impromptu Administrator application.

2. Open the Catalog

Open the relevant catalog by selecting the following menu option:

Catalog ▶ Open

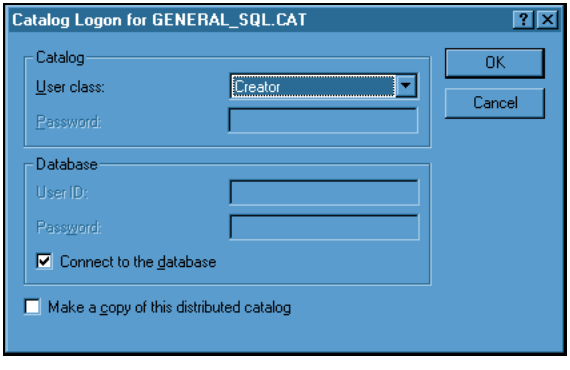
Select the Catalog and click Open.

For practice, select the General catalog and click Open.

3. Log in as Creator

Select Creator from the User class option list, and click OK.

For practice, select Creator from the User class option list, and click OK. Log in with the user id of sa, password of master. Click OK.



4. Open the database Tables dialog

Open the database Tables dialog by making the following menu selection:

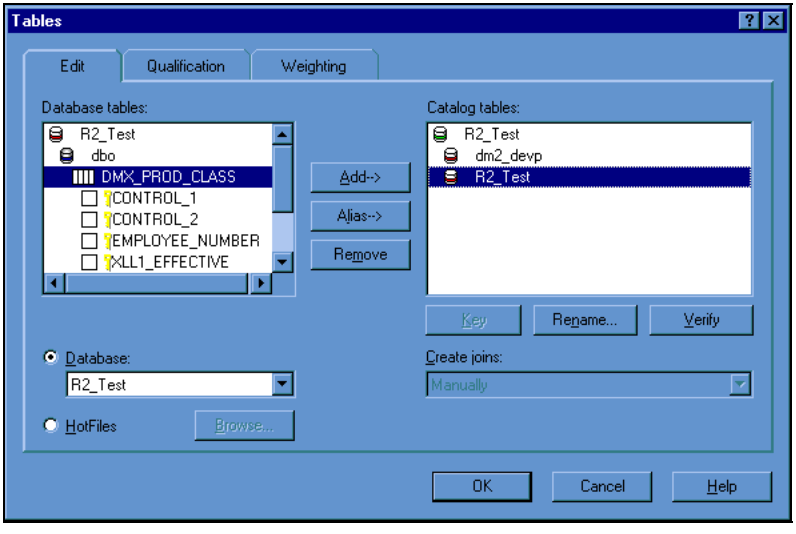
Catalog ▶ Tables…

For practice, open the database Tables dialog.

5. Select table

Before you begin amending the tables, ensure that the Catalog table and the Database table names match both in name and color. Select the table in the Catalog tables dialog.

For practice, expand the R2_Test catalog table, then dbo, and then double-click the DMX_PROD_CLASS table in the Database tables dialog.



6. Click Add—>

Click Add—> to add the table.

For practice, click Add—>.

7. Select the Qualifications tab

Click on the Qualifications tab

8. Select the new table

Highlight the new table name.

9. Verify the table is dequalified

10. Click OK

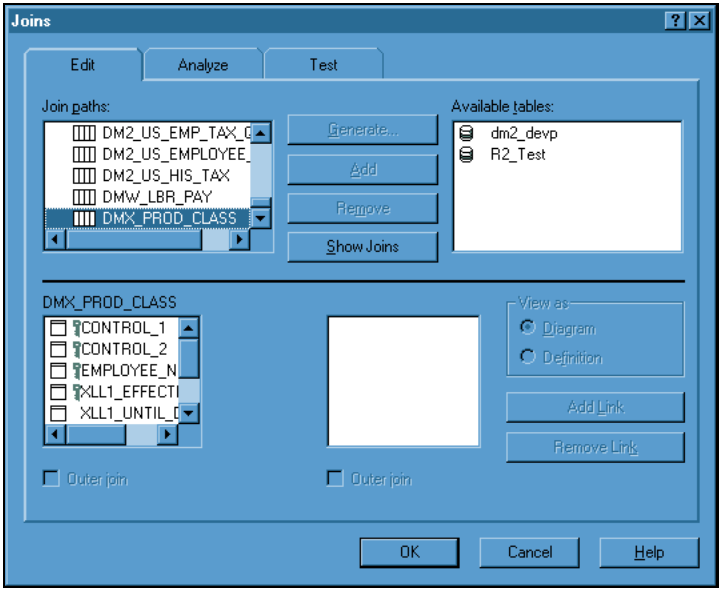
Click OK to save your changes. You will automatically be brought to the Joins dialog.

For practice, click OK.

11. Select table

Select the table in the Join paths list.

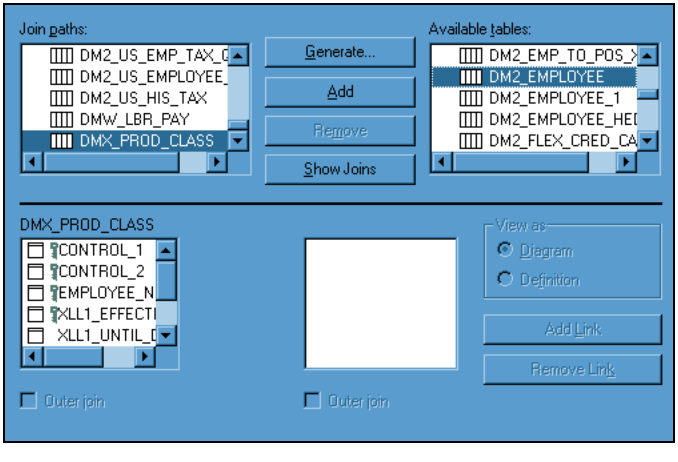
For practice, click the DMX_PROD_CLASS in the Join paths list.



12. Select Available table

Select a table in the Available tables list.

For practice, click the DM2_EMPLOYEE in the Available tables list.



13. Click Generate…

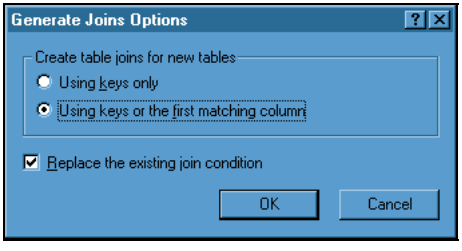
Click Generate… to create the join. The Generate Joins Options dialog will display.

For practice, click Generate….

14. Click Using keys radio button

Click the Using keys or the first matching column radio button.

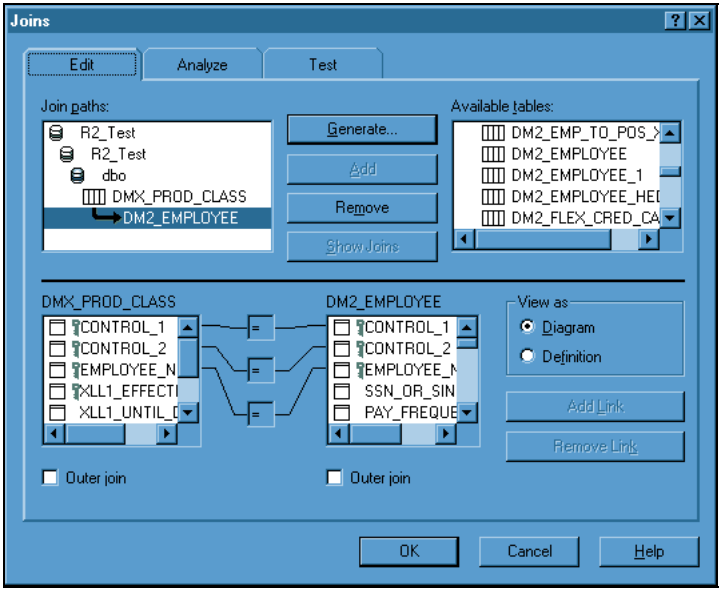
For practice, click the Using keys or the first matching column radio button.



15. Click OK

Click OK on the generate joins options dialog. The joins will automatically be created by Control-1, Control-2 and Employee number.

For practice, click OK.



16 Check for errors

Click the Analyze tab to check for errors. If there are any errors, you will have to resolve them.

Click the Analyze tab to check for errors.

17 Click OK

Click OK on the Joins dialog.

For practice, click OK.

Note: If the table is 'dated', that is, it has an effective date field, then perform steps 18–

18. Open User Profiles

Open the User Profiles dialog by selecting:

Catalog ► User Profiles

For practice, open User Profiles.

19. Select the Filter tab

Chose the Filter tab by clicking on it.

For practice, click the Filter tab.

20. Review the User Class

Make sure the User Class is 'User'.

21. Select the new table name

In the Catalog tables box, highlight the new table name.

For practice, highlight the new table name.

22. Click Edit

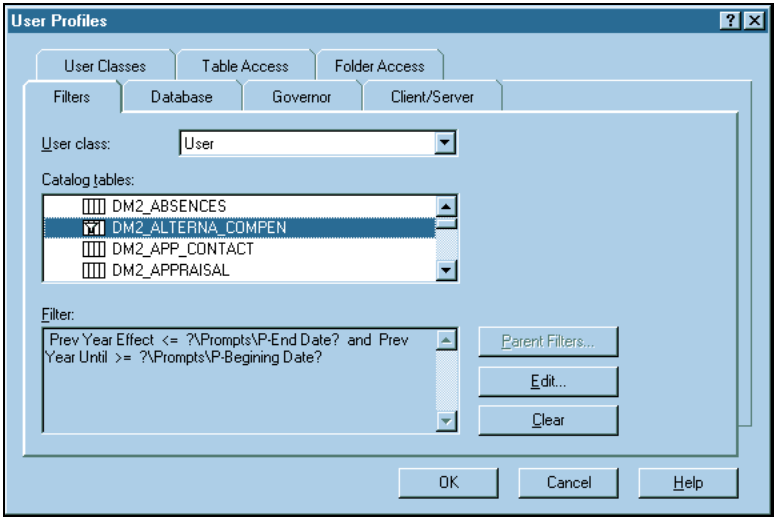
Click the Edit button to enter date related filtering requirements.

For practice, click 'Edit'.

23. Enter filter information

Using specific effective data fields for the new table, create the filter for the 'dated' table.

In the following example, 'Prev Year Effect' and 'Prev Year Until' are the date related fields.



24. Click 'OK'

Click 'OK' to end the filter creation process.

For practice, click 'OK'.

25. Click 'OK'

Click 'OK' to close the User Profiles.

26. Open the Folders dialog

Open the Folders dialog by making the following menu selection:

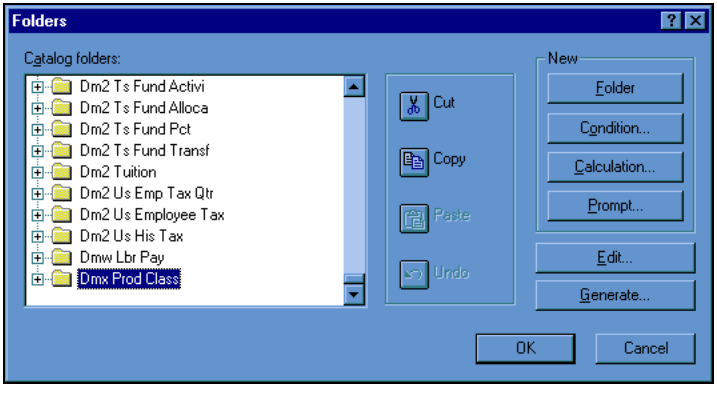
Catalog ► Folders…

For practice, open the Folders dialog.

27. Select folder

Select the new folder.

For practice, click the DMX_PROD_CLASS folder.



28. Click Cut

Click Cut to move the folder.

For practice, click Cut.

29 Expand Admin folder

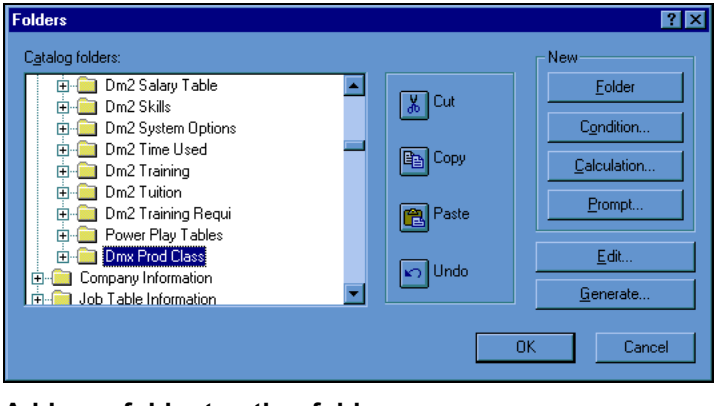
Double-click the Admin folder to expand it.

For practice, expand the Admin folder.

30. Add new folder to Admin folder

Click the folder you want to insert before. Click Paste to add the folder under Admin.

For practice, add the new folder to the end of the Admin folder.



31. Add new folder to other folders

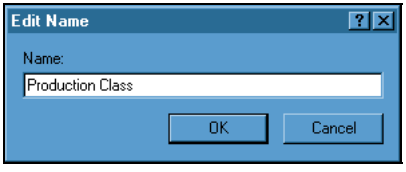
Go to any other folder you want to add these columns to. Click Paste to add the folder to put it in the visible part of the catalog.

For practice, add the folder to Employee Personal Information.

32. Edit the name

Click each column followed by Edit to edit the name to something more meaningful.

For practice, rename the folder name to Production Class.



33. Click OK

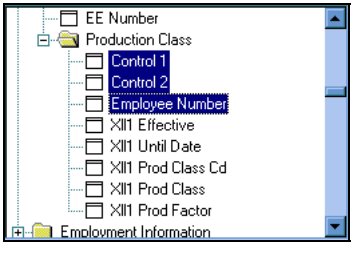
Click OK to accept the new name.

For practice, click OK.

34. Delete foreign keys in visible space

Do not put out foreign keys in the visible part of the catalog. Expand the new folder(s) and select the Control 1, Control 2, and Employee Number columns. Click Cut.

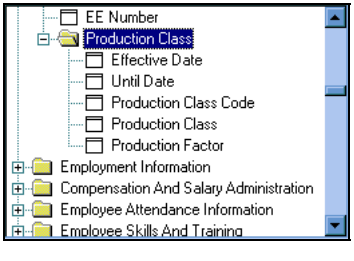
For practice, select the Control 1, Control 2, and Employee Number columns and click Cut.



35. Rename column names

Rename the visible columns in the new folder(s) to something more meaningful to users.

For practice, rename the columns as in the example below:



36. Click OK

Click OK to finish.

For practice, click OK.

Deleting a data mart table

To delete a data mart table, follow these steps:

The original release of Reporting Administration includes some tables that may be specific to Canada or the US The DM2_HIPAA table is for U.S. companies that record additional information about an employee's dependents which is not included on the 10-SCR. Since this table is not needed in Canada, the Guided Practice exercises in this task will delete this table from the data mart.

1. Open the override file

Use a text editor to edit or create the override file. This file will result in the necessary sql script to drop and recreate tables in the data mart. For ease, open both the r2_datamart_xxx.xxx file and the r2_alter_xxx.xxx at the same time.

For practice, open sql\r2_alter_sql.sql and sql/r2_datamart_sql.sql.

2. Copy the table drop DDL statements from r2_datamart_xxx.xxx

Copy and paste the default table drop DDL statements for the data mart table to be dropped from the r2_datamart_xxx.xxx to the end of r2_alter_xxx.xxx.

For practice, copy and paste a default table drop DDL statement for DM2_HIPAA from the r2_datamart_xxx.sql to the end of the r2_alter_sql.sql.

3. Amend r2_alter_xxx.xxx

Make any required changes to the r2_alter_xxx.xxx as identified in the customization request.

For practice, amend the sql\r2_alter_sql.sql as in the following sample:

```
/* ========================================================== */
/*   Table: DM2_HIPAA                                         */
/*          Date: MM/DD/YYYY  Author: Your Name Here          */
/* ========================================================== */

if exists (select 1
            from  sysobjects
           where  id = object_id('DM2_HIPAA')
            and   type = 'U')
   drop table DM2_HIPAA
go
```

4. Save and close override file

Save and close r2_alter_xxx.xxx, and close r2_datamart_xxx.xxx.

For practice, save and close r2_alter_sql.sql, and close r2_datamart_sql.sql.

5. Execute the script

In order for the alter script to take effect, you will need to execute it using your database query program.

For practice, execute the script by performing the following steps:

a. Launch ISQL
b. Login as sa
c. Select R2_Test as the database
d. Open r2_alter_sql.sql
e. Click the Execute Query button on the launchbar
f. The message 'This command did not return data, and it did not return any rows' should be displayed in the Results tab

6. Delete the direct load format file for this table

Use the combination of Source, Segment, and Sequence to establish the name of the format file, which can be found in the fmt subdirectory.

Refer to Reporting Administration Control Table Quick Reference (on page 267) for a list of source, sequence and segment codes.

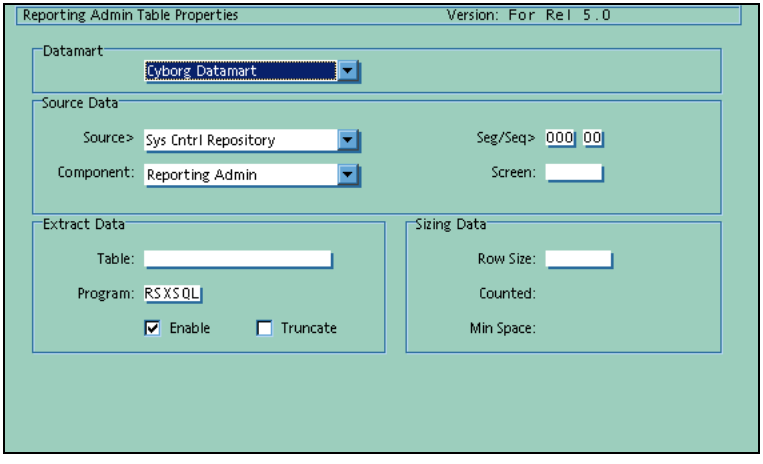
*For practice, the source of this data is the Employee Master record (**M_**), the segment is the **LPI** segment and there are no repeating groups of data on this segment so we will have a single sequence(**00**). Delete the fmt\M_LPI00.FMT file.*

7. Open Reporting Admin Table Properties form

Open Reporting Admin Table Properties form (RSXSCR) by making the following selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Administration Task List

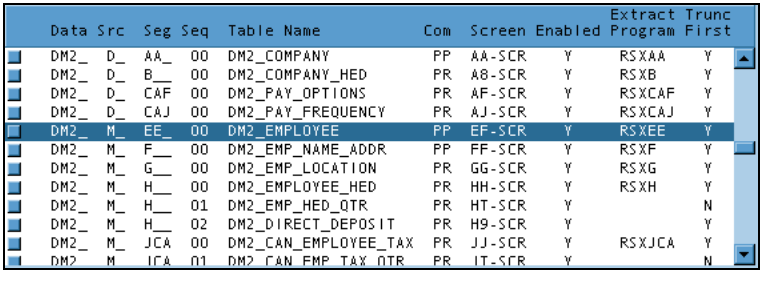
For practice, open Reporting Admin Table Properties form:



8. Locate the entry for the table

Locate the entry for the table to be deleted.

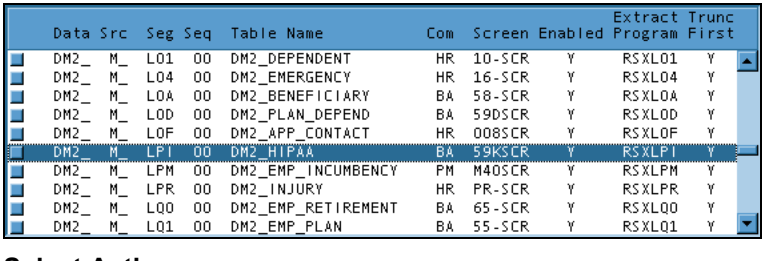
This is most easily done by clicking the 'Show selection list in the message area' button on the toolbar while displaying Reporting Administration Table Properties (RSXSCR) form:



Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
DM2_	D_	B__	00	DM2_COMPANY_HED	PR	A8-SCR	Y	RSXB	Y
DM2_	D_	CAF	00	DM2_PAY_OPTIONS	PR	AF-SCR	Y	RSXCAF	Y
DM2_	D_	CAJ	00	DM2_PAY_FREQUENCY	PR	AJ-SCR	Y	RSXCAJ	Y
DM2_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
DM2_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
DM2_	M_	G__	00	DM2_EMP_LOCATION	PR	GG-SCR	Y	RSXG	Y
DM2_	M_	H__	00	DM2_EMPLOYEE_HED	PR	HH-SCR	Y	RSXH	Y
DM2_	M_	H__	01	DM2_EMP_HED_QTR	PR	HT-SCR	Y		N
DM2_	M_	H__	02	DM2_DIRECT_DEPOSIT	PR	H9-SCR	Y		Y
DM2_	M_	JCA	00	DM2_CAN_EMPLOYEE_TAX	PR	JJ-SCR	Y	RSXJCA	Y
DM2_	M_	JCA	01	DM2_CAN_EMP_TAX_QTR	PR	JT-SCR	Y		N

Make a note of the Program name.

For practice, locate the entry for the DM2_HIPAA table.



Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	M_	L01	00	DM2_DEPENDENT	HR	10-SCR	Y	RSXL01	Y
DM2_	M_	L04	00	DM2_EMERGENCY	HR	16-SCR	Y	RSXL04	Y
DM2_	M_	LOA	00	DM2_BENEFICIARY	BA	58-SCR	Y	RSXLOA	Y
DM2_	M_	LOD	00	DM2_PLAN_DEPEND	BA	59DSCR	Y	RSXLOD	Y
DM2_	M_	LOF	00	DM2_APP_CONTACT	HR	008SCR	Y	RSXLOF	Y
DM2_	M_	LPI	00	DM2_HIPAA	BA	59KSCR	Y	RSXLPI	Y
DM2_	M_	LPM	00	DM2_EMP_INCUMBENCY	PM	M40SCR	Y	RSXLPM	Y
DM2_	M_	LPR	00	DM2_INJURY	HR	PR-SCR	Y	RSXLPR	Y
DM2_	M_	LQO	00	DM2_EMP_RETIREMENT	BA	65-SCR	Y	RSXLQO	Y
DM2_	M_	LQ1	00	DM2_EMP_PLAN	BA	55-SCR	Y	RSXLQ1	Y

9. Select Actions

Select the Actions menu.

For practice, select Actions.

10. Select Delete This Entry

Select the Delete This Entry item.

For practice, select Delete This Entry.

11. Click Yes

Click Yes when the Confirm dialog displays.

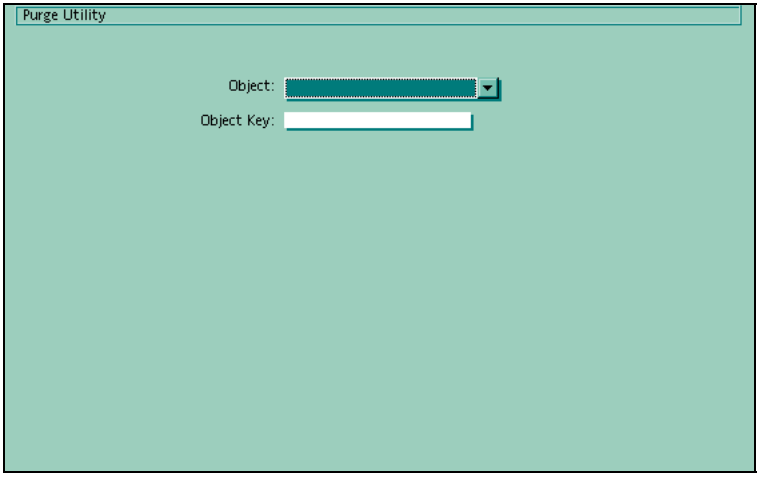
For practice, click Yes.

12. Access the PURGE Utility form (PURGE)

Access the this form by making the following selection from the Navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Purge

For practice, open the Purge Utility form.



13. Specify the type of object to purge

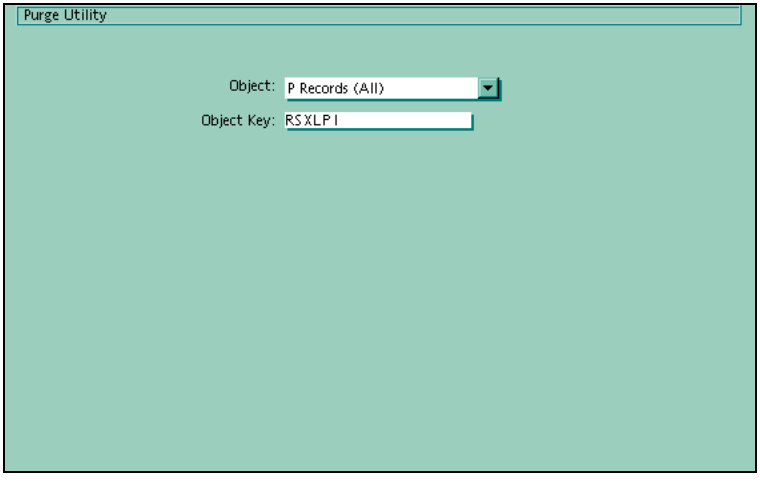
Enter or choose an object type from the pull-down menu. An object is a record type.

For practice, select P Records (All) from the Object option list.

14. Specify the key for the object

The key indicates the specific record to purge. Type in the Program name noted earlier. This field is case sensitive.

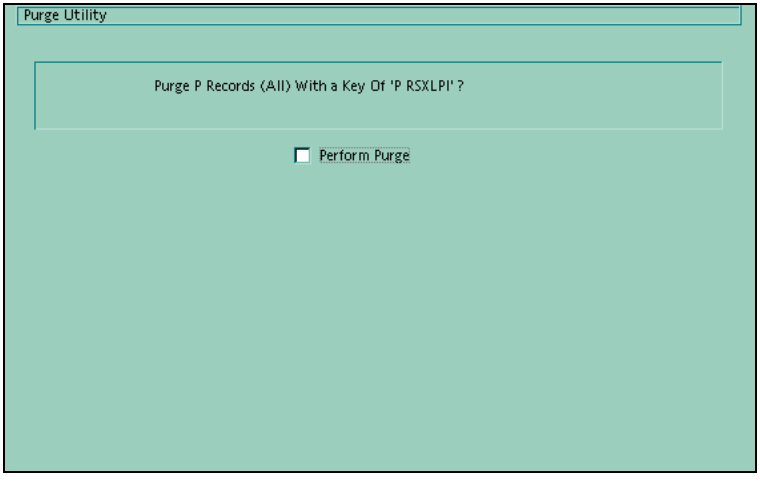
For practice, type RSXLPI in the Object Key text box.



15. Press Enter

The system displays a prompt, verifying the record type and name to be purged.

For practice, press Enter.



16. Verify the purge by selecting the checkbox and press Enter

The system deletes the record and displays a '- - - -Complete- - - -' message.

For practice, select the checkbox and press Enter.

Deleting a data mart table from the Cognos catalog

For each catalog to be changed, follow these steps:

Note: Use the Content Overview Reports produced from Cognos Impromptu to identify which catalogs need to be changed.

1. Launch Impromptu Administrator

If the Impromptu Administration icon has been added to the Launch toolbar then select it to launch the application.

If there is no Impromptu icon on the Launch toolbar, then make the following selection from your Windows desktop:

Start ▶ Programs ▶ Cognos ▶ Impromptu Administrator

For practice, launch the Impromptu Administrator application.

2. Open the Catalog

Open the relevant catalog by selecting the following menu option:

Catalog ▶ Open

Select the catalog and click Open.

For practice, open the Benefits catalog and click Open.

3. Log in as Creator

Select Creator from the User class option list, and click OK.

For practice, select Creator from the User class option list, and log in with the user id of sa, password of master. Click OK.

4. Open the Tables dialog

Open the Tables dialog by selecting the following menu option:

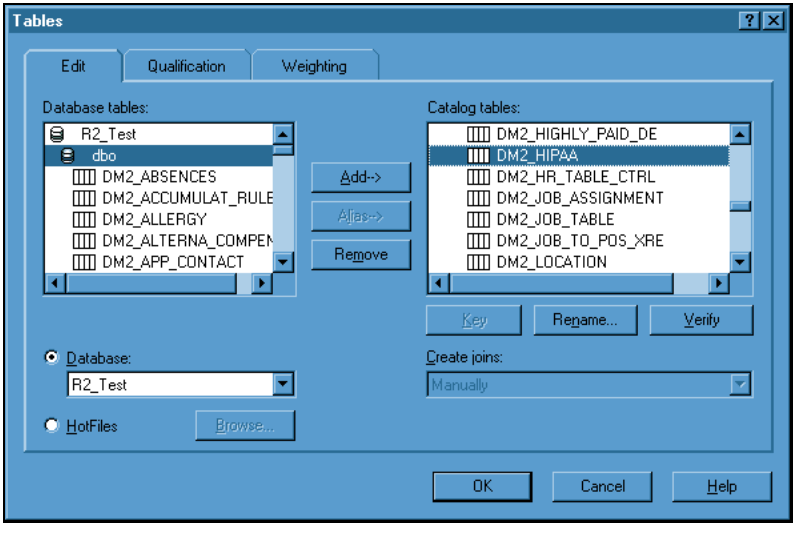
Catalog ▶ Tables…

For practice, select the Catalog ▶ Tables… menu option.

5. Select the table

Select the table to be deleted in the Catalog tables dialog.

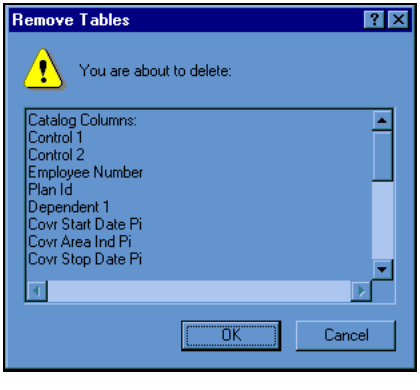
For practice, select the DM2_HIPAA table in the Catalog tables dialog.



6. Click Remove

Click Remove to remove the table. A warning dialog will be displayed.

For practice, click Remove to remove the DM2_HIPAA table.



7. Click OK

Click OK to finish.

For practice, click OK.

Adding a data mart

The Cyborg data mart represents the main components of the system, such as Human Resources or Position Administration.

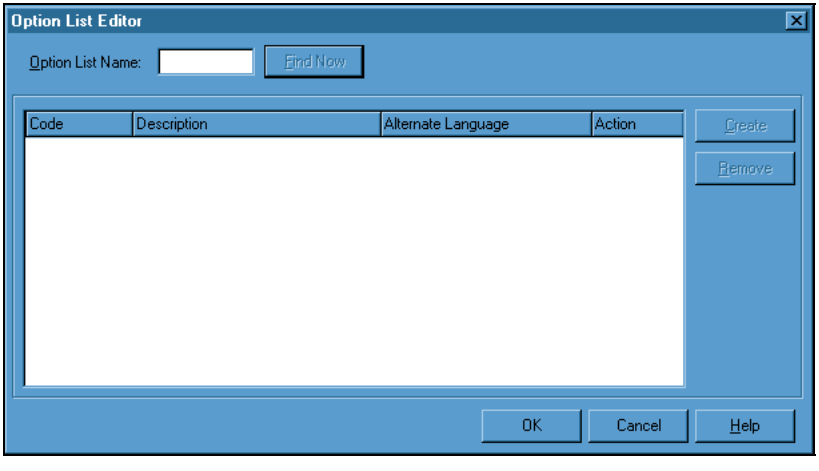
To add a data mart, follow these steps:

1. Open the Option List Editor (CSUPDT)

Open the Option List Editor (CSUPDT) by making the following selection from the navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

For practice, open the Option List Editor.



2. Type option list name in text box

Type the relevant option list name in the Option List Name text box.

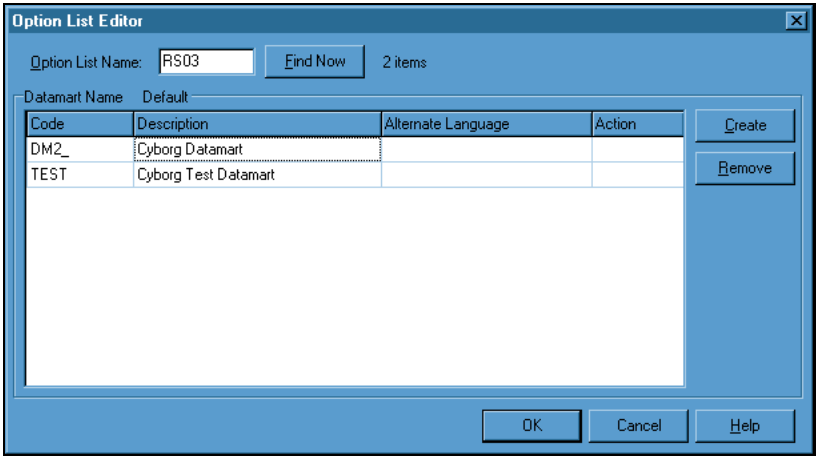
Refer to Option Lists for Reporting Administration (on page 231) for details of the option lists specific to Reporting Administration.

For practice, type RS03 in the Option List Name text box.

3. Click Find Now

Click Find Now to display the option list in the dialog.

For practice, click Find Now.



4. Click Create

Click Create to add a new entry.

For practice, click Create.

5. Type the Code value

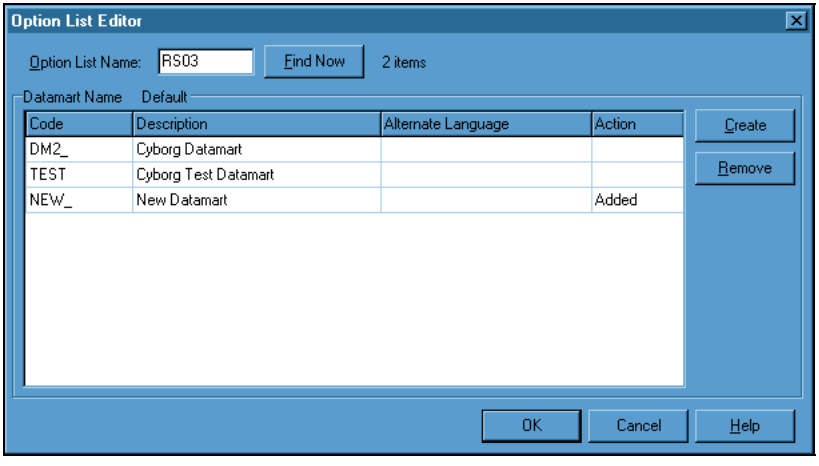
Enter the Code value for the new data mart. This field is defined as four characters.

For practice, type 'NEW_' in the Code field.

6. Type the Description value

Type a description of the new data mart in the Description field. This can be up to 20 characters.

For practice, type 'New Datamart' in the Description field.



7. Click OK

Click OK to accept the changes. The new data mart will be displayed in the option list.

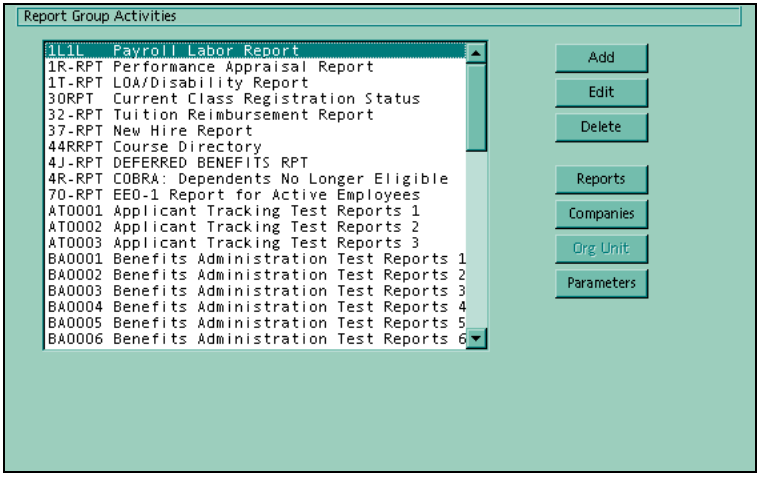
For practice, click OK.

8. Open Report Group Activities form (RGMSTR)

You now need to create a new report for the new data mart. Open the Report Group Activities form (RGMSTR) by making the following selection from the Navigator:

Component: Reporting
Process: Report Scheduling
Task: Schedule Report Groups

For practice, open Report Group Activities form.



9. Click Add

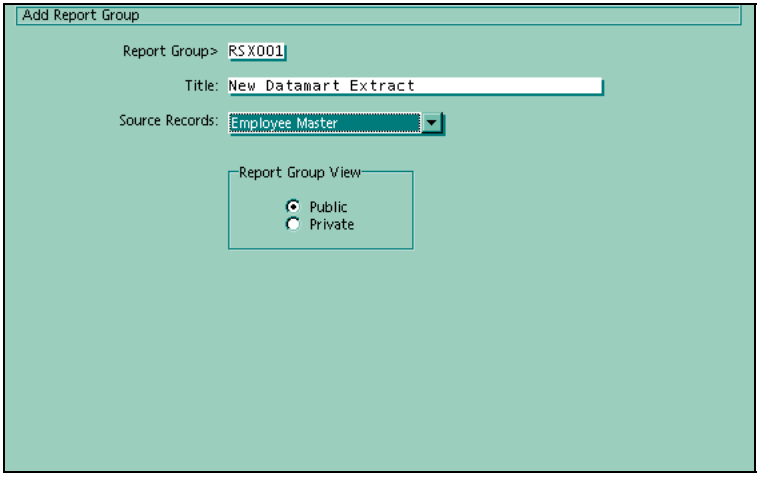
Click Add to add a new report group.

For practice, click Add.

10. Complete the form

Type the name of the report in the Report Group> text box. Type a title in the Title text box. This can be up to 40 characters. Select the Source from the Source Records option list.

For practice, type 'RSX001' in the Report Group> text box, 'New Datamart Extract' in the Title: text box and select 'Employee Master' from the Source Records option list.



11. Press Enter

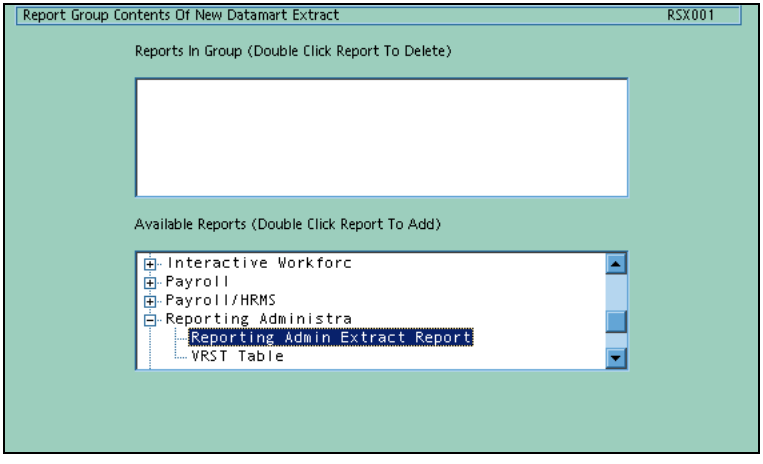
Press Enter to accept the changes. The Report Group Contents Of New Datamart Extract form will display.

For practice, press Enter.

12. Add Reporting Admin Extract Report

Double-click RSXRPT Reporting Admin Extract Report, found under Reporting Administration component, to add it to the report group.

For practice, add the RSXRPT report from Reporting Administration group.



13. Press Enter

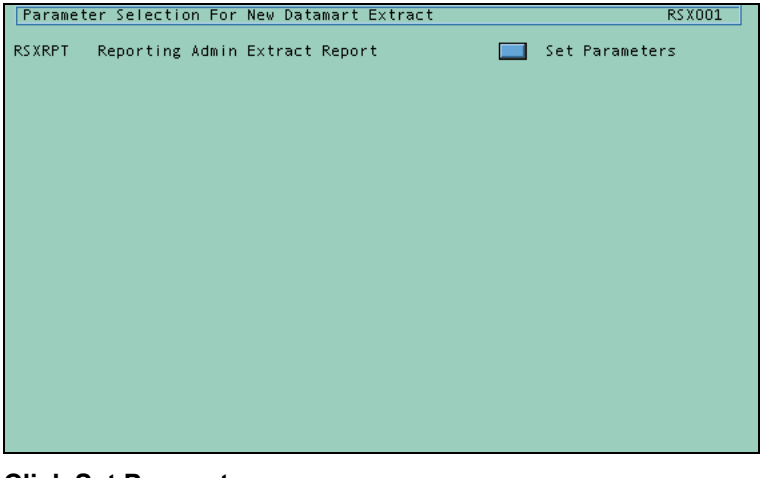
Press Enter to accept the changes. You will be returned to the Report Group Activities form.

For practice, press Enter.

14. Click Parameters

Click Parameters. The Parameter Selection for New Datamart Extract form will display.

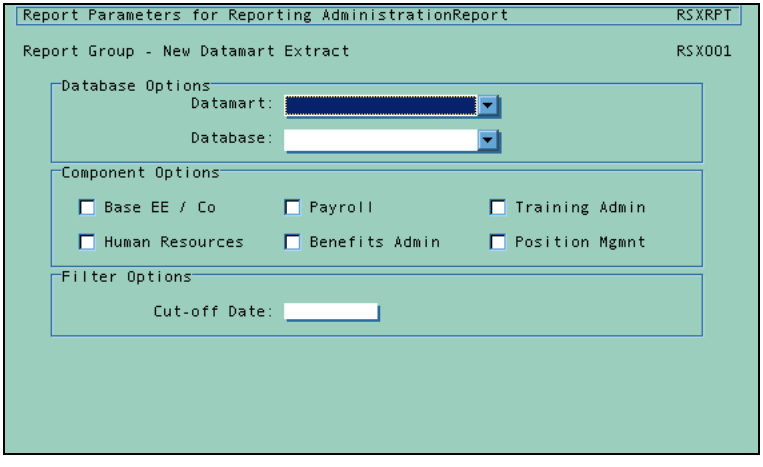
For practice, click Parameters.



15. Click Set Parameters

Access the Report Parameters for Reporting Admin Extract Report (RSXRPT) form by clicking Set Parameters.

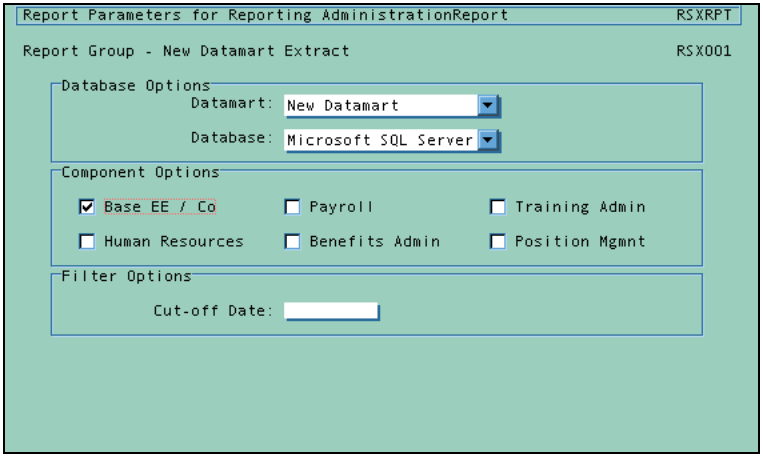
For practice, click Set Parameters.



16. Complete the Report Parameters for Reporting Administration Extract Report (RSXRPT) form

Complete the Report Parameters for Reporting Administration Extract Report (RSXRPT) form for the new data mart.

For practice, complete the Report Parameters for Reporting Administration Extract Report (RSXRPT) form as in the following example:



17. Press Enter

Press Enter to accept the new configuration. You will be returned to the Parameter Selection for New Datamart Extract form.

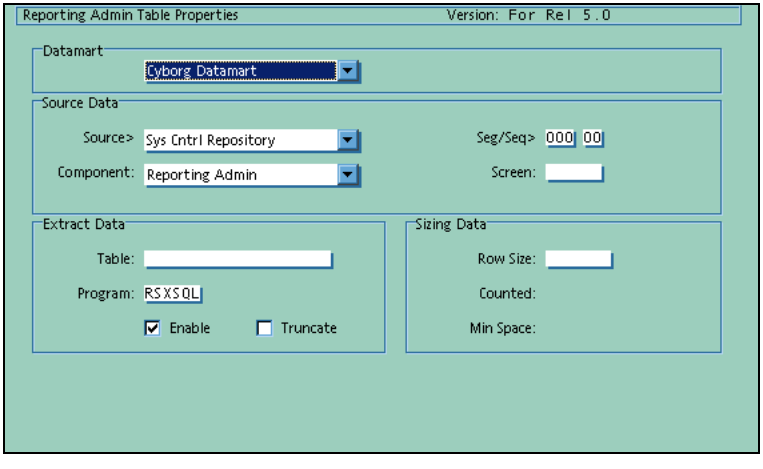
For practice, press Enter.

18. Open Reporting Admin Table Properties form

You will now need to add a new task list for the new data mart. This is done using Reporting Admin Table Properties (RSXSCR) form. Open this by making the following selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Administration Task List

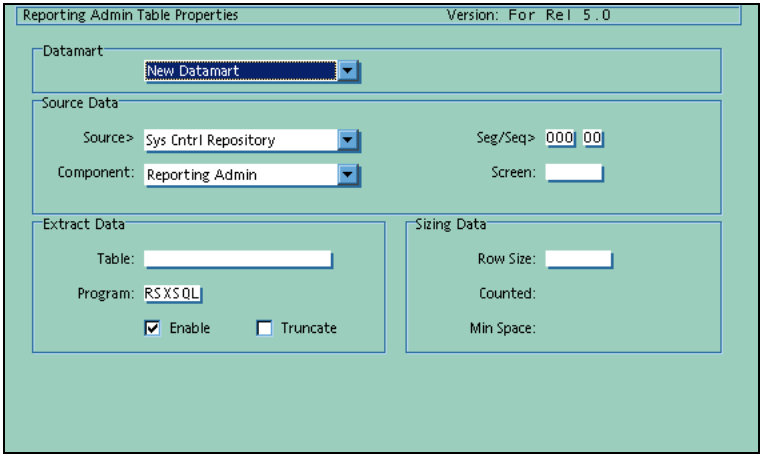
For practice, open the Reporting Admin Table Properties form:



19. Add an entry for RSXSQL

You must add an entry for the RSXSQL to produce script.

For practice, complete the Reporting Admin Table Properties form as in the following example:



20. Press Enter

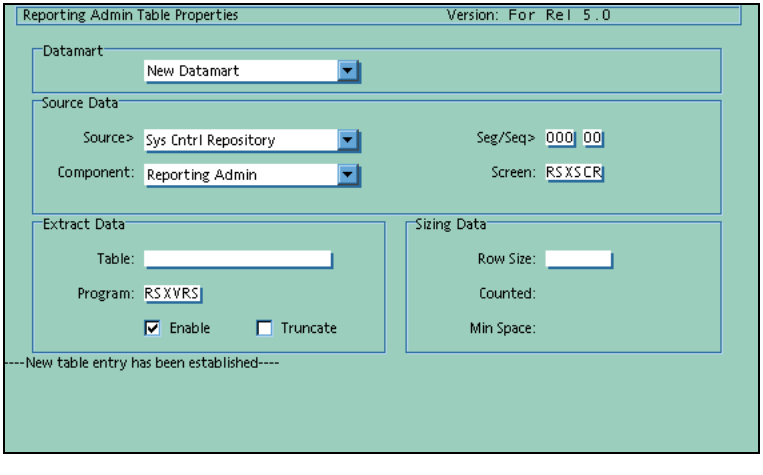
Press Enter to accept the new data mart table entry. A ‘New table entry has been established’ message will appear on the form.

For practice, press Enter.

21. Add an entry for RSXVRS

You must add an entry for the RSXVRS to produce output for the loader.

For practice, complete the Reporting Admin Table Properties form as in the following example:



22. Press Enter

Press Enter to accept the new data mart entry. A ‘Maintenance has been performed’ message will appear on the form.

For practice, press Enter.

23. Add remaining tasks

Carry out steps 21 and 22 for each task to be added to the data mart.

This is most easily done by clicking the Select button on the toolbar while displaying Reporting Admin Table Properties (RSXSCR) form:

Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
DM2_	D_	B__	00	DM2_COMPANY_HED	PR	A8-SCR	Y	RSXB	Y
DM2_	D_	CAF	00	DM2_PAY_OPTIONS	PR	AF-SCR	Y	RSXCAF	Y
DM2_	D_	CAJ	00	DM2_PAY_FREQUENCY	PR	AJ-SCR	Y	RSXCAJ	Y
DM2_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
DM2_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
DM2_	M_	G__	00	DM2_EMP_LOCATION	PR	GG-SCR	Y	RSXG	Y
DM2_	M_	H__	00	DM2_EMPLOYEE_HED	PR	HH-SCR	Y	RSXH	Y
DM2_	M_	H__	01	DM2_EMP_HED_QTR	PR	HT-SCR	Y		N
DM2_	M_	H__	02	DM2_DIRECT_DEPOSIT	PR	H9-SCR	Y		Y
DM2_	M_	JCA	00	DM2_CAN_EMPLOYEE_TAX	PR	JJ-SCR	Y	RSXJCA	Y
DM2_	M_	JCA	01	DM2_CAN_EMP_TAX_QTR	PR	JT-SCR	Y		N

You can then select the table name(s) and amend the Data mart option to the new data mart.

Note: *If there are a large number of tasks to add to the data mart, you would be better to export the VRST table to text file and make you changes there. Then MAINTI the new table entries back in to the System Control Repository.*

For practice, add DM2_COMPANY, DM2_EMPLOYEE, DM2_EMP_NAME_ADDR, and DM2_EMP_ACTIVITY to the New Datamart data mart. The resulting selection list should look similar to the following example:

NEW_	CF	000	00		RS		Y	RSXSQL	N
NEW_	CF	VRS	00		RS	RSXSCR	Y	RSXVRS	N
NEW_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
NEW_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
NEW_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
NEW_	M_	LZC	00	DM2_EMP_ACTIVITY	PP	08-SCR	Y	RSXLZC	Y

Creating a new OS script for a data mart

To create a new OS script for a data mart, follow these steps:

1. **Make a copy of JRSXRPT.BAT**
   Make a copy of JRSXRPT.BAT, found in the \runs directory, giving the copy a meaningful name appropriate for the data mart.

   For practice, make a copy of \runs\JRSXRPT.BAT, and name the copy JRSX001.BAT.

2. **Open the copy for edit**
   Open the newly-created file for edit.

   For practice, edit JRSX001.BAT.

3. **Change DB-NAME**
   Change the DB-NAME variable to the relevant database name.

   For practice, change the DB-NAME variable to equal r2_test.

4. **Change DB-OWNER**
   Change the DB-OWNER variable to the new schema owner.

   For practice, change the DB-OWNER variable to dbo.

5. **Change DB-USER**
   Change the DB-USER variable to the new database login user id.

   For practice, change the DB-USER variable to sa.

6. **Change DB-PASSWORD**
   Change the DB-PASSWORD variable to the new password.

   For practice, change the DB-PASSWORD variable.

7. **Change RUNREP name**
   Change the RUNREP name to the new RGMSTR group name.

   For practice, change the RUNREP name to RSX001.

8. Save and close batch file

Save and close the batch file.

For practice, save and close JRSX001.BAT. If you successfully completed the Guided Practice, JRSX001.BAT will resemble the following sample:

```
set DB-NAME=r2_test
set DB-OWNER=dbo
set DB-USER=sa
set DB-PASSWORD=
set ISQL-PATH=c:\mssql\binn\
set BCP-PATH=c:\mssql\binn\

if "%1" == ""            goto :Extract
if /I "%1" == "Extract"  goto :Extract
if /I "%1" == "Sort"     goto :Sort
if /I "%1" == "Split"    goto :Split
if /I "%1" == "Truncate" goto :Truncate
if /I "%1" == "Load"     goto :Load
echo *
echo ********************************************
echo *** "%1" is an invalid Step Restart Name; ***
echo *** - Job has been terminated !!!         ***
echo ********************************************
echo *
goto :End

:Extract
TITLE --- Extracting Data ---

REM ************************************************
ECHO STEP 1 - EXTRACT DATA
REM ************************************************
if exist ..\txt\rsxrpt.36 del ..\txt\rsxrpt.36
echo P REPORTJ00100        REPORT  RSX001              > ..\work\report.04
echo P REPORTJ00100        RSXPMM  RSX001             >> ..\work\report.04
set FILE03=..\list\report.03
set FILE04=..\work\report.04
set FILE10=..\sql\rsxrpt.10
set FILE15=..\work\report.15
set FILE36=..\txt\rsxrpt.36
cd ..\data
..\prog\cbsvb
cd ..\runs
```

Deleting a data mart

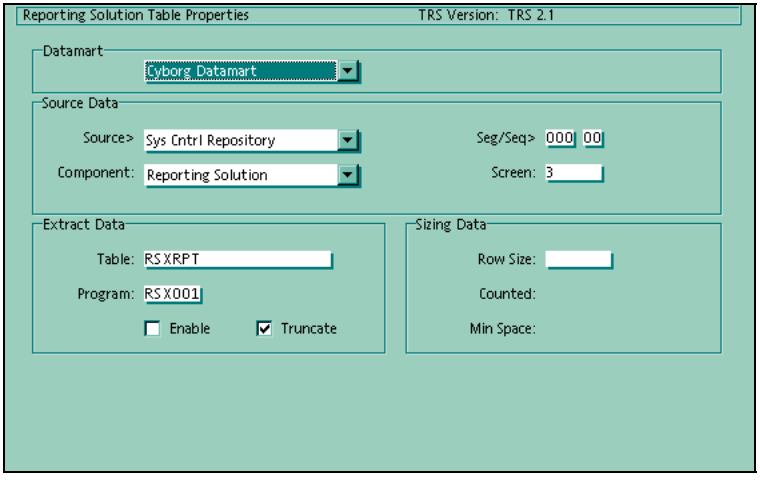
To delete a data mart, complete the following steps:

1. Open Reporting Admin Table Properties form

You will first need to delete the tasks in the VRST task list for the data mart to be deleted. Open Reporting Admin Table Properties form (RSXSCR) by making the following selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Administration Task List

For practice, open Reporting Admin Table Properties form:



2. Delete tasks on the VRST table for this data mart

Select the first task on the VRST table for this data mart.

This is most easily done by clicking the 'Show selection list in the message area' button on the toolbar while displaying Reporting Administration Table Properties (RSXSCR) form:

Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
DM2_	D_	B__	00	DM2_COMPANY_HED	PR	A8-SCR	Y	RSXB	Y
DM2_	D_	CAF	00	DM2_PAY_OPTIONS	PR	AF-SCR	Y	RSXCAF	Y
DM2_	D_	CAJ	00	DM2_PAY_FREQUENCY	PR	AJ-SCR	Y	RSXCAJ	Y
DM2_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
DM2_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
DM2_	M_	G__	00	DM2_EMP_LOCATION	PR	GG-SCR	Y	RSXG	Y
DM2_	M_	H__	00	DM2_EMPLOYEE_HED	PR	HH-SCR	Y	RSXH	Y
DM2_	M_	H__	01	DM2_EMP_HED_QTR	PR	HT-SCR	Y		N
DM2_	M_	H__	02	DM2_DIRECT_DEPOSIT	PR	H9-SCR	Y		Y
DM2_	M_	JCA	00	DM2_CAN_EMPLOYEE_TAX	PR	JJ-SCR	Y	RSXJCA	Y
DM2_	M_	JCA	01	DM2_CAN_EMP_TAX_QTR	PR	JT-SCR	Y		N

You can then select the task to be deleted from the data mart.

For practice, select DM2_EMP_EMP_ACTIVITY from the New Datamart data mart.

Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	M_	LZR	00	DM2_LOCATION	HR	05CSCR	Y	RSXLZR	Y
DM2_	M_	LZS	00	DM2_APPRAISAL	HR	50-SCR	Y	RSXLZS	Y
DM2_	M_	LZT	00	DM2_MONETARY_PERQ	HR	27-SCR	Y	RSXLZT	Y
DM2_	M_	PE_	00	DM2_PERIOD_END	PR	PE-SCR	Y	RSXPE	Y
NEW_	CF	000	00		RS		Y	RSXSQL	N
NEW_	CF	VRS	00		RS	RSXSCR	Y	RSXVRS	N
NEW_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
NEW_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
NEW_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
NEW_	M_	LZC	00	DM2_EMP_ACTIVITY	PP	08-SCR	Y	RSXLZC	Y

3. Select Actions

Select the Actions menu option from the launchbar.

For practice, select Actions.

4. Click Delete This Entry

Click Delete This Entry. A Confirm dialog will display.

For practice, click Delete This Entry.

5. Click Yes

Click Yes to confirm the deletion. A '- - - Table record has been deleted - - -' message will display.

For practice, click Yes.

6. Delete remaining tasks for the data mart

You will need to perform these steps for each task to be deleted.

Note: If there are a large number of tasks to delete from the task list, you should consider exporting the VRST table to a text file and make your changes there. Then MAINTI the deleted table entries back in to the System Control Repository.

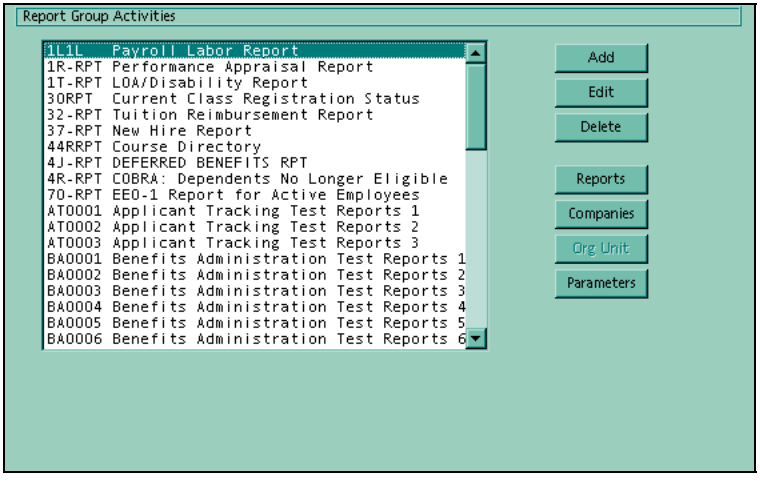
For practice, delete the remaining tasks for the New Datamart data mart.

7. Open Report Group Activities form

You will now need to delete the Report Group for the data mart to be deleted. Open the Report Group Activities form (RGMSTR) by making the following selection from the navigator:

Component: Reporting
Process: Report Scheduling
Task: Schedule Report Groups

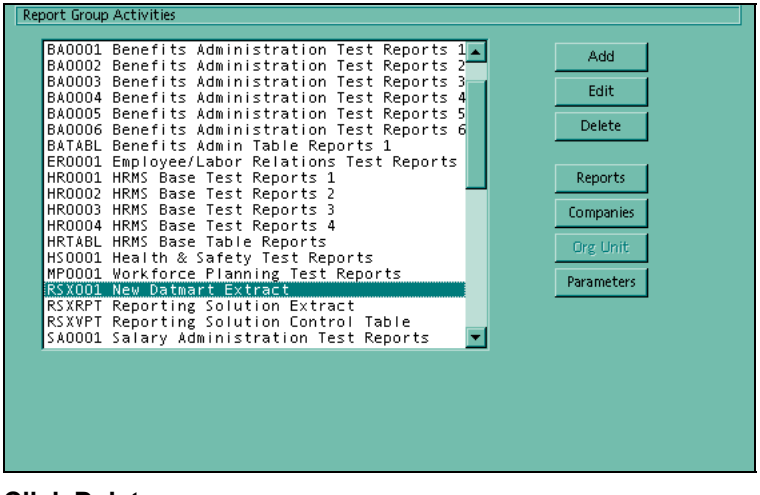
For practice, open the Report Group Activities form.



8. Select the Report Group

Select the Report Group to be deleted.

For practice, select RSX001.



9. Click Delete

Click Delete. A warning message will appear.

For practice, click Delete.

```
Warning Messages
    + Report group and its contents will be deleted
Information Messages

        A Warning message means that Cyborg has found a
        problem with your information. Although Cyborg can
        proceed if this information is correct, the warning gives
        you a chance to review the information in case a
        mistake has been made.
        An example of a Warning message would be entering
        an employee start date and birth date that make an
        employee fourteen years old. Although this may be true,
        it is most likely to be a typing error.
```

10. Press Enter

Select the warning message checkbox and press Enter.

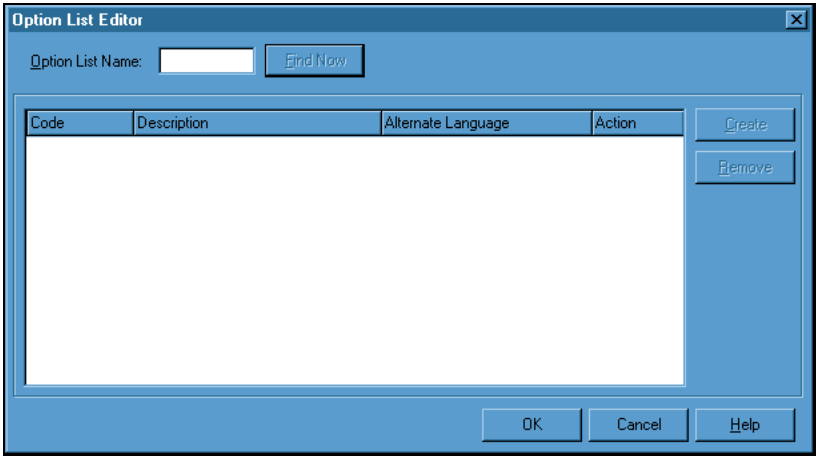
For practice, select the warning message checkbox and press Enter.

11. Open the Option List Editor

You now need to delete the data mart entry from the Datamart Name (RS03) option list. Open the Option List Editor (CSUPDT) by making the following menu selection from the navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

For practice, open the Option List Editor.



12. Type option list name in text box

Type the relevant option list name in the Option List Name text box.

☞ *Refer Option Lists for Reporting Administration (on page 231) for details of the option lists specific to Reporting Administration.*

For practice, type RS03 in the Option List Name text box.

13. Click Find Now

Click Find Now to display the option list in the dialog.

For practice, click Find Now.

14. Select the option list entry to be deleted

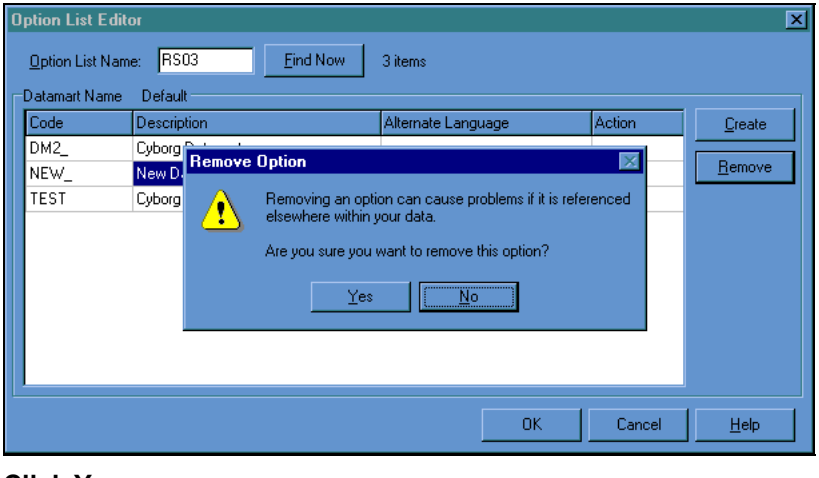
Click the description of the entry to delete.

For practice, select the New Datamart option list entry.

15. Click Remove

Click Remove. The Remove Option warning dialog will display, asking you to confirm that you want to delete the entry.

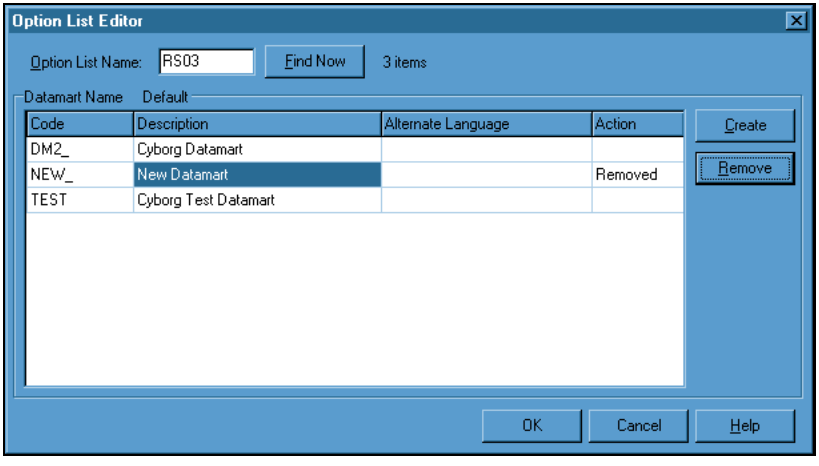
For practice, click Remove.



16. Click Yes

Click Yes to confirm. The word ‘Removed’ will appear in the Action field.

For practice, click Yes.



17. Click OK

Click OK.

For practice, click OK.

Deleting the OS script for a data mart

To delete the OS script for a data mart, follow these steps:

1. Navigate to the runs directory

Using Windows Explorer, navigate to the runs directory.

For practice, navigate to the runs directory.

2. Delete the data mart script

Delete the data mart script in the runs directory.

For practice, delete JRSX001.BAT from the runs directory.

Testing your customization

Once you have customized a field in Reporting Administration, you will need to test that the customization was successful. Some of the tests are embedded in the preceding steps. To complete your testing, follow these steps:

1. Access extract scripts

Access the command prompt and go to the *n*:\Cyborg45\Runs directory, where *n* is the drive, and *Cyborg40* is the directory on which the extract script is stored.

For practice, access the \Runs subdirectory. Ensure that the username and password is set to sa, master in the jrsxrpt.bat.

2. Execute extract

At the command prompt, type:

```
jrsxrpt
```

For practice, type 'jrsxrpt'.

3. Press Enter

Press Enter.

The extract batch file will run, calling the splitter and bulk load programs, and the data mart will be created.

For practice, press Enter.

4. Verify extract

If the batch job has successfully run there will be no errors in the following log files:

- n:\Cyborg50\Log\jrsxrpt.log
- n:\Cyborg50\Log\jrsxsplt.log
- n:\Cyborg50\Log\jrsxload.log

In addition, there should be no .bad files with non-zero sizes in the n:\Cyborg50\BCPERR directory.

For practice, open jrsxrpt.log, jrsxsplt.log, and jrsxload.log files and ensure that there are no errors in the files. Check the size of the \bcperr.bad files. Open any with a non-zero size and check for errors.*

5. Launch the Impromptu Administration program

If the Impromptu Administration icon has been added to the Launch toolbar then select it to launch the application.

If there is no Impromptu icon on the Launch toolbar, then make the following selection from your Windows desktop:

Start ► Programs ► Cognos ► Impromptu Administrator

For practice, launch the Impromptu Administrator application.

6. Open the catalog

Open the relevant catalog by selecting the following menu option:

Catalog ► Open

Select the catalog and click Open.

For practice, open the General catalog and click Open.

7. Log in as Creator

Select Creator from the User class option list, and click OK.

For practice, select Creator from the User class option list, and click OK.

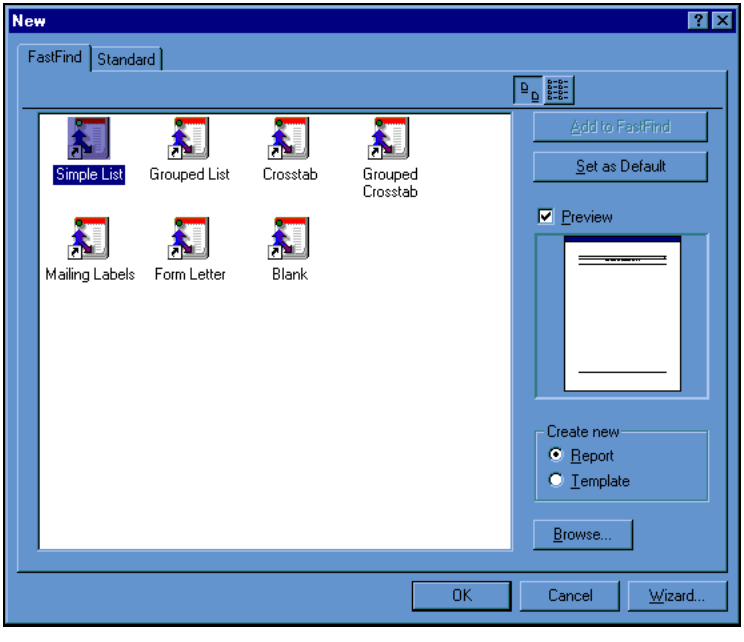
8. Create a Simple List

Create a simple list by making the following menu selection:

File ► New

Select Simple List from the New dialog.

For practice, select Simple List.



9. Click OK

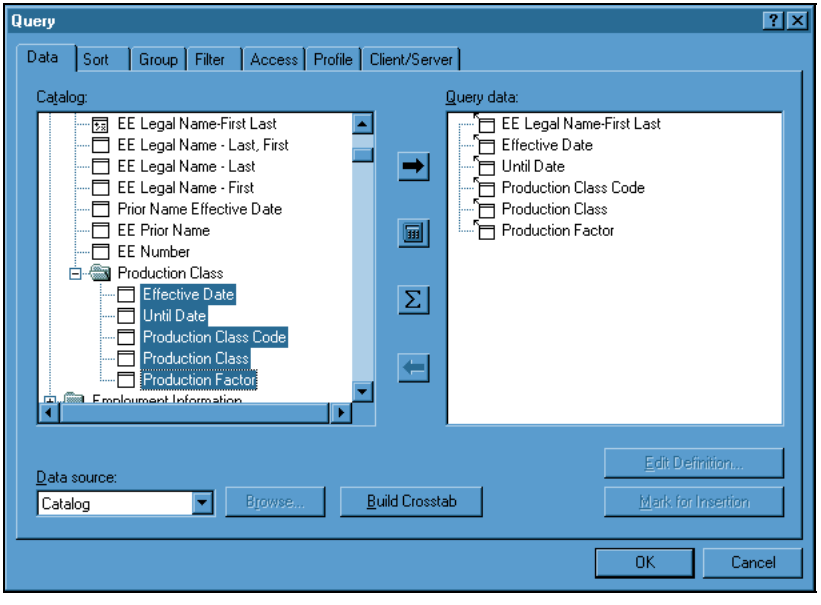
Click OK. The Query dialog will display.

For Practice, click OK.

10. Add report data

Click the data tab and add the customized data item to the Query data window by double-clicking the items which you have customized.

For practice, select EE Legal Name-First last from the Employee Personal Information folder, and all of the columns from the Employee Personal Information ► Production Class folder.



11. Click OK

Click OK.

For practice, click OK.

12. Review the query results

Review your customization requirement and ensure that the query displays the desired customized results.

For practice, the report should show data on the new fields.

See also

- *Troubleshooting a Customization (on page 211)*

For more detail on error checking.

- *Components of Reporting Administration (on page 235)*

For more detail on the structure and use of the jrsxrpt batch job.

Extended Practice

1. Looking at Sample 1 in Appendix H, identify which, if any, modifications are required to customize the data mart.

2. Make the relevant modifications to customize Reporting Administration.

3. Looking at Sample 2 in Appendix H, identify which, if any, modifications are required to customize the data mart.

4. Make the relevant modifications to customize Reporting Administration.

Review of Questions Answered

1. When would you create multiple data marts?

CHAPTER 9

Customizing the Extract Parameters

In This Chapter

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Introduction

This chapter will help you to ensure you perform the appropriate tasks for customizing the extract parameters.

Tasks

This chapter explains the following:

- Defining extraction parameters for Reporting Administration
- Creating an extraction task list
- Adding a component
- Deleting a component
- Testing your customization

Prerequisites

Before you can customize Reporting Administration, you must:

- Determine if customization will provide a good return on investment
- Identify the items you wish to customize

☞ *Refer to Planning for your Customization Project (on page 39) for more information on creating project requirements.*

☞ *Refer to Analyzing your MAINTO (on page 51) for information on using your MAINTO to determine required customizations.*

Questions answered

The following question is answered in this chapter:

How would you best identify which format files require modification?

Component relationships

Reporting Administration is composed of many components. Each component plays an important role in the final goal—an end user running Impromptu to produce reports. Major components in Reporting Administration include:

- Extraction routines (CSL)
- Data mart Extract File (FILE36)
- SQL Script File (FILE10)
- Data mart Extract File Splitter (RSPLIT)
- Direct Loader Control/Format Files
- Data Definition Language (DDL)

Extraction routines

The extraction routines are programmed in Cyborg Scripting Language (CSL) or Report Generator (RG), depending on where the data resides (the online or the batch system). The extraction routines cannot automatically extract all the fields in a segment, simply because there is no way for these routines to know the column and table in the data mart to which the fields belong. Detailed coding is required to specify what should be extracted, and where the data should be placed, once extracted. When you add or remove a data element from Reporting Administration, this may be the first component requiring an update.

Data Mart Extract File (FILE36)

The Data Mart Extract File (FILE36) is the file in which data is placed after extraction. It is a fixed length (1024), sequential output file defined to CBSVB and to P5PRNT.

SQL Script File (FILE10)

FILE10 contains the SQL commands required to truncate the data mart tables.

Data Mart Extract File Splitter (RSPLIT)

This COBOL program separates the contents of FILE36 into table files to be loaded into the data mart. If you have more than one data mart, it must be run once for each data mart to be loaded.

Direct Loader Control/Format Files

The direct loader utility for each database will use the control/format file for each table in order to load data from a text file into the database table. This utility will be run once for each data mart table to be loaded.

Data Definition Language (DDL)

The DDL (Data Definition Language) defines the organization and structure of the data mart. Once the data is extracted, it must then be inserted, according to how this file understands the content and structure of the data. If you decide to add or remove a data element such as a field or table, the DDL must be revised to include a statement relative to the placement of that data element.

RSXRPT

The execution of the extract process is the first step of a standard REPORT process, producing both SQL commands in FILE10 and extract data in FILE36. There is an I (inquiry) in the CODE-1 position so that this script can be executed at any time and does not require exclusive use of the data files. A standard script can be scheduled or executed by hand to perform this task.

```
@ECHO OFF
CLS
rem ************************************************
ECHO    REPORTING ADMINISTRATION EXTRACT IS STARTED
rem ************************************************
SET FILE01=\ST50\DAT\FILE01
SET FILE02=\ST50\DAT\FILE02
SET FILE03=\ST50\TXT\RSXRPT.03
SET FILE04=\ST50\TXT\RSXRPT.04
SET FILE10=\ST50\SQL\RSXRPT.10
SET FILE15=\ST50\TXT\RSXRPT.15
SET FILE36=\ST50\TXT\RSXRPT.36
ECHO                      REPORTI RSXRPT > \ST50\TXT\RSXRPT.04
..\PROG\CBSVB
SET FILE01=
SET FILE02=
SET FILE03=
SET FILE04=
SET FILE10=
SET FILE15=
SET FILE36=
```

Identifying customization components

RSXVPT Reporting Administration Control report

The RSXVPT Reporting Administration Control report contains a listing of all the entries on the RSXSCR Table properties task list (VRST). A sample layout of the report is provided below:

```
DATA    SRC SEG SEQ  MODULE TABLE NAME           SCREEN    EXTRACT   ENABLED   TRUNCATE
-----   --- --- ---  ------ -------------------- ------    -------   -------   --------

DM2_     M_ LPM 00     PM   DM2_EMP_INCUMBENCY   M40SCR    RSXLPM        Y         Y
DM2_     M_ LPR 00     HR   DM2_INJURY           PR-SCR    RSXLPR        Y         Y
DM2_     M_ LQ0 00     BA   DM2_EMP_RETIREMENT   65-SCR    RSXLQ0        Y         Y
DM2_     M_ LQ1 00     BA   DM2_EMP_PLAN         55-SCR    RSXLQ1        Y         Y
```

Use this report as a cross-reference when making a customization. On the same line of the report, you can locate the Bulk Copy Program format file (SRC + SEG + SEQ), the associated table name, and the associated extract program to be changed. For example, if you added a column to the DM2_INJURY table, you must also modify the extract routine RSXLPR and the BCP format file, M_LPR00. The following table references the report field to the column location in the RSXSCR Table properties task list.

Report field	Column location
VRST-DATAMART	001
VRST-SOURCE	010
VRST-SEGMENT	013
VRST-SEQUENCE	017
VRST-MODULE	024
VRST-NAME	029
VRST-SCREEN	050
VRST-PROGRAM	060
VRST-ENABLED	074
VRST-TRUNCATE	084
PERM-01-V0 (COUNTER)	

☞ *Refer to Reporting Administration Control Table Quick Reference (on page 267) for a summary of RSXVPT.*

Detailed Directions

This section provides detailed instructions for completing the customization tasks.

Task

Defining extraction parameters for Reporting Administration 174
Creating an extraction task list 177
Adding a component 180
Deleting a component 194
Testing your customization 207

Defining extraction parameters for Reporting Administration

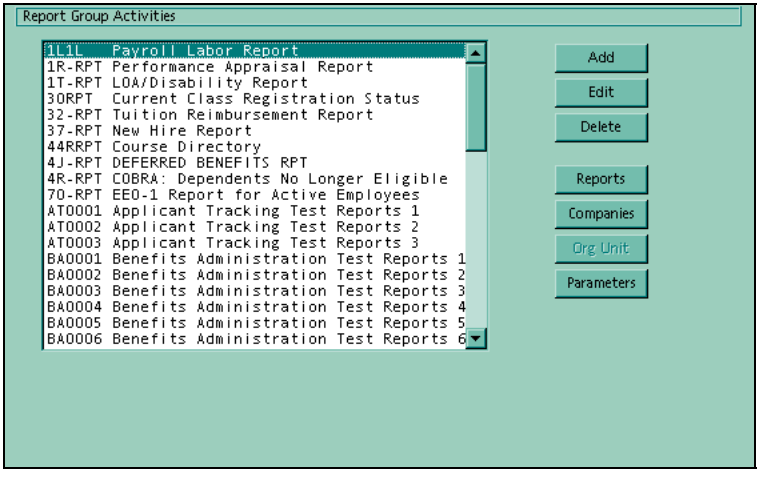
To define extraction parameters for Reporting Administration, follow these steps:

1. Open Report Group Activities form

Open Report Group Activities form (RGMSTR) by making the following selection from the navigator:

Component: Reporting
Process: Report Scheduling
Task: Schedule Report Groups

For practice, open Report Group Activities form.



2. Select RSXRPT

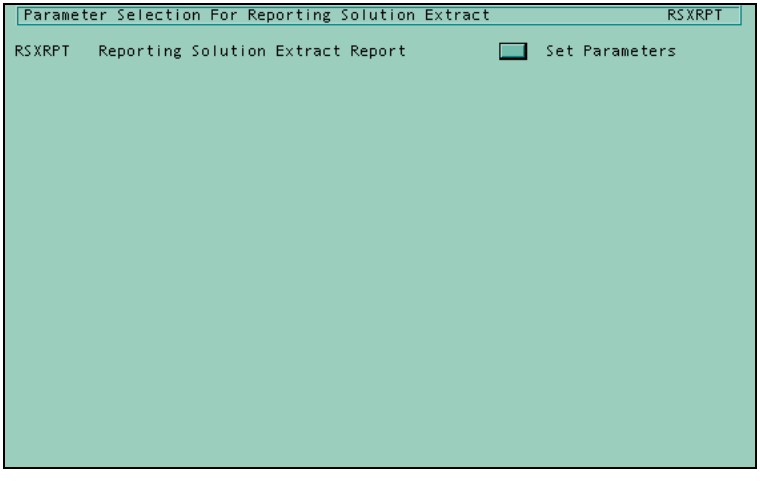
Select Reporting Administration Extract form, RSXRPT.

For practice, select RSXRPT.

3. Click Parameters

The Parameter Selection For Reporting Administration Extract form will display.

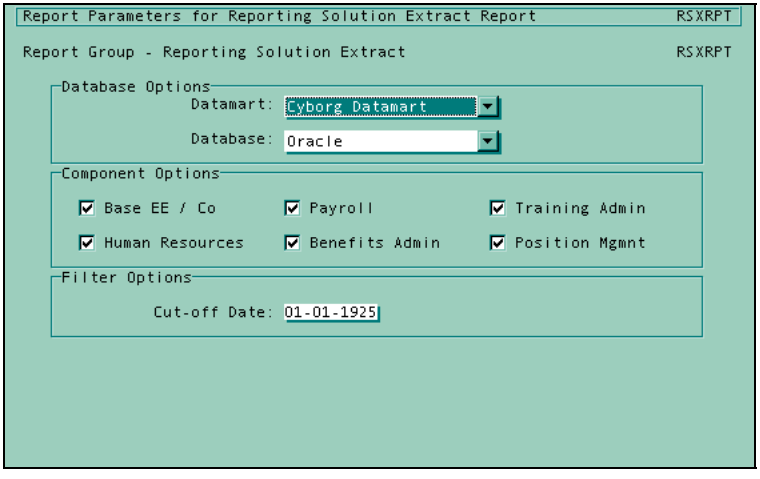
For practice, click Parameters.



4. Click Set Parameters

Click Set Parameters to access the Report Parameters for Reporting Administration Extract Report (RSXRPT) form.

For practice, click Set Parameters.



5. Specify a data mart

Select a data mart to determine which data will be written from the Datamart option list. The values are populated from the Datamart Name (RS03) option list.

For practice, select the Cyborg Datamart from the Datamart option list.

6. Specify a Database

Select a database management system from the Database option list. The values are populated from the Database Type (RS01) option list.

For practice, select Microsoft SQL Server from the Database option list.

7. Select Component Options

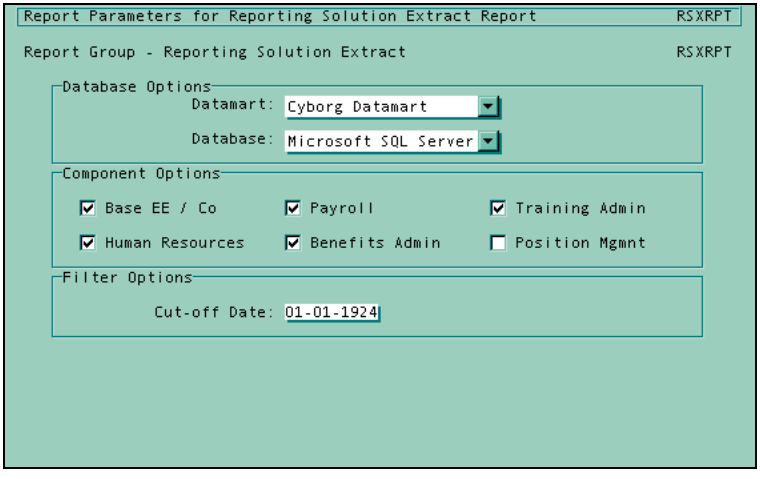
Select or de-select the components to be included in the extraction process. The values are populated from the Component Options (RS04) option list.

For practice, select all component checkboxes, except for Position Mgmnt.

8. Specify a Cut-off Date

If you want to restrict extraction to a particular period of time, enter a date in the format: MM-DD-CCYY (US and Canada, excluding Quebec) or DD-MM-CCYY (elsewhere).

For practice, type 01-01-1924 in the Cut-Off Date text box.



9. Press Enter

Press Enter to accept the changes.

For practice, press Enter.

See also:

- *Extraction forms (on page 68)*

For detailed information on the Report Parameters for Reporting Administration Extract Report form (RSXRPT).

- *Option Lists for Reporting Administration (on page 231)*

For further detail on the option lists specific to Reporting Administration.

Creating an extraction task list

To create an extraction task list, follow these steps:

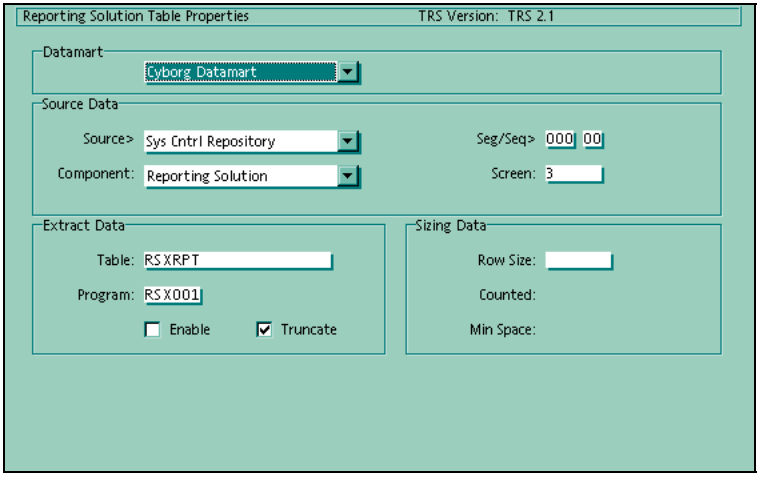
Note: The form used in this task is applicable only for System Repository and Employee Database extraction.

1. Open Reporting Administration Table Properties form

Open Reporting Administration Table Properties form (RSXSCR) by making the following selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Solution Task List

For practice, open Reporting Administration *Table Properties form.*



2. Select a data mart

Select a data mart to which data will be written, from the Datamart option list. The values are populated from the Datamart Name (RS03) option list.

For practice, select the Cyborg Workforce Data Mart from the Datamart option list.

3. Select a Source

Select a source container from which the data will be extracted, from the Source> option list. The values are populated from the Record Source (RS02) option list.

For practice, select Sys Cntrl Repository from the Source> option list.

4. Select a Component

Select a component to be included in the extraction process, from the Component option list. The values are populated from the Component Names (RS01) option list.

For practice, select Reporting Administration from the Component option list.

5. Specify a Seg/Seq

Type the segment ID and the child sequence ID for the data to be extracted in the Seg/Seq> text boxes.

Refer to Reporting Administration Control Table Quick Reference (on page 267) for a list of source, sequence and segment codes.

For practice, type VRS 00 in the Seg/Seq> text boxes.

6. Specify a Screen

Type the ID for the form containing the data to be extracted in the Screen text box.

For practice, type RSXSCR in the Screen text box.

7. Specify a Table

Type the name of the table to which the extracted data should be written in the Table text box.

For practice, leave the Table text box blank.

8. Specify a Program

Type the name of the CSL subroutine to extract the data in the Program text box.

For practice, type RSXVRS in the Program text box.

9. Enable extraction

Select the Enable checkbox.

For practice, select the Enable checkbox.

10. Enable truncation

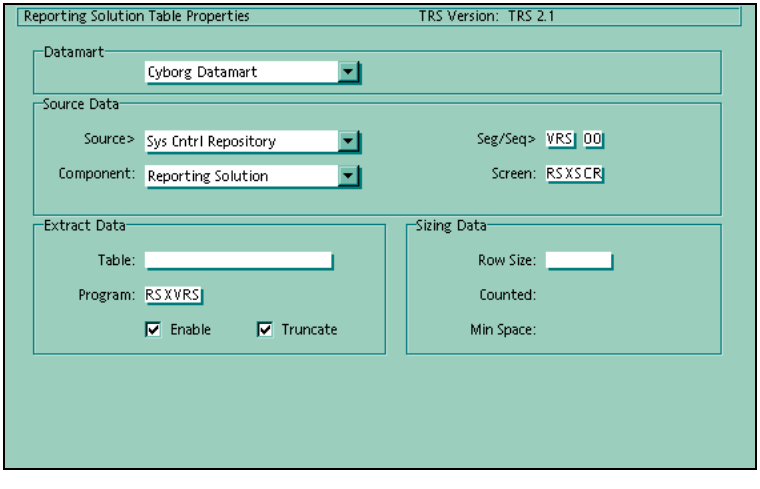
Select the Truncate checkbox to enable truncation of the data mart table.

For practice, select the Truncate checkbox.

11. Specify a Row Size

Type the length of a row in the data mart table for this data in the Row Size text box.

For practice, leave the Row Size check box blank.



12. Press Enter

Press Enter to accept the changes.

For practice, press Enter.

See also:

- *Extraction forms (on page 68)*

For detailed information on the Reporting Admin Table Properties form (RSXSCR).

Adding a component

Generally a component represents a set of tables around a definable subject matter, such as Human Resources or Position Administration. The PP (Base EE / Co) component includes all of the tables that are common to all of the catalogs.

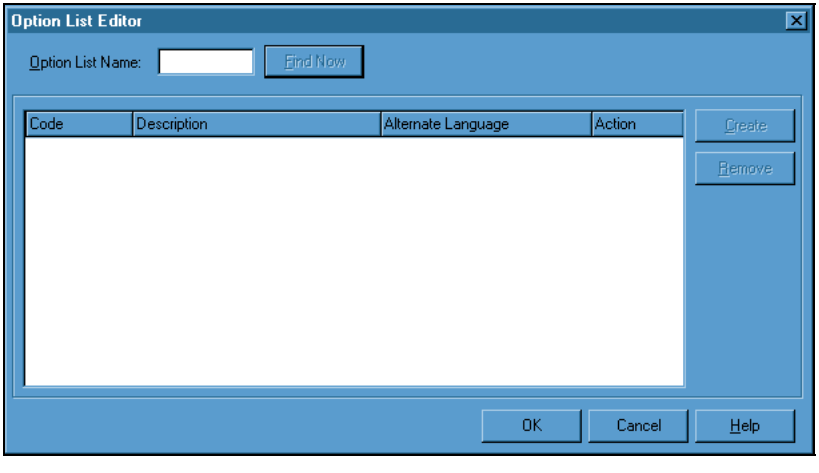
To add a component to the extraction process, follow these steps:

1. Open the Option List Editor

Open the Option List Editor (CSUPDT) by making the following menu selection from the navigator:

Component:	Development Tools
Process:	Option Lists
Task:	Edit

For practice, open the Option List Editor.



2. Type option list name in text box

Type the relevant option list name in the Option List Name text box.

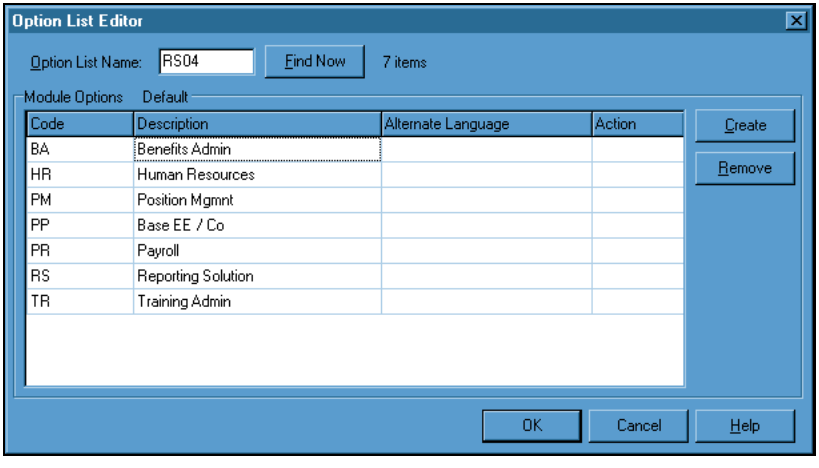
Refer to Option Lists for Reporting Administration (on page 231) for details of the option lists specific to Reporting Administration.

For practice, type RS04 in the Option List Name text box.

3. Click Find Now

Click Find Now to display the option list in the dialog.

For practice, click Find Now.



4. Click Create

Click Create to add a new entry.

For practice, click Create.

5. Type the Code value

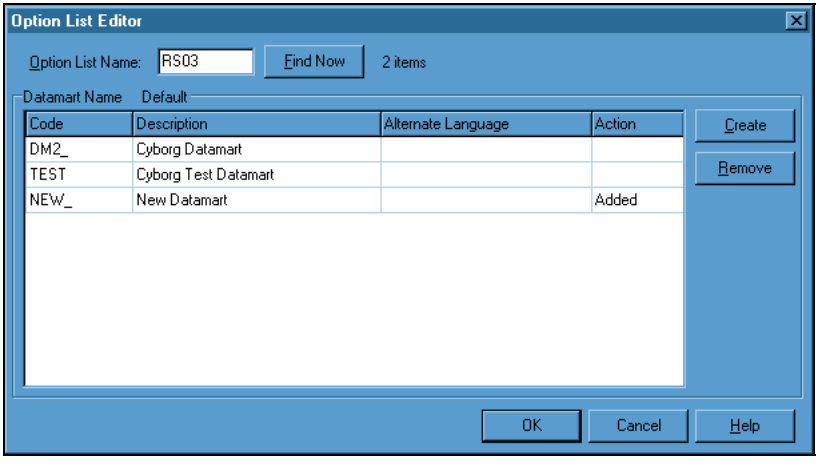
Enter the Code value for the new data mart. This field is defined as two characters.

For practice, type MI in the Code field.

6. Type the Description value

Type a description of the new data mart in the Description field. This can be up to 20 characters.

For practice, type 'Mining' in the Description field.



7. Click OK

Click OK to accept the changes.

For practice, click OK.

8. Open the Field Maintenance And Edit form

Open the Field Maintenance And Edit form (F-NAME) by making the following menu selection:

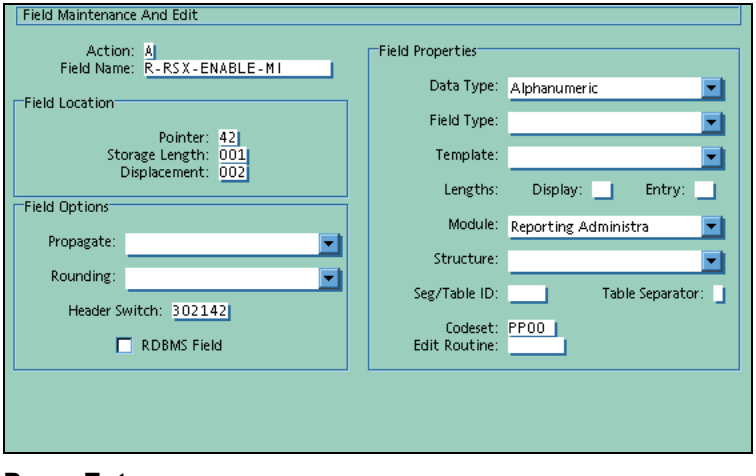
Component: Development Tools
Process: Fields And Verbs
Task: Define a field

For practice, open the Field Maintenance And Edit form.

9. Add a new field

Each component can be enabled or disabled from the RGMSTR form. As such, each component needs to have a field defined to act as that switch. Add a new field R-RSX-ENABLE-xx. ‘xx’ represents the new component code.

For practice, complete the form as in the example below:



10. Press Enter

Press Enter to accept the new field.

For practice, press Enter.

11. Open GETSAT

You will need to add the new component to the Report Parameters for Reporting Administration Extract Report (RSXRPT) form. Open the Get Copy of Screen Appearance Table (GETSAT) form by making the following selection:

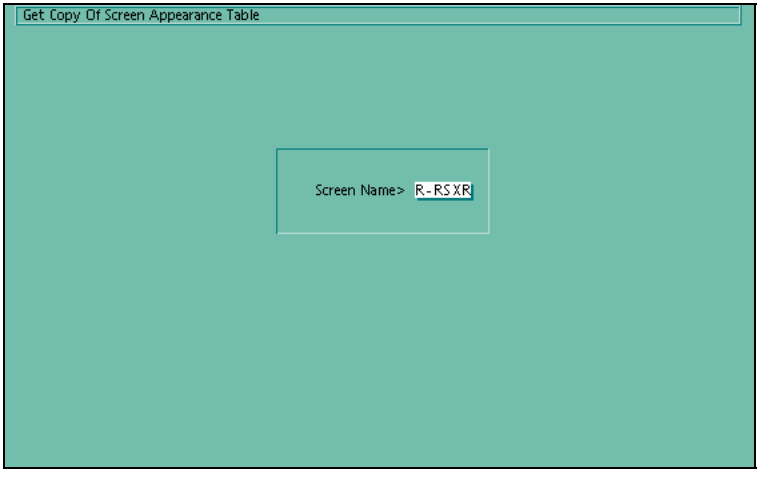
Component: Development Tools
Process: Programming Utilities
Task: Extract Form Appearance Table

For practice, open the Get Copy of Screen Appearance Table (GETSAT) form.

12. Type form name

Type the name of the form to be updated in the Screen Name text box.

For practice, type R-RSXR in the Screen Name text box.



13. Press Enter

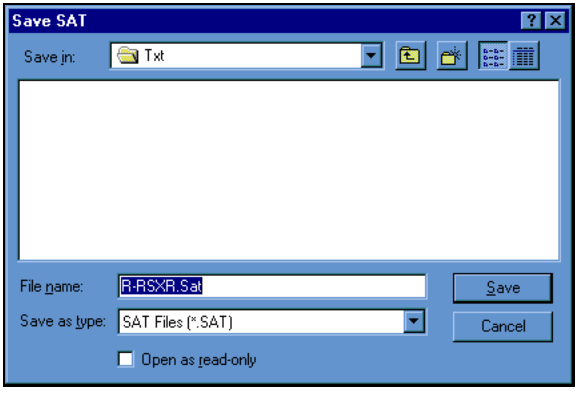
Press Enter. The Save SAT dialog appears, prompting you to save the copy of the Screen Appearance Table file.

For practice, press Enter.

14. Save the Screen Appearance Table

Save the Screen Appearance Table by navigating to a suitable location and clicking Save.

For practice, save the file as R-RSXR.Sat in a temporary directory. Click Save.



15. Edit the Screen Appearance Table

Edit the Screen Appearance Table to add the new component to the Report Parameters for Reporting Administration Extract Report (RSXRPT) form.

For practice, edit the file as in the following sample:

```
P R-RSXRS00303 PL  Report Parameters for Reporting Solution
P R-RSXRS00373 PL  RSXRPT
P R-RSXRS10706GPG     0570                                Database Options
P R-RSXRS10831 PDR2                    R-RSX-DATAMART     Datamart:
P R-RSXRS11031 PDR2                    R-RSX-DATABASE-TYPE Database:
P R-RSXRS11206GPG     0670                                Component Options
P R-RSXRS11409GPC                      R-RSX-ENABLE-PP    Base EE / Co
P R-RSXRS11431GPC                      R-RSX-ENABLE-PR    Payroll
P R-RSXRS11531GPC                      R-RSX-ENABLE-MI    Mining
P R-RSXRS11453GPC                      R-RSX-ENABLE-TR    Training Admin
P R-RSXRS11609GPC                      R-RSX-ENABLE-HR    Human Resources
P R-RSXRS11631GPC                      R-RSX-ENABLE-BA    Benefits Admin
P R-RSXRS11653GPC                      R-RSX-ENABLE-PM    Position Mgmnt
P R-RSXRS11806GPG     0470                                Filter Options
P R-RSXRS12031 PER2                    R-RSX-CUT-OFF-DATE Cut-off Date:
```

16. Save the file

Save and close the file

For practice, save and close R-RSXR.Sat.

17. Run PUTSAT

Run the Update Form Appearance Table (PUTSAT) program by making the following menu selection:

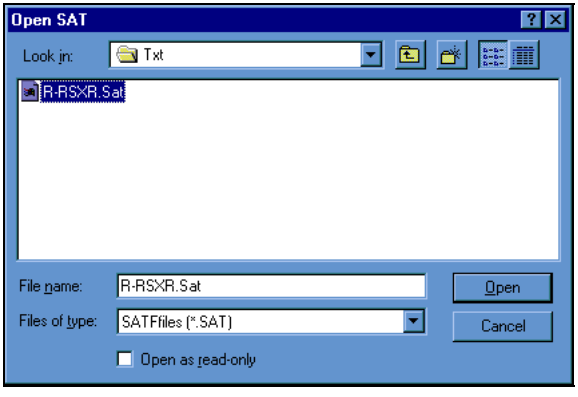
Component: Development Tools
Process: Programming Utilities
Task: Update Form Appearance Table

For practice, run the Update Form Appearance Table (PUTSAT) program.

18. Select Screen Appearance Table file

Select the updated Screen Appearance Table file from the Open SAT dialog.

For practice, select R-RSXR.Sat.



19. Click Open

Click Open. A 'RELOAD IS OK' message should be displayed.

For practice, click Open.

```
R-RSXR 99999E   RELOAD IS OK.  Ver-4.0 LENGTH  1,737 04-05-00 14:23:29
```

20. Open the Report Group Activities (RGMSTR) form

Open the Report Group Activities (RGMSTR) form by making the following menu selection:

Component: Reporting
Process: Report Scheduling
Task: Schedule Report Groups

For practice, open the Report Group Activities (RGMSTR) form.

21. Select Reporting Administration Extract report

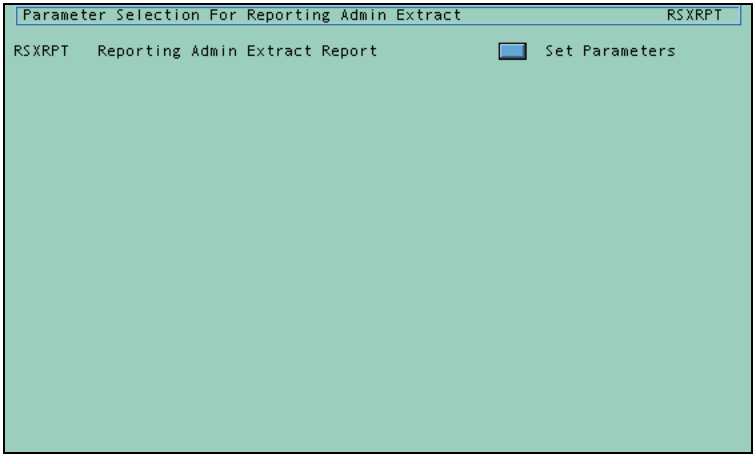
Select RSXRPT from the list.

For practice, select RSXRPT.

22. Click Parameters

Click Parameters. The Parameter Selection for Reporting Admin Extract form will display.

For practice, click Parameters.



23. Click Set Parameters

Click Set Parameters. The Report Parameters for Reporting Administration Extract Report (RSXRPT) form will display, showing the new component.

For practice, click Set Parameters.

24. Select the new component

Select the new component by clicking the checkbox.

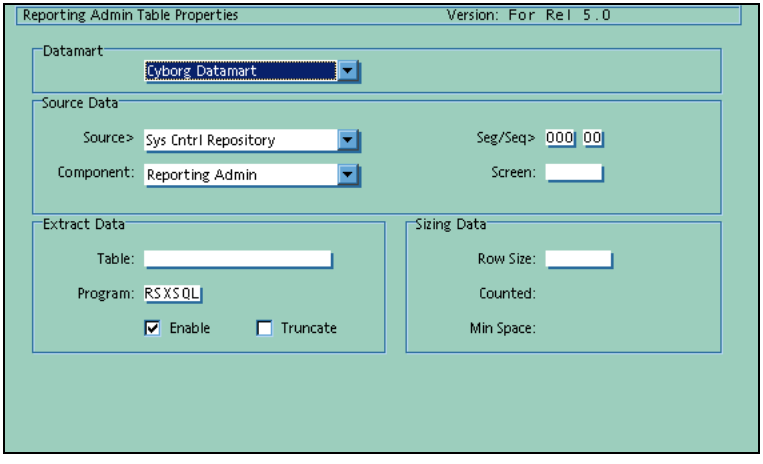
For practice, select the Mining checkbox.

25. Open Reporting Administration Table Properties form

Open Reporting Administration Table Properties form (RSXSCR) by making the following menu selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Administration Task List

For practice, open the Reporting Admin Table Properties form:



26. Select a task to add to the new component

Add a new task to the new component.

For practice, select DM2_BONUS and make it a member of the Mining component.

27. Open the Edit Utility

Open the Edit Utility (EDIT) by making the following menu selection:

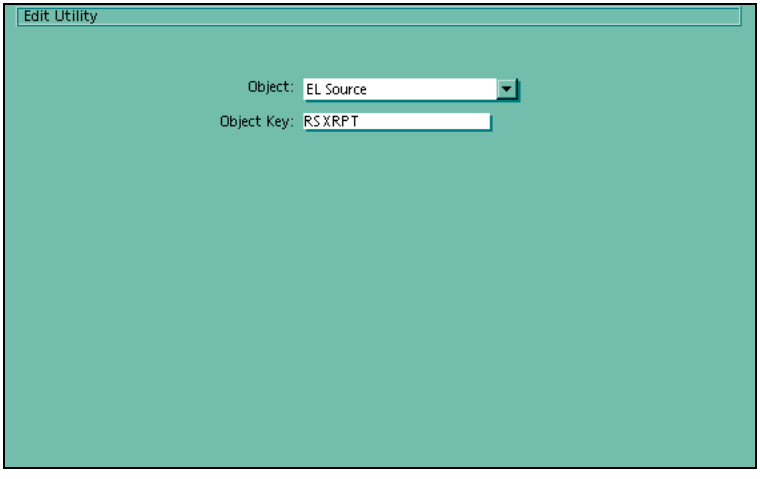
Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Edit Control Repository Object

For practice, open the Edit Utility.

28. Edit the RSXRPT CSL subroutine

Open the RSXRPT CSL subroutine for edit by selecting EL Source from the Object option list and typing RSXRPT in the Object Key text box.

For practice, open RSXRPT for edit.



29. Press Enter

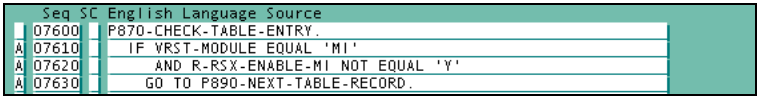
Press Enter. The RSXRPT CSL subroutine will open.

For practice, press Enter.

30. Add an IF statement to the RSXRPT CSL subroutine

Add an IF statement to check for the module being enabled.

For practice, add an IF statement for the Mining component as in the sample below:



31. Open RELOAD

Open the RELOAD form by making the following menu selection:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

32. Reload RSXRPT CSL subroutine

Reload the RSXRPT subroutine by typing the name of the program in the MODULE NAME text box.

For practice, reload RSXRPT.

33. Press Enter

Press Enter. A ‘RELOAD IS OK’ message should display.

```
RSXRPT 99999E   RELOAD IS OK.  Ver-4.0 LENGTH  1,155 04-05-00 15:48:12
```

For practice, press Enter.

34. Open the Edit Utility

Open the Edit Utility by making the following menu selection:

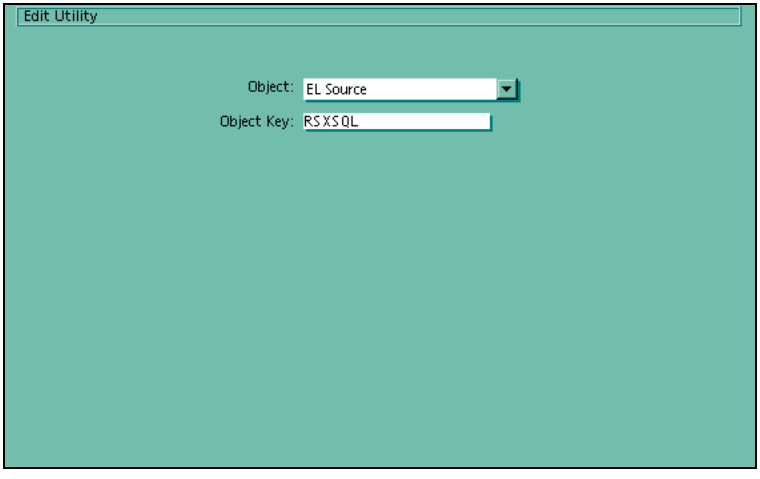
Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Edit Control Repository Object

For practice, open the Edit Utility.

35. Edit the RSXSQL CSL subroutine

Open the RSXSQL CSL subroutine for edit by selecting EL Source from the Object option list and typing RSXSQL in the Object Key text box.

For practice, open RSXSQL for edit.



36. Press Enter

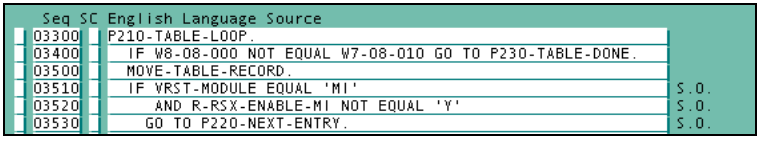
Press Enter. The RSXSQL CSL subroutine will open.

For practice, press Enter.

37. Add an IF statement to the RSXSQL CSL subroutine

Add an IF statement to check for the new module being enabled.

For practice, add an IF statement for the Mining component as in the sample below:



38. Open RELOAD

Open the RELOAD form by making the following menu selection:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

39. Reload RSXSQL CSL subroutine

Reload the RSXSQL subroutine by typing the name of the program in the MODULE NAME text box.

For practice, reload RSXSQL.

```
Compile a Source Program                                          RELOAD

        The RELOAD program compiles a given program's source
        code.  When executed, RELOAD reads the source program
        and checks for syntax errors and validates field names.
        If no errors are found an object module is created.

                 Complete the text boxes below, then hit enter:  X

                 Enter MODULE NAME: RSXSQL
```

40. Press Enter

Press Enter. A ‘RELOAD IS OK’ message should display.

```
RSXSQL 99999E   RELOAD IS OK.  Ver-4.0 LENGTH    699 04-05-00 15:55:54
```

For practice, press Enter.

41. Open the Edit Utility

Open the Edit Utility by making the following menu selection:

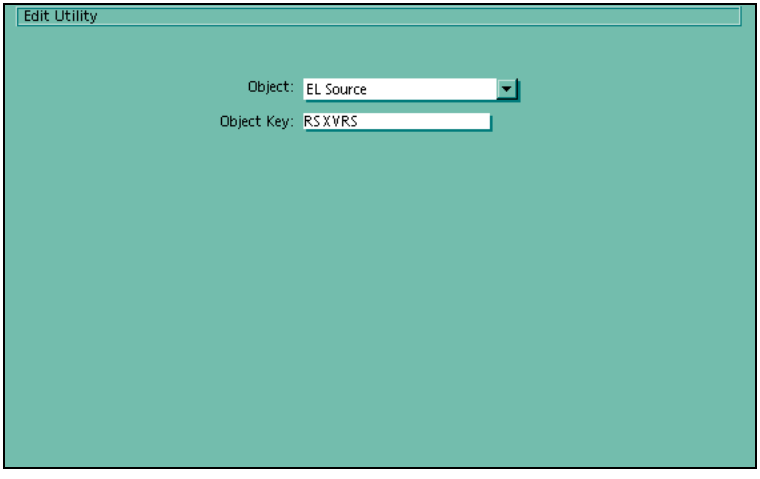
Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

For practice, open the Edit Utility.

42. Edit the RSXVRS CSL subroutine

Open the RSXVRS CSL subroutine for edit by selecting EL Source from the Object option list and typing RSXVRS in the Object Key text box.

For practice, open RSXVRS for edit.



43. Press Enter

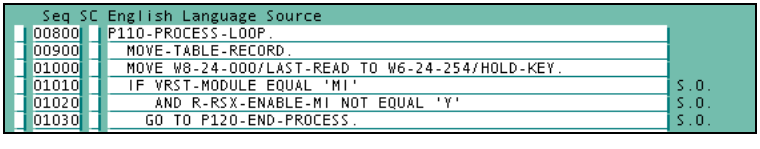
Press Enter. The RSXVRS CSL subroutine will open.

For practice, press Enter.

44. Add an IF statement to the RSXVRS CSL subroutine

Add an IF statement to check for the new module being enabled.

For practice, add an IF statement for the Mining component as in the sample below:



45. Open RELOAD

Open the RELOAD form by making the following menu selection:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

46. Reload RSXVRS CSL subroutine

Reload the RSXVRS subroutine by typing the name of the program in the MODULE NAME text box.

For practice, reload RSXVRS.

```
Compile a Source Program                                          RELOAD

        The RELOAD program compiles a given program's source
        code.  When executed, RELOAD reads the source program
        and checks for syntax errors and validates field names.
        If no errors are found an object module is created.

                Complete the text boxes below, then hit enter:  X

                Enter MODULE NAME: RSXVRS
```

47. Press Enter

Press Enter. A ‘RELOAD IS OK’ message should display.

```
RSXVRS 99999E   RELOAD IS OK.  Ver-4.0 LENGTH    552 04-05-00 16:04:01
```

For practice, press Enter.

Deleting a component

A component is a group of tables. Generally a component represents a set of tables around a definable subject matter, such as Human Resources or Position Administration. The PP (Base EE / Co) component includes all of the tables that are common to all of the catalogs.

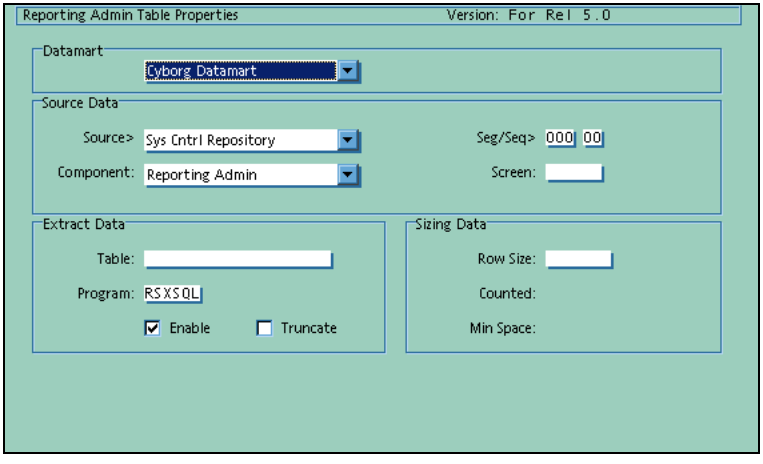
To delete a component from the extraction process, complete the following steps:

1. Open Reporting Admin Table Properties form

Open Reporting Admin Table Properties form (RSXSCR) by making the following selection:

Component: Reporting Administration
Process: Reporting Administration
Task: Reporting Administration Task List

For practice, open Reporting Admin Table Properties form.



2. Select task from VRST table

This is most easily done by clicking the 'Show selection list in the message area' button on the toolbar while displaying Reporting Administration Table Properties (RSXSCR) form:

Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	D_	AA_	00	DM2_COMPANY	PP	AA-SCR	Y	RSXAA	Y
DM2_	D_	B__	00	DM2_COMPANY_HED	PR	A8-SCR	Y	RSXB	Y
DM2_	D_	CAF	00	DM2_PAY_OPTIONS	PR	AF-SCR	Y	RSXCAF	Y
DM2_	D_	CAJ	00	DM2_PAY_FREQUENCY	PR	AJ-SCR	Y	RSXCAJ	Y
DM2_	M_	EE_	00	DM2_EMPLOYEE	PP	EF-SCR	Y	RSXEE	Y
DM2_	M_	F__	00	DM2_EMP_NAME_ADDR	PP	FF-SCR	Y	RSXF	Y
DM2_	M_	G__	00	DM2_EMP_LOCATION	PR	GG-SCR	Y	RSXG	Y
DM2_	M_	H__	00	DM2_EMPLOYEE_HED	PR	HH-SCR	Y	RSXH	Y
DM2_	M_	H__	01	DM2_EMP_HED_QTR	PR	HT-SCR	Y		N
DM2_	M_	H__	02	DM2_DIRECT_DEPOSIT	PR	H9-SCR	Y		Y
DM2_	M_	JCA	00	DM2_CAN_EMPLOYEE_TAX	PR	JJ-SCR	Y	RSXJCA	Y
DM2_	M_	JCA	01	DM2_CAN_EMP_TAX_QTR	PR	JT-SCR	Y		N

Select the task(s) from the VRST table which is a member of the component being deleted.

For practice, select DM2_BONUS.

Data	Src	Seg	Seq	Table Name	Com	Screen	Enabled	Extract Program	Trunc First
DM2_	M_	LZ4	00	DM2_SKILLS	HR	33-SCR	Y	RSXLZ4	Y
DM2_	M_	LZ7	00	DM2_PEXAM_SCHD	HR	18-SCR	Y	RSXLZ7	Y
DM2_	M_	LZ8	00	DM2_PEXAM_TEST	HR	19-SCR	Y	RSXLZ8	Y
DM2_	M_	LZA	00	DM2_EMPLOYEE_1	HR	03-SCR	Y	RSXLZA	Y
DM2_	M_	LZB	00	DM2_CITIZENSHIP	HR	02-SCR	Y	RSXLZB	Y
DM2_	M_	LZC	00	DM2_EMP_ACTIVITY	HR	08-SCR	Y	RSXLZC	Y
DM2_	M_	LZD	00	DM2_JOB_ASSIGNMENT	HR	05-SCR	Y	RSXLZD	Y
DM2_	M_	LZE	00	DM2_BONUS	MI	26-SCR	Y	RSXLZE	Y
DM2_	M_	LZF	00	DM2_SALARY	HR	40-SCR	Y	RSXLZF	Y
DM2_	M_	LZG	00	DM2_RATING	HR	49-SCR	Y	RSXLZG	Y
DM2_	M_	LZH	00	DM2_PERQS	HR	20-SCR	Y	RSXLZH	Y
DM2_	M_	LZM	00	DM2_MEDICAL	HR	15-SCR	Y	RSXLZM	Y

3. Click Actions

Click the Actions menu item on the launchbar.

For practice, click Actions.

4. Click Delete This Entry

Click the Delete This Entry menu item.

For practice, click Delete This Entry.

5. Click Yes

Click Yes on the Confirm dialog.

For practice, click Yes.

Note: Steps 2–5 should be performed for each task from the VRST table which is a member of the component being deleted.

6. Open the Option List Editor

Open the Option List Editor (CSUPDT) by making the following menu selection from the navigator:

Component:	Development Tools
Process:	Option Lists
Task:	Edit

For practice, open the Option List Editor.

7. Type option list name in text box

Type the option list name in the Option List Name text box.

☞ *Refer to Option Lists for Reporting Administration (on page 231) for details of the option lists specific to Reporting Administration.*

For practice, type RS04 in the Option List Name text box.

8. Click Find Now

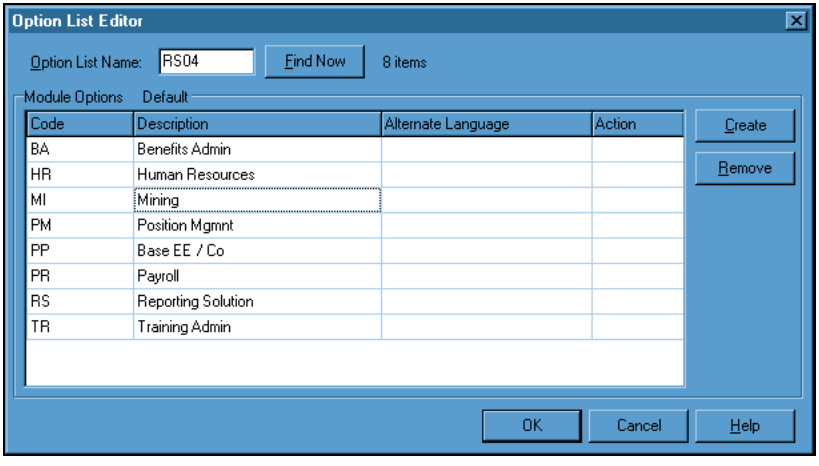
Click Find Now to display the option list in the dialog.

For practice, click Find Now.

9. Select the component entry.

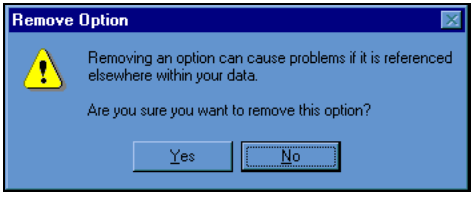
Select the component which is to be deleted from the option list.

For practice, select the Mining component.



10. Click Remove

Click Remove to remove this entry. A warning dialog will display.



For practice, click Remove.

11. Click Yes

Click Yes on the confirm dialog to confirm the deletion of the component. 'Removed' will be displayed in the Action field for the component.

For practice, click Yes.

12. Click OK

Click OK. The component will be removed from the option list.

For practice, click OK.

13. Open the Field Maintenance And Edit form

Open the Field Maintenance And Edit (F-NAME) form by making the following menu selection:

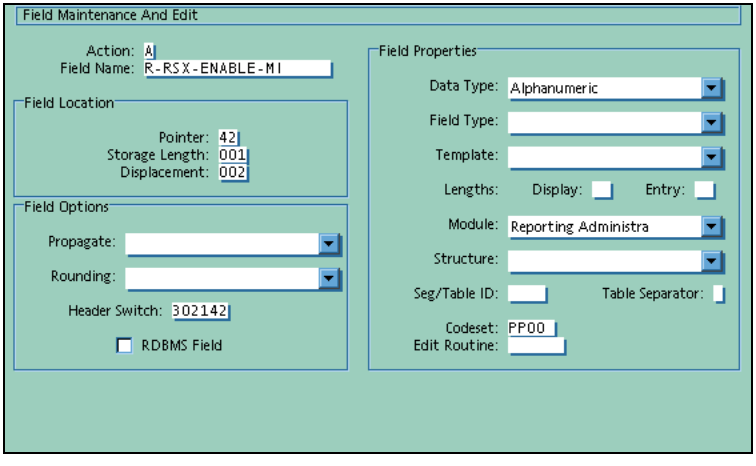
Component:	Development Tools
Process:	Fields and Verbs
Task:	Define A Field

For practice, open the Field Maintenance And Edit form.

14. Select the component field

Select the component field to be deleted.

For practice, select R-RSX-ENABLE-MI.



15. Delete the component field

To delete the component field, select the following from the menu:

Actions ► Delete This Entry

A confirmation dialog will display.

For practice, delete the R-RSX-ENABLE-MI field.

16. Click Yes

Click Yes to delete the entry.

For practice, click Yes.

17. Open GETSAT

You will need to delete the component from the Report Parameters for Reporting Administration Extract Report (RSXRPT) form. Open the Get Copy of Screen Appearance Table (GETSAT) form by making the following menu selection:

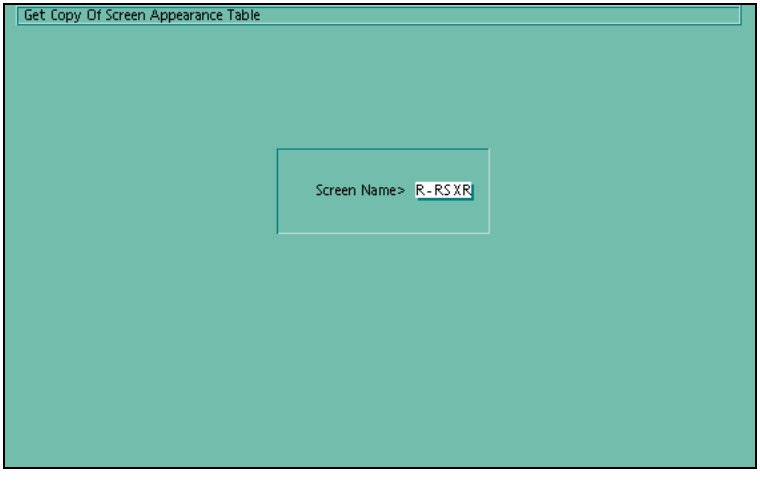
Component: Development Tools
Process: Programming Utilities
Task: Extract Form Appearance Table

For practice, open the Get Copy of Screen Appearance Table (GETSAT) form.

18. Type form name

Type the name of the form to be updated in the Screen Name text box.

For practice, type R-RSXR in the Screen Name text box.



19. Press Enter

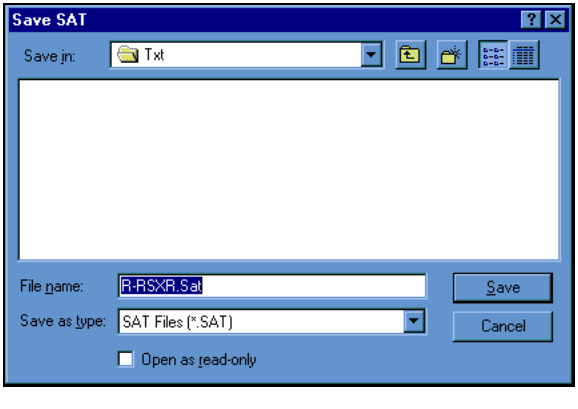
Press Enter. The Save SAT dialog appears, prompting you to save the copy of the Screen Appearance Table file.

For practice, press Enter.

20. Save the Screen Appearance Table

Save the Screen Appearance Table by navigating to a suitable location and clicking Save.

For practice, save the file as R-RSXR.Sat in a temporary directory. Click Save.



21. Edit the Screen Appearance Table

Edit the Screen Appearance Table to delete the component from the Report Parameters for Reporting Administration Extract Report (RSXRPT) form.

For practice, edit the file to remove the Mining component, as in the following sample:

```
P R-RSXRS00303 PL  Report Parameters for Reporting Solution
P R-RSXRS00373 PL  RSXRPT
P R-RSXRS10706GPG     0570                                Database Options
P R-RSXRS10831 PDR2                    R-RSX-DATAMART     Datamart:
P R-RSXRS11031 PDR2                    R-RSX-DATABASE-TYPE Database:
P R-RSXRS11206GPG     0670                                Component Options
P R-RSXRS11409GPC                      R-RSX-ENABLE-PP    Base EE / Co
P R-RSXRS11431GPC                      R-RSX-ENABLE-PR    Payroll
P R-RSXRS11453GPC                      R-RSX-ENABLE-TR    Training Admin
P R-RSXRS11609GPC                      R-RSX-ENABLE-HR    Human Resources
P R-RSXRS11631GPC                      R-RSX-ENABLE-BA    Benefits Admin
P R-RSXRS11653GPC                      R-RSX-ENABLE-PM    Position Mgmnt
P R-RSXRS11806GPG     0470                                Filter Options
P R-RSXRS12031 PER2                    R-RSX-CUT-OFF-DATE Cut-off Date:
```

22. Save the file

Save and close the file.

For practice, save and close R-RSXR.Sat.

23. Run PUTSAT

Run the Update Form Appearance Table (PUTSAT) program by making the following menu selection:

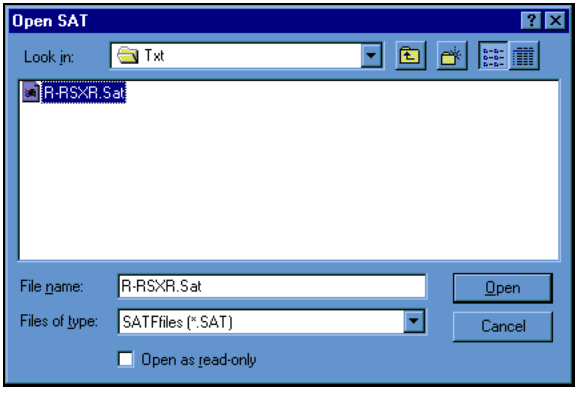
Component: Development Tools
Process: Programming Utilities
Task: Update Form Appearance Table

For practice, run the Update Form Appearance Table (PUTSAT) program.

24. Select Screen Appearance Table file

Select the updated Screen Appearance Table file from the Open SAT dialog.

For practice, select R-RSXR.Sat.



25. Click Open

Click Open. A 'RELOAD IS OK' message should be displayed.

For practice, click Open.

```
R-RSXR 99999E   RELOAD IS OK.   Ver-4.0 LENGTH  1,737 04-05-00 14:23:29
```

26. Open the Edit Utility (EDIT)

Open the Edit Utility by making the following menu selection:

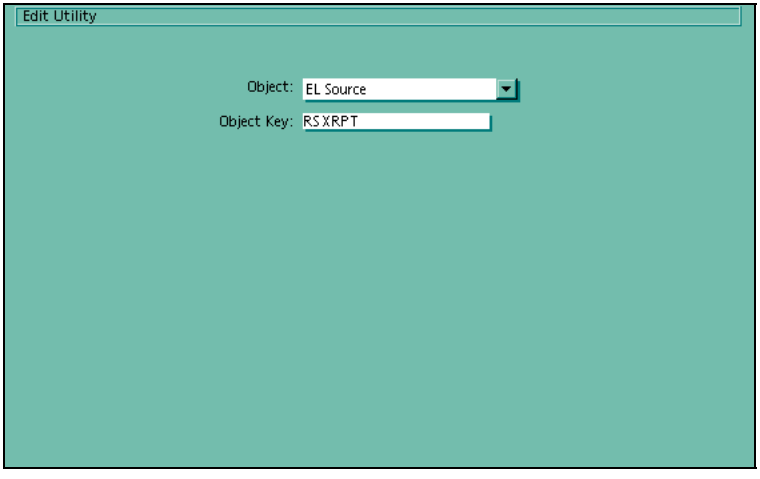
Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

For practice, open the Edit Utility.

27. Edit the RSXRPT CSL subroutine

Open the RSXRPT CSL subroutine for edit by selecting EL Source from the Object option list and typing RSXRPT in the Object Key text box.

For practice, open RSXRPT for edit.



28. Press Enter

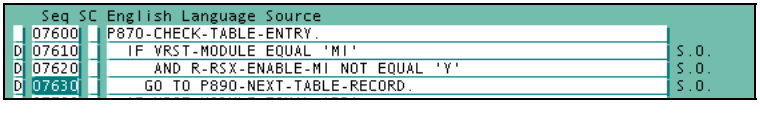
Press Enter. The RSXRPT CSL subroutine will open.

For practice, press Enter.

29. Remove the IF statement from the RSXRPT CSL subroutine

Remove the IF statement which checks for the module being deleted.

For practice, delete the IF statement for the Mining component as in the sample below:



30. Open RELOAD

Open the RELOAD form by making the following menu selection:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

31. Reload RSXRPT CSL subroutine

Reload the RSXRPT subroutine by typing the name of the program in the MODULE NAME text box.

For practice, reload RSXRPT.

```
Compile a Source Program                                          RELOAD

        The RELOAD program compiles a given program's source
        code.  When executed, RELOAD reads the source program
        and checks for syntax errors and validates field names.
        If no errors are found an object module is created.

                 Complete the text boxes below, then hit enter:  X

                 Enter MODULE NAME: RSXRPT
```

32. Press Enter

Press Enter. A ‘RELOAD IS OK’ message should display.

```
RSXRPT 99999E   RELOAD IS OK.  Ver-4.0 LENGTH  1,155 04-05-00 15:48:12
```

For practice, press Enter.

33. Open the Edit Utility (EDIT)

Open the Edit Utility by making the following menu selection:

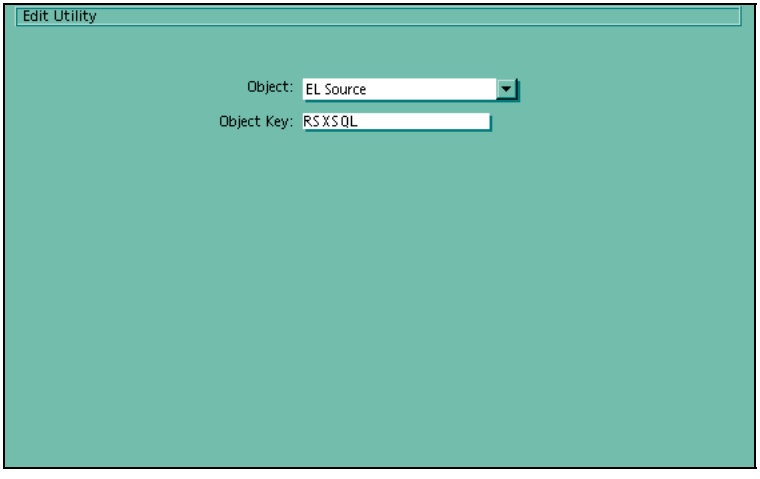
Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

For practice, open the Edit Utility.

34. Edit the RSXSQL CSL subroutine

Open the RSXSQL CSL subroutine for edit by selecting EL Source from the Object option list and typing RSXSQL in the Object Key text box.

For practice, open RSXSQL for edit.



35. Press Enter

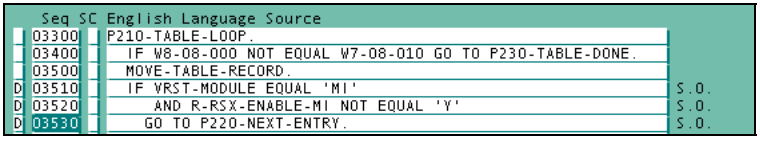
Press Enter. The RSXSQL CSL subroutine will open.

For practice, press Enter.

36. Remove the IF statement from the RSXSQL CSL subroutine

Remove the IF statement which checks for the module being deleted.

For practice, delete the IF statement for the Mining component as in the sample below:



37. Open RELOAD

Open the RELOAD form by making the following menu selection:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

38. Reload RSXSQL CSL subroutine

Reload the RSXSQL subroutine by typing the name of the program in the MODULE NAME text box.

For practice, reload RSXSQL.

```
Compile a Source Program                                          RELOAD

        The RELOAD program compiles a given program's source
        code.  When executed, RELOAD reads the source program
        and checks for syntax errors and validates field names.
        If no errors are found an object module is created.

                 Complete the text boxes below, then hit enter:  X

                 Enter MODULE NAME: RSXSQL
```

39. Press Enter

Press Enter. A ‘RELOAD IS OK’ message should display.

```
RSXSQL 99999E   RELOAD IS OK.  Ver-4.0 LENGTH    699 04-05-00 15:55:54
```

For practice, press Enter.

40. Open the Edit Utility (EDIT)

Open the Edit Utility by making the following menu selection:

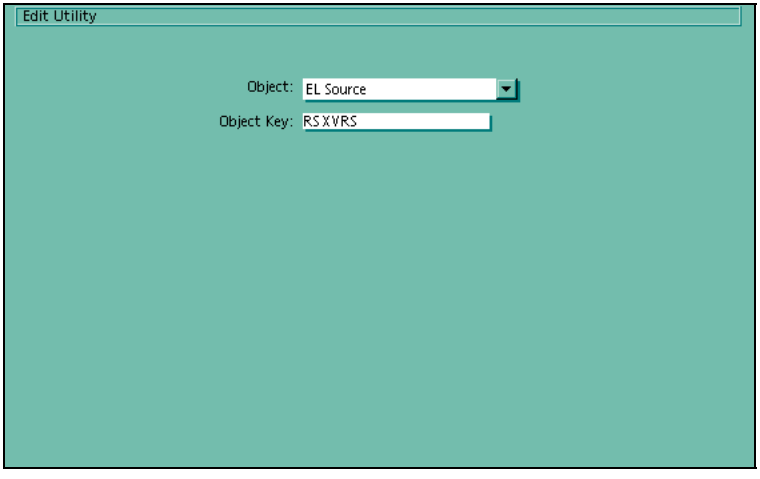
Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

For practice, open the Edit Utility.

41. Edit the RSXVRS CSL subroutine

Open the RSXVRS CSL subroutine for edit by selecting EL Source from the Object option list and typing RSXVRS in the Object Key text box.

For practice, open RSXVRS for edit.



42. Press Enter

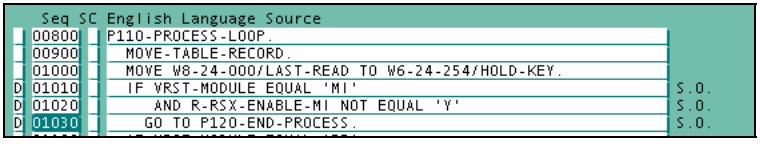
Press Enter. The RSXVRS CSL subroutine will open.

For practice, press Enter.

43. Remove the IF statement from the RSXVRS CSL subroutine

Remove the IF statement which checks for the module being deleted.

For practice, delete the IF statement for the Mining component as in the sample below:



44. Open RELOAD

Open the RELOAD form by making the following menu selection:

Component: Development Tools
Process: Programming Utilities
Task: Compile a Source Program

For practice, open the RELOAD form.

45. Reload RSXVRS CSL subroutine

Reload the RSXVRS subroutine by typing the name of the program in the MODULE NAME text box.

For practice, reload RSXVRS.

```
Compile a Source Program                                          RELOAD

        The RELOAD program compiles a given program's source
        code.  When executed, RELOAD reads the source program
        and checks for syntax errors and validates field names.
        If no errors are found an object module is created.

                 Complete the text boxes below, then hit enter:  X

                 Enter MODULE NAME: RSXVRS
```

46. Press Enter

Press Enter. A ‘RELOAD IS OK’ message should display.

For practice, press Enter.

```
RSXVRS 99999E   RELOAD IS OK.  Ver-4.0 LENGTH    552 04-05-00 16:04:01
```

Testing your customization

Once you have customized a field in Reporting Administration, you will need to test that the customization was successful. Some of the tests are embedded in the preceding steps. To complete your testing, follow these steps:

1. Access extract scripts

Access the command prompt and go to the *n*:\Cyborg45\Runs directory, where *n* is the drive, and *Cyborg45* is the directory on which the extract script is stored.

For practice, access the \Runs subdirectory. Ensure that the username and password are set to ‘sa’ and ‘master’, respectively, in the jrsxrpt.bat.

2. Execute extract

At the command prompt, type:

```
jrsxrpt
```

For practice, type ‘jrsxrpt’.

3. Press Enter

Press Enter.

The extract batch file will run, calling the splitter and bulk load programs, and the data mart will be created.

For practice, press Enter.

4. Verify extract

If the batch job has successfully run there will be no errors in the following log files:

- *n*:\Cyborg45\Log\jrsxrpt.log
- *n*:\Cyborg45\Log\jrsxsplt.log
- *n*:\Cyborg45\Log\jrsxload.log

In addition, there should be no .bad files with non-zero sizes in the *n*:\Cyborg45\BCPERR directory.

For practice, open jrsxrpt.log, jrsxsplt.log, and jrsxload.log files and ensure that there are no errors in the files. Check the size of the \bcperr.bad files. Open any with a non-zero size and check for errors.*

5. Check FILE10

Open RSXRPT.10 and check for a 'truncate table' command for the customized table.

For practice, open \sql\rsxrpt.10 and check that the 'truncate table' command for DM2_BONUS exists, as in the following sample:

```
truncate table DM2_BONUS
go
```

See also

- *Troubleshooting a Customization (on page 211)*
For more detail on error checking.

- *Components of Reporting Administration (on page 235)*
For more detail on the structure and use of the jrsxrpt batch job.

Extended Practice

1. Looking at Sample 1 in Appendix H, identify which, if any, modifications require a customization of the extract parameters.

2. Make the relevant modifications to customize Reporting Administration.

3. Looking at Sample 2 in Appendix H, identify which, if any, modifications require a customization of the extract parameters.

4. Make the relevant modifications to customize Reporting Administration.

Review of Questions Answered

1. How would you best identify which format files require modification?

CHAPTER 10

Troubleshooting a Customization

In This Chapter

Introduction 212
Debugging considerations 213

Introduction

As you perform your customizations, you will employ general troubleshooting techniques if problems arise.

Debugging considerations

Error logs

There are a variety of logs that provide you information on processing and errors. For the direct load, files are contained in the following folders:

- bcperr: contains the errors and bad data from a BCP load—files with an extension of .bad should be 0 bytes in length if there were no errors.
- logrs: contains the log information from a BCP load

AS/400

These log files do not exist on AS/400 systems. If you are running Reporting Administration on an AS/400 system, you will need to check the job queue for error messages.

Subroutine trace log

Following is an example of how to invoke CALL-level tracing.

```
P RSXRPT 05000 P830-LOAD-SUBROUTINE.
P RSXRPT 05100   MOVE R-RSX-PROGRAM TO W7-06-012.
P RSXRPT 05200   SAVE-MY-45-PLACE.
P RSXRPT 05300 @ PERFORM P900-CALL-TRACE.
P RSXRPT 05400   CALL.
P RSXRPT 05500   RESET-MY-45-PLACE.
P RSXRPT 05600   GO TO P810-PROGRAM-LOOP.
```

Note: *You can use call-level tracing to trace a full extract at call level, but not at instruction level, which will provide employee or subroutine information. You can then run an instruction level tracing on that subroutine to get any finer detail necessary.*

You could also check FILE03.log for Cyborg Scripting Language (CSL) errors.

Extract File (FILE36)

Look at FILE36. This is a text file, (which will be too big to be opened in Notepad), that you can search for errors.

FILE10

You could look at RSXRPT.10 (FILE10), which is the output from CBSVB and contains all of the truncate commands. You can use this information to determine which sets of tables you are working with at the moment. This information can be used to tell which areas are enabled and not enabled.

DDL

You can use your database query program to check for any errors in the Data Definition Language (DDL) statements in the override file.

For example, if your environment was SQL Server, you would execute the DDL script by performing the following steps:

1. Launch ISQL
2. Login as sa
3. Select the appropriate database
4. Open the script to be run
5. Click the Execute Query button on the launchbar
6. Any errors will be displayed in the Results tab. If the script ran successfully, the message 'This command did not return data, and it did not return any rows' will be displayed.

AS/400

Files not loading

Check that the format files, text files, RSPLIT, and the database files all have the same file lengths.

Catalogs

Tables

Any errors arising from customizing catalog tables will be highlighted by clicking the Verify button in the Tables dialog (Catalog ► Tables…).

Joins

Any errors arising from customizing table joins will be shown by selecting the Analyze tab in the Joins dialog (Catalog ► Joins…).

PART 4

Appendices

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APPENDIX A

Practice and Review Answers

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Introduction

This appendix provides answers for the Apply the Concept practices, as well as the Extended Practice and Review of Questions Answered that are included at the end of each instructional chapter.

Planning for your Customization Project

Apply the Concept

Apply the Concept

An end user has been trying to report on Position Administration data, but has been unsuccessful. You quickly realize that the problem is that your organization has not implemented Position Administration. What level of customization would you consider first?

A. Level 1

B. Level 2

C. Level 3

Answer

B—The catalog administrator can change the catalog so that Position Administration fields are not available, or change the user classes so that Position Administration is not displayed.

Review of Questions Answered

1. When is a 'customization' a customization to Reporting Administration?
   Any changes required to the data model would be considered a customization to Reporting Administration.

2. How do you know when a customization is a requirement?
   When the customization requires the creation of a new data mart, component, or field, then a customization to Reporting Administration is required.

3. What are some alternatives to removing elements from the data mart?
   You can use the Report Parameters For Reporting Administration Extract Report (RSXRPT) form to turn off components, data from which will not then get extracted.

Analyzing your MAINTO

Extended Practice

1. Looking at MAINTO Sample 1 in Appendix H, identify the customizations you would need to make.
   See MAINTO Sample Answer 1 on page 225.

2. Looking at MAINTO Sample 2 in Appendix H, identify the customizations you would need to make.
   See MAINTO Sample Answer 2 on page 226.

3. Examine MAINTO Sample 3 in Appendix H, and determine what customizations you would need to do to Reporting Administration.
   See MAINTO Sample Answer 3 on page 229.

Review of Questions Answered

1. How is the MAINTO output interpreted? What does it mean?
   The output report from the MAINTO operation is interpreted by locating the exact revisions made (added, deleted, or revised) on the line located in the report. After reviewing each line of code, as well as what that piece of code is used for, you can determine the impact of the revision on Reporting Administration.

The Extraction Process

Review of Questions Answered

1. Which extraction routines are used for extracting Labor and History data?
   The code that actually builds the extraction records is the Report Generator 7E7E. The code that runs the extract is JRSXPAY.bat.

2. Why would you want to restrict extraction to some components?
   As a performance-enhancing technique, you could restrict extraction to some components using the Report Parameters for Reporting Administration Extract Report (RSXRPT) form. Also, fewer components being extracted would mean a faster extraction process and less storage space needed on the server. For example, if there were 50 tables for a particular component, then there would be 50 subroutines called for each employee in your organization.

Customizing a Field

Extended Practice

1. Looking at Sample 1 in Appendix H, identify which, if any, fields have been modified.
   See MAINTO Sample Answer 1 on page 225.

2. Make the relevant modifications to customize Reporting Administration.
   See MAINTO Sample Answer 1 on page 225.

3. Looking at Sample 2 in Appendix H, identify which, if any, fields have been modified.
   See MAINTO Sample Answer 2 on page 226.

4. Make the relevant modifications to customize Reporting Administration.
   See MAINTO Sample Answer 2 on page 226.

Review of Questions Answered

1. Under which circumstances must you customize a CSL program when you add a field to the data mart?
   If you add, modify, or delete a field from the extract process, you must edit the corresponding direct load format file. Each direct load format file must match exactly with the table structure as defined by that table's Data Definition Language (DDL).

Customizing a Data Mart

Extended Practice

1. Looking at Sample 1 in Appendix H, identify which, if any, modifications are required to customize the data mart.
   See MAINTO Sample Answer 1 on page 225.

2. Make the relevant modifications to customize Reporting Administration.
   See MAINTO Sample Answer 1 on page 225.

3. Looking at Sample 2 in Appendix H, identify which, if any, modifications are required to customize the data mart.
   See MAINTO Sample Answer 2 on page 226.

4. Make the relevant modifications to customize Reporting Administration.
   See MAINTO Sample Answer 2 on page 226.

Review of Questions Answered

1. When would you create multiple data marts?
   There are two delivered data marts: the Cyborg Workforce Data Mart and the Test Data Mart. You could have multiple data marts, for example based on organization, or job function, and so forth.

Customizing the Extract Parameters

Extended Practice

1. Looking at Sample 1 in Appendix H, identify which, if any, modifications require a customization of the extract parameters.
   See MAINTO Sample Answer 1 on page 225.

2. Make the relevant modifications to customize Reporting Administration.
   See MAINTO Sample Answer 1 on page 225.

3. Looking at Sample 2 in Appendix H, identify which, if any, modifications require a customization of the extract parameters.
   See MAINTO Sample Answer 2 on page 226.

4. Make the relevant modifications to customize Reporting Administration.
   See MAINTO Sample Answer 2 on page 226.

Review of Questions Answered

1. How would you best identify which format files require modification?
   *Use the combination of source, segment, and sequence to determine the name of the format file. For example, if the source of the data is the Employee Data record (**M_**), the segment is the **LL1** segment, and there are no repeating groups of data on this segment (**00**), the filename of the format file would be M_LL100.FMT.*

MAINTO Sample 1 Answer

```
==============================================================================
SQL     The R2_Alter_sql.sql will contain the following script:
==============================================================================
        /* ========================================================== */
        /*   Table: DM2_EMP_LOCATION                                  */
        /* ========================================================== */
        if exists (select 1
                    from  sysobjects
                   where  id = object_id('DM2_EMP_LOCATION')
                    and   type = 'U')
           drop table DM2_EMP_LOCATION
        go
        create table DM2_EMP_LOCATION
        (
            CONTROL_1           char(002)             not null,
            CONTROL_2           char(004)             not null,
            EMPLOYEE_NUMBER     char(010)             not null,
            LOCATION_NUMBER     numeric(02,0)         not null,
            LOCATION_PERCENT    numeric(06,2)         null    ,
            CONTROL_3_CODE      char(006)             null    ,
            CONTROL_3           varchar(020)          null    ,
            CONTROL_4_CODE      char(002)             null    ,
            CONTROL_4           varchar(020)          null    ,
            CONTROL_5_CODE      char(004)             null    ,
            CONTROL_5           varchar(020)          null    ,
            CONTROL_6_CODE      char(004)             null    ,
            CONTROL_6           varchar(020)          null    ,
            FUNCTION_CODE       char(010)             null    ,
            FUNCTION            varchar(020)          null    ,
            constraint PK_DM2_EMP_LOCATION
             primary key (CONTROL_1, CONTROL_2, EMPLOYEE_NUMBER, LOCATION_NUMBER)
        )
        go

==============================================================================
FMT     The M_G__00.FMT file will contain the following:
==============================================================================
        6.0
        15
        1       SQLCHAR       0       2       ""        1       CONTROL_1
        2       SQLCHAR       0       4       ""        2       CONTROL_2
        3       SQLCHAR       0       10      ""        3       EMPLOYEE_NUMBER
        4       SQLCHAR       0       2       ""        4       LOCATION_NUMBER
        5       SQLCHAR       0       6       ""        5       LOCATION_PERCENT
        6       SQLCHAR       0       6       ""        6       CONTROL_3_CODE
        7       SQLCHAR       0       20      ""        7       CONTROL_3
        8       SQLCHAR       0       2       ""        8       CONTROL_4_CODE
        9       SQLCHAR       0       20      ""        9       CONTROL_4
        10      SQLCHAR       0       4       ""        10      CONTROL_5_CODE
        11      SQLCHAR       0       20      ""        11      CONTROL_5
        12      SQLCHAR       0       4       ""        12      CONTROL_6_CODE
        13      SQLCHAR       0       20      ""        13      CONTROL_6
        14      SQLCHAR       0       10      ""        14      FUNCTION_CODE
        15      SQLCHAR       0       20      ".\r\n"   15      FUNCTION
```

```
==============================================================================
CSL     No changes required to the CSL. Just RELOAD RSXG program.
==============================================================================

==============================================================================
CAT     No changes required to the COGNOS catalogs.
==============================================================================
```

MAINTO Sample 2 Answer

```
==============================================================================
SQL     The R2_Alter_sql.sql will contain the following script:
==============================================================================

        /* ========================================================== */
        /*   Table: DMX_DRUG_TEST                                     */
        /* ========================================================== */
        if exists (select 1 from sysobjects
                    where id = object_id('DMX_DRUG_TEST')
                      and type = 'U')
           drop table DMX_DRUG_TEST
        go
        create table DMX_DRUG_TEST
        (
            CONTROL_1          char(02)           not null,
            CONTROL_2          char(04)           not null,
            EMPLOYEE_NUMBER    char(10)           not null,
            XDRUG_TEST_DATE    datetime           not null,
            XDRUG_TEST_SEQ     char(01)           not null,
            XDRUG_TEST_CODE    char(05)           not null,
            XDRUG_TEST         varchar(20)            null,
            XDRUG_TEST_RESULT  char(08)               null,
          constraint PK_DMX_DRUG_TEST primary key
           (CONTROL_1, CONTROL_2, EMPLOYEE_NUMBER, XDRUG_TEST_DATE, XDRUG_TEST_SEQ, XDRUG_TEST_CODE))
       go

==============================================================================
FMT     The M_LN900.FMT file will contain the following:
==============================================================================

        6.0
        8
        1       SQLCHAR       0       2       ""        1       CONTROL_1
        2       SQLCHAR       0       4       ""        2       CONTROL_2
        3       SQLCHAR       0      10       ""        3       EMPLOYEE_NUMBER
        4       SQLCHAR       0      10       ""        4       XDRUG_TEST_DATE
        5       SQLCHAR       0       1       ""        5       XDRUG_TEST_SEQ
        6       SQLCHAR       0       5       ""        6       XDRUG_TEST_CODE
        7       SQLCHAR       0      20       ""        7       XDRUG_TEST
        8       SQLCHAR       0       8       ".\r\n"   8       XDRUG_TEST_RESULT
```

```
==============================================================================
CSL     The RSXALT.05 will contain the following:
==============================================================================

        F XDRUG-TEST-DATE        3600600382  1034PKN9  HS                    110410    C
        P RSXLN9 00000 SECURITY 'RS'. @ DRUG_TEST TABLE EXTRACT                SRS    A
        P RSXLN9 00001 @LAST MODIFIED ON:  00-00-00  BY:        AUTHOR:               A
        P RSXLN9 00003 @RSXLN9 is an extract subroutine for the Reporting             A
        P RSXLN9 00004 @Administration. It is set up from RSXSCR and called from RSXRPT.     A
        P RSXLN9 00005 @It will produce data for the DMX_DRUG_TEST table.             A
        P RSXLN9 00100   IM-A-SUBROUTINE.                                             A
        P RSXLN9 00200 P100-PROCESS-SEGMENT.                                          A
        P RSXLN9 00300   PROCESS XDRUG-TEST-1CODE.                                    A
        P RSXLN9 00400     IF XDRUG-TEST-DATE LESS THAN R-RSX-CUT-OFF-DATE            A
        P RSXLN9 00500       GO TO P999-RETURN.                                       A
        P RSXLN9 00600     PERFORM P200-TABLE-DATA.                                   A
        P RSXLN9 00700   END-PROCESS.                                                 A
        P RSXLN9 00800   GO TO P999-RETURN.                                           A
        P RSXLN9 00900 P200-TABLE-DATA.                                               A
        P RSXLN9 01000   IF SPACES EQUAL XDRUG-TEST-1CODE GO TO P210-TEST-2CODE.      A
        P RSXLN9 01100   PERFORM P900-ROW-KEY.                                        A
        P RSXLN9 01200   MOVE XDRUG-TEST-1CODE     TO SCREEN. @  5 CHARS              A
        P RSXLN9 01300   PRINT XDRUG-TEST-1.                  @ 20 CHARS              A
        P RSXLN9 01400   MOVE XDRUG-TEST-RESULT-1  TO SCREEN. @  8 CHARS              A
        P RSXLN9 01500   CALL 'RSXRWR'.                                               A
        P RSXLN9 01600 P210-TEST-2CODE.                                               A
        P RSXLN9 01700   IF SPACES EQUAL TEST-2CODE GO TO P220-TEST-3CODE.            A
        P RSXLN9 01800   PERFORM P900-ROW-KEY.                                        A
        P RSXLN9 01900   MOVE TEST-2CODE           TO SCREEN. @  5 CHARS              A
        P RSXLN9 02000   PRINT XDRUG-TEST-2.                  @ 20 CHARS              A
        P RSXLN9 02100   MOVE XDRUG-TEST-RESULT-2  TO SCREEN. @  8 CHARS              A
        P RSXLN9 02200   CALL 'RSXRWR'.                                               A
        P RSXLN9 02300 P220-TEST-3CODE.                                               A
        P RSXLN9 02400   IF SPACES EQUAL TEST-3CODE GO TO P230-TEST-4CODE.            A
        P RSXLN9 02500   PERFORM P900-ROW-KEY.                                        A
        P RSXLN9 02600   MOVE TEST-3CODE           TO SCREEN. @  5 CHARS              A
        P RSXLN9 02700   PRINT XDRUG-TEST-3.                  @ 20 CHARS              A
        P RSXLN9 02800   MOVE XDRUG-TEST-RESULT-3  TO SCREEN. @  8 CHARS              A
        P RSXLN9 02900   CALL 'RSXRWR'.                                               A
        P RSXLN9 03000 P230-TEST-4CODE.                                               A
        P RSXLN9 03100   IF SPACES EQUAL TEST-4CODE GO TO P299-EXIT.                  A
        P RSXLN9 03200   PERFORM P900-ROW-KEY.                                        A
        P RSXLN9 03300   MOVE TEST-4CODE           TO SCREEN. @  5 CHARS              A
        P RSXLN9 03400   PRINT XDRUG-TEST-4.                  @ 20 CHARS              A
        P RSXLN9 03500   MOVE XDRUG-TEST-RESULT-4  TO SCREEN. @  8 CHARS              A
        P RSXLN9 03600   CALL 'RSXRWR'.                                               A
        P RSXLN9 03700 P299-EXIT.                                                     A
        P RSXLN9 03800   EXIT.                                                        A
        P RSXLN9 03900 P900-ROW-KEY.                                                  A
        P RSXLN9 04000   CALCULATE R-RSX-ROW-COUNTER + :1 = R-RSX-ROW-COUNTER.        A
        P RSXLN9 04100   SET SCREEN TO :1601.                                         A
        P RSXLN9 04200   MOVE R-RSX-TARGET         TO SCREEN. @  5 CHARS              A
        P RSXLN9 04300   MOVE R-RSX-TABLE-SEQ      TO SCREEN. @  2 CHARS              A
        P RSXLN9 04400   MOVE R-RSX-ROW-COUNTER    TO SCREEN. @  8 CHARS              A
        P RSXLN9 04500   MOVE CONTROL-1            TO SCREEN. @  2 CHARS              A
        P RSXLN9 04600   MOVE CONTROL-2            TO SCREEN. @  4 CHARS              A
        P RSXLN9 04700   MOVE EMPLOYEE-NUMBER      TO SCREEN. @ 10 CHARS              A
        P RSXLN9 04800   PRINT XDRUG-TEST-DATE.               @ 10 CHARS              A
        P RSXLN9 04900   MOVE XDRUG-TEST-SEQ       TO SCREEN. @  1 CHARS              A
        P RSXLN9 05000   EXIT.                                                        A
        P RSXLN9 05100 P999-RETURN.                                                   A
        P RSXLN9 05200   RETURN.                                                      A
```

```
        P RSXLN9M00100 RSRSXLN9 is a program for Reporting Administration.              A
        P RSXLN9M00105VDESCRIPTION                                                    A
        P RSXLN9M00110   RSXLN9 is a subroutine called from RSXRPT, which will        A
        P RSXLN9M00115   extract the LN9 Segment data from the                        A
        P RSXLN9M00120   Employee Data Record. It will produce extract text           A
        P RSXLN9M00125   in SCREEN starting at :1601. RSXRWR will be called to        A
        P RSXLN9M00130   write the extract text in SCREEN.                       2    A
        P RSXLN9M00135   RSXLN9 will build extract text for the following             A
        P RSXLN9M00140   table(s) in the Cyborg Datamart.                             A
        P RSXLN9M00145      00 - DMX_DRUG_TEST                                        A
        P RSXLN9M00150                                                                A
        P RSXLN9M00155VUSAGE                                                          A
        P RSXLN9M00160   You can enable or disable this subroutine from being         A
        P RSXLN9M00165   called via the RSXSCR Table Properties Screen.               A
        P RSXLN9M00201VEXTRACT FIELD MAPPING FOR DMX_DRUG_TEST                   2    A
        P RSXLN9M00211   Cyborg Field Name      Datamart Column Name   Length     2    A
        P RSXLN9M00221   CONTROL-1              CONTROL_1                 2           A
        P RSXLN9M00231   CONTROL-2              CONTROL_2                 4           A
        P RSXLN9M00241   EMPLOYEE-NUMBER        EMPLOYEE_NUMBER          10           A
        P RSXLN9M00251   XDRUG-TEST-DATE        XDRUG_TEST_DATE          10           A
        P RSXLN9M00261   XDRUG-TEST-SEQ         XDRUG_TEST_SEQ            1           A
        P RSXLN9M00271   XDRUG-TEST-1CODE       XDRUG_TEST_CODE           5           A
        P RSXLN9M00281   XDRUG-TEST-1           XDRUG_TEST               20           A
        P RSXLN9M00291   XDRUG-TEST-RESULT-1    XDRUG_TEST_RESULT         8           A
        VRSTDM2_M_LN900         HRDMX_DRUG_TEST       YYRSXLN9000060       X19SCR      A

==============================================================================
CAT     This table will have to be added to at least one catalog.
==============================================================================

         Add the table to a Cognos catalog.

         Define the join to the DM2_EMPLOYEE table on the columns
            CONTROL_1, CONTROL_2, EMPLOYEE_NUMBER

         Cut the default folder and paste it under the Admin folder.

         Copy the Dmx_drug_test Admin folder to a visible folder.

         Cut the foreign keys from the visible folder.

         Rename the columns in the visible folder.
```

MAINTO Sample 3 Answer

```
F STATUS                 2900201700  20   8E   PP    N                          C Change O/L Binding
F XEE-CHANGE-LIFE        2900102700       8E   PP    N          PP42            A Field Redefinition
F XEE-CHANGE-OPEN        2900102800       8E   PP    N                          A Field Redefinition
F XEE-CHANGE-ENROLLED    2900102900       8E   PP    N          PR97            A Field Redefinition
F XEE-CHANGE-TERM        2900103000       8E   PP    N                          A Field Redefinition
F XEE-CHANGE-HED         2900103100       8E   PP    N                          A Field Redefinition
F INSURANCE-GROUP        2900203800       8E   PP    N          PP469           A Field Redefinition
F INSURANCE-DISPLAY      2900203800  20  D8E   PP    N          PP469           A Field Redefinition
F XEE-USER-CLASS-CD      2900106000       8E   PP    Y          PR01            A Field Redefinition
F XEE-USER-CLASS         2900106000  20  D8E   PP    Y          PR01            A Field Redefinition
F COMMISSION-FLAG        2900106100       8E   PP    N          PP00            C Change O/L Binding

F CONTROL-4-CODE         3100401200       8    PP    Y85QALT    PR02Y           C Change O/L Binding
F CONTROL-4              3100401200  15  D8    PP    N          PR02Y           C Change O/L Binding
F FUNCTION-CODE          3101002400       8    PP    Y85QALT                    C Change O/L Binding
F FUNCTION               3101002400  15   8    PP    N                          C Change O/L Binding

F ACCR-CUR-ACCR-XF       3200505612       8    PP    N                          A Field Redefinition
F ACCR-DATE-ACCR-XF      3200606181       8    PP    N                          A Field Redefinition

F XLL1-EFFECTIVE         3600600382  1034KKL1  PP    Y                          A New User Segment
F XLL1-PROD-CLASS-CD     3600100900       KL1  PP    Y          PR01            A New User Segment
F XLL1-PROD-CLASS        3600100900  20  DKL1  PP    Y          PR01            A New User Segment
F XLL1-PROD-FACTOR       3601001012  1322 KL1  PP    Y                          A New User Segment

F XLM1-BOOTS-DATE        3600600382  1034KKM1  PP    Y                          A New User Segment
F XLM1-BOOTS-CITY        3600600900       KM1  PP    Y          EO05            A New User Segment
F XLM1-BOOTS-COST        3600801512  1022 KM1  PP    Y                          A New User Segment
F XLM1-BOOTS-DESC        3603002300       KM1  PP    Y                          A New User Segment
F XLM2-PANTS-DATE        3600600382  1034KKM2  PP    Y                          A Repeating Group
F XLM2-PANTS-CITY        3600600900       KM2  PP    Y          EO05            A Repeating Group
F XLM2-PANTS-COST        3600801512  1022 KM2  PP    Y                          A Repeating Group
F XLM2-PANTS-DESC        3603002300       KM2  PP    Y                          A Repeating Group
F XLM3-SHIRT-DATE        3600600382  1034KKM3  PP    Y                          A Repeating Group
F XLM3-SHIRT-CITY        3600600900       KM3  PP    Y          EO05            A Repeating Group
F XLM3-SHIRT-COST        3600801512  1022 KM3  PP    Y                          A Repeating Group
F XLM3-SHIRT-DESC        3603002300       KM3  PP    Y                          A Repeating Group
F XLM4-COAT-DATE         3600600382  1034KKM4  PP    Y                          A Repeating Group
F XLM4-COAT-CITY         3600600900       KM4  PP    Y          EO05            A Repeating Group
F XLM4-COAT-COST         3600801512  1022 KM4  PP    Y                          A Repeating Group
F XLM4-COAT-DESC         3603002300       KM4  PP    Y                          A Repeating Group

F XZB-CURRENT-BON-POOL   3600202410       KZB  HR    N         0                A Field Redefinition
F XZB-PRIOR-BON-POOL     3600202610       KZB  HR    N         0                A Field Redefinition
F XZB-CURRENT-BON-PTS    3600702814       KZB  HR    N         0                A Field Redefinition
F XZB-PRIOR-BON-POINTS   3600703514       KZB  HR    N         0                A Field Redefinition
```

APPENDIX B

Option Lists for Reporting Administration

In This Appendix

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Introduction

This appendix documents the option lists specific to Reporting Administration.

Database Types (RS01)

Code	Name	Other Value
IBM	IBM - DB2	
IFX	Informix	
MST	Microsoft SQL Server	go
ORA	Oracle	
SYB	Sybase SQL Server	go

Record Source (RS02)

Code	Name	Other Value
CF	Sys Cntrl Repository	
DF	Employee Database	
D_	Company Data	
MH	Employee History	
ML	Employee Labor	
M_	Employee Data	

Datamart Name (RS03)

Code	Name	Other Value
DM2_	Cyborg Datamart	DM2_DEVP
TEST	Cyborg Test Datamart	DM2_DEVP

Module Options (RS04)

Code	Name	Other Value
BA	Benefits Admin	
HR	Human Resources	
PM	Position Mgmnt	
PP	Personnel	
PR	Payroll	
RS	Reporting Administration	
TR	Training Admin	

Note: A new code of 'RS' has been added to the Module Names (SC01) option list.

APPENDIX C

Components of Reporting Administration

In This Appendix

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OS Scripts 240

Introduction

This appendix documents the major components of Reporting Administration.

Reporting Administration components

The following table shows the major components of Reporting Administration:

Owner	Object	Name	Description
The Solution Series or eCyborg	Option Lists	SC03	Module code RS added
		RS01	Database Types
		RS02	Record Source
		RS03	Data Mart Name
		RS04	Module Options
	Fields	Prefixed by 'RSX' or 'VRST'	Fields added to support the new programs introduced by Reporting Administration
	CSL Programs	RSXSCR (Reporting Administration Table Properties form)	Task List form
		RSXRPT (Reporting Administration Extract Program)	Main extract report with parameters
		RSXRWR (Reporting Administration General Writer)	Universal WRITER subroutine
		RSXnnn	Data element specific subroutines called by RSXRPT
	Report Generators	7E7E	History and Labor record extract
	V-Tables	VRST	Task List table
	CBSV COBOL Overrides	FILE36	1024 fixed length, sequential, output
	P5PRNT COBOL Overrides	FILE36	1024 fixed length, sequential, output
	P4CALC COBOL Overrides	FILE36	1024 fixed length, sequential, output
	COBOL Programs	RSPLIT	Splits FILE36 data into one file per each data mart table

Owner	Object	Name	Description
Database	Direct Load Format Files	CSSSS##.FMT	Bulk Copy Program format files for MS SQL Server
	SQL Scripts	dm2_datamart_sql.sql	Fixed
		FILE10	Dynamic
Operating System	Job Script	JRSXRPT.BAT	Job Control Script for populating the data mart
Cognos	Impromptu Catalogs	Benefits_sql.cat	Benefits Administration
		General_sql.cat	General Information
		Payroll_sql.cat	Payroll Labor and History
		Training_sql.cat	Training Administration

Reporting Administration directory structure

The following table explains the directory structure of Reporting Administration for non-AS/400 systems. New directories which have been added to the standard Cyborg directory structure are italicized.

Directory	Purpose
CTL / FMT	Contains the bulk loader control files. FMT = BCP. CTL = SQLDR.
DATA	Contains data files to support Solution Series or eCyborg operations.
LDERR / BCPERR	Contains bad data detected during the bulk load process. There will be one bad data file for each data file loaded. BCPERR = BCP. LDERR = SQLDR.
List	Contains the output reports from running various jobs.
Log	Contains log files from running various jobs.
LOGRS	Contains the log files from running the bulk loader. There will be one log file for each bulk load control file. It may also contain other Reporting Administration-specific log files.
Runs	Contains the OS scripts.
SQL	Directory containing the SQL scripts to be run.
TXT	Contains Reporting Administration extracted data
Work	Working directory that contains temporary output files.

AS/400

The following table explains the library structure of Reporting Administration for AS/400 systems. The italicized names represent the additions to the structure, however, additional members have been added to the existing files and libraries.

Library/ Container	File	Purpose
CNSVS	*CYBDM2FMT*	Contains the bulk loader control files.
	QCLSRC	Contains all Control Language (CL) source code.
	QCBLSRC	Contains all Cobol Source.
	QDDSSRC	Contains File Data descriptions.
	QTXTSRC	Directory containing text files and SQL scripts to be run.
CBSVF	Various	Contains data files to support Solution Series or eCyborg operations. This includes all the input and output files/reports from running jobs.
CBSVP	Various	Contains Object Code.
CYBDM2	Various	Data mart DB2 tables.
CYBDM2TXT	Various	Contains Reporting Administration extracted data.

OS Scripts

This section discusses the OS scripts used to ‘glue’ together the various Reporting Administration components.

There are five new or modified Reporting Administration OS scripts on each platform: JRSXRPT, JRSXPAY, JMNTRUNR, JCREATEDM, and JRSXVPT. JRSXRPT and JRSXPAY are responsible for loading data into the data mart. JCREATEDM creates the data mart and will only be run at install time or when a new data mart needs to be created. JMNTRUNR is a very simple modification to JMNTRUN to cause the payroll maintenance run to extract labor and history data. And finally, JRSXVPT is a standard report script that allows users to output the VRST table in a report format.

JRSXRPT

Pseudo Code

The pseudo code for this script is as follows:

Note: This applies to non-AS/400 systems only.

```
Initialize environment variables as necessary.

If the user specified a starting point
        Goto that point in the script.
End if

// Stage 1 - Extract
Build a FILE04 that requests CBSVB to run the PM and non-PM extract routines.
Setup the various file definitions needed by CBSVB.
Invoke CBSVB.

//Stage 2 - Sort
Invoke a platform specific sort utility to sort the resulting FILE36.

//Stage 3 - Split
Delete any output files that may be left from earlier runs of RSPLIT.
Setup the various file definitions needed by RSPLIT.
Invoke RSPLIT.
Delete the sorted version of FILE36, as it’s no longer needed.

//Stage 4 - Truncate
Execute the SQL file produced in Stage 1 for truncating the data mart tables that
are to be loaded.  The database login information is “hard-coded” into the script.

//Stage 5 - Load
Delete any output files that may be left from earlier runs of this stage.
For each file to be loaded
Invoke the database’s bulk load utility, passing it the data file and control file
and requesting that it place its log file in the “logRS” directory and any bad
data reports in the “bad data” directory.
End loop
Delete the files produced by the splitter (as they’re no longer needed).
```

AS/400

Pseudo Code

The pseudo code for this script is as follows:

```
Initialize environment variables as necessary.

If the user specified a starting point
        Goto that point in the script.
End if

// Stage 1 - Extract
Build a FILE04 that requests CBSVB to run the PM and non-PM extract routines.
Setup the various file definitions needed by CBSVB15.
Invoke CBSVB.

//Stage 2 - Sort
Invoke a copy command with a logical file definition to sort the resulting FILE36.

//Stage 3 - Split
Delete any output files that may be left from earlier runs of RSPLIT (JRSXDLTF).
Create all output files for RSPLIT (JRSXCRTPF).
Invoke RSPLIT process (JRSXSPLIT).
Delete the sorted version of FILE36, as it's no longer needed.

//Stage 4 - Load
For each file to be loaded
Invoke the database clear and load script (JRSXPROC).
End loop
Delete the files produced by the splitter (as they're no longer needed)
(JRSXDLTF).
```

Input / Output Files

The following table details the files produced and consumed by each stage of the script. The names are kept generic as they may vary from platform to platform. A separate table provides the platform specific name given to these files. The table below only focuses on Reporting Administration-specific files, that is, all of CBSVB's files are not detailed.

Stage	Inputs	Outputs	Description
All		SysOut	Unless otherwise directed, the diagnostic messages generated from running this job will go to the console.
Extract	FILE04	FILE36	The extracted data.
		FILE10	Truncate commands for the tables to be loaded.
		CBSVB FILE03	CBSVB's output log file.
Sort	FILE36	Sorted File36	A temporary file that is deleted.
Split	Sorted FILE36	Txt files	A separate txt (data) file is produced for each database table to be loaded.
	FILE04	RSPLIT FILE03	RSPLIT's output log file.
Truncate	FILE10	SQL Truncate Log File	A file containing the results of executing FILE10.
Load	Txt files	Bulk loader logs	The log file produced by the database specific bulk load utility. Its contents will vary from database to database.

Stage	Inputs	Outputs	Description
	Bulk loader control files	Bad data logs	Bad data the bulk loader encountered in the txt files.

This next table translates the generic file name to the platform specific names. Columns have been merged when the same name is used across multiple platforms. The names have been prefixed by the directory in which they can be found. Because of the large volume of files produced by splitting and loading, the names have been limited to the directory and extension.

File	Platform		
	NT - SQL Server	NT - Oracle	Unix
FILE36	txt/rsxrpt.36		
FILE10	txt/rsxrpt.10		
Sorted FILE36	txt/rsxrptr.36		
Txt Files	txt/<name>	txt/<name>.dat	
SQL Truncate Log File	logrs/rsxrpt.log	logrs/truncate.log	
Bulk Loader Control Files	fmt/<name>.fmt	ctl/<name>.ctl	
Bulk Loader Log Files	logrs/<name>.log		
Bulk Loader Bad Data	bcperr/<name>.bad	ldrerr/<name>.bad	

AS/400

The following table translates the generic file name to specific file member names. The library/file names in which a member can be found prefixes the names. Because of the large volume of file members produced by splitting and loading, the names have been limited to the library/file names.

Stage	Inputs	Outputs	Description
All		Logs	Information on the running of this process will be held in the job queue.
Extract	QBSVS/ QTXTSRC/ FILE04	CYBDM2TXT/ RSXRPT36	The extracted data.
		CYBDM2TXT/ RSXRPT10	Truncate commands for the tables to be loaded. This file is only used to capture the transaction coming from CBSVB, but are not used in this process.
		CBSVB FILE03	CBSVB's output log file.

Stage	Inputs	Outputs	Description
Sort	CYBDM2TXT/ RSXRPT36	CYBDM2TXT/ RSPLIT36	A temporary file that is deleted.
Split	CYBDM2TXT/ RSPLIT36	CYBDM2TXT/ <name>	A separate text (data) file is produced for each database table to be loaded.
	FILE04	RSPLIT FILE03	RSPLIT's output log file.
Load	CYBDM2TXT/ <txt files>		Check the job logs for any errors or problems in the processing of this stage.
	CBSVS/ CYBDM2FMT/ <format files>		

Platform Specifics

SQL Server

SQL Server's bulk loader is called BCP. Note that the 'bad data' directory is named after it: 'BCPerr'. Its control files are called format files and these are terminated with the extension .fmt and are placed in a directory called 'FMT'.

The following table contains environment variables that must be set for the specific platform the script is executing on.

Variable	Purpose
DB-NAME	Name of the database where the data mart resides.
DB-OWNER	Owner of the data mart.
DB-PASSWORD	Password for accessing the data mart.
ISQL-PATH	Path up to but not including isql (the tool used to execute SQL commands).
BCP-PATH	Path up to but not including bcp.

Oracle

Oracle's bulk loader is called SQL Loader (SQLLDR). Its bad data directory is called 'LDRerr'. The control files end with the extension of '.ctl' and are located in the 'CTL' directory.

SQLDR expects its input data files to have an extension of '.dat'. If an extension is not provided, '.dat' is assumed. The splitter does not assign an extension to its output files, so scripts which use SQLDR must add the '.dat' extension.

The following table contains environment variables that must be set for the specific platform the script is executing on.

Variable	Purpose
DB-USER	Name of the database where the data mart resides.
DB-PASSWORD	Password for accessing the data mart.
ORA_HOME	The path to this platform's Oracle installation.
SQL_TOOL	Path up to and including the tool to be used for running SQL scripts (for example, plus80 or SQL Plus).
LDR_TOOL	Path up to and including sqlLdr.

AS/400

There are two processes that are invoked during the running of this script. These are: JRSXSPLIT and JRSXPROC. JRSXSPLIT executes the RSPLIT Cobol program, and JRSXPROC executes the clearing and loading of the DB2 tables.

The command being used to load the DB2 tables is CPYFRMIMPF (CoPY FRoM IMPort File). This command is being used to allow a fixed length text file to be loaded with having the same exact layout. This command also utilizes format files that are used to identify the data columns.

There are no specific environment variables that are needed for Reporting Administration. The only consideration would be where the environment is created.

JRSXPAY

Pseudo code

The pseudo code for this script is as follows:

Note: This applies to non-AS/400 systems only.

```
Initialize environment variables as necessary.

If the user specified a starting point
        Goto that point in the script.
End if

//Stage 1 - Split
Delete any output files that may be left from earlier runs of RSPLIT.
Setup the various file definitions needed by RSPLIT.
Invoke RSPLIT.
Delete the sorted version of FILE36, as it's no longer needed.

//Stage 2 – Purge Obsolete Data
Execute the SQL script to truncate the working tables in the data mart.
Bulk load the HIS_PAY and LBR_PAY working tables with the replacement data.
Execute the SQL script to purge old rows which match the replacement rows in the
working tables.

//Stage 3 – Load
Delete any output files that may be left from earlier runs of this stage.
For each file produced by RSPLIT
Invoke the database's bulk load utility, passing it the data file and control file
and requesting that it place its log file in the "logRS" directory and any bad
data reports in the "bad data" directory.
End loop
```

```
Delete the files produced by the splitter (as they're no longer needed).
```

AS/400

Pseudo Code

The pseudo code for this script is as follows:

```
If the user specified a starting point
        Goto that point in the script.
End if

//Stage 1 - Split
Delete any output files that may be left from earlier runs of RSPLIT (JRSXDLTF).
Create all output files for RSPLIT(JRSXCRTPF).
Invoke RSPLIT process (JRSXSPLIT).
Delete the sorted version of FILE36, as it's no longer needed.

//Stage 2 - Purge Obsolete Data
Bulk load the HIS_PAY and LBR_PAY working tables with the replacement data.
Execute the SQL script to purge old rows which match the replacement rows in the
working tables.

//Stage 3 - Load
For each file produced by RSPLIT
Invoke the database's bulk load utility, passing it the data file and control
file.
End loop
Delete the files produced by the splitter (as they're no longer needed)
(JRSXDLTF).
```

Input / Output files

The following table details the files produced and consumed by each stage of the script. The names are kept generic as they may vary from platform to platform. A separate table provides the platform specific name given to these files. The table below only focuses on Reporting Administration-specific files, that is, all of CBSVB's files are not detailed.

Stage	Inputs	Outputs	Description
All		SysOut	Unless otherwise directed, the diagnostic messages generated from running this job will go to the console.
Split	Sorted FILE36	Txt files	A separate txt (data) file is produced for each database table to be loaded.
	FILE04	FILE03	Listing file from RSPLIT.
Purge	working.sql	working.log	The results of executing the working.sql file.
	Purge.sql	purge.log	The results of executing the purge.sql file.
Load	Txt files	Bulk loader logs	The log file produced by the database specific bulk load utility. Its contents will vary from database to database.
	Bulk loader control files	Bad data logs	Bad data the bulk loader encountered in the .txt files.

This next table translates the generic file name to the platform specific names. Columns have been merged when the same name is used across multiple platforms. The files have

been prefixed by the directory in which they can be found. Because of the large volume of files produced by splitting and loading, the names have been limited to the directory and extension.

File	Platform		
	NT - SQL Server	NT - Oracle	Unix
Sorted FILE36	txt/RG7E7E.36		
Txt Files	txt/<name>	txt/<name>.dat	
Working.sql	sql/ r2_working_sql.sql	sql/ r2_working_tables_ora.sql	
Working.log	logrs/ r2_working_sql.log	logrs/ r2_working_tables.log	
Purge.sql	sql/ r2_purge_sql.sql	sql/ r2_purge_ora.sql	
Purge.log	logrs/r2_purge.log		
Bulk Loader Control Files	fmt/<name>.fmt	ctl/<name>.ctl	
Bulk Loader Log Files	Logrs/<name>.log		
Bulk Loader Bad Data	bcperr/<name>.bad	ldrerr/<name>.bad	

AS/400

The following table translates the generic file name to specific file member names. The library/file names in which a member can be found prefixes the names. Because of the large volume of file members produced by splitting and loading, the names have been limited to the library/file names.

Stage	Inputs	Outputs	Description
All		Job Queue	Unless otherwise directed, the diagnostic messages generated from running this job will go to the console.
Split	CYBDM2TXT/ RSPLIT.36	CYBDM2TXT/ <name>	A separate text (data) file is populated for the various files being split out of the program.
	CBSVS/ QTXTSRC/ FILE04	FILE03 Job Queue	Results are produced in the job queue for the running of the SPLIT program.
Purge	CBSVS/ QTXTSRC/ PURGE400	Job Queue	The results of executing the PURGE400.file.
Load	CYBDM2TXT/ <name>	Job Queue	Results for each of the files loaded are held in the job queue.

Stage	Inputs	Outputs	Description
	CBSVS/ CYBDM2FMT/ <name>		

Platform Specifics

In general, the differences described in the Platform Specifics section for JRSXRPT apply to JRSXPAY as well. The following sections discuss additional considerations specific to JRSXPAY.

Oracle

The Oracle scripts typically add an extension of '.dat' to the MHEEA50 and MLEEA50 files prior to bulk loading them into the working tables. This extension must then either be removed or accounted for by the code that loads these files into the data mart tables.

AS/400

There are two processes that are invoked during the running of this script. These are JRSXCLRMH and JRSXCLRML, which are simply a series of clear file commands.

JCREATEDM

The JCREATEDM script groups together the steps necessary to create a data mart on the various platforms. Because this process varies considerably between platforms, a generic algorithm will not be presented.

The power play model required a support table of dates that does not change from extract to extract. Rather than truncate and load this table each time, it is loaded on creation of the data mart and never truncated.

SQL Server

Pseudo Code

The pseudo code for this script is as follows:

```
Initialize environment variables as necessary.
Execute the SQL script that creates the "container" for the data mart.
Execute the SQL script that defines the data mart tables.
Execute the SQL script that defines the "groups" for the data mart.
Load the DM2_DATE table with dates.
```

Input / Output Files

Stage	Inputs	Outputs	Description
Create Container	sql/ r2_container_sql.sql	list/ container.log	The results of creating the container.
Define Tables	sql/ r2_datamart_sql.sql	list/ datamart.log	The results of defining the data mart tables.
Define groups	sql/ r2_groups_sql.sql	list/ groups.log	The results of defining the groups.
Load Dates	data/c_data.dat	BCPERR/ c_date.bad	Any bad data in the C_DATE.dat file.
	fmt/c_date.fmt	LOGRS/ c_date.log	The results of loading the C_DATE.dat file.

Environment Variables

Variable	Purpose
SQLSRVR	Name of server on which the database is located.
DB-USER	DB User name to be used when logging into the data mart.
DB-PASSWORD	Password for accessing the data mart.
ISQL-PATH	Path up to but not including isql (the tool used to execute SQL commands).

Variable	Purpose
BCP-PATH	Path up to but not including bcp.
DB-NAME	Name given to the data mart.
DB-OWNER	Data mart's owner.

Oracle

Oracle's create script contains more steps than SQL Server's does. For Oracle, the script starts by creating the data mart owner, which requires DBA privileges. The remainder of the scripts must then execute using the user name and password created by this first SQL script. To reduce security risks, the DBA user name and password are passed in as parameters to the script.

Pseudo Code

The pseudo code for this script is as follows:

```
Initialize environment variables as necessary.
Execute the SQL script that creates the data mart "owner", using the DBA user name
and password.
//The remaining scripts are executed using the "data mart" user name and password.
Execute the SQL script that creates the "container" for the data mart.
Execute the SQL script that defines the data mart tables.
Execute the SQL script that defines the "roles" for the data mart.
Execute the SQL script that creates synonyms that allow the data mart tables to be
access without using the container name.
Load the DM2_DATE table with dates.
```

Input / Output Files

The following table details all the files produced and consumed by each stage of the script. The names are kept generic as they may vary from platform to platform.

Stage	Inputs	Outputs	Description
Create User	sql/r2_owner_ora.sql	logrs/ r2_container.log	The results of creating the data mart owner.
Create Container	sql/r2_container_ora.sql	logrs/ r2_container.log	The results of creating the container.
Define Tables	sql/r2_datamart_ora.sql	logrs/ r2_datamart.log	The results of defining the data mart tables.
Define roles	sql/r2_role_ora.sql	logrs/r2_role.log	The results of defining the groups.
Define Synonyms	sql/r2_synonyms_ora.sql	logrs/ r2_synonyms.log	The results of defining the synonyms.
Load Dates	data/c_data.dat	LDRERR/ c_date.bad	Any bad data in the C_DATE.dat file.
	ctl/c_date.ctl	LOGRS/c_date.log	The results of loading the C_DATE.dat file.

Environment Variables

The following table contains environment variables that must be set for the specific platform the script is executing on.

Variable	Purpose
%1	Input Parameter giving the DBA user name to use when running the 'owner' script.
%2	Input Parameter giving the DBA password to use when running the 'owner' script.
DB-USER	User name that will be generated by the 'owner' script.
DB-PASSWORD	Password that will be generated by the 'owner' script.
ORA_HOME	Root directory of the Oracle installation.
SQL_TOOL	Path to the tool to be used for executing sql scripts.
LDR_TOOL	The path to BCP.

AS/400

Pseudo Code

The pseudo code for this script is as follows:

```
Execute the SQL script that creates the "collection" for the data mart.
Execute the SQL script that defines the data mart tables.
Execute the SQL script that grants permissions for the data mart.
Load the DM2_PP_DATE table with dates.
```

Input / Output Files

The following table details all the files produced and consumed by each stage of the script. The names are kept generic as them may vary from platform to platform.

Stage	Inputs	Outputs	Description
Create collection	CBSVS/QTXTSRC/ COLLE400	Job Queue	The results of creating the collection.
Define tables	CBSVS/QTXTSRC/ CREAT400	Job Queue	The results of defining the data mart tables.
Define permissions	CBSVS/QTXTSRC/ GRANT400	Job Queue	The results of defining the groups.
Load Dates	CYBDM2TXT/ C_DATE		Delivered dates to populate DM2_PP_DATE.
	CBSVS/CYBDM2FMT /C_DATE		Delivered format file used in populating DM2_PP_DATE
Load Dates	DM2_P00023		System generated name for DM2_PP_DATE. This name will not change as long as there are no customizations to the file member CREAT400 used in this script.
		Job Queue	Messages will appear in the queue to assist in investigating the bad data.

JRSXVPT

This script is a 'standard' report-script. The inputs and outputs are the same for every platform so no platform specific discussion is necessary.

Pseudo Code

The pseudo code for the script is as follows:

Note: This applies to non-AS/400 systems only.

```
Initialize environment variables as necessary.
Build a FILE04 that tells CBSVB to run the RSXVPT report.
Invoke CBSVB.
Sort the results.
Build a FILE04 that tell CBSVB to run RTPRNT on the sorted results.
Invoke CBSVB.
```

AS/400

Pseudo Code

The pseudo code for this script is as follows:

```
Setup a FILE04 that tells CBSVB to run the RSXVPT report.
Setup the various file definitions needed by CBSVB.
Invoke CBSVB.
Sort the results.
Build a FILE04 that tell CBSVB to run RTPRNT on the sorted results.
Invoke CBSVB.
```

Input / Output files

The following table details the files produced and consumed by each stage of the script:

Note: This applies to non-AS/400 systems only.

Stage	Inputs	Outputs	Description
Extract Report Data	work/report.04	list/report.03	Log file from CBSVB.
		work/report.15	The results of running REPORTI.
Sort results	work/report.15	work/report14	The sorted results.
Format Report Data	work/report.04	list/rtprnt.03	Log file from CBSVB that also contains the formatted report results.
	work/report.14		

AS/400

The following table translates the generic file name to specific file member names. The library/file names in which a member can be found prefixes the names. Because of the large volume of file members produced by splitting and loading, the names have been limited to the library/file names.

Stage	Inputs	Outputs	Description
Extract Report Data	CBSVS/QTXTSRC/ RSREPTVDR	Job Queue	Log file from CBSVB.
		FILE03	
		CBSVF/P40OUT	The results of running REPORTI.
Sort results	CBSVF/P40OUTL	CBSVF/FILE15	The sorted results.
Format Report Data	CBSVS/QTXTSCR/ RTPRNTDR	FILE03 Job Queue	Log file from CBSVB that also contains the formatted report results.
	CBSVF/FILE15		

JMNTRUNR

This file is almost identical to JMNTRUN. The only differences are that a line has been added to cause P4CALC to run the 7E7E generator and a definition for FILE36 has been added for use by P5PRNT. This script is responsible for the extract stage. Because the changes are so simple, additional discussion is not necessary.

AS/400

JRSXSPLIT

Because of the need to declare every possible file that the Split program could use, JRSXSPLIT was created to simplify the process.

Stage	Inputs	Outputs	Description
RSPLIT	FILE04		Split input control card.
	FILE36		Sorted extract file.
		FILE03	Report output.
		CYBDM2TXT/ <name>	Data to be loaded into the tables.
		Job Queue	Listing of job results.

APPENDIX D

Extract Programs by Class

In This Appendix

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Introduction

This appendix shows the extract programs by their class.

TARGETS	SEGMENTS	R GROUP	UNTIL DATE	FILE IO	EXTRACT
Multiple	Multiple	Yes	No	Yes	RSXT_C
Multiple	Multiple	Yes	No	Yes	RSXT_N
Multiple	Multiple	Yes	No	Yes	RSXT_S
Multiple	Multiple	Yes	Yes	Yes	RSXTC
Multiple	Multiple	Yes	Yes	Yes	RSXTK
Multiple	Multiple	Yes	Yes	Yes	RSXTN
Multiple	Multiple	Yes	Yes	Yes	RSXTW
Multiple	Multiple	Yes	Yes	Yes	RSXT_D
Multiple	Multiple	Yes	Yes	Yes	RSXT_P
Multiple	Single	No	No	No	RSXH
Multiple	Single	No	No	No	RSXJCA
Multiple	Single	No	No	No	RSXJUS
Multiple	Single	No	No	Yes	RSXCE
Multiple	Single	Yes	No	Yes	RSXTY
Multiple	Single	Yes	Yes	No	RSXLQA
Multiple	Single	Yes	Yes	No	RSXLZM
Multiple	Single	Yes	Yes	Yes	RSXTL
Multiple	Single	Yes	Yes	Yes	RSXTT
Multiple	Single	Yes	Yes	Yes	RSXTV
Multiple	Single	Yes	Yes	Yes	RSXU2
Single	Multiple	No	No	No	RSXLO1
Single	Multiple	No	No	No	RSXLO4
Single	Multiple	No	No	No	RSXLOA
Single	Multiple	No	Yes	No	RSXLQV
Single	Multiple	No	Yes	No	RSXT10
Multiple	Multiple	Yes	No	Yes	RSXT_C
Multiple	Multiple	Yes	No	Yes	RSXT_N
Multiple	Multiple	Yes	No	Yes	RSXT_S
Multiple	Multiple	Yes	Yes	Yes	RSXTC
Multiple	Multiple	Yes	Yes	Yes	RSXTK

TARGETS	SEGMENTS	R GROUP	UNTIL DATE	FILE IO	EXTRACT
Multiple	Multiple	Yes	Yes	Yes	RSXTN
Multiple	Multiple	Yes	Yes	Yes	RSXTW
Multiple	Multiple	Yes	Yes	Yes	RSXT_D
Multiple	Multiple	Yes	Yes	Yes	RSXT_P
Multiple	Single	No	No	No	RSXH
Multiple	Single	No	No	No	RSXJCA
Multiple	Single	No	No	No	RSXJUS
Multiple	Single	No	No	Yes	RSXCE
Multiple	Single	Yes	No	Yes	RSXTY
Multiple	Single	Yes	Yes	No	RSXLQA
Multiple	Single	Yes	Yes	No	RSXLZM
Multiple	Single	Yes	Yes	Yes	RSXTL
Multiple	Single	Yes	Yes	Yes	RSXTT
Multiple	Single	Yes	Yes	Yes	RSXTV
Multiple	Single	Yes	Yes	Yes	RSXU2
Single	Multiple	No	No	No	RSXLO1
Single	Multiple	No	No	No	RSXLO4
Single	Multiple	No	No	No	RSXLOA
Single	Multiple	No	Yes	No	RSXLQV
Single	Multiple	No	Yes	No	RSXT10
Single	Multiple	No	Yes	No	RSXT11
Single	Multiple	No	Yes	No	RSXT12
Single	Multiple	No	Yes	No	RSXT13
Single	Multiple	No	Yes	No	RSXT50
Single	Multiple	No	Yes	No	RSXT51
Single	Multiple	No	Yes	No	RSXT52
Single	Multiple	No	Yes	No	RSXT53
Single	Multiple	No	Yes	No	RSXT54
Single	Multiple	No	Yes	No	RSXT55
Single	Multiple	No	Yes	No	RSXT56
Single	Multiple	No	Yes	No	RSXTE1
Single	Multiple	No	Yes	No	RSXTE2
Single	Multiple	No	Yes	No	RSXTE3
Single	Multiple	No	Yes	No	RSXTE4

TARGETS	SEGMENTS	R GROUP	UNTIL DATE	FILE IO	EXTRACT
Single	Multiple	No	Yes	No	RSXTE5
Single	Multiple	No	Yes	No	RSXTE6
Single	Multiple	No	Yes	No	RSXTE7
Single	Multiple	No	Yes	No	RSXTE8
Single	Multiple	No	Yes	No	RSXTE9
Single	Multiple	No	Yes	Yes	RSXT0D
Single	Multiple	No	Yes	Yes	RSXT0E
Single	Multiple	No	Yes	Yes	RSXT0X
Single	Multiple	No	Yes	Yes	RSXT0Y
Single	Multiple	No	Yes	Yes	RSXTA
Single	Multiple	No	Yes	Yes	RSXTB1
Single	Multiple	No	Yes	Yes	RSXTB2
Single	Multiple	No	Yes	Yes	RSXTB3
Single	Multiple	No	Yes	Yes	RSXTBX
Single	Multiple	No	Yes	Yes	RSXTX
Single	Multiple	No	Yes	Yes	RSXUT1
Single	Multiple	Yes	Yes	Yes	RSXTJ
Single	Single	No	No	No	RSXAA
Single	Single	No	No	No	RSXB
Single	Single	No	No	No	RSXCAF
Single	Single	No	No	No	RSXCAJ
Single	Single	No	No	No	RSXEE
Single	Single	No	No	No	RSXF
Single	Single	No	No	No	RSXG
Single	Single	No	No	No	RSXLOF
Single	Single	No	No	No	RSXLPI
Single	Single	No	No	No	RSXLPR
Single	Single	No	No	No	RSXLQD
Single	Single	No	No	No	RSXLQR
Single	Single	No	No	No	RSXLQU
Single	Single	No	No	No	RSXLQY
Single	Single	No	No	No	RSXLR4
Single	Single	No	No	No	RSXLRA
Single	Single	No	No	No	RSXLRD

TARGETS	SEGMENTS	R GROUP	UNTIL DATE	FILE IO	EXTRACT
Single	Single	No	No	No	RSXLT1
Single	Single	No	No	No	RSXLT2
Single	Single	No	No	No	RSXLT5
Single	Single	No	No	No	RSXLVA
Single	Single	No	No	No	RSXLVG
Single	Single	No	No	No	RSXLZ1
Single	Single	No	No	No	RSXLZ2
Single	Single	No	No	No	RSXLZ3
Single	Single	No	No	No	RSXLZ4
Single	Single	No	No	No	RSXLZ7
Single	Single	No	No	No	RSXLZE
Single	Single	No	No	No	RSXLZN
Single	Single	No	No	No	RSXLZO
Single	Single	No	No	No	RSXLZQ
Single	Single	No	No	No	RSXLZS
Single	Single	No	No	No	RSXLZT
Single	Single	No	No	No	RSXPE
Single	Single	No	No	Yes	RSXDFH
Single	Single	No	No	Yes	RSXT_A
Single	Single	No	No	Yes	RSXT_Y
Single	Single	No	No	Yes	RSXT_Z
Single	Single	No	No	Yes	RSXVRS
Single	Single	No	Yes	No	RSXLPM
Single	Single	No	Yes	No	RSXLQ0
Single	Single	No	Yes	No	RSXLQ1
Single	Single	No	Yes	No	RSXLQ2
Single	Single	No	Yes	No	RSXLQ4
Single	Single	No	Yes	No	RSXLQ5
Single	Single	No	Yes	No	RSXLQ6
Single	Single	No	Yes	No	RSXLQ8
Single	Single	No	Yes	No	RSXLQ9
Single	Single	No	Yes	No	RSXLQC
Single	Single	No	Yes	No	RSXLQO
Single	Single	No	Yes	No	RSXLQT

TARGETS	SEGMENTS	R GROUP	UNTIL DATE	FILE IO	EXTRACT
Single	Single	No	Yes	No	RSXLR5
Single	Single	No	Yes	No	RSXLWF
Single	Single	No	Yes	No	RSXLZA
Single	Single	No	Yes	No	RSXLZB
Single	Single	No	Yes	No	RSXLZC
Single	Single	No	Yes	No	RSXLZD
Single	Single	No	Yes	No	RSXLZF
Single	Single	No	Yes	No	RSXLZG
Single	Single	No	Yes	No	RSXLZH
Single	Single	No	Yes	No	RSXLZP
Single	Single	No	Yes	No	RSXLZR
Single	Single	No	Yes	Yes	RSX0U1
Single	Single	No	Yes	Yes	RSXTB
Single	Single	No	Yes	Yes	RSXTE
Single	Single	No	Yes	Yes	RSXTG
Single	Single	No	Yes	Yes	RSXTM
Single	Single	No	Yes	Yes	RSXTS
Single	Single	No	Yes	Yes	RSXTZX
Single	Single	No	Yes	Yes	RSXTZY
Single	Single	No	Yes	Yes	RSXUT0
Single	Single	Yes	No	No	RSXLQE
Single	Single	Yes	No	No	RSXLT3
Single	Single	Yes	No	No	RSXLZ8
Single	Single	Yes	Yes	No	RSXLOD
Single	Single	Yes	Yes	No	RSXLQ3
Single	Single	Yes	Yes	No	RSXLQS
Single	Single	Yes	Yes	No	RSXLRT
Single	Single	Yes	Yes	No	RSXLRU
Single	Single	Yes	Yes	Yes	RSXTO
Single	Single	Yes	Yes	Yes	RSXTP
Single	Single	Yes	Yes	Yes	RSXTU
Single	Single	Yes	Yes	Yes	RSXU1

APPENDIX E

Reporting Administration Tax Field Map

In This Appendix

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Introduction

This section shows the fields used for tax purposes.

	Wages								Tax					Weeks
	Total	ER	EE	UI	Prem	Work In	Resident	Prior	ER	EE	UI	EIC	Prior	Count
101 - Fica OASDI	119	117	118					123	120	122			124	
102 - Federal			119	121	123	117	118			120		122		124
103 - Fica HI		117	118						120	122				
104 - RTA														
105 - RTA														
2xx - State	123qtr		119	121	123	117	118			120	122			124
3xxyyyy - County			119			117	118			120				
4xx - SDI	123qtr		121							122				
4xxyyyy - City			119			117	118			120				

APPENDIX F

Reporting Administration CSL Extract Frameworks

In This Appendix

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RSXF01 Framework 263
RSXF02 Framework 265
RSXF03 Framework 266

Introduction

This section shows the three CSL frameworks used for extracting data.

There are three primary frameworks for the CSL extract programs. Each of the three frameworks is a subclass of the same algorithm. The class algorithm for all data extraction for Reporting Administration is a looping mechanism in paragraph 100 for looping through or looking at all of a particular type of data and a detail section for building a single row of data to be extracted in paragraph 200.

Framework	Description
RSXF01	Framework for all CSL programs extracting data from the System Control Repository.
RSXF02	Framework for all CSL programs extracting data from Records in the Employee Database.
RSXF03	Framework for all CSL programs extracting data from Segments in the Employee Database.

Within each of these frameworks are some lines of code for handling the different sub-classes of data to be extracted. There are lines of code for the following data sub-classes:

Sub-class	Description	Marker
Effective Dates	Most data has an effective date. For each effective date, an until-date will be derived and added to the extract data.	@effd
Sub-stacks	Some of the data is held in segments as a stack within a stack (sub-stacks). For each sub-stack of data, the until-date calculation will have to be re-seeded.	@subs
Many to one	Some of the data needs to be concatenated during the extraction. For each additional segment or table entry, there will need to be code to retrieve that data as part of the current data.	@many
One to Many	Some of the data is stored as repeating groups and needs to be split into multiple tables in the data mart. For each repeating group, there will need to be code to extract that data to a separate data mart table. There are no default lines of code in any of the frameworks for repeating groups of data. You will have to look at one of the delivered extracts for sample code.	

RSXF01 Framework

```
P RSXF01 00000 SECURITY 'RS'. @ <table name> TABLE EXTRACT             SRS
P RSXF01 00001 @LAST MODIFIED ON:            BY:        AUTHOR:
P RSXF01 00003 @RSXF01 is an extract subroutine for the Reporting
P RSXF01 00004 @Administration. It is set up from RSXSCR and called from RSXRPT.
P RSXF01 00005 @It will produce data for the <table name> table.
P RSXF01 00100   IM-A-SUBROUTINE.
P RSXF01 00200 P100-SEGMENT-CHECK.
P RSXF01 00300   MOVE '20991231' TO RING-TO-DATE.                     @effd
P RSXF01 00400   MOVE SPACES TO W6-16-254/HOLD-KEY.                   @subs
P RSXF01 00500   MOVE '02' TO KEY01-SIZE.
P RSXF01 00600   MOVE '<>' TO KEY01-AREA.
P RSXF01 00700   READ-UNIQUE FILE01.
P RSXF01 00800   IF STAT-KEY GREATER '00' GO TO P999-RETURN.
P RSXF01 00900 P110-PROCESS-LOOP.
P RSXF01 01000   IF W8-01-022-ID NOT EQUAL 'A' GO TO P120-END-PROCESS.@many
P RSXF01 01100   MOVE-TABLE-RECORD-1.
P RSXF01 01200   READ FILE01.                                          @many
P RSXF01 01300   IF STAT-KEY GREATER '00' GO TO P999-RETURN.           @many
P RSXF01 01400   IF TABLE-KEY NOT EQUAL W8-22-000 GO TO P120-END-PROC.@many
P RSXF01 01500   IF W8-01-022-ID NOT EQUAL 'B' GO TO P120-END-PROCESS.@many
P RSXF01 01600   MOVE-TABLE-RECORD-2.                                  @many
P RSXF01 01700   IF W8-16-000/LAST-READ NOT EQUAL W6-16-254/HOLD-KEY  @subs
P RSXF01 01800     MOVE '20991231' TO RING-TO-DATE.                    @subs
P RSXF01 01900   MOVE W8-24-000/LAST-READ TO W6-24-254/HOLD-KEY.
P RSXF01 02000   IF RING-TO-DATE NOT LESS THAN R-RSX-CUT-OFF-DATE     @effd
P RSXF01 02100     PERFORM P200-TABLE-DATA.
P RSXF01 02200 P120-END-PROCESS.
P RSXF01 02300   READ FILE01.
P RSXF01 02400   IF STAT-KEY GREATER '00' GO TO P999-RETURN.
P RSXF01 02500   IF W8-02-000 EQUAL '<>'
P RSXF01 02600     GO TO P110-PROCESS-LOOP.
P RSXF01 02700   GO TO P999-RETURN.
P RSXF01 02800 P200-TABLE-DATA.
P RSXF01 02900   CALCULATE R-RSX-ROW-COUNTER + :1 = R-RSX-ROW-COUNTER.
P RSXF01 03000   SET SCREEN TO :1601.
P RSXF01 03100   MOVE R-RSX-TARGET         TO SCREEN. @  3 CHARS
P RSXF01 03200   MOVE R-RSX-TABLE-SEQ      TO SCREEN. @  2 CHARS
P RSXF01 03300   MOVE R-RSX-ROW-COUNTER    TO SCREEN. @  8 CHARS
P RSXF01 56300   CALL 'RSXRWR'.
P RSXF01 56400 P290-CALCULATE-UNTIL.                                   @effd
P RSXF01 56500   MOVE '000001' TO TIME-SPAN.                           @effd
P RSXF01 56600   CALCULATE TA-TABLE-DATE - TIME-SPAN = RING-TO-DATE.  @effd
P RSXF01 56700 P299-RESET-FILE01.
P RSXF01 56800   MOVE '24' TO KEY01-SIZE.
P RSXF01 56900   MOVE W6-24-254/HOLD-KEY TO KEY01-AREA.
P RSXF01 57000   READ-UNIQUE FILE01.
P RSXF01 57100   EXIT.
P RSXF01 57200 P999-RETURN.
P RSXF01 57300   RETURN.
P RSXF01D01001 <table name> TABLE EXTRACT SUBROUTINE (RSXF01)
P RSXF01D03001 RSXF01 - <table name> TABLE EXTRACT SUBROUTINE
P RSXF01D03002 <table name> TABLE EXTRACT SUBROUTINE (RSXF01)
P RSXF01M00100 RSRSXF01 is a program for Reporting Administration.
P RSXF01M00105VDESCRIPTION
P RSXF01M00110   RSXF01 is a subroutine called from RSXRPT, which will
P RSXF01M00115   extract the <t> Table data from the
```

```
P RSXF01M00120   System Control Repository. It will produce extract text
P RSXF01M00125   in SCREEN starting at :1601. RSXRWR will be called to
P RSXF01M00130   write the extract text in SCREEN.                       2
P RSXF01M00135   RSXF01 will build extract text for the following
P RSXF01M00140   table(s) in the Cyborg Data mart.
P RSXF01M00145      00 - <table name>
P RSXF01M00150
P RSXF01M00155VUSAGE
P RSXF01M00160   You can enable or disable this subroutine from being
P RSXF01M00165   called via the RSXSCR Table Properties Screen.
P RSXF01M00201VEXTRACT FIELD MAPPING FOR DM2_JOB_TABLE                   2
P RSXF01M00211   Cyborg Field Name      Data mart Column Name   Length     2
```

RSXF02 Framework

```
P RSXF02 00000 SECURITY 'RS'. @ <table name> TABLE DATA EXTRACT         SRS
P RSXF02 00001 @LAST MODIFIED ON:            BY:        AUTHOR:
P RSXF02 00003 @RSXF02 is an extract subroutine for the Reporting
P RSXF02 00004 @Administration. It is set up from RSXSCR and called from RSXRPT.
P RSXF02 00005 @It will produce data for the <table name> table.
P RSXF02 00100   IM-A-SUBROUTINE.
P RSXF02 00200 P100-SEGMENT-CHECK.
P RSXF02 00300   MOVE '07      H'    TO W7-00-044/KEY02.
P RSXF02 00400   MOVE COMPANY-NUMBER TO W7-00-046/KEY02.
P RSXF02 00500   READ-UNIQUE FILE02.
P RSXF02 00600   IF STAT-KEY GREATER '00' GO TO P999-RETURN.
P RSXF02 00700 P110-PROCESS-LOOP.
P RSXF02 00800   MOVE W8-10-010/TAX-KEY   TO KEY-FIELD.
P RSXF02 00900   MOVE W8-32-003/LAST-READ TO W6-32-254/HOLD-KEY.
P RSXF02 01000   READ-TAXES.
P RSXF02 01100   PERFORM P200-TABLE-DATA.
P RSXF02 01200 P120-END-PROCESS.
P RSXF02 01300   READ FILE02.
P RSXF02 01400   IF STAT-KEY GREATER '00' GO TO P999-RETURN.
P RSXF02 01500   IF W8-06-003 EQUAL COMPANY-NUMBER AND
P RSXF02 01600      W8-01-009 EQUAL 'H'
P RSXF02 01700     GO TO P110-PROCESS-LOOP.
P RSXF02 02700   GO TO P999-RETURN.
P RSXF02 03600 P200-TABLE-DATA.
P RSXF02 03700   CALCULATE R-RSX-ROW-COUNTER + :1 = R-RSX-ROW-COUNTER.
P RSXF02 03800   SET SCREEN TO :1601.
P RSXF02 03900   MOVE R-RSX-TARGET         TO SCREEN. @  5 CHARS
P RSXF02 04000   MOVE R-RSX-TABLE-SEQ      TO SCREEN. @  2 CHARS
P RSXF02 04100   MOVE R-RSX-ROW-COUNTER    TO SCREEN. @  8 CHARS
P RSXF02 51900   CALL 'RSXRWR'.
P RSXF02 52000 P299-RESET-FILE02.
P RSXF02 52100   MOVE '32' TO KEY02-SIZE.
P RSXF02 52200   MOVE W6-32-254/HOLD-KEY TO KEY02-AREA.
P RSXF02 52300   READ-UNIQUE FILE02.
P RSXF02 52400   EXIT.
P RSXF02 52500 P999-RETURN.
P RSXF02 52600   RETURN.
P RSXF02D01001 <table name> TABLE EXTRACT SUBROUTINE (RSXF02)
P RSXF02D03001 RSXF02 - <table name> TABLE EXTRACT SUBROUTINE
P RSXF02D03002 <table name> TABLE EXTRACT SUBROUTINE (RSXF02)
P RSXF02M00100 RSRSXF02 is a program for Reporting Administration.
P RSXF02M00105VDESCRIPTION
P RSXF02M00110   RSXF02 is a subroutine called from RSXRPT, which will
P RSXF02M00115   extract the <t> Segment data from the
P RSXF02M00120   Employee Database. It will produce extract text
P RSXF02M00125   in SCREEN starting at :1601. RSXRWR will be called to
P RSXF02M00130   write the extract text in SCREEN.                      2
P RSXF02M00135   RSXF02 will build extract text for the following
P RSXF02M00140   table(s) in the Cyborg Data mart.
P RSXF02M00145      00 - <table name>
P RSXF02M00150
P RSXF02M00160VUSAGE
P RSXF02M00165   You can enable or disable this subroutine from being
P RSXF02M00170   called via the RSXSCR Table Properties Screen.
P RSXF02M00201VEXTRACT FIELD MAPPING FOR DM2_COMPANY_TAX                 2
P RSXF02M00211   Cyborg Field Name      Data mart Column Name   Length     2
```

RSXF03 Framework

```
P RSXF03 00000 SECURITY 'RS'. @ <table name> TABLE EXTRACT             SRS
P RSXF03 00001 @LAST MODIFIED ON:            BY:        AUTHOR:
P RSXF03 00003 @RSXF03 is an extract subroutine for the Reporting
P RSXF03 00004 @Administration. It is set up from RSXSCR and called from RSXRPT.
P RSXF03 00005 @It will produce data for the <table name> table.
P RSXF03 00100   IM-A-SUBROUTINE.
P RSXF03 00200 P100-PROCESS-SEGMENT.
P RSXF03 00300   MOVE '20991231' TO RING-TO-DATE.                     @effd
P RSXF03 00400   MOVE L-SEGMENT TO W6-06-254/HOLD-KEY.                @subs
P RSXF03 00500   PROCESS <process field>.
P RSXF03 00600   IF L-SEGMENT NOT EQUAL W6-06-254/HOLD-KEY            @subs
P RSXF03 00700      MOVE '20991231' TO RING-TO-DATE                   @subs
P RSXF03 00800      MOVE L-SEGMENT TO W6-06-254/HOLD-KEY.             @subs
P RSXF03 00900     IF RING-TO-DATE LESS THAN R-RSX-CUT-OFF-DATE       @effd
P RSXF03 01000       GO TO P999-RETURN.                               @effd
P RSXF03 01100     PERFORM P200-TABLE-DATA.
P RSXF03 01200   END-PROCESS.
P RSXF03 01300   GO TO P999-RETURN.
P RSXF03 01400 P200-TABLE-DATA.
P RSXF03 01500   SAVE-MY-PLACE.                                       @many
P RSXF03 01600   FIND <non key field> STARTING WITH W6-03-257/PLAN.   @many
P RSXF03 01700   IF NOT FOUND                                         @many
P RSXF03 01800     RESET-MY-PLACE                                     @many
P RSXF03 01900     GO TO P299-EXIT.                                   @many
P RSXF03 02000   RESET-MY-PLACE.                                      @many
P RSXF03 02100   CALCULATE R-RSX-ROW-COUNTER + :1 = R-RSX-ROW-COUNTER.
P RSXF03 02200   SET SCREEN TO :1601.
P RSXF03 02300   MOVE R-RSX-TARGET         TO SCREEN. @  5 CHARS
P RSXF03 02400   MOVE R-RSX-TABLE-SEQ      TO SCREEN. @  2 CHARS
P RSXF03 02500   MOVE R-RSX-ROW-COUNTER    TO SCREEN. @  8 CHARS
P RSXF03 55000   CALL 'RSXRWR'.
P RSXF03 55100 P290-CALCULATE-UNTIL.                                  @effd
P RSXF03 55200   MOVE '000001' TO TIME-SPAN.                          @effd
P RSXF03 55300   CALCULATE <date field> - TIME-SPAN = RING-TO-DATE.   @effd
P RSXF03 55400 P299-EXIT.
P RSXF03 55500   EXIT.
P RSXF03 55600 P999-RETURN.
P RSXF03 55700   RETURN.
P RSXF03D01001 <table name> TABLE EXTRACT SUBROUTINE (RSXF03)
P RSXF03D03001 RSXF03 - <table name> TABLE EXTRACT SUBROUTINE
P RSXF03D03002 <table name> TABLE EXTRACT SUBROUTINE (RSXF03)
P RSXF03M00100 RSRSXF03 is a program for Reporting Administration.
P RSXF03M00105VDESCRIPTION
P RSXF03M00110   RSXF03 is a subroutine called from RSXRPT, which will
P RSXF03M00115   extract the <s> Segment data from the
P RSXF03M00120   Employee Data Record. It will produce extract text
P RSXF03M00125   in SCREEN starting at :1601. RSXRWR will be called to
P RSXF03M00130   write the extract text in SCREEN.                      2
P RSXF03M00135   RSXF03 will build extract text for the following
P RSXF03M00140   table(s) in the Cyborg Data mart.
P RSXF03M00145      00 - <table name>
P RSXF03M00150
P RSXF03M00155VUSAGE
P RSXF03M00160   You can enable or disable this subroutine from being
P RSXF03M00165   called via the RSXSCR Table Properties Screen.
P RSXF03M00201VEXTRACT FIELD MAPPING FOR <table name>                  2
P RSXF03M00211   Cyborg Field Name      Data mart Column Name   Length     2
```

APPENDIX G

Reporting Administration Control Table Quick Reference

In This Appendix

Introduction 269

Introduction

This section provides a quick reference to Reporting Administration Control Table. It summarizes the fields displayed in Reporting Administration Table Properties form (RSXSCR).

Note: This does not show Position Administration data.

Table Name	Src	Seg	Seq	Compnt	Screen	Program	Enable	Truncate	Row Size
	CF	VRS	00	RS	RSXSCR	RSXVRS	Y	N	
	CF	000	00	RS		RSXSQL	Y	N	
DM2_ABSENCES	M_	LVA	00	HR	93-SCR	RSXLVA	Y	Y	196
DM2_ACCUMULAT_RULE	CF	TO_	00	BA	TO-SCR	RSXTO	Y	Y	50
DM2_ALLERGY	M_	LZM	01	HR	15-SCR		Y	Y	58
DM2_ALTERNA_COMPEN	M_	LR5	00	PR	BACSCR	RSXLR5	Y	Y	102
DM2_APP_CONTACT	M_	LOF	00	HR	008SCR	RSXLOF	Y	Y	114
DM2_APPRAISAL	M_	LZS	00	HR	50-SCR	RSXLZS	Y	Y	118
DM2_ASSOCIATION	M_	LZO	00	HR	29-SCR	RSXLZO	Y	Y	70
DM2_AUTH_TIME_OFF	M_	LRT	00	HR	93ASCR	RSXLRT	Y	Y	72
DM2_AVG_DEFERR_PCT	M_	LQR	00	BA	52-SCR	RSXLQR	Y	Y	92
DM2_BENEF_PLAN_HED	CF	TK_	01	BA	TK-SCR		Y	Y	65
DM2_BENEF_PLN_SEAR	CF	TK	02	BA	TK-SCR		Y	Y	75
DM2_BENEF_TBL_CTRL	CF	TZY	00	BA	AY-SCR	RSXTZY	Y	Y	74
DM2_BENEFICIAR_PCT	M_	LQS	00	BA	59BSCR	RSXLQS	Y	Y	47
DM2_BENEFICIARY	M_	LOA	00	BA	58-SCR	RSXLOA	Y	Y	267
DM2_BENEFIT_PLAN	CF	TK_	00	BA	TK-SCR	RSXTK	Y	Y	190
DM2_BONUS	M_	LZE	00	HR	26-SCR	RSXLZE	Y	Y	127
DM2_BREAK_IN_SVC	CF	TU_	00	BA	TU-SCR	RSXTU	Y	Y	85
DM2_CAN_EMP_TAX_QTR	M_	JCA	01	PR	JT-SCR		Y	N	653
DM2_CAN_EMPLOYEE_TAX	M_	JCA	00	PR	JJ-SCR	RSXJCA	Y	Y	648

Table Name	Src	Seg	Seq	Compnt	Screen	Program	Enable	Truncate	Row Size
DM2_CERTIFICATION	M_	LZN	00	HR	28-SCR	RSXLZN	Y	Y	113
DM2_CITIZENSHIP	M_	LZB	00	HR	02-SCR	RSXLZB	Y	Y	279
DM2_CLASS_EVALU	CF	T_Y	00	TR	23RSCR	RSXT_Y	Y	Y	292
DM2_CLASS_SCHD_COST	CF	T_S	02	TR	13RSCR		Y	Y	72
DM2_CLASS_SCHD_TIME	CF	T_S	01	TR	13RSCR		Y	Y	69
DM2_CLASS_SCHEDULE	CF	T_S	00	TR	13RSCR	RSXT_S	Y	Y	276
DM2_COBRA_QUALIFY	M_	LQY	00	BA	86-SCR	RSXLQY	Y	Y	117
DM2_COM_TAX_QTR	DF	H__	01	PR	T1-SCR		Y	Y	213
DM2_COMPANY	D_	AA_	00	PP	AA-SCR	RSXAA	Y	Y	252
DM2_COMPANY_HED	D_	B__	00	PR	A8-SCR	RSXB	Y	Y	456
DM2_COMPANY_TAX	DF	H__	00	PR	T1-SCR	RSXDFH	Y	Y	208
DM2_CONSIDER_ACCUM	CF	CE_	00	BA	60-SCR	RSXCE	Y	Y	80
DM2_CONSIDER_FICA	CF	CE_	01	BA	602SCR		Y	Y	110
DM2_CONTACT	M_	LWF	00	HR	EM-SCR	RSXLWF	Y	Y	152
DM2_COORDINATOR	CF	T_C	00	TR	14RSCR	RSXT_C	Y	Y	212
DM2_COORDITOR_CRS	CF	T_C	01	TR	14RSCR		Y	Y	44
DM2_COURS_OFFERING	CF	T_D	00	TR	10RSCR	RSXT_D	Y	Y	288
DM2_COURS_PROVIDER	CF	T_N	00	TR	19RSCR	RSXT_N	Y	Y	228
DM2_COURSE_BOOKING	CF	T_Z	00	TR	20RSCR	RSXT_Z	Y	Y	196
DM2_COVERAGE_COST	CF	TM_	00	BA	TM-SCR	RSXTM	Y	Y	229
DM2_CRS_DEVP_COST	CF	T_A	00	TR	11RSCR	RSXT_A	Y	Y	90
DM2_CRS_OFFER_COST	CF	T_D	03	TR	10RSCR		Y	Y	79
DM2_CRS_OFFER_OBJ	CF	T_D	01	TR	10RSCR		Y	Y	51
DM2_CRS_OFFER_PREQ	CF	T_D	04	TR	10RSCR		Y	Y	54
DM2_CRS_OFFER_SKIL	CF	T_D	02	TR	10RSCR		Y	Y	76
DM2_CRS_PROVDR_CRS	CF	T_N	01	TR	19RSCR		Y	Y	49
DM2_DC_CONTRIBUT	M_	LQE	00	BA	64CSCR	RSXLQE	Y	Y	69

Table Name	Src	Seg	Seq	Compnt	Screen	Program	Enable	Truncate	Row Size
DM2_DEPENDENT	M_	LO1	00	HR	10-SCR	RSXLO1	Y	Y	292
DM2_DIRECT_DEPOSIT	M_	H__	02	PR	H9-SCR		Y	Y	107
DM2_DISCIPLINE	M_	LRD	00	HR	DA-SCR	RSXLRD	Y	Y	122
DM2_DISCRIMINAT_PLN	CF	TV_	01	BA	TV-SCR		Y	Y	30
DM2_DISCRIMINAT_TST	CF	TV_	00	BA	TV-SCR	RSXTV	Y	Y	57
DM2_EDUCATION	M_	LZ1	00	HR	30-SCR	RSXLZ1	Y	Y	129
DM2_EEO_ESTABLISH	CF	TX_	00	HR	TX-SCR	RSXTX	Y	Y	302
DM2_EEO_STATIS_PCT	CF	TY_	01	HR	TY-SCR		Y	Y	65
DM2_EEO_STATISTICS	CF	TY_	00	HR	TY-SCR	RSXTY	Y	Y	123
DM2_EMERGENCY	M_	LO4	00	HR	16-SCR	RSXLO4	Y	Y	235
DM2_EMP_ACTIVITY	M_	LZC	00	HR	08-SCR	RSXLZC	Y	Y	163
DM2_EMP_CLAS_RESUT	M_	LT2	00	TR	30RSCR	RSXLT2	Y	Y	271
DM2_EMP_CLASS_COST	M_	LT5	00	TR	34RSCR	RSXLT5	Y	Y	83
DM2_EMP_CLASS_OBJ	M_	LT3	00	TR	30RSCR	RSXLT3	Y	Y	76
DM2_EMP_ELIGIBILIT	M_	LRA	00	BA	90-SCR	RSXLRA	Y	Y	60
DM2_EMP_FLEX_CREDT	M_	LQO	00	BA	55CSCR	RSXLQO	Y	Y	149
DM2_EMP_HED_QTR	M_	H__	01	PR	HT-SCR		Y	N	325
DM2_EMP_INCUMBENCY	M_	LPM	00	PM	M40SCR	RSXLPM	Y	Y	101
DM2_EMP_LOCATION	M_	G__	00	PR	GG-SCR	RSXG	Y	Y	150
DM2_EMP_NAME_ADDR	M_	F__	00	PP	FF-SCR	RSXF	Y	Y	246
DM2_EMP_PLAN	M_	LQ1	00	BA	55-SCR	RSXLQ1	Y	Y	157
DM2_EMP_PLAN	M_	LQ4	00	BA	64-SCR	RSXLQ4	Y	Y	157
DM2_EMP_PLAN_CNTRI	M_	LQ5	00	BA	54-SCR	RSXLQ5	Y	Y	286
DM2_EMP_PLAN_COVER	M_	LQ8	00	BA	53-SCR	RSXLQ8	Y	Y	131
DM2_EMP_PLAN_VEST	M_	LQ9	00	BA	63-SCR	RSXLQ9	Y	Y	73
DM2_EMP_RETIREMENT	M_	LQ0	00	BA	65-SCR	RSXLQ0	Y	Y	141
DM2_EMPLOYEE	M_	EE_	00	PP	EF-SCR	RSXEE	Y	Y	509

Table Name	Src	Seg	Seq	Compnt	Screen	Program	Enable	Truncate	Row Size
DM2_EMPLOYEE_1	M_	LZA	00	HR	03-SCR	RSXLZA	Y	Y	157
DM2_EMPLOYEE_HED	M_	H__	00	PR	HH-SCR	RSXH	Y	Y	320
DM2_FLEX_CRED_CALC	CF	U1_	00	BA		RSXU1	N	Y	49
DM2_FLEX_PLAN_HED	CF	U2_	01	BA	TKFSCR		Y	Y	33
DM2_FLEX_PLAN_OPTS	CF	U2_	00	BA	TKFSCR	RSXU2	Y	Y	42
DM2_FSA_BALANCE	M_	LQT	00	BA	57-SCR	RSXLQT	Y	Y	101
DM2_FSA_CLAIM	M_	LQU	00	BA	56-SCR	RSXLQU	Y	Y	118
DM2_GRIEVANCE	M_	LVG	00	HR	GT-SCR	RSXLVG	Y	Y	149
DM2_HIGHLY_PAID_DE	M_	LQV	00	BA	51-SCR	RSXLQV	Y	Y	432
DM2_HIPAA	M_	LPI	00	BA	59KSCR	RSXLPI	Y	Y	44
DM2_HR_TABLE_CTRL	CF	TZX	00	HR	AX-SCR	RSXTZX	Y	Y	72
DM2_INJURY	M_	LPR	00	HR	PR-SCR	RSXLPR	Y	Y	182
DM2_JOB_ASSIGNMENT	M_	LZD	00	HR	05-SCR	RSXLZD	Y	Y	119
DM2_JOB_EVAL_DETAI	CF	TC_	01	HR	TC-SCR		Y	Y	70
DM2_JOB_EVAL_PROFI	CF	TC_	00	HR	TC-SCR	RSXTC	Y	Y	48
DM2_JOB_TABLE	CF	TA_	00	HR	TA-SCR	RSXTA	Y	Y	229
DM2_LOCATION	M_	LZR	00	HR	05CSCR	RSXLZR	Y	Y	231
DM2_MASTER_PLAN	CF	TP_	00	BA	TP-SCR	RSXTP	Y	Y	30
DM2_MEDICAL	M_	LZM	00	HR	15-SCR	RSXLZM	Y	Y	190
DM2_MONETARY_PERQ	M_	LZT	00	HR	27-SCR	RSXLZT	Y	Y	112
DM2_OCCUPATION_GRP	CF	TE_	00	HR	TE-SCR	RSXTE	Y	Y	157
DM2_PARTICIP_TYPE	CF	TN_	01	BA	TN-SCR		Y	Y	144
DM2_PAY_FREQUENCY	D_	CAJ	00	PR	AJ-SCR	RSXCAJ	Y	Y	156
DM2_PAY_OPTIONS	D_	CAF	00	PR	AF-SCR	RSXCAF	Y	Y	523
DM2_PENSION_BENEFI	M_	LQ6	00	BA	66-SCR	RSXLQ6	Y	Y	181
DM2_PERIOD_END	M_	PE_	00	PR	PE-SCR	RSXPE	Y	Y	52
DM2_PERQS	M_	LZH	00	HR	20-SCR	RSXLZH	Y	Y	95

Table Name	Src	Seg	Seq	Compnt	Screen	Program	Enable	Truncate	Row Size
DM2_PEXAM_SCHD	M_	LZ7	00	HR	18-SCR	RSXLZ7	Y	Y	186
DM2_PEXAM_TEST	M_	LZ8	00	HR	19-SCR	RSXLZ8	Y	Y	60
DM2_PLAN_DEPEND	M_	LOD	00	BA	59DSCR	RSXLOD	Y	Y	42
DM2_PLAN_EARN_DED	CF	TS_	00	BA	TS-SCR	RSXTS	Y	Y	220
DM2_PLAN_ELIG_STAT	CF	TL_	01	BA	TL-SCR		Y	Y	35
DM2_PLAN_ELIGIBILI	CF	TL_	00	BA	TL-SCR	RSXTL	Y	Y	124
DM2_PLAN_OPT_ACTIV	CF	TT_	00	BA	TT-SCR	RSXTT	Y	Y	77
DM2_PLAN_OPT_STATU	CF	TT_	01	BA	TT-SCRY	Y	108		
DM2_PLAN_PARTICIP	CF	TN_	00	BA	TN-SCR	RSXTN	Y	Y	56
DM2_PLAN_RETIREMNT	CF	TJ	00	BA	TJ-SCR	RSXTJ	Y	Y	127
DM2_PLAN_SERVICE	M_	LQ3	00	BA	62-SCR	RSXLQ3	Y	Y	98
DM2_PLANNED_SALARY	M_	LZP	00	HR	45-SCR	RSXLZP	Y	Y	190
DM2_PP_ACTIVITY_CD	CF	CHR	09	RS	CSUPDT	RSXTCC	Y	Y	22
DM2_PRIOR_YEAR_2	CF	TW_	01	HR	TW-SCR		Y	Y	78
DM2_PRIOR_YEAR_TOT	CF	TW_	00	HR	TW-SCR	RSXTW	Y	Y	34
DM2_PROG_SCHED_CRS	CF	T_P	01	TR	15RSCR		Y	Y	86
DM2_PROG_SCHEDULED	CF	T_P	00	TR	15RSCR	RSXT_P	Y	Y	97
DM2_RATING	M_	LZG	00	HR	49-SCR	RSXLZG	Y	Y	176
DM2_REQUIS_BASIC	CF	URT	00	PM	R10SCR	RSXUT0	Y	Y	97
DM2_REQUIS_CANDID	CF	URT	10	PM	R11SCR	RSXUT1	Y	Y	128
DM2_SALARY	M_	LZF	00	HR	40-SCR	RSXLZF	Y	Y	298
DM2_SALARY_REVIEW	M_	LZQ	00	HR	43-SCR	RSXLZQ	Y	Y	118
DM2_SALARY_TABLE	CF	TB_	00	HR	TB*SCR	RSXTB	Y	Y	178
DM2_SAVINGS_BOND	M_	LR4	00	BA	SB-SCR	RSXLR4	Y	Y	67
DM2_SERVICE_BRKS	M_	LQ2	00	BA	61-SCR	RSXLQ2	Y	Y	100
DM2_SKILLS	M_	LZ4	00	HR	33-SCR	RSXLZ4	Y	Y	216
DM2_SYSTEM_OPTIONS	CF	TG_	00	PP	TG-SCR	RSXTG	Y	Y	343

Table Name	Src	Seg	Seq	Compnt	Screen	Program	Enable	Truncate	Row Size
DM2_TIME_USED	M_	LRU	00	HR	93USCR	RSXLRU	Y	Y	72
DM2_TRAINING	M_	LZ3	00	HR	31-SCR	RSXLZ3	Y	Y	292
DM2_TRAINING_REQUI	M_	LT1	00	HR	31RSCR	RSXLT1	Y	Y	115
DM2_TS_FUND_ACTIVI	M_	LQC	00	BA	80-SCR	RSXLQC	Y	Y	186
DM2_TS_FUND_ALLOCA	M_	LQA	00	BA	79-SCR	RSXLQA	Y	Y	96
DM2_TS_FUND_PCT	M_	LQA	01	BA	79-SCR		Y	Y	83
DM2_TS_FUND_TRANSF	M_	LQD	00	BA	81-SCR	RSXLQD	Y	Y	111
DM2_TUITION	M_	LZ2	00	HR	32-SCR	RSXLZ2	Y	Y	148
DM2_US_EMP_TAX_QTR	M_	JUS	01	PR	JT-SCR		Y	N	846
DM2_US_EMPLOYEE_TAX	M_	JUS	00	PR	JJ-SCR	RSXJUS	Y	Y	841

APPENDIX H

MAINTO for Extended Practice Exercises

In This Appendix

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Sample 1 277
Sample 2 278
Sample 3 280

Introduction

This chapter shows MAINTO samples to be used when completing the Extended Practice exercises.

Sample 1

```
         1         2         3         4         5         6         7         8
1...5....0....5....0....5....0....5....0....5....0....5....0....5....0....5....0

F CONTROL-FOUR           3600202300  20  DKZR  HR    N          HR449100110    C
F CONTROL-THREE          3600601700  20  DKZR  HR    N          HR439100111    C
F CTRL-FOUR              3600202300       KZR  HR    Y85QALT   0HR449104110    C
F CTRL-THREE             3600601700       KZR  HR    Y85QALT   0HR439104111    C
```

Sample 2

```
         1         2         3         4         5         6         7         8
1...5....0....5....0....5....0....5....0....5....0....5....0....5....0....5....0

C HS99                  Drug Testing Values                                     A
C HS99 A                Alcohol                                                 A
C HS99 C                Cocaine                                                 A
C HS99 H                Heroine                                                 A
C HS99 T                Amphetamines                                            A
F XDRUG-TEST-1           3600501000  20  DKN9  HS               HS99           A
F XDRUG-TEST-1CODE       3600501000       KN9  HS               HS99           A
F XDRUG-TEST-2           3600502300  20  DKN9  HS               HS99           A
F XDRUG-TEST-2CODE       3600502300       KN9  HS               HS99           A
F XDRUG-TEST-3           3600503600  20  DKN9  HS               HS99           A
F XDRUG-TEST-3CODE       3600503600       KN9  HS               HS99           A
F XDRUG-TEST-4           3600504900  20  DKN9  HS               HS99           A
F XDRUG-TEST-4CODE       3600504900       KN9  HS               HS99           A
F XDRUG-TEST-CODE        3600501000       KN9  HS               HS99           A
F XDRUG-TEST-DATE        3600600382  0834PKN9  HS                              A
F XDRUG-TEST-RESULT-1    3600801500       KN9  HS                              A
F XDRUG-TEST-RESULT-2    3600802800       KN9  HS                              A
F XDRUG-TEST-RESULT-3    3600804100       KN9  HS                              A
F XDRUG-TEST-RESULT-4    3600805400       KN9  HS                              A
F XDRUG-TEST-SEQ         3600100900      KKN9  HS                              A
P X19SCR 00000 SECURITY 'HS'. @ Drug Exam Tests/Results            MEHS        A
P X19SCR 00001 @LAST MODIFIED ON:  04-11-97  BY:  KYNE  AUTHOR:  GLF           A
P X19SCR 00002 @06140120                                  LZ8                  A
P X19SCR 00003 @The X19SCR screen is used to record the tests required or      A
P X19SCR 00004 @requested for an employee and if applicable the results.       A
P X19SCR 00100 P100-START-SCREEN.                                               A
P X19SCR 00200   KEY-REQUIRED. UPDATE-EMPLOYEE.                                 A
P X19SCR 00300   NEW-SCREEN-STYLE.                                              A
P X19SCR 00400   SCREEN-SECTION '0'.                                            A
P X19SCR 00500   IF INQUIRY-MODE OR SELECTION-MODE                              A
P X19SCR 00600     GO TO P990-INQUIRY-SCREEN.                                   A
P X19SCR 00700 P200-ENTRY-SCREEN.                                               A
P X19SCR 00800   SCREEN-SECTION '1'.                                            A
P X19SCR 00900 P300-VERIFY.                                                     A
P X19SCR 01000   SET-FOR-MESSAGES.                                              A
P X19SCR 01100   IF ERRORS-EXIST RETURN.                                        A
P X19SCR 01200   IF RECORD-NOT-UPDATED GO TO P999-PROMPTS.                      A
P X19SCR 01300   RETURN.                                                        A
P X19SCR 01400 P990-INQUIRY-SCREEN.                                             A
P X19SCR 01500   SCREEN-SECTION '8'.                                            A
P X19SCR 01600   RETURN.                                                        A
P X19SCR 01700 P999-PROMPTS.                                                    A
P X19SCR 01800   SCREEN-SECTION '9'.                                            A
P X19SCRM00100   Drug Exam Tests/Results                                        A
P X19SCRM00101VDESCRIPTION                                                      A
P X19SCRM00102    The Drug Exam Test/Results screen (X19SCR) is                 A
P X19SCRM00104    used to record the tests an employee or applicant             A
P X19SCRM00106    received during a scheduled drug examination. Test            A
P X19SCRM00108    results may also be recorded. This screen is optional         A
P X19SCRM00110    and may not apply to all employees and applicants.      2     A
P X19SCRM00112DMORE SCREENS - TEXT BASE SYSTEM                                  A
P X19SCRM00114D   If you are using Cyborg's text base system, enter an M        A
P X19SCRM00116D   in the M/L (More/Last) field to access another screen.        A
P X19SCRM00118D   When you have recorded the last screen of data, enter an      A
P X19SCRM00120D   a L for Last screen.                                          A
```

```
P X19SCRM00201VMORE SCREENS - ST SYSTEM                                    A
P X19SCRM00202H   Enter the number 1 (one) in the Screen Number field to   A
P X19SCRM00204H   record the first four tests/results of a drug           A
P X19SCRM00206H   examination. Record the tests and results.          2   A
P X19SCRM00208H   Move to the More/Last Screen box. If you are recording   A
P X19SCRM00210H   four or fewer tests, select the Last option button to   A
P X19SCRM00212H   indicate this is the last page. If you are recording    A
P X19SCRM00214H   more than four tests, select the More option to         A
P X19SCRM00216H   indicate there is another page(s) to view.           2   A
P X19SCRM00220H   If there are more than four tests to record, enter a    A
P X19SCRM00222H   2 (two) in the Screen Number field. When you have       A
P X19SCRM00224H   recorded the remaining tests on your last sequence     A
P X19SCRM00226H   screen, select the Last option button from the More/Last A
P X19SCRM00228H   Screen box.                                             A
P X19SCRM00301DSCREEN FIELD DESCRIPTIONS                                  A
P X19SCRM00302 *XDRUG-DATE                                                A
P X19SCRM00303 *XDRUG-TEST-SEQ                                            A
P X19SCRM00304 *XDRUG-TEST-1CODE                                          A
P X19SCRM00305 **DAXDRUG-TEST-1                                           A
P X19SCRM00306 *XDRUG-RESULT-1                                            A
P X19SCRM00307 *XDRUG-TEST-2CODE                                          A
P X19SCRM00308 **DAXDRUG-TEST-2                                           A
P X19SCRM00309 *XDRUG-RESULT-2                                            A
P X19SCRM00310 *XDRUG-TEST-3CODE                                          A
P X19SCRM00311 **DAXDRUG-TEST-3                                           A
P X19SCRM00312 *XDRUG-RESULT-3                                            A
P X19SCRM00313 *XDRUG-TEST-4CODE                                          A
P X19SCRM00314 **DAXDRUG-TEST-4                                           A
P X19SCRM00316 *MORE/LAST                                                 A
P X19SCRM99900       MENU                                                 A
P X19SCRS00303 PL  Drug Exam Tests/Results                                A
P X19SCRS00349 PIN                    EMPLOYEE-NAME       EMPLOYEE-NAME   A
P X19SCRS10621GPER2                   XDRUG-TEST-DATE     Date of Test>   A
P X19SCRS10657GPER2                   XDRUG-TEST-SEQ      Screen Number>  A
P X19SCRS10902GPG     1250                                Tests/Results   A
P X19SCRS10955GPG     1225                                More Screens    A
P X19SCRS11156 PL  Choose More if you have                                A
P X19SCRS11207 PDR2                   XDRUG-TEST-1CODE    1:              A
P X19SCRS11233GPL  Results:                                               A
P X19SCRS11242 PEN2                   XDRUG-TEST-RESULT-1                 A
P X19SCRS11256 PL  filled this screen and                                 A
P X19SCRS11356 PL  there are more tests                                   A
P X19SCRS11407 PDR2                   XDRUG-TEST-2CODE    2:              A
P X19SCRS11442 PEN2                   XDRUG-TEST-RESULT-2                 A
P X19SCRS11456 PL  to enter.                                              A
P X19SCRS11607 PDR2                   XDRUG-TEST-3CODE    3:              A
P X19SCRS11642 PEN2                   XDRUG-TEST-RESULT-3                 A
P X19SCRS11656 PL  Choose Last otherwise.                                 A
P X19SCRS11807 PDR2                   XDRUG-TEST-4CODE    4:              A
P X19SCRS11842 PEN2                   XDRUG-TEST-RESULT-4                 A
P X19SCRS11863GPR     0M              MORE/LAST           More            A
P X19SCRS11963GPR     0L              MORE/LAST           Last            A
P X19SCRS80702 PEC2   9               XDRUG-DATE          Date of Drug    A
P X19SCRS80716 PEC2   9               XDRUG-TEST-SEQ      Screen Number   A
P X19SCRS80724 PEN2   9               XDRUG-TEST-1CODE    Test 1          A
P X19SCRS80730 PIA    9               XDRUG-TEST-1        Test 1          A
P X19SCRS80753 PIA    9               XDRUG-RESULT-1      Result          A
RFM2136USN9             User Defined LN9 SegT             USER_DEFINED_LN9 A
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Sample 3

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F 1099R-AMT-IND01        3900108500        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND02        3900108600        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND03        3900108700        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND04        3900108800        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND05        3900108900        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND06        3900109000        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND07        3900109100        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND08        3900109200        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND09        3900109300        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND10        3900109400        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND11        3900109500        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-IND12        3900109600        W2P4PR    Y          PP00 109354    A
F 1099R-AMT-INDCTRS      3901208500        W2P4PR    Y          PP00 309410    A
F 1099R-FOREIGN-ADDR     3000105300       K    PR    Y          W200 505175    A
F 1099R-HED-1            3900307000        W2HSPR    Y               105121    A
F 1099R-HED-2            3900307300        W2HSPR    Y               105121    A
F 1099R-HED-3            3900307600        W2HSPR    Y               105121    A
F 1099R-HED-4            3900307900        W2HSPR    Y               105121    A
F 1099R-HED-BOX-NAME     3901005400        W2HSPR    Y          W235 209210    A
F 1099R-HED-DELETE       3900112200        39WSPR    Y               109354    A
F 1099R-HED-SEP-CODE     3900106400        W2HSPR    Y          W202 109254    A
F 1099R-HED-TABLE        3900904500        W2HSPR    Y               109310    A
F 1099R-OTHER-PCENT      3000304010       K    PR    Y               111464    A
F 1099R-PCENT-TOTAL      3000204410       K    PR    Y               111464    A
F 1099R-PYR-TEL-13       3900307300        W2P4PR    Y               109343    A
F 1099R-PYR-TEL-47       3900407600        W2P4PR    Y               109342    A
F 1099R-PYR-TEL-AC       3900307000        W2P4PR    Y               109343    A
F 1099R-PYR-TEL-EX       3900508000        W2P4PR    Y               109332    A
F 1099R-PYR-TELPHN       3901007000        W2P4PR    Y               209310    A
F 12-CONTROL-4           4200405600        12  PR    N          PR02Y502142    C
F 12-FUNC-1              4200106800        12  PR    N          PP00 107443 ** A
F 12-FUNC-2              4200106900        12  PR    N          PP00 107443 ** A
F ACCR-CUR-ACCR-XF       3200505612       8    PP    N               108231    A
F ACCR-DATE-ACCR-XF      3200606181       8    PP    N               109231    A
F ACCR-STATUS-CODE-XF    4000204200        T!  PP    N          PE049111364    A
F ADDRESS-25             3002503400       K    PP    N               100910    A
F CITY-10                3001009400       K    PP    N               100310    A
F CITY/STATE-20          3002009400       K    PP    N               100510    A
F CLOSE-MOVE-YEAR        3600200384020234PKRQ  ER    Y               305143    C
F COMMISSION-FLAG        2900106100       8E   PP    N          PP00 110465    C
F CONTINUE-INSURANCE     2900502700       8E   PP    N               108132    A
F CONTROL-4              3100401200  15  D8    PP    N          PR02Y100110    C
F CONTROL-4-CODE         3100401200       8    PP    Y85QALT    PR02Y107122    C
F DAYS-ELAPSED           0800622210            PP    N               100110    A
F DENTAL-ELIGIBILITY     3600603782  1034 8PC  PE    Y               406120    C
F EMPLOYEE-NAME-18       30018004A0       K    PP    N               100210    A
F EMPLOYEE-NAME-29       30029004A0       K    PP    N               100110    A
F EMPLOYMENT-CODE-1      2900103800       8E   PP    N               110454    A
F EMPLOYMENT-CODE-2      2900103900       8E   PP    N               110454    A
F FUNCTION               3101002400  15   8    PP    N               100110    C
F FUNCTION-CODE          3101002400       8    PP    Y85QALT         208410    C
F GREGORIAN-DATE-1       0800620280                  N               109331    C
F INSURANCE-DISPLAY      2900203800  20  D8E   PP    N          PP469109110    A
F INSURANCE-GROUP        2900203800       8E   PP    N          PP469109344    A
F JULIAN-CALC-FLAG       0800125000                  N                         A
F JULIAN-DATE-1          0800521810                  N                         A
F JULIAN-DATE-2          0800524010                  N                         A
F JULIAN-DAYS-2          0800324210                  N                         A
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F JULIAN-TIME-DAYS        0800324710                 N                        A
F JULIAN-TIME-SPAN        0800524510                 N                        A
F JULIAN-TIME-YEARS       0800224510                 N                        A
F JULIAN-YEAR-2           0800224010                 N                        A
F KL-FUNC-1               4200104800        KL  PR   N          PP00 107443 ** A
F KL-FUNC-2               4200104900        KL  PR   N          PP00 107443 ** A
F LONG-TERM-ELIGIBLTY     3600602782  1034 8PC  PE   N               209210    C
F MEDICAL-ELIGIBILITY     3600600782  1034 8PC  PE   N               307120    C
F R-04A-DATE-LTR          0600604682  1034           N               405210    C
F R-04B-DATE-INTRVW       0600604682  1034           N               110310    C
F R-04B-DATE-LTR          0600605682  1034           N               405210    C
F R-04C-DATE-LTR          0600604682  1034           N               405210    C
F R-04D-DATE-INTRVW       0600604682  1034           N               110310    C
F R-04D-DATE-LTR          0600605682  1034           N               405210    C
F R-0L-FIRST-DATE         0600603682  1034           N               110410    C
F R-0L-SECOND-DATE        0600604282  1034           N               111520    C
F R-0N-FIRST-DATE         0600603682  1034           N               110410    C
F R-0N-SECOND-DATE        0600604282  1034           N               111520    C
F R-1F-SEL-STRT-DATE      0600603682  1034           N               208210    C
F R-1O-SPECIAL-DATE       0600603682  1034           N               112521    C
F R-1Y-DATE               0600603682  1034           N               100210    C
F R-20R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-20R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-21R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-21R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-22R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-23R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-23R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-24R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-24R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-25R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-25R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-26R-EFFECT-DATE       0600604282  1034           N               112521    C
F R-27R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-27R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-28R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-28R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-29R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-29R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-2E-ADP-YEAR-DATE      0600603682  1034           N               208210    C
F R-30R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-30R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-31A-START-DATE        0600603982  1034      TN   N               405110    C
F R-31N-LETTER-DATE       0600604582  1034           N               112521    C
F R-31N-START-DATE        0600603982  1034           N               405110    C
F R-31R-START-DATE        0600604282  1034           N               405110    C
F R-32R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-32R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-33R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-33R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-34R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-34R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-38R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-38R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-3A-AS-OF-DATE         0600603682  1034                           307310    C
F R-40-CRED-SRV-DATE      0600603682  1034           N               209210    C
F R-41-VST-CALC-DATE      0600603682  1034           N               208210    C
F R-44-AS-OF-DATE         0600603682  1034           N               307310    C
F R-45R-CLS-FRM-DATE      0600603682  1034           N               209210    C
F R-45R-CLS-TO-DATE       0600604282  1034           N               209310    C
F R-47R-FROM-DATE         0600603682  1034           N               110410    C
F R-47R-TO-DATE           0600604282  1034           N               208410    C
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F	R-48-END-DATE	0600604982	1034		N	208410	C
F	R-48-START-DATE	0600603682	1034		N	110410	C
F	R-48R-FROM-DATE	0600603682	1034		N	110410	C
F	R-48R-TO-DATE	0600604282	1034		N	208410	C
F	R-49-END-DATE	0600604982	1034		N	208410	C
F	R-49-START-DATE	0600603682	1034		N	110410	C
F	R-4C-SPECIAL-DATE	0600603682	1034		N	112521	C
F	R-4D-AS-OF-DATE	0600603682	1034		N	307310	C
F	R-4E-AS-OF-DATE	0600603682	1034		N	307310	C
F	R-4F-SPECIAL-DATE	0600603682	1034		N	112521	C
F	R-4I-SPECIAL-DATE	0600603682	1034		N	112521	C
F	R-4L-END-DATE	0600604982	1034		N	208410	C
F	R-4L-START-DATE	0600603682	1034		N	110410	C
F	R-4M-AS-OF-DATE	0600603682	1034		N	307310	C
F	R-4P-FLEX-DATE	0600603682	1034		N	209410	C
F	R-4P-RETURN-DATE	0600604582	1034		N	111520	C
F	R-4R-AS-OF-DATE	0600603682	1034		N	307310	C
F	R-4S-END-DATE	0600604982	1034		N	208410	C
F	R-4S-START-DATE	0600603682	1034		N	110410	C
F	R-4T-END-DATE	0600604982	1034		N	208410	C
F	R-4T-START-DATE	0600603682	1034		N	110410	C
F	R-4U-END-DATE	0600604982	1034		N	208410	C
F	R-4U-START-DATE	0600603682	1034		N	110410	C
F	R-4X-START-DATE	0600603682	1034		N	110410	C
F	R-5E-PLAN-DATE	0600603682	1034		N	209410	C
F	R-5H-START-DATE	0600604082	1034		N	110410	C
F	R-5I-MATCH-DATE	0600603682	1034		N	110410	C
F	R-5J-START-DATE	0600603682	1034		N	110410	C
F	R-5O-PLAN-YEAR	0600604282	1034		N	209410	C
F	R-5O-SPECIAL-DATE	0600603682	1034		N	112521	C
F	R-5P-PLAN-YEAR	0600604282	1034		N	209410	C
F	R-5P-SPECIAL-DATE	0600603682	1034		N	112521	C
F	R-60-START-DATE	0600604282	1034		N	110410	C
F	R-6CX-TO-DATE	0600604282	1034		N	208410	C
F	R-81-PLAN-YEAR	0600603682	1034	BA	N	209410	C
F	R-85-EFFDT-TBLCHG	0600606082	1034	BA	N	110310	C
F	R-85-EFFECTIVE-DT	0600604082	1034	BA	N	504121	C
F	R-85-LASTDATE-PPD	0600604682	1034	BA	N	113631	C
F	R-87-YEAR-END	0600603682	1034		N	209510	C
F	R-87D-YEAR-END	0600603682	1034		N	405210	C
F	R-8L-ASOF-DATE	0600603682	1034	BA	N	209410	C
F	R-8L-END-RNGDATE	0600604882	1034	BA	N	208310	C
F	R-8L-START-RNGDATE	0600604282	1034	BA	N	110310	C
F	R-8O-END-RNGDATE	0600604982	1034	BA	N	208310	C
F	R-8O-START-RNGDATE	0600603682	1034	BA	N	110310	C
F	R-8R-PAYPRD-ENDATE	0600603682	1034	BA	N	111420	C
F	R-8U-UNTIL-DATE	0600603682	1034		N	110410	C
F	R-8V-END-CLMDATE	0600604782	1034	BA	N	208310	C
F	R-8V-START-CLMDATE	0600604182	1034	BA	N	110310	C
F	R-8W-ASOF-CLMDATE	0600603982	1034	BA	N	209310	C
F	R-8WR-ASOF-CLMDATE	0600603982	1034	BA	N	110310	C
F	R-8X-ASOF-CLMDATE	0600603982	1034	BA	N	209310	C
F	R-8Z-ASOF-SPRTNGDT	0600603682	1034	BA	N	209210	C
F	R-9A-TBL-EFFDATE	0600603682	1034	HR	N	208310	C
F	R-9B-TBL-EFFDATE	0600603682	1034	HR	N	208310	C
F	R-EIF-EMP-NBR	06010036001010			N	405310	A
F	R-EIF-LANGUAGE	06002048000202			N	PP54 305153	A
F	R-EIF-LINEUPS	06002046100202			N	205142	A
F	R-GA-AS-OF-DATE	0600603682	1034		N	307310	C
F	R-GB-RNGE-END-DATE	0600604282	1034	BA	N	209210	C
F	R-GB-RNGE-START-DATE	0600603682	1034	BA	N	209110	C
F	R-GC-AS-OF-DATE	0600603682	1034	SA	N	307310	C

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F R-GD-AS-OF-DATE         0600603682  1034      SA    N              307310    C
F R-GE-START-DATE         0600603682  1034            N              110410    C
F R-GF-FROM-DATE          0600603682  1034            N              209410    C
F R-GF-TO-DATE            0600604282  1034            N              307410    C
F R-GG-FROM-DATE          0600603682  1034            N              209410    C
F R-GG-TO-DATE            0600604282  1034            N              307410    C
F RET-PLAN-IND            2900106000       8E   PP    N          PP00 303144    A
F ROE-CONTACT-AREA        3600303100       8YB  PR    Y              111554    C
F ROE-CONTACT-NAME        36020011A0       8YB  PR    Y              100310    C
F ROE-CONTACT-PHONE       3600803400       8YB  PR    Y              211510    C
F ROE-ISSUER              23020021A0       8AM  PP    Y              100610    C
F ROE-ISSUER-AREA         2300304100       8AM  PP    Y              110453    C
F ROE-ISSUER-EXT          2300405200       8AM  PP    Y              110543    C
F ROE-ISSUER-PHONE-NBR    2300804400       8AM  PP    N              110231    C
F ROE-LANGUAGE-PREF       2300205600       8AM  PP    Y          PP54 112575    C
F ROE-UIC-CODE            2300205800       8AM  PP    Y              107342    C
F SHORT-TERM-ELIGIBLTY    3600601782  1034 8PC  PE    N              110210    C
F SIN-11                  2900101300     J8E   PP    N              103221    C
F SPECIAL-DATE-3          0600604982  1034      PP    N              307310    C
F STATUS                  2900201700  20   8E   PP    N              100110    C
F W2-HED-BOX14-DESC       3900608700        W2HSPR    Y              306132    C
F W2-P4-CONTROL           3902504500        W2P4PR    N              100710    A
F W2-RT-1-CONTROL         3902504500        W2R1PR    Y              100610    A
F W2-RT-1-DELETE          3900112200        W2R1PR    Y              107243    A
F W2-RT-2-CONTROL         3902504500        W2R2PR    Y              100610    A
F W2-RT-2-DELETE          3900112200        W2R2PR    Y              107243    A
F W2-RT-3-CONTROL         3902504500        W2R3PR    Y              100610    A
F W2-RT-3-DELETE          3900112200        W2R3PR    Y              107243    A
F W2-RT-4-CONTROL         3902504500        W2R4PR    Y              100610    A
F W2-RT-4-DELETE          3900112200        W2R4PR    Y              107243    A
F W2-RT-5-CONTROL         3902504500        W2R5PR    Y              100610    A
F W2-RT-5-DELETE          3900112200        W2R5PR    Y              107243    A
F W2-RT-6-CONTROL         3902504500        W2R6PR    Y              100610    A
F W2-RT-6-DELETE          3900112200        W2R6PR    Y              107243    A
F W2-RT-7-CONTROL         3902504500        W2R7PR    Y              100610    A
F W2-RT-7-DELETE          3900112200        W2R7PR    Y              107243    A
F W2-RT-8-CONTROL         3902504500        W2R8PR    Y              100610    A
F W2-RT-8-DELETE          3900112200        W2R8PR    Y              107243    A
F W2-RT-COMP-ADDR         3904007000      G W2R5PR    Y              100110    A
F W2-RT-COMP-CITY         3904007000      G W2R6PR    Y              100110    A
F W2-RT-COMP-CONTACT      3904007000      G W2R7PR    Y              100110    A
F W2-RT-COMP-NAME         3904007000      G W2R3PR    Y              100110    A
F W2-RT-COMP-NAME-2       3904007000        W2R4PR    Y              100110    A
F W2-RT-COMP-STATE        3900211000      G W2R6PR    Y          PP56 110454    A
F W2-RT-COMP-TEL          3901507000        W2R8PR    Y              100210    A
F W2-RT-COMP-TEL-1-3      3900307300      G W2R8PR    Y              110353    A
F W2-RT-COMP-TEL-4-7      3900407600      G W2R8PR    Y              110353    A
F W2-RT-COMP-TEL-AC       3900307000      G W2R8PR    Y              110353    A
F W2-RT-COMP-TEL-EXT      3900508000        W2R8PR    Y              110342    A
F W2-RT-COMP-ZIP          3900511200      G W2R6PR    Y              305131    A
F W2-RT-COMP-ZIP-EXT      3900411700        W2R6PR    Y              110343    A
F W2-RT-EFILE-NAME        3901508500        W2R8PR    Y              605410    A
F W2-RT-FOREIGN-CD        3900111600        W2R2PR    Y          PP00 405164    A
F W2-RT-PRIOR-YR-IND      3900107000        W2R1PR    Y              111465    A
F W2-RT-REPLACE-CD        3900210000        W2R8PR    Y              405154    A
F W2-RT-TEST-CD           3900111500        W2R2PR    Y          PP00 205143    A
F W2-RT-XMTR-CD           3900511000      G W2R2PR    Y              205121    A
F W2-RT-XMTR-NAME         3904008000      G W2R1PR    Y              100110    A
F W2-RT-XMTR-NAME-2       3904007000        W2R2PR    Y              100110    A
F W2-RT-XMTR-TIN          3900907100      G W2R1PR    Y              305210    A
F W2-RUN-W2               3900107100        W2RCPR    Y          W234 106342    C
F W2-TRF-CONT-TEL-13      3900307300        W2P4PR    N              111454    A
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F W2-TRF-CONT-TEL-47     3900407600        W2P4PR    N              111454    A
F W2-TRF-CONT-TEL-AC     3900307000        W2P4PR    N              111454    A
F W2-TRF-CONT-TEL-EX     3900508000        W2P4PR    N              111443    A
F W2T-RTRN-ZIP           3900509700        W2B4PR    Y              108431    C
F W2T-XMTR-ZIP           3900511000        W2A4PR    Y              108431    C
F X-FW01-AS-OF-DATE      0600603680  0834                           109220    A
F X-FW03-RNGE-END-DT     0600604280  0834                           111431    A
F X-FW03-RNGE-START-DT   0600603680  0834                           111331    A
F X-FW04-HED-NUMBER      0600303600                                 110353    A
F X-FW05-EE-SELECT       0600103600                            XWS7 109354    A
F X-FW05-SORT            0600103700                            XWS8 106242    A
F X-FW06-AMT             0600403600                                 106321    A
F X-FW06-ID              0600304000                                 106331    A
F X-FW07-END             0600604380  0834                           100110    A
F X-FW07-SELECT          0600103600                                 106142    A
F X-FW07-START           0600603780  0834                           306410    A
F X-FW08-TAXFILE         0600803600                                 206210    A
F X-FW08-YREND           0600604480  0834                           306410    A
F X-FW09-LINE2           0600105900                                 106242    A
F X-FW09-QE-DATE         0600604280  0834                           306310    A
F X-FW09-SORT-1          0600203600                            XWS1 106132    A
F X-FW09-SORT-2          0600203800                            XWS1 106132    A
F X-FW09-SORT-3          0600204000                            XWS1 106132    A
F X-FW09-TERMS           0600905000                                 306310    A
F X-FW11-DATA            0600103800                            XWS4 106242    A
F X-FW11-DEPT            0600405000                                 106221    A
F X-FW11-EE-TYPE         0600103700                            XWS3 206142    A
F X-FW11-FACILITY        0600404500                                 206132    A
F X-FW11-LINEUPS         0600107110                            XWS6 206143    A
F X-FW11-NAME            0601005500                                 306410    A
F X-FW11-SEQ             0600103900                            XWS5 106342    A
F X-FW11-TC-FORMAT       0600103600                            XWS2 109354    A
F X-FW12-HOURLY          0600103600                                 106142    A
F X-FW13-ADDRESS         0600103800                                 206143    A
F X-FW13-DATE-PRINT      0600103700                                 111465    A
F X-FW13-END-DATE        0600606580  0834                           306210    A
F X-FW13-END-EE          0601004900                                 306310    A
F X-FW13-SORT            0600107100                            XWSA 106242    A
F X-FW13-START-DATE      0600605980  0834                           306110    A
F X-FW13-START-EE        0601003900                                 306210    A
F X-FW13-TYPE            0600103600                            XWS9 106242    A
F X42-ACTIVITY           4200300900  20  D     HR    N          HR09 100510    A
F X42-ACTIVITY-CODE      4200300900            HR    N          HR09 112564    A
F X42-ACTIVITY-DATE      4200600382  1034      HR    N               112521    A
F X42-AMOUNT-CHANGE      4200806812081122      HR    N               210410    A
F X42-ANNUAL-SALARY      4200905912091222      HR    N               210410    A
F X42-CONTROL-3-CODE     4200403100       8    PP    N          PR019111453    A
F X42-CONTROL-4-CODE     4200403500            PP    N          PR02Y111453    A
F X42-CONTROL-5-CODE     4200403900            PP    N          PR039111453    A
F X42-CONTROL-6-CODE     4200404300            PP    N          PR049111453    A
F X42-CURRENT-BON-POOL   4200201200            PP    N          PR98 111364    A
F X42-CURRENT-BON-PTS    4200701414070824      PP    N               111332    A
F X42-EFFECTIVE-DATE     4200600382  1034      HR    N               113631    A
F X42-EMPLOYEE-STATUS    4200201200  20  D     HR    N          HR10 100210    A
F X42-G-CONTROL-3-CODE   4200400800            PP    N          PR019          A
F X42-G-CONTROL-4-CODE   4200401200            PP    N          PR02Y113564    A
F X42-G-CONTROL-5-CODE   4200401600            PP    N          PR039          A
F X42-G-CONTROL-6-CODE   4200402000            PP    N          PR049          A
F X42-G-FUNCTION-CODE    4201002400            PP    N          PR059          A
F X42-G-KEY              4200200110            PP    N                         A
F X42-G-LOCATION-PCT     4200500310050624      PP    N                         A
F X42-G-SEG-CODE         4200100000            PP    N                         A
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F X42-G-SEG-DATA         4203200100            PP    N                        A
F X42-HOURLY-RATE        4200704414070824      HR    N               110421   A
F X42-HRS-PER-PERIOD     4200503912050622      HR    N               307132   A
F X42-JOB-CHANGE         4200302000  20  D     HR    N          HR33 100410   A
F X42-JOB-CHANGE-TYPE    4200302000            HR    N          HR33 307154   A
F X42-JOB-CODE           4200602300            HR    N               107320   A
F X42-JOB-EFFECTIVE      4200601482  1034      HR    N               307210   A
F X42-KEY-SEP&CHG-TYPE   4200400900            HR    N                        A
F X42-KEY-SEPARATOR      4200100910            HR    N          HR70          A
F X42-LZB-DELETE         4200103000            PP    N               107243   A
F X42-LZC-DELETE         4200107600            PP    N               107243   A
F X42-LZD-DELETE         4200107700            PP    N               107243   A
F X42-LZF-DELETE         4200107800            PP    N               107243   A
F X42-LZQ-DELETE         4200105500            PP    N               107243   A
F X42-MARITAL-CODE       4200100900            PP    N          HR04 111565   A
F X42-MARITAL-STATUS     4200100900  20  D     PP    N          HR04 100210   A
F X42-NEXT-REV-DATE      4200604782  1034      PP    N               208210   A
F X42-NEXT-REV-TYPE      4200205300            HR    N          HR34 108143   A
F X42-NEXT-REVIEW        4200205300  20  D     HR    N          HR34 100410   A
F X42-PAYMENT-CODE       4200103810            HR    N          PP40 111565   A
F X42-PRIOR-BON-POINTS   4200702314070824      PP    N               209121   A
F X42-PRIOR-BON-POOL     4200202100            PP    N          PR98 109253   A
F X42-RECORD-DATE        4200600382  1034      PP    N               110410   A
F X42-RESULT-EMP-STAT    4200201200            HR    N               110254   A
F X42-REVIEW-DATE        4200607982  1034      HR    N               110410   A
F X42-SAL-PER-PERIOD     4200805112081122      HR    N               307210   A
F X42-SALARY-CHG-TYPE    4200303500            HR    N          HR11 110253   A
F X42-SALARY-EFFECTIVE   4200602982  1034      HR    N               110210   A
F X42-SEG-TYPE/CODE      4200300000            HR    N                        A
F X42-SEGMENT            4207100000            HR    N                        A
F X42-SEGMENT-DATA       4206000300            HR    N                        A
F X42-SEGMENT-DATA-MOR   4200806300            HR    N                        A
F X42-SEGMENT-KEY        4200700310            HR    N                        A
F X42-TOTAL-DEPENDENTS   4200201010            PP    N               209154   A
F X42-ZB-KEY             4200600300            HR    N                        A
F X42-ZB-MARITAL-CODE    4200100900            HR    N         0HR04          A
F X42-ZB-SEG-NON-KEY     4206200900            HR    N                        A
F X42-ZC-ACTIVITY-CODE   4200300900            HR    N          HR09          A
F X42-ZC-KEY             4200900300            HR    N                        A
F X42-ZC-RES-EMP-STAT    4200201200            HR    N                        A
F X42-ZC-SEG-NON-KEY     4205901200            HR    N                        A
F X42-ZD-JOB-CHG-TYPE    4200301000            HR    N          HR33          A
F X42-ZD-JOB-CODE        4200601300            HR    N                        A
F X42-ZD-JOB-CODE-EXT    4200401910            HR    N                        A
F X42-ZD-SEG-NON-KEY     4205801300            HR    N                        A
F X42-ZF-ANNUAL-CHG      4200804312081022      HR    N                        A
F X42-ZF-ANNUAL-SAL      4200903412091222      HR    N                        A
F X42-ZF-HOURLY-RATE     4200701314070824      HR    N                        A
F X42-ZF-HOURS-PER-PD    4200502012050622      HR    N                        A
F X42-ZF-PAYMENT-FREQ    4200102500            HR    N          PP29          A
F X42-ZF-SAL-CHG-TYPE    4200301000            HR    N          HR11          A
F X42-ZF-SAL-PER-PD      4200802612081122      HR    N                        A
F X42-ZF-SEG-016-055     4201605500            HR    N                        A
F X42-ZF-SEG-NON-KEY     4205801300            HR    N                        A
F X42-ZQ-KEY             4200600300            HR    N                        A
F X42-ZQ-NEXT-REV-TYPE   4200200900            HR    N          HR34          A
F X42-ZQ-SEG-NON-KEY     4206200900            HR    N                        A
F XEE-CHANGE-ALL         2900502700       8E   PP    N               110542   A
F XEE-CHANGE-ENROLLED    2900102900       8E   PP    N          PR97 110264   A
F XEE-CHANGE-HED         2900103100       8E   PP    N               110564   A
F XEE-CHANGE-INS-FLAGS   2900402800       8E   PP    N               110243   A
F XEE-CHANGE-LIFE        2900102700       8E   PP    N          PP42 110464   A
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F XEE-CHANGE-OPEN        2900102800       8E   PP    N              110464    A
F XEE-CHANGE-TERM        2900103000       8E   PP    N              110464    A
F XEE-USER-CLASS         2900106000  20  D8E   PP    Y         PR01 100410    A
F XEE-USER-CLASS-CD      2900106000       8E   PP    Y         PR01 108153    A
F XHH-USER-NUMBER        3200905810       8    PP    N              208310    A
F XJOB-CODE2             3600201300       KZD  HR    N              203210    A
F XJOB-CODE3             3600301300       KZD  HR    N              204121    A
F XLL1-EFFECTIVE         3600600382  1034KKL1  PP    Y              404210    A
F XLL1-PROD-CLASS        3600100900  20  DKL1  PP    Y         PR01 109354    A
F XLL1-PROD-CLASS-05     3600100900  05  DKL1  PP    Y         PR01 109354    A
F XLL1-PROD-CLASS-CD     3600100900       KL1  PP    Y         PR01 109254    A
F XLL1-PROD-FACTOR       3601001012  1322 KL1  PP    Y              309510    A
F XLM1-BOOTS-CITY        3600600900       KM1  PP    Y         EO05 109431    A
F XLM1-BOOTS-COST        3600801512  1022 KM1  PP    Y              209410    A
F XLM1-BOOTS-DATE        3600600382  1034KKM1  PP    Y              209410    A
F XLM1-BOOTS-DESC        3603002300       KM1  PP    Y              100910    A
F XLM2-PANTS-CITY        3600600900       KM2  PP    Y         EO05 109431    A
F XLM2-PANTS-COST        3600801512  1022 KM2  PP    Y              209410    A
F XLM2-PANTS-DATE        3600600382  1034KKM2  PP    Y              209410    A
F XLM2-PANTS-DESC        3603002300       KM2  PP    Y              100910    A
F XLM3-SHIRT-CITY        3600600900       KM3  PP    Y         EO05 109431    A
F XLM3-SHIRT-COST        3600801512  1022 KM3  PP    Y              209410    A
F XLM3-SHIRT-DATE        3600600382  1034KKM3  PP    Y              209410    A
F XLM3-SHIRT-DESC        3603002300       KM3  PP    Y              100910    A
F XLM4-COAT-CITY         3600600900       KM4  PP    Y         EO05 109431    A
F XLM4-COAT-COST         3600801512  1022 KM4  PP    Y              209410    A
F XLM4-COAT-DATE         3600600382  1034KKM4  PP    Y              209410    A
F XLM4-COAT-DESC         3603002300       KM4  PP    Y              100910    A
F XRATE-BASE             0800675000            PP    N              205210    A
F XSAVE-DATE-1           0600610080060834                           305210    A
F XSAVE-DATE-2           0600610680060834                           305210    A
F XSAVE-DATE-3           0600611280060834                           305210    A
F XSAVE-DATE-4           0600611880060834                           305210    A
F XSAVE-TEXT             0802080000            PP    N              100610    A
F XSPECIAL-PO-NBR        0600803600            PP    N              108210    A
F XWORK-AMOUNT           0600631212060822                           305210    A
F XWORK-W6-084           0600608480  0834                           305210    A
F XWS-BEG-DATE           0800680082  1034      PP    N              307410    A
F XWS-DENT-PREM          0700434012            PP    N              203110    A
F XWS-DENT-TOTAL-EMP     0800471910040430      PP    N                        A
F XWS-DENT-TOTAL-PREM    0800772312070922      PP    N                        A
F XWS-DOH-DATE           0800681282  1034      PP    N              307410    A
F XWS-DOT-DATE           0800681882  1034      PP    N              307410    A
F XWS-DOTX-DATE          0800683082  1034      PP    N              208410    A
F XWS-END-DATE           0800680682  1034      PP    N              307410    A
F XWS-HEALTH-COMP        0800885512            PP    N              110421    A
F XWS-HEALTH-EMPL        0800886312            PP    N              110421    A
F XWS-HEALTH-TOT-COMP    0800887112            PP    N              110221    A
F XWS-HEALTH-TOT-EMPL    0800887912            PP    N              110221    A
F XWS-HOLD-DELAY         0800689081            PP    N              108321    A
F XWS-INSURANCE-CODE     0800180000            PP    N                        A
F XWS-LIFE-PREM          0800465412040522      PP    N              108332    A
F XWS-LIFE-PREM-1        0800465412040522      PP    N              108332    A
F XWS-LIFE-TOT-A-COV     0800461610040430      PP    N                        A
F XWS-LIFE-TOT-A-DOL     0800762012070922      PP    N                        A
F XWS-LIFE-TOT-B-COV     0800462710040430      PP    N                        A
F XWS-LIFE-TOT-B-DOL     0800763112070922      PP    N                        A
F XWS-LIFE-TOT-C-COV     0800463810040430      PP    N                        A
F XWS-LIFE-TOT-C-DOL     0800764212070922      PP    N                        A
F XWS-LIFE-TOT-D-COV     0800466510040430      PP    N                        A
F XWS-LIFE-TOT-D-DOL     0800766912070922      PP    N                        A
F XWS-LIFE-TOTAL-COV     0800467610040430      PP    N                        A
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F XWS-LIFE-TOTAL-EMP     0800468010040430      PP    N                        A
F XWS-LIFE-TOTAL-PREM    0800768412070922      PP    N                        A
F XWS-LTD-TOTAL-EMP      0800469110040430      PP    N                        A
F XWS-LTD-TOTAL-PREM     0800775612070922      PP    N                        A
F XWS-MED-PREM           0800465010            PP    N               107331   A
F XWS-MED-PREM-1         0800584812050622      PP    N                        A
F XWS-MED-TOTAL-COV      0800476310040430      PP    N                        A
F XWS-MED-TOTAL-EMP      0800477610040430      PP    N                        A
F XWS-MED-TOTAL-PREM     0800778012070922                                     A
F XWS-PAGE               0800454510            PP    N               203110   A
F XWS-PAGE-NO            0800180200            PP    N                        A
F XWS-PAI-TOTAL-EMP      0800473010040430      PP    N                        A
F XWS-PAI-TOTAL-PREM     0800773412070922      PP    N                        A
F XWS-PRINT-CTRL         0800160300            PP    N                        A
F XWS-REH-DATE           0800682482  1034      PP    N               307410   A
F XWS-SRV-DAYS           0800684281  0834      PP    N                        A
F XWS-TOT-PREM           0800565812050622      PP    N               107320   A
F XZB-CURRENT-BON-POOL   3600202410       KZB  HR    N         0     111364   A
F XZB-CURRENT-BON-PTS    3600702814       KZB  HR    N         0     111332   A
F XZB-PRIOR-BON-POINTS   3600703514       KZB  HR    N         0     209131   A
F XZB-PRIOR-BON-POOL     3600202610       KZB  HR    N         0     109253   A
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Glossary of Terms

.EXE
A binary file containing a program in machine language that is ready to be executed.

.INI
A file that contains the parameters (values) used by the .exe file (program).

360-degree appraisal
Appraisals that include evaluations from an employee's managers and supervisors, peers, subordinates, and even customers, clients, and suppliers.

Absence data
Employee-level absence information that is entered on the absences forms.

Absence point
User-defined number that may be assigned for a particular absence and that can be totaled over time to determine if an employee is within the accepted number of absences for a time period.

Absence type
A classification of an employee absence, such as 'jury duty' or 'sick'. Employee absences are recorded by date and absence type.

Account timeout
The period of time that elapses before a user's account becomes invalid because of inactivity.

Accumulator id
A three-position, alphanumeric identifier for a benefits accumulator.

Acrobat
A suite of programs developed by Adobe Systems, Inc. For creating and distributing electronic documents. Programs in the suite allow you to create a portable document format (PDF) file for a document. You can then distribute the PDF file electronically to people who view the document with their freely distributed acrobat reader. People viewing a PDF file (or document) with the Acrobat Reader see the document with the exact layout intended by the author.

Action button
An action button performs an action such as saving the information you entered or telling the system you finished reviewing a page. An action button consists of an icon (or button) accompanied by underlined text (link text). For example, at various places throughout eCyborg Interactive Workforce you may see an action button displaying a check mark accompanied by the underlined text 'save changes'. You can click either the text or the button to save your changes to the page.

Activity code
Describes the clock transaction (ring) activity, such as clock start or meal end.

Activity types
With the time and attendance solution, you can set up the system so that an employee or group of employees may clock in and out for up to eight different activities: clock-in (1), break 1 start (2), break 1 end (3), meal start (4), meal end (5), break 2 start (6), break 2 end (7), and clock end (8).

Actuarial valuation
An examination of a pension plan to determine if contributions are being accumulated at a rate sufficient to pay the promised pensions.

Administration home page
The administration page that displays when a user logs on using his or her administrator user ID and password. The administration page displays links to individual administrator pages (eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration).

Administrative User ID
User ID created by an administrator with the role of eCyborg Interactive Workforce administrator. This ID differs from the employee user ID generated for the administrator.

Aggregate tax method
Method of calculating taxes in which year-to-date income is used to project annual wages (using prorating), on which taxes are calculated. With this method, the amount of tax withheld can vary from pay period to pay period. This method is useful in preventing a salesperson from being over withheld as the result of fluctuations in commission over various pay periods. It is activated on the payroll solution by selecting aggregate/cumula tax (9) from the Withholding Method (PR09) option list on the Employee Tax Record Maintenance form. It is also referred to as cumulative tax calculation method.

Annualization
Process of calculating the annual amount of pay based on the number of pay periods and pay period amounts. Calculated by multiplying the number of pay periods in the year by the current taxable wages in the pay period.

Annualization factor
The factor that is used to multiply current pay period wages to determine annual wages. For example, a monthly pay frequency has an annualization factor of 12. The Payroll Solution typically calculates income taxes on the basis of annual wages. The annualization factor is entered by selecting an option from the Annualization (PP33) option list on the Company Pay Frequencies form for each pay frequency.

Annuitant
Someone entitled to receive or currently receiving payments from an annuity.

Annuity
A contract providing an income for a specific period of time.

Applicant
A person who is applying for a job or position in your organization. Internal applicants come from within your organization while external applicants come from outside of your organization.

Appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

ASCII
American **S**tandard **C**ode for **I**nformation **I**nterchange. The basis of character sets used in almost all present-day computers; US-ASCII uses only seven bits to convey some control codes, space, numbers, most basic punctuation, and unaccented letters a-z and A-Z.

Ask Me wizard
A natural language, full-text search facility within the online help. This allows users to type in a question, the wizard interprets the question, and displays related topics.

As-of reporting
Ability to report on data for a specified date or date range.

Audit record
A snapshot of information entered on a form. Audit records are stored on the employee database and are displayed on audit reports in an is/was reporting format. Adjustments and time entries are stored as audit records and are extracted for a payroll run in which they update the employee's record.

Audit report
A report that is available after the running of a program; it lists created records as well as error messages for records that could not be created.

Audit trail
A report of changes made to your employee database, such as the Payroll Audit Trail (0101) report.

Authorized absence
Absences that are generally considered as paid time away from regularly scheduled work.

Automatic plan
A plan that has been defined with a default option and default pre- or posttax indicator (also known as core/default plan).

Average deferral percentage
Percentage used in nondiscrimination and compliance testing mandated by US law. The calculation is defined as the contribution divided by the compensation.

Average rating
A rating used for performance appraisal systems with categories weighted by relative importance, where the average score reflects the weighted scores.

Back
Takes the user back to the previous page.

Badge
Time and Attendance Administration can be set up to use two different types of badge readers. The type of badge your organization uses, is determined by your third party badge reader software. The two types of badges are magnetic badges and bar code badges.

Badge error
Occurs when a badge is used to create a clock transaction (ring) and an employee has not been assigned to the badge.

Badge number
Up to ten-character ID stored on employee badges and clock transactions (rings) that tie clock transactions (rings) to an employee on the ***Employee Database*** (on page 298).

Batch
A group of transactions submitted to the batch payroll processing system. Also, a collection of time entries that corresponds to an employee group, such as department.

Batch control record
Precedes all transactions separated by group; used to identify the company to which the transactions in that group apply. By entering anticipated totals for dollars and hours on the batch control record, you may verify your totals against those accumulated by the system.

Batch layout facility
A program that produces a segment layout for loading forms via batch. This was formerly known as BATCHL.

Batch number
An alphanumeric field on the batch control record containing a user-defined value used to identify a unique group of time entries or transactions.

Batch processing
A processing method that runs in the background and requires limited intervention.

Benchmark job
A standard or point of reference for determining total job points.

Beneficiary
A person named by the participant in an insurance or pension plan to receive any benefit provided by the plan if the participant dies.

Benefits control number
A four-position, alphanumeric identifier that specifies which tables are accessed for an organization.

Benefits statement
Report that indicates the coverage and cost of each benefits plan in which an employee participates.

Big option list
A large option list that includes a search facility. This was formerly known as a big codeset.

Bridge loan
A loan made to assist a relocated employee in purchasing a new residence before the sale of their old residence is complete.

Browser
Software application used to locate and display web pages. Modern browsers give users access to graphics, text, and multimedia information, including sound and video.

Budget plan year
A twelve-month period over which a salary budget is effective.

Budget scenario
The result of creating one or more salary plans in order to see the effect of different increase policies on the budget.

Budget setting
The process of analyzing and selecting an organization's salary budget for the coming plan year.

Cafeteria plan
A specific type of flexible benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with flexible benefits plan.

Calculation option list
An option list that contains calculation formula. This was formerly known as a calculation codeset.

Candidate
A person who is applying for a job or position in your organization and is under consideration.

Career planning
Providing career incentives such as advancement and additional education and training for individual employees in order to meet projected organizational needs.

Carrier record
A carrier record supplies information from one application area to another application.

Case-sensitive
A program that distinguishes between uppercase (capital) and lowercase (small) letters. A case-sensitive program that expects you to enter all commands in uppercase will not respond correctly if you enter one or more characters in lowercase.

Catalog
A file (with the extension of .cat) that contains all the information necessary for Impromptu to access and retrieve information from a relational database. The catalog provides a business view of the data, as well as information about what database to access, where the database is stored, and how the tables in the catalog are joined in the datamart.

Category code
General term used to refer to the option selected from category (PP01 and PP02) option lists on the company earnings and company deductions forms. It is used to indicate the type of earning or deduction.

CE/H
Abbreviation for considered earnings/hours.

Change control facility
A facility for updating and comparing your system control repository. This was formerly known as MAINTI/MAINTO.

Check box
A standard windows control that displays a yes/no setting, either checked (yes) or unchecked (no).

Check digit
Unique identifier that is generated by the TBLCHK program and used by the system to check the table relationship records.

Checklist
A list of tasks to be performed in sequence. The checklist displays within the navigator area. Checklists link tasks and other checklists together to perform work flow functions. Users can display a checklist by selecting a checklist icon within the tasks in the navigator.

eCyborg Interactive Workforce specific—a list of tasks/pages generally displayed in a chart with hot spots (links) for the checklist items. The user clicks the link to access the page.

Checklist item
An item appearing within the navigator when a checklist is being displayed. Checklist items include tasks, dialogs and even other checklists.

Checklist item status
Defines the status of a checklist item. These can be:

Available to perform
Required
Not available
Already completed

Checklist margin
The area of the navigator that displays the checklist item status when a checklist is being displayed.

Checkmark
If in the done column of a eCyborg Interactive Workforce checklist, indicates that an item on a

checklist is complete. Can also indicate OK, finished, submit, and so forth.

Class
A class is an occurrence of a course that is specific to a location and a date, that is being administered using Training Administration. For example, 'eCyborg: Using the Web Client′ on Thursday, December 21, in Chicago is a class of the course 'eCyborg: Using the Web Client'.

Class evaluation results
These are the results as entered on the evaluation forms filled out by the class participants upon completion of the class. These results are recorded on the class evaluation results form.

Client data file
File containing information replicated from the System Control Repository. Used by client workstations to improve response time, since editing can be performed locally. May be located on each client workstation or may be located on a server and be shared by multiple client workstations on the network. Formerly known as the Client Control File.

Clock in and out
Also referred to as swipe/swiping the clock. When an employee uses their badge to record an activity time, they must pass their badge through the badge reader. This action can be referred to as clocking in and out.

Clock transaction
Record containing the information needed to create time entries for payroll processing. Clock transaction (ring) information includes date, time, and badge number. A clock transaction (ring) is created when a badge is swiped through a clock.

Clock transaction warning
Occurs when a clock transaction (ring) time falls outside of an employee's schedule warning times.

Closing costs
The costs associated with the purchase of a new house.

CLP
Abbreviation for certificates, licenses, and permits.

Codeset
A list of valid code values and associated descriptions from which you may select an appropriate entry. This is now known as an option list.

Coefficient
Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Combined register (2222) report
A report that provides a detailed printout of all earnings, hours, taxes, and deductions for all the payments and adjustments made on a payroll run. It is Report Generator 2222.

Command button
A standard windows control that initiates a command of sets an option (previously known as push button).

Common tax organization
A method of setting up taxation in an organization in which all necessary tax specification records are contained in a single organization. The common tax organization often handles tax specification records more efficiently, since it avoids duplication of the federal tax records and of any state or local records used by multiple companies.

Communication event
A letter or email that can be triggered automatically or manually within the system. Communication events are set up by the system administrator and usually include data from a form or record.

Compa ratio
The ratio of a given salary compared with the midpoint of the salary range. The formula is the salary divided by the midpoint.

Competency
A requisite capacity to perform a single or set of skills or activities.

Complement limit
A 'complement limit' is the maximum number of complement units that can be assigned to a position at any one time.

Complement position
A 'complement position' is a position that is included in complement control.

Complement unit
A 'complement unit' is the type of unit used to measure the value of a position, for example, headcount, fte or hours.

Compliance
Conformity in fulfilling legal requirements.

Component
The first level of functional organization on the navigator or menu, such as employee resourcing or employee development.

Component icon
An icon that denotes the current component. There are a number of components within the system. Each component appears as an icon on the navigator.

Component plan
Any plan included under the flex master plan or grouped together under a group master.

Condition
Predefined criteria that can be added to a report's filter.

Considered earnings
An employee's paid earnings that are to be accumulated, based on plan rules, for use in determining credited service or calculations of final benefits amounts.

Considered earnings/hours (CE/H) accumulators
Used only in benefits plans to accumulate the earnings and hours an employee has acquired toward eligibility for a deferred plan. Accumulators may be retained on a monthly, quarterly, or annual basis.

Considered hours paid
Actual number of hours for which an employee was paid and that are to be accumulated based on plan rules.

Considered hours worked
Actual number of hours an employee worked. These hours are to be accumulated based on plan rules for use in determining credited service for a plan participant (or for a non-participant if eligibility has been met).

Consolidated reporting
Option that enables packaged reports to be processed for all organizations (consolidated).

Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Context-sensitive help
Information about an object and its current condition. It answers the question 'what is this?'

Contribution type
The type of contribution being made to a benefits plan. The system allows for the deduction and accumulation of up to five different contributions per plan: basic employee pretax, basic employee posttax, supplemental employee pretax, supplemental post-tax, and organization.

Control 1-2
A company or group of employees (now known as an organization).

Control levels
A hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are user-defined.

Control number
An alphanumeric designation assigned to a table to define the table records that will be used for each organization.

Conversion
A method for transferring data from either a manual or automated system into the system.

Co-ordinator
A coordinator is an instructional institution, organization or person who administers training courses.

Core plan
One of the plans that make up the minimum benefits in which all eligible employees are required to enroll—for example, medical and life. Employees who fail to return enrollment forms with their benefit choices may

be automatically enrolled in the core plans (also known as default plans).

Cost categories
Cost categories are classifications or divisions used to separate costs for training into broad groupings, for example, equipment or operating costs.

Cost types
Cost types are used to further define training costs. For example, the category of equipment could be further broken down into the cost type of overhead projector and monitor rental.

Costing
Projecting the future cost of a benefits plan contribution for budget purposes.

Course
A course is a separate unit of instruction in a subject being administered using the training administration solution. For example, 'eCyborg: Using the Web Client′ is a course. This may be applied to a training course provided internally or externally.

Course directory
A course directory is a list of all available courses.

CPI
Characters **p**er **i**nch

Credited service
The number of years of employment for which an employee is given credit for use in determining final benefits amounts.

Crew
A group of employees who rotate from one schedule assignment (shift) to another, following a rotation pattern.

Crew code
A unique, one-character, alphanumeric identifier of a crew.

Cross-reference keys
Provide direct query access to data within the system database.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 295).

Cumulative data
Also called 'to-date data'. includes payroll earning, deduction, net pay, taxable wage, and tax to-date figures for employees.

Cursor
A special symbol, usually a solid rectangle or a blinking underline character, that signifies where the next character will be displayed on the screen. To type in different areas of the screen, you need to move the cursor. You can use the arrow keys or a mouse to move the cursor.

Customer-defined
Values that depend on an organization-specific definition--for example, option list.

CYB88X
An English Language root program used to set the production version switch to on or off, in addition to other automatic settings.

Cyborg Scripting Language
Cyborg's fourth-generation programming language, previously called English Language.

Data extract
Method for extracting information from The Solution Series for the purpose of subsequently loading it into eCyborg Interactive Workforce databases.

Data load
The process of moving data from one system or media to another. It encompasses data mapping, data extraction and conversion, and the actual loading of the data. Also the method of loading data extracted from The Solution Series into eCyborg Interactive Workforce databases using programming scripts.

Data mapping
The process of identifying, comparing, and matching data (field to field) to be converted from one system or media to another.

Database
A collection of information organized so that a computer program can quickly search for and select specific pieces of data. Think of a database as an electronic filing system.

Data mart
Relational tables with a defined structure that have been designed to automatically accept full datamart extract data seamlessly.

DDL
SQL Data Definition Language.

Deduct credits by plan
A method of distributing flexible benefit credits. The total monetary value for credits is prorated based on the employee's pay frequency. Credits are given to employees as earnings added to their pay; the cost of individual employee plans are collected through payroll deductions and listed on the employee's payment stub.

Deduct credits by plan method
A method of distributing flexible benefit credits. Credits are given to employees as earnings added to their pay; the individual employee plan costs are then collected through payroll deductions.

Deduction
An amount subtracted from available net pay. Deductions can be involuntary (child support or maintenance) or voluntary (pension plans).

Deduction cycle
A predetermined schedule for taking voluntary deductions, based on the defined frequency.

De-enrollment
The process of shutting off plan benefits for an employee for reasons other than a separation activity.

Deferred compensation
Any benefit that is not immediately payable to an employee, but is instead deferred to a later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plan.

Deferred plan
Any benefits plan in which benefits are not immediately payable to an employee, but are deferred to some later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plans.

Delimiter
A character that tells the system where an item of data ends and another starts.

Denormalizing
The process of taking a normalized, logical design and intentionally disobeying the rules to increase performance.

Dependent
An individual who relies or depends on another for his or her support.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

Detail page
A page in eCyborg Interactive Workforce that displays detailed information. Summary pages contain links to the detail for each record.

Dialog box
A secondary window that appears on the screen to present information or request input. Dialog boxes are generally temporary—they disappear after you enter the requested information.

Disability insurance tax
A tax required by some us states to be funded by employee-paid contributions to pay all or part of the cost of disability insurance coverage. On the Payroll Solution, us state disability insurance tax records are established as Type 4 taxes.

Disciplinary action
Action taken against an employee for violation of an organization policy or procedure.

Discretionary increase
A salary increase amount or percentage determined by a manager according to the guidelines established by the organization.

Display
Make data or images display on a computer monitor.

Display box
An area on a form in which data is displayed (formally known as an inquiry field).

Disposable income
For garnishment purposes in the us, an employee's earnings minus deductions required by state or federal law.

Distributed location
A customer location where data changes are replicated and may be distributed. A DL is identified to the system by a unique 5-position alphanumeric node ID.

Distribution
The process of passing data from a source DL to one or more target DLs.

Distribution rules
A set of parameters that determine how data will be distributed from one DL to another. These are defined at each DL by the owner using the distribution rules screens. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 297).

Double-click
Click a mouse button twice in rapid succession.

Drop-down list
A drop-down list is a view of the acceptable entry options available for a text box.

Drop-down list box
A standard windows control that displays a current setting but can be opened to display a list of choices. The user selects a choice by double clicking on the choice. The user can type into the field, and the system moves the list of choices to the last letter typed.

Dynamic SQL
Statements created by a program that must be interpreted and converted to executable sql statements at run time.

Earned income credit
A refundable amount that reduces the tax owed by certain low-income individuals in the us who meet adjusted gross income levels.

Earning
Money paid in return for work performed or services rendered. In Payroll Administration, earnings are separated by earning numbers into various categories such as regular pay, overtime pay, shift pay, bonuses, and so forth.

Earnings category
Used to categorize similar earnings. For example, all the overtime earnings can be grouped into category 01, all the shift differentials/premiums into category 06, and so forth.

EBCDIC
Extended **B**inary **C**oded **D**ecimal **I**nterchange **C**ode; binary code for alphabetic and numeric characters developed by IBM for its computers.

eCyborg Interactive Workforce Home
Button on every page that returns the user to the eCyborg Interactive Workforce Home Page.

eCyborg Interactive Workforce Home page
Home page that displays each time employees log on to eCyborg Interactive Workforce after completing the new user tasks on the New User Home page.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EIC
Abbrevation for ***earned income credit*** (on page 297).

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic Performance Support system
Online tools that help users perform their job quickly and efficiently. EPSS can include online help, computer-based training (CBT), electronic manuals, wizards, and so on.

Email
Literally 'electronic mail'. This is a message that is sent to one or more people within or outside of your organization by an automated email software package.

Employee cancellation
An employee cancellation occurs when an employee is canceled from attending a training class or training program.

Employee Database
The file that contains organization and employee records. This is File02. It was formerly known as the Master File.

Employee Database record
The complete record for an employee. It may be composed of multiple physical records.

English Language
Former name of Cyborg's fourth-generation programming language, now called Cyborg Scripting Language.

Enrollment form
A customer-defined form used by employees to record their benefits elections and any associated dependent and/or beneficiary information.

Entitlement accrual
An accumulation of hours for an employee benefit, such as sick leave or vacation time, commonly known as an accrual.

Entity
Each Organization Unit, Job, Position, and Incumbent is an entity. Together they are entities.

Entry field
An area on a screen or browser page where the user can input information.

Entry form
An entry form is a form used to enter data.

Environment
The host platform and workstations where your Cyborg system resides, and any communication protocols. Also, a work space dedicated to a specific processing type. For example: development, test, and production.

EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 297).

Event
The combination of a trigger (changes made to system data) and an action (the creation of an email or letter). Events always consist of these two component halves.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Extract file
A data file generated to be used by another system or application.

Federal Insurance Contributions Act
The United States Federal Insurance Contributions Act imposes two taxes on both employers and employees. Tax is withheld from an employee's wages to finance the Old-Age, Survivor's, and Disability Insurance (OASDI) social security program and the Hospital Insurance (HI) medicare program. Employers are then required to match the amounts withheld from employees. On the Payroll Solution, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FICA
Abbreviation for Federal Insurance Contributions Act.

Field
A data item on the database. This is usually displayed on a form as a text box.

eCyborg Interactive Workforce specific—A space allocated for a particular item of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on. Every field has a name (also called a field label).

Filter
Device used by report to select certain rows of information from the database, thus limiting the amount of data from the database to be viewed in the report.

Finished
Users click Finished when they have completed all information on a checklist or other Interactive Workforce page.

First normal form
For a database to be in first normal form, all repeating groups must have been moved into separate tables.

Flat rate tax
A US local tax that is calculated as a standard percentage rate and that is calculated in the same way for all employees (that is, factors such as marital status do not enter into the calculation). For many such local taxes, Cyborg does not provide tax specification information on the Tax Authority File. Instead, you need to enter a Tax Specification Record for the tax on a Tax Specification Information form, indicating the tax rate in the Flat Rate text box.

Flex credits
Units granted to an employee in order to purchase benefits under a Flexible Benefits Program.

Flex Master Plan
Defines your Flexible Benefits Program and ties component plans together as a group. Employees are enrolled in the Master Plan and then select the benefit plans in which they wish to participate—for example, medical, dental, and life. Flex master plans are set up in Benefits Administration and used by eCyborg Interactive Benefits to display benefit plans to users for initial and open enrollment.

Flex plan
A benefit plan where, in addition to a core of basic benefits (if applicable), the organization/company allocates to each employee a credit for purchasing additional benefits tailored to their individual needs. Flexible benefit plans may include a flexible spending account.

Flexible Benefits Plan
A specific type of benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with cafeteria plan.

Flexible Benefits Program
A benefits program in which an organization may allocate to each employee a pool of credits or a monetary amount that is to be used to purchase benefits tailored to individual needs.

Flexible Spending Arrangement
A benefits welfare plan set up as an account in an employee's name that is used to reimburse the employee for certain personal expenses. In the United States, these accounts are provided by employers as a way for employees to pre-fund dependent care, legal services, or medical expenses with pretax currency.

Folder
Logical organization device for the content of a Cognos catalog.

Form
A window of information that appears within The Solution Series, including text boxes and other controls. This was formerly known as a screen.

Form area
An area of the window that contains a form.

Form Builder
A tool provided by Cyborg Systems for use with The Solution Series for designing forms.

Formal education
Education that is obtained from a college or university.

Forward
Displays the next page.

FSA
Abbreviation for Flexible Spending Arrangement.

FTE
Abbreviation for Full Time Equivalent.

FTP
File **T**ransfer **P**rotocol. A means of allowing a user on one computer to transfer files to and from another computer over a network

Full Time Equivalent
The ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of 0.5 means working half of the time that represents full time employment.

Funeral days
Absences from regularly scheduled work due to a funeral, which at the discretion of the organization, can be considered as authorized or unauthorized, paid or unpaid time off.

Gap analysis
Comparison of a current state of being with a desired state of being. For example, you could perform a skill or competency gap analysis on individual employees or on the workforce as a whole, comparing the existing state of skills and competencies with the required state or level of skills and competencies.

Garnishment
A legal procedure authorizing a deduction from an employee's earnings to satisfy a legal requirement.

General ledger interface
A file that provides a balanced payroll journal for the period. This file contains journal entries for labor expenses, withheld deductions, income, disability, UI, and other withheld taxes, net pay, and company-paid taxes. The interface may also be produced on paper.

Go to details
Displays a new page with detailed information. Used on summary pages.

Graphical User Interface
The Solution Series provides integrated human resource and payroll functionality via the Microsoft Windows Graphical User Interface. These are the elements that display on your screen.

Grievance
A formal complaint made by an employee against the organization usually because of an unsatisfactory working condition or other work-related dispute.

Gross wages
The total of all earnings paid to an employee.

It is stored in the Total Pay (field 119 of the US Tax Authority File) field of the employee's US FICA tax record 101 (FICA-OASDI). This figure appears on the Combined Register (2222) report as Total Pay. It does not appear on US W-2 forms.

Group box
A standard Windows control that groups a set of controls.

Group plan
Defines any number of benefit plans tied together as a group. Group plans are used to define common eligibility and to cluster plans for reporting purposes.

GUI
Abbreviation for Graphical User Interface.

Handicap
Having a physical or mental disability that substantially limits activities especially in relation to employment or education.

Health and safety profile
Data on the employee record that includes information such as the employee's blood type, language, physician, emergency contacts, and any disabilities.

HED
Acronym for Hours, Earnings, and Deductions. Each earning or deduction must be established in The Solution Series with a unique identifying three-digit code. HEDs are used to record pay, hours worked, and deduction amounts and arrears for each employee.

Help
Hot spot on an eCyborg Interactive Workforce page that displays step-by-step directions for completing the page.

History record
Part of an employee's payment history; a snapshot of a check paid to an employee or an adjustment made to an HED or tax.

Holiday days
The time off that all employees are entitled to based on the decision of the organization or government regulation.

Home page
The main page of a Web site that generally serves as an index or table of contents to other documents stored as pages on the site.

HTML
Abbreviation for **HyperText Markup Language,** the authoring language used to create documents on the World Wide Web. HTML defines the structure and layout of a Web document by using a variety of tags and attributes.

Import facility
A tool delivered with The Solution Series that moves data from an external source to any organization or employee form.

Import record
A line in a spreadsheet or delimited file that contains employee or company data.

Inactive plan
A benefits plan that no longer allows employee enrollment.

Inactive tax record
An employee tax record that is no longer in effect for a given employee. Neither wages nor taxes are accumulated for the particular tax record. However, any wages and/or taxes already accumulated remain until clearing is performed. Such clearing is usually performed in preparing the Employee Database for a new year. The inactive records can be deleted at this time. The process of making a tax inactive is called deactivating.

Incumbent
An incumbent is an employee linked with a specific position. The linking of an employee with a Position is an incumbency. An employee may be linked to more than one position; in other words, an employee with multiple incumbencies. A position to which more than one employee is linked has multiple incumbents.

Information-level security
These records grant access to employee and table data via specific password records.

Initial Administrator
Only user whose user ID and password are created during installation. The initial administrator always has authority to all administrative functions: eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration, and can assign administrative roles to others by creating administrative user IDs and passwords.

Initial passwords
Password generated by eCyborg Interactive Workforce for each user ID extracted from The Solution Series. Users must create a user-defined password when they log on to eCyborg Interactive Workforce for the first time.

InitialAdmin
See Initial Administrator.

Inquiry form
A inquiry form is a form used to view data already entered.

Instructional text
Any paragraph(s) on the page that explain the function of the page or fields to the user.

Internal candidate
An employee of your organization who is applying for another job or position in your organization.

Internet
A global network connecting millions of computers.

Intranet
A network belonging to an organization, usually a corporation accessible only by the organization's members, employees, or others with authorization and used to share information.

Investment funds
Different options or accounts available to employees for allocating their contributions, usually applicable to thrift/savings plans.

IPEDS
Integrated Postsecondary Education Data System.

Job assignment
A job associated with a particular employee.

Job code
A designation for a job assignment.

Job streams
A generic reference, Job Control Language, for your operating system's command language.

Job type
A generic category that further defines a particular job.

Jury duty
This is compulsory service on court appointed juries. Employers are required by law to excuse jury duty related absences. They are not, however, required by law to pay the employee during this time away from the job.

Label
Text that describes the information the user enters into the field.

Labor record
A record containing the hours, amounts, associated charge-to control levels, and function assigned on the employee's Payroll Home Location/Pay Allocations form.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Log off
Logs the user off the system. When referring to the Log Off button, use initial caps.

Logical Employee Model
A collection of default employee information that is used to create a model. Logical Employee Model templates are used when hiring new employees to save time and ensure that critical information is established consistently and correctly. These were formally known as LMODELs.

LPI
Lines **p**er **i**nch

Mailing address
An address, other than your legal residence address, to which you have your mail sent.

Maintenance payroll run
A maintenance payroll run automatically updates organization and employee records, but it does not process time entries or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

MAINTO
Change Control Facility (MAINTO) utility used to produce an output listing in FILE10, which is then used to locate areas of customized code.

Major activity
Event that causes a change in an employee's employment status, such as a new hire, termination, or rehire.

Mandatory field
A field that requires the user to enter information before the user can exit the screen or page.

Map file
Stores the predefined relationships between an import file and a form.

Mass time entry creation
Creating time entries for a group of employees through one program execution, such as for a paid holiday.

Master File (0202) report
A Cyborg report that produces a formatted display of the data in an employee's current batch Employee Database record. This includes the wages and taxes accumulated for the employee, covering current, month-to-date, quarter-to-date, and year-to-date information for individual tax codes. It is report generator 0202.

Matrix ID
Unique identifier for each pay-for-performance matrix.

Menu
A list of choices; the choices are generally links that take the user to another screen or page.

Menu bar item
A menu that appears on the menu bar.

Message area
An area of the window that contains messages or selection lists relevant to the current form. The Message Area can be turned on or off.

Method code
One of many specific routines (usually delivered by Cyborg and identified by a two-character code) used to calculate earnings and deductions.

Midpoint
The middle of the span of currency from the minimum to the maximum of the employee salary grade.

Minimart
Relational tables you create so you can insert data from your Subset data extractions.

Monetary perquisites
A privilege or profit that an employee is entitled to that is incidental to regular wages or salary.

Moving expenses
The expenses incurred by an employee due to moving from one location to another for employment purposes.

Multiple master
A file compression technique that duplicates the current employee Permanent Master Record as many times as there are payments to that employee during one pay period. These multiple masters are detail records reflecting the amounts for the payment being made (current), and the adjusted MTD, QTD, and YTD totals. The system uses multiple master records to create history records showing the current payment figures only.

Navigation bar
In eCyborg Interactive Workforce the Navigation bar shows the name of the page you are using, for example, 'Mailing Address'. The top line of the Navigation bar shows the path you took from the Home page to reach the present page. Links on the Navigation bar let you return to the home page or log off the system.

Navigator
Left pane of the work area which forms the main method of moving through the forms. From the Navigator users select the component, process, and task in which they are interested.

Net credit method
A method allocating flex credits. An employee's cost of benefits is calculated as either a net cash earning or a net deduction from the employee's pay. The net amount is the difference, either plus or minus, between the credits allocated to the employee and the cost of his or her flex benefits choices.

New hire
Process of hiring a new employee for your organization.

New user
A user of eCyborg Interactive Workforce who has not yet completed reviewing and updating their personal information on the New User Home page.

New User Home page
Home page that displays for new users of eCyborg Interactive Workforce until they complete reviewing and updating their personal information.

Node
A Distributed Location.

Node ID
A unique 5-position identifier for a node. The naming convention is defined by the user.

Normalization
Removes redundancy from the data, and requires every data element to be referenced by the primary key.

Number registered
This is the number of employees registered for a training class. It is updated and displayed on the Class Schedule form.

Object
Each System Control Repository record type is assigned an object code. A single record type can have several object codes assigned to allow limited display.

Object key
A field that allows you to specify the System Control Repository record group you want to display. The value of this field is dependent on the type of information you want to display.

Obsolete plan
A benefits plan that will no longer be used.

Off cycle
An off-cycle payroll run is an additional payroll for the period just completed. An off-cycle payroll run is commonly used to process nonstandard payments, such as bonuses. It is sometimes referred to as an additional or bonus payroll run.

Online
Turned on and connected, for example, printers are on-line when they are ready to receive data from the computer. Users are considered on-line when they are connected to a computer service through a modem. That is, they are actually on the line.

Open enrollment
A period of time during which employees can enroll in or change their benefit choices for the upcoming year, generally in October or November.

Operator ID
A four-character code that identifies the user to the system.

Option
An item in the option list for a field. This was formerly known as a codeset item.

eCyborg Interactive Benefits and Benefits Administration specific—In Benefits, the plan coverage that an employee selects, such as single or family coverage.

Option button
A standard Windows control that allows you to select from a fixed set of mutually exclusive options (previously known as radio button).

Option list
An option list is a list of options that are available within a Text box. This was formerly known as a Codeset.

eCyborg Interactive Workforce specific—Options available in The Solution Series that the eCyborg Interactive Workforce administrator loads in to eCyborg Interactive Workforce. The options are then available in the drop-down list boxes in eCyborg Interactive Workforce.

Organization
A group of employees who are employed in a common structure, governed by the same set of rules or policies, and eligible for the same earnings and deductions For example, your organization may be structured into parts that represent employee groups such as active, union, retirees, applicants, and so forth.

Formerly known as a company or Control 1-2.

Organization Level 3
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Organization Level 4
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 5
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 6
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Number
A six-character user-defined code that represents an organization; the highest level of the organizational structure in Payroll Administration.

Formerly known as a Control 1-2.

Organization Unit
An organization unit ('Org Unit') is a grouping of Positions within an organization (for example, Accounts Department).

Organization Validation table
A table that validates that an organization is valid and payments can be made.

Organization-specific tax setup
A method of implementing Tax Specification Records in which each organization involved in tax processing contains all the specification records required to process taxes for its employees, as opposed to a common tax organization.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Paid absence
Employee absence that will be paid by the organization. A time entry will be created for this absence.

Parallel run
The process of executing the same programs simultaneously on two separate systems to obtain the same or similar results.

Parameter form
A form that is displayed when certain programs are called from the Navigator or menus. The form facilitates entering parameters for the program.

Password
A secret series of characters, generally user defined, that enables you to access a computer, a software application, or a file. On multi-user systems, each user must enter his or her password before the computer will respond to commands.

In eCyborg Interactive Workforce, the password ensures that unauthorized users cannot access user-specific information.

Password aging
The period of time that elapses before a user-defined password expires and the user must change his or her password.

Pay allocation
A means of allocating, on a percentage basis, employee labor hours and amounts to multiple sets of control levels 3 through 6 and function to accurately reflect employees whose labor must be charged to more than one area within an organization.

Pay document
A pay slip or deposit advice with its associated pay stub.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semimonthly. Also referred to as a payroll period.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A preprinted form, corresponding to a check or deposit advice that lists all earning, gross pay, taxes, deduction, and net pay information for an employee.

Pay-for-performance matrix
Chart representation of the variables that result from the combination of salary increase information, how much to give and when.

Payment history record
A record documenting the detail information for a payment or adjustment. Multiple payment history records may be generated for an employee, reflecting multiple adjustments or payments. These records include all earning, deduction, and tax information included in the payment or adjustment.

Payroll home location
The location where the employee is normally assigned to work and where labor distribution information is charged. An employee's home location comprises specific Payroll Levels and is always assigned Allocation Number 01 on the Payroll Home Location/Pay Allocations form. The Function field may also be used as part of a home location, depending on your specific requirements.

Payroll Level 3
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Payroll Level 4
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 5
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 6
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll period
A defined period of time for which an employer pays wages to employees.

Payroll Process Control
A series of forms used during the Payroll Process to determine the type of run (payroll run or maintenance run). Allows you to specify the pay frequencies to be paid and which reports are to be produced.

Payroll run
Updates organization and employee records, processes time entries, calculates employee pay, generates pay documents and payroll reports, including the Combined Register. It also produces a variety of special interface outputs.

PCL
Printer **C**ontrol **L**anguage

PDF
A file format that captures formatting information from a variety of desktop publishing applications, making it possible to have formatted documents appear on the screen and be printed. To view a file in PDF format, you need Adobe Acrobat Reader, a free application distributed by Adobe Systems.

Peer-group appraisal
Appraisal that uses performance evaluations completed by an individual employee's co-workers or project team members.

Pending de-enrollment segment
Plans for which an employee is enrolled, but has lost eligibility, as listed on the Pending Plan Enrollment/De-Enrollment form.

Pending eligibility segment
Plans for which an employee is eligible but not enrolled, as listed on the Pending Plan Enrollment/De-Enrollment form.

Performance appraisal
A periodic assessment and ranking of an employee's skills and accomplishments.

Performance appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from

1-Outstanding to 5-Unsatisfactory.

Performance rating
A method of ranking the performance of an employee during a given period using options ranging from 1-Outstanding to 5-Unsatisfactory.

Performance-related pay
Monetary payments made to employees based on how well an employee has fulfilled job expectations.

Perquisites
Property or privileges extended to an employee.

Personal days
Authorized absences that are generally considered as paid time away from regularly scheduled work, but can be either paid or unpaid.

Phonetic keys
The keys you use to access employee data using the phonetic spelling of an employee's last name.

Pixel
The smallest rectangular area of an image on a screen.

Plan deactivation
A process that makes a plan inactive and prevents future employee enrollment.

Plan ID
A three-position, alphanumeric identifier for a plan in the system.

Plan shutdown
The process of de-enrolling an employee from all benefits plans because of a separation activity.

Plan year
The 12-month period over which a salary budget is effective.

eCyborg Interactive Workforce specific—The calendar, policy, or fiscal year in which the records of a Benefits plan are maintained.

Policy tables
Highest level tables that are used to record the generic (or master) rules for an organization or group of employees. These included your organization's rules relating to working time procedures, such as clocking in and out, docking for lateness, and overtime. Each policy consists of a Policy Master table and one or more Policy Activities table.

Pop-up menu
A menu that appears when you use the second mouse button within the system. This menu contains context sensitive commands and options that relate to the object you have clicked on.

Portable document format
See PDF.

Position
A specific role with an organization—for example, Accounts Manager.

Alternative definition: to place an object in a specified location.

Position Administration Control Number
Two-character alphanumeric value that tells Position Administration which tables to use for a specific company.

Position complement
A 'Position complement' is the value of a Position. The organization complement is the total value of all Positions included in the complement.

Position in range
The difference between a given salary and the minimum of the salary range, divided by the difference between the range's maximum and minimum, and expressed as a percentage.

Posttax
A contribution made after taxes have been withheld from earnings.

Premium
The amount of money an organization agrees to pay an insurance company for a policy or annuity, or the amount contributed by an employee to the employer to cover the employee's portion of the total premium.

Prenotification
Informing a bank or credit union that an employee will be using direct deposit with them in the future. Cyborg recommends that you fill out the Direct Deposit Information form two pay periods in advance of the first deposit date. This ensures that a prenotification record is provided to the bank or credit union in a timely manner.

Pretax
A contribution made before taxes have been withheld from earnings.

Primary account
The account set up in eCyborg Interactive Workforce to receive an employee's pay or reimbursement checks. After deductions and deposits to additional (secondary) accounts, the remainder of pay is deposited into the primary account.

Process
A subset of a component that logically groups tasks on the Navigator or menu. For example, the process 'Maintain Employee Details' contains tasks such as 'Basic Employee Information' and 'Personal Information'.

Alternate definition: An action that brings about a result.

Process bar
The graphical representation of a process on the navigator. Each process bar is within a Component.

Program
A program is a series of classes being administered using Training Administration. For example, 'The Cyborg Training Schedule for January-June 1996' may be a program consisting of eight different classes.

Alternative definition: a form or other program within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

Protected amount
The amount of disposable income protected from garnishment in the US This amount may vary from state to state.

Prototype HED
An HED defined on a benefits form for use in recording employee/organization contributions when an employee is enrolled in a benefits plan. This allows the setup and maintenance of payroll deductions using Benefits Administration.

Provider
A provider is an instructional institution, organization, or person who is available to teach training courses.

Push button
A button on the interface which appears depressed when clicked on (now known as command button).

Quartile
Points that represent the division of a salary grade range into four equal parts.

Query alternate keys
The keys you use to access the employee master record in an order other than by primary key.

Query primary keys
The keys you use to direct your QUERY program to a record type.

Quick Hire
The process of hiring an employee by entering one two-panel form with the required data elements rather than entering a series of forms.

Radio button
A button on a form that selects an option, the radio buttons that make a field are mutually exclusive (now known as an option button).

Recall
Return a laid-off employee to active status, usually with no affect to benefits.

Reciprocal taxation
Reciprocal tax withholding refers to agreements made between US states and (or) localities regarding income tax calculation and reporting for compensation paid to an employee who lives in one state or locality and works in another.

Record
A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definition: To set down for preservation in writing or other permanent form.

Recruitment
Process of finding and hiring new employees who meet the needs of your organization.

Recycle File
P05IN; A file that contains employee data and pay document information required for payment

reconciliation. It also contains time entries to be processed and paid at a later date. This file is used to pass data to the next payroll or maintenance run.

Registration
Registration is the act of enrolling an employee in a class.

Registration number
A three-digit registration number is assigned to employees for tracking purposes when they register for a training class. This enables the order in which the employees registered to be viewed.

Rehire
The process of hiring a former employee of your organization. Typically, a break in service is incurred and benefits must start over (usually requiring a new adjusted seniority date if used in benefits tracking).

Reimbursement account
The account into which employee's travel and other expense type reimbursement checks are directly deposited.

Reinstatement
The process of returning a former employee to active status within a certain time period (such as 90 days), thus qualifying the employee to have certain benefits restored to the original hire date.

Reject time
The point at which an error condition will occur. An error condition must be manually corrected/approved and approved before a time entry can be generated by the system.

Relocation
The process of moving an employee from one organization to another geographic location, whether the move be domestic or international. This process also applies to applicants who are being relocated as part of the hire process.

Remaining net pay
The 'bucket' of money that is left after all employee deductions and taxes have been taken from the employee's gross pay. This 'bucket' of money can then be used for multiple deposits if the enterprise sets up multiple deposit HEDs.

Replication
The automatic process of writing changes made in the Employee Database and option lists and tables in the System Control Repository to the Replication Holding File (FILE08).

Replication Application
English Language program (DSAPLY) that reads records from the Replication Packet File (FILE20) produced by the Replication Reception program (DSRECV) and updates the System Control Repository and Employee Database accordingly.

Replication Distribution
Two COBOL programs that work together to distribute and receive updates. The Replication Distribution Program (DSTRIB reads either the Replication Holding File (FILE08) or a Replication Packet File (FILE20), selects data applicable to a specific DL and writes all necessary data to a new output-only Replication Packet File (FILE21). The resulting FILE21 will be processed on the remote DL via the DSRECV Replication Reception program.

Replication Holding File
FILE08. This file contains additions, changes, and deletions to the System Control and the Employee Database. Data is distributed from and written to this file, based on the data distribution rules configured for the target DL by the source DL.

Replication Packet File
(FILE21/20). This file contains data changes and is created specifically to update a target DL. This information may include Company/Employee data, tables and option lists, and time entry and adjustment records.

Report
The term report refers to a report produced on paper.

Report Generator
A program that produces the batch payroll and the batch payroll reports.

Report Group
A series of packaged reports that are created using the Report Group Activities form and are run together.

Report Group Scheduler
This is the program that allows you to schedule reports. This was formerly known as the Report Scheduler.

Report parameters
Specific guidelines for determining the information to be processed by a given report or program.

Requisition
A formal request to fill a vacancy or vacancies.

Requisition candidate
A candidate for a vacancy represented on a requisition.

Requisition limit
A total unit value of a requisition.

Requisition unit
The value of a requisition expressed as an FTE, hours, salary or headcount.

Retirement
Occurs when an employee retires from the organization.

Return
The activity of an employee returning as an employee to active status, usually following a leave of absence.

Alternative definition: key on keyboard used to perform a carriage return, can also be known as Enter.

Review process
A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

RG
Report Generator.

Roll-up reporting
Option that enables packaged reports to be processed within organizations (roll-up).

Rotation pattern
A way of describing the working pattern for a group of employees (crew) who regularly work different shifts. A crew is a group of employees who together regularly work the same schedules according to a rotation pattern.

Safety standards
Legally-mandated workplace safety standards.

Salary budget record
Defines, for each employee, the budgeted increase amount, percentage, and effective date for a specific salary plan year, and the prorated effect of this increase on the budget in terms of amounts and percentages for each employee.

Salary grade
A range of salary amounts associated with a particular job.

Salary grade range
A range of salary amounts associated with the salary grade for a particular job.

Salary plan
A set of rules or guidelines used to budget for salary increases for the coming year.

Salary plan year
A 12-month period over which a salary plan is effective.

Salary range
The span of salary amounts from the minimum to the maximum of the employee salary grade.

Salary review
A periodic evaluation of an employee's compensation.

Salary review authorization form
Hard copy format of the employee criteria necessary to review and approve proposed salary increases.

SAT file
The Solution Series form appearance table. Simple text file that reflects the form's layout.

Save Changes
Saves the page (form) the user completed. (When you click 'Save Changes', eCyborg Interactive Workforce saves the information on the page whether or not the user made changes.)

Schedule Activities table
Identifies activity types for each point in a work day where the process of clocking in and out should be

dealt with. Each Schedule activity also contains time parameters that will be used to calculate whether an employee will be docked or credited time.

Schedule assignments

Also referred to as a schedule. This term refers to the details of the Schedule Master tables to which an employee is assigned. These details include the date the assignment took place, the Schedule Number and Sub-Schedule Number, and (if applicable), the crew to which the employee is assigned.

Schedule error

Occurs when a clock transaction (ring) time falls outside of an employee's schedule reject times.

Schedule Master table

Used to set up your organization's Time and attendance rules (such as HEDs and the minimum number of hours an employee must work before a meal deduction is made). A Schedule Master table is associated with a Calendar Routine, earnings Code, and Shift Premium table by entering the appropriate identifier.

Schedule number

A unique three-character alphanumeric identifier used to partially identify a schedule table.

Screen

Now known as a form.

Scroll bar

When information on a page takes up more than one screen of your monitor, the system adds scroll bars to the right side of the screen. On the scroll bar:

Click the up arrow to move line by line to the top of the page

Click the down arrow to move line by line to move to the bottom of the page

Click the double arrows to move several lines up or down the page

Click and drag the bar in the scroll area to manually move up or down the page.

Search argument

The value from an employee's master record used to search benefits tables to apply plan rules to specific groups of employees.

Search type

The definition of a field from an employee's master record to use as the search argument.

Secondary account(s)

Additional account or accounts at financial institutions that employees set up in eCyborg Interactive Workforce receive a portion of their pay. A primary account must be defined before an employee can set up additional accounts.

Security Officer

The assigned employee who is responsible for the setting up and monitoring of the security your Cyborg system.

Self-adjusting taxes

Taxes for which the system automatically recalculates the tax on a cumulative year-to-date basis on each payroll run.

In the U. S. these include FICA taxes: Social Security (tax record 101) and Medicare (tax record 103). The purpose of this calculation is to avoid any differences (of pennies) in FICA tax paid versus FICA tax due at year-end due to rounding on a pay period basis. In addition, certain state disability taxes and employee-paid state unemployment insurance taxes also self-adjust.

Sequential Master File

P20IN; The batch processing version of the Employee Database. This file contains organization and employee data, tax tables, and the object code for programs.

Service interruption

A period of time during which an employee did not maintain an active working status in the organization.

Service method

A calculation option list that determines the method for calculating credited service.

Session

When users log onto a software application, they begin a session. When they log off, they end the session.

Alternate definition: The period of time during which a class is held.

Shift
An employee schedule assignment for a given day. For a rotation pattern, this is a Sub-Schedule Number.

Alternative definition: key on keyboard, typically used to describe key combinations for a shortcut key.

Shift premium
A premium (or differential) added to an employee's regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

Shortcut menu
A menu that appears when you right-click within The Solution Series 4. This menu contains context-sensitive commands and options that relate to the object (form, Navigator, and so on) on which you have clicked.

Sick days
The time off that an employee is allowed to take due to illness as a result of an employment contract or organizational policy.

Solution View
An online utility that provides the tools for creating new forms, fields, and report programs without the direct use of Cyborg Scripting Language.

Source DL
The node that owns the data being distributed. Depending on the rules established, the same DL can alternate from source to target.

Special assessment
Extraordinary or temporary taxes, such as additional employer-paid or employee-paid contributions to state unemployment programs or to mandatory health insurance programs.

Spinbox
A control on the interface composed of a text box and increment and decrement buttons that allow you to adjust a value from a limited range of possible values.

Spreadsheet application
Software for recording ledger entries, creating worksheets, graphing data, and other accounting functions.

SQL
Structured Query Language.

Standalone Time and Attendance
Customers who are using the Cyborg's Time and Attendance Administration but not the Cyborg's Payroll Administration.

Static data
Includes organization and employee information, such as name and salary.

Static SQL
Data Definition Language (DDL) and Data Manipulation Language (DML) statements embedded in application programs.

Status bar
The bar that appears at the bottom of The Solution Series window. The Status Bar displays useful information, such as your current session number, the currently displayed organization and employee, and so forth.

Sub-schedule number
A two-digit numeric text box used to further identify a schedule table.

Succession planning
Finding and developing employees for placement into identified key positions that are expected to become vacant sometime in the future.

Summary page
To help you see information at a glance, eCyborg Interactive Workforce uses summary pages. The summary page displays a short view of detailed information. For example, all your emergency contacts appear on a summary page. You delete the contact or proceed to the detail for the contact from the summary page.

Summary plan
A customer-owned description of a benefits plan.

Supplemental wages
Wages that are separate from regular earnings may be classified as supplemental wages and taxed using the default method. The default method means using a set

percentage specified by the tax authority. Examples of such earnings are bonuses and commissions.

Surplus

A 'surplus' is an exceeded complement position.

System administrator

An individual responsible for maintaining a multi-user computer system, including a local-area network (LAN). Typical duties include:

Adding and configuring new workstations
Setting up user accounts
Installing system-wide software
Performing procedures to prevent the spread of viruses
Allocating mass storage space

System Control Repository

This is the file that contains system definitions for The Solution Series, (FILE01).This was formerly known as the Control File.

System Generator

A type of Report Generator that performs system functions, such as defining data elements and system messages.

Table

Contains an organization's rules and policies and controls what actions take place at the employee level.

Alternative definition: means of displaying information in columns and rows.

Table Definition Record

Table containing data about the Position Administration table records, including the location of keys to associated tables.

Target DL

The node that receives the data being distributed. Depending on the rules established, the same DL can alternate from target to source.

Task

The lowest level of organization on the Navigator or menu, generally equivalent to a form. checklist, or dialog.

Task icon

An icon denoting a task. Task icons describe the type of task, including Forms, Checklists, Dialogs and others.

Tax authority

A government agency to which an employer and employee has statutory tax obligations. The tax authorities for which you handle taxes exist at the federal, state/province, and local levels.

Tax Authority File

A Cyborg-supplied file that contains all the tax-specific information needed to calculate taxes for tax authorities. This includes wage-bracket tables for different marital statuses and information relating to allowances and standard deductions. The sources for the contents of this file are tax specifications published by the various tax authorities.

Tax code

The three-character to seven-character Cyborg-supplied reference code that identifies a tax and that serves as the link between the Tax Specification Record and the employee tax record.

Tax Maintenance File

One of the two Cyborg-supplied tax files. A Tax Maintenance File is a file issued by Cyborg in conjunction with a Tax Update Bulletin (TUB). It contains all the tax specifications that are being updated in the bulletin, in the form of tax specification transactions. These transactions are typically used as input to the batch maintenance run in which tax updates are applied.

Tax specification

Each tax authority publishes tax specification information that specifies how each tax must be administered. This information specifies how employers should calculate taxes and how taxes should be withheld from employees (if withholding applies). The tax specifications can be in the form of tax formulas and (or) tax tables.

Tax Specification record

A record on your Employee Database that contains the tax specifications for a tax. The record contains all the information, as obtained from the governmental

authority, needed to calculate tax amounts for the tax. The record may contain more than one tax; for example, US state Tax Specification records contain information for both state income tax and state unemployment insurance. Once a Tax Specification record is activated, tax specification information from the Cyborg-supplied tax files can be loaded onto the record on your Employee Database.

Tax table

A set of information required to calculate a tax, for a specific set of employee parameters. Tax tables are stored and maintained in Tax Specification records. A table typically includes wage and bracket information and data relating to allowances, such as personal exemptions and to standard deductions. There can be several tables relating to marital and resident status in a given Tax Specification record.

Tax type

This term refers to various categories of taxes, for example, income, National Insurance, unemployment, disability, Social Security (FICA-OASDI), and Medicare (FICA-HI).

Taxability

The term refers to whether an hours, earnings, and deductions amount is to be included in taxable wages to be accumulated for a specific tax. If the hours, earnings, and deductions amount is excludable, then the amount is not included in taxable wages. If the hours, earnings, and deductions amount is taxable, then the amount is included in taxable wages. The term fully excludable or fully taxable implies that more than one type of tax is being referenced, for example, state income tax and state unemployment insurance in the US.

Taxable wage base

The taxable wage base represents the maximum amount of an employee's wages on which tax is levied and after which there is no liability. A wage base in the US typically is in effect for FICA, unemployment taxes, and disability.

Tax-related Regulatory Bulletin

A TUB contains the updates to tax specifications supplied by Cyborg, consisting of a bulletin document, a tax file that contains the updated tax specifications, and a printed listing of tax specification transactions with the updates.

TDR

Table Definition Record.

Template

A basis from which to create a custom item. For example, you can use an existing Cyborg report as a template for your custom report.

Temporary password

A set of alphanumeric characters used with a user ID to limit access to a software application. The system requires that users replace their temporary password with a user-defined password within a certain number of days.

Termination

The activity of an employee no longer being employed by the organization.

Test environment

A separate organization or system partition used only for testing.

Text box

A control on the interface in which text can be entered and edited (formerly known as a field).

Text qualifier

The character surrounding an item between delimiters. All values between the qualifier are data items and are not scanned for a delimiter. This allows a delimiter character, such as a comma, to be a valid data item. Example:

"item 1","item 2","item 3, 4 and 5"

This string contains three data items:

Item 1

Item 2

Item 3, 4 and 5

Although the third item contains a comma, it is ignored as a delimiter because it is between the text qualifier of speech/quotation marks (").

Time entry
The form in which you enter the hours worked for an employee. This was formerly known as a Time Card.

Time entry extract file
A file of time entries external to the Time and Attendance Solution that is used to feed to payroll.

Time entry validation
The Time Entry Validation/Creation program identifies and assigns an activity, for example Clock In (1), to each clock transaction (ring) when performing the validation function. Each clock transaction must be assigned to an activity, in order for time entry hours to be calculated for an employee, for a particular shift. This program validates clock transactions (rings) and generates time entries.

Timeout
The period of time that elapses before a user's eCyborg Interactive Workforce account becomes invalid because of inactivity.

ToolTip
A standard Windows control that provides a small pop-up window that provides descriptive text, such as a label, for a control or graphic object.

Top-down appraisal
Appraisal made by a supervisor or manager of an employee's capabilities. Such an appraisal is generally based on the supervisor's or manager's day-to-day observation of an employee's work performance and will usually include an appraisal interview with the employee.

Trainer
Trainers are set up on the Provider Index Form. They are instructional institutions, organizations or persons who are available to teach a training class.

Trainer code
The trainer code is a four-character value that represents a trainer. This value resides in Option List TR38.

Training area
The training area is recorded on the Class Schedule Form. It is typically defined as the section of the organization to which the training applies, such as manufacturing.

Training class results
These are the class details and absence information recorded on the Process Class Results form. Details recorded include the objectives met when taking a training class.

Training class status
The status value is updated and displayed on the Class Schedule Form. It tracks whether the training class is canceled, full or available.

Training course code
The training course code is a six-character value that represents a training course. This value resides in Option List TR33 and is associated with a course title.

Training plan
A plan of training courses that an employee will attend in the future to achieve the necessary skills to perform a job.

Training reason
The reason for training is used to identify why a training request has been made. For example, the purpose of the training to act as a refresher, to acquire new skills, and so forth.

Training request
A training request is a request for an employee to attend a specific course or class. A formal request for training is not essential. This step could be omitted and the employee could be registered directly in the course of his or her choice.

Transfer
Process of moving an employee from one organization to another organization, such as moving an applicant from the applicant organization to the active employee organization.

Alternative definition: to move data or files from one computer to another

Trend analysis
Reporting or statistics that indicate the rate of change in costs and other elements of a benefits plan.

Trigger
A set of conditions that must occur for an email or letter communication event to start. This can involve the creation, deletion, or modification of forms or checklists within the system.

Truncate
A database operation that deletes date from a table, but does not delete the table's definition.

Tuition reimbursement
Remuneration made to employees for tuition expenses.

Type of training request
The type of training request indicated whether the employee was required to attend the training or whether he or she asked to attend the training.

Unauthorized absence
Absences that are generally not considered paid time away from regularly scheduled work.

Underlined text
In browser applications, text that provides a link to another screen or page.

Unemployment insurance tax
A tax required by some US states to be funded by employee-paid contributions to pay all or part of the cost of unemployment insurance coverage. On the Payroll Solution, state unemployment insurance tax records are established as Type 2 taxes.

Unpaid absence
Employee absence that will not be paid by the organization. A time entry will not be created for this absence.

Upward appraisal
Appraisal that calls for evaluations by those who work under the direction of the employee being evaluated.

URL
Acronym for uniform resource locator. A standard way of specifying the location of an object, typically a web page, on the Internet. URLs are the form of address used on the World-Wide Web. They are used in HTML documents to specify the target of a hyperlink which is often another HTML document (possibly stored on another computer).

User class
Cognos Impromptu assigns security according to configured user profiles. These security profiles are configured by your Impromptu administrator.

User code
A set of characters (up to eighteen alphanumeric characters) that, along with the password, identify the user to the system as a valid user user when they log on.

The user code is case-sensitive (upper case, lower case) and must be entered using the correct case.

User defined password
A set of alphanumeric characters created by users that allows them to view and update information in a software application.

User ID
A set of characters that identify you to the software application. The application contains a list of authorized users by user ID. When you attempt to log on, the system checks the list of authorized users to determine whether you have authority to use the application.

User profile
Used for security purposes to determine what you can and cannot do while you are using the system, and which parts of the system you can access. A user profile is created and maintained for you by a Security Officer. Each user of the system will have a user profile.

Vacancy
An open position that needs to be filled, or an unfilled complement position

Vacation days
The time off that an employee is entitled to as a result of an employment contract or due to length of service.

Validation
The process where the Time Entry Validation program identifies and assigns an activity to a clock transaction (ring) when performing the validation function.

Variant forms
Method of displaying country-specific variation of Cyborg-delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning time
Used to set a period of time after which an employee will appear on the exception report for a particular activity. A Warning condition will allow the creation of a time entry. A Reject condition will not. This is part of the Time and Attendance Administration.

Welfare benefit plan group
First level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare benefit plan subgroup
Second level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare plan
Any insurance or other benefit plan that provides immediate benefits to a participant—for example, medical insurance.

What-if mode
Method for processing a report that allows viewing of information without updating of employee records.

Window
A standard Windows object that displays information. A window is a separately controllable area of the form that typically has a rectangular border.

Wizard
A form if user assistance that automates a task through a dialog with the user.

Work area
The Solution Series screen. It includes the menus, toolbars, Navigator, forms area, message area, and status bar.

Work instructions
Specific tasks to be completed during the migration of data and files from test to production.

Work restrictions
Restrictions that prevent an employee from participating in specific workplace functions.

Worker's compensation
Legislation in the US that provides compensation to employees who suffer work-related injuries.

Workforce competency
The capacity of the overall workforce to perform required functions and sets of activities.

XHTML
Extensible HyperText Markup Language, used by the help pages for eCyborg.

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Using Reporting Administration
Participant's Guide

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CHAPTER 1

Overview of Reporting Administration

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Introduction to Overview of Reporting Administration

The Administrative Solutions provide a great deal of flexibility for reporting on data in the system. This chapter concentrates on introducing the functionality provided by Reporting Administration.

Terms you should understand

To understand this chapter, you should be familiar with the following terms:

catalog	A file that contains all the information necessary for Impromptu to access and retrieve information from a relational database. The catalog provides a business view of the data, as well as information about what database to access, where the database is stored, and how the tables in the catalog are joined in the data mart.
data mart	The Cyborg-produced relational database from which the Cognos tools report.
Impromptu	A tool for interactive database reporting. Reports are built from the database using a pre-defined catalog.
user class	Cognos Impromptu assigns security according to configured user profiles. These security profiles are configured by your Impromptu administrator.

Reporting Administration

Reporting Adminstration

Includes the following:

- Additional functionality
- Cyborg-specific Impromptu Catalogs
- Cognos Reporting Tools—PowerPlay, Impromptu
- Data model—representation of the data mart
- Pre-defined filters
- PowerPlay models
- Support

Reporting Administration combines the power of the business intelligence tools from Cognos Corporation, a Cyborg strategic partner, with a value-added relational database (data mart) package from Cyborg. Reporting Administration includes the following:

- Additional functionality so the Cognos reporting tools can be launched directly your work area.
- Cyborg-specific Impromptu catalogs for the delivered data mart, which promote intuitive user access to the data extracted from your system and placed in the data mart.
- Cognos reporting tools (Impromptu, PowerPlay).
- Support for Cognos' PowerPlay Online Analytical Processing (OLAP) package and the delivered Workforce Planning models.
- Pre-defined filters for selecting information by some single or multiple criteria.
- Reporting Administration Workforce Data Model, a metadata representation of the data mart.

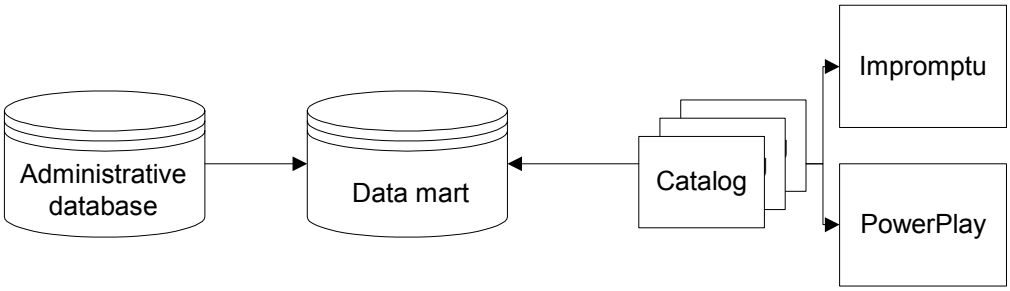
Features of Reporting Administration

Reporting Administration provides everything you need to perform easy and meaningful reporting on your organization's data. Cyborg has successfully integrated all the pieces necessary to deliver a full-featured reporting solution. It is easy to use and incredibly powerful.

Reporting Administration combines the power of the business intelligence tools from Cognos Corporation, a Cyborg strategic partner, with a value-added relational database (data mart) package from Cyborg. Reporting Administration includes the following:

- Additional functionality so that you can launch the Cognos reporting tools directly your work area.
- Cognos reporting tools (Impromptu, PowerPlay).
- Cyborg-specific Impromptu catalogs for the delivered data mart, which promote intuitive user access to the data extracted from your system and placed in the data mart.
- Support for Cognos' PowerPlay Online Analytical Processing (OLAP) package and the delivered Workforce Planning Models.

The basic inter-relationship of Reporting Administration components is shown in the following figure:



Extraction process

The system administrator for your organization decides how frequently to run an extract. You should note that the data in the data mart is only as current as the last extract.

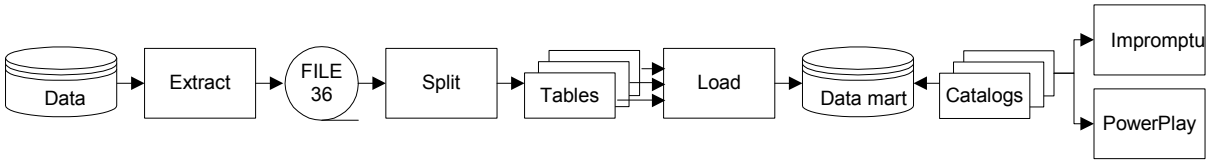
Data from the Employee Database and System Control Repository is extracted and then loaded into the Reporting Administration Workforce data mart. The data is then available for access by the Cognos tools, Impromptu and PowerPlay, through the catalogs and cubes.

The baseline of activities necessary to (re)populate the data mart, can be logically divided into three stages:

- Extracting all necessary data from your system
- Splitting the extracted data into per-table groupings (files)
- Loading the data for each table individually into Reporting Administration data mart

There are two extract/import processes performed, depending on the type of data wanted—core system or Labor and History. The core system extraction copies data from your database (System Control Repository and Employee Database) and places the copied data in the Data mart Extract File (FILE36), a temporary system file. A COBOL program, the Data Mart Extract File Splitter (RSPLIT), creates separate files for every representative table, with the Data mart Extract File as input. A script generated by the extract process truncates (empties) the target data mart table via a platform-specific interpreter. A bulk loader then loads the data from the tables created by the splitter program into the data mart table.

The following figure depicts the extraction process:



The Labor and History extraction is a payroll-related process. It employs an incremental extraction strategy by accessing the Batch Master File (P20) twice. The first time to extract records into the Data mart Extract File, and the second time to mark the extracted records so they will not be extracted again. The Data mart Extract File Splitter creates separate files for every representative table, with the Data mart Extract File as input. A bulk loader then loads the data from these tables into the data mart table.

Data mart

The extract process automatically (re)populates the Workforce data mart. The data mart is a relational database on the server that contains tables populated by the enhanced data. Reporting Administration data mart tables contain the following data:

- Company Information
- Employee Information
- Position Administration Information
- Earnings and Deductions
- Labor and History
- Training Administration
- Employee Skills, Competencies, and Abilities
- Benefits Administration

When the data is extracted, Reporting Administration is able to automatically populate its tables, making the data available for users to report upon.

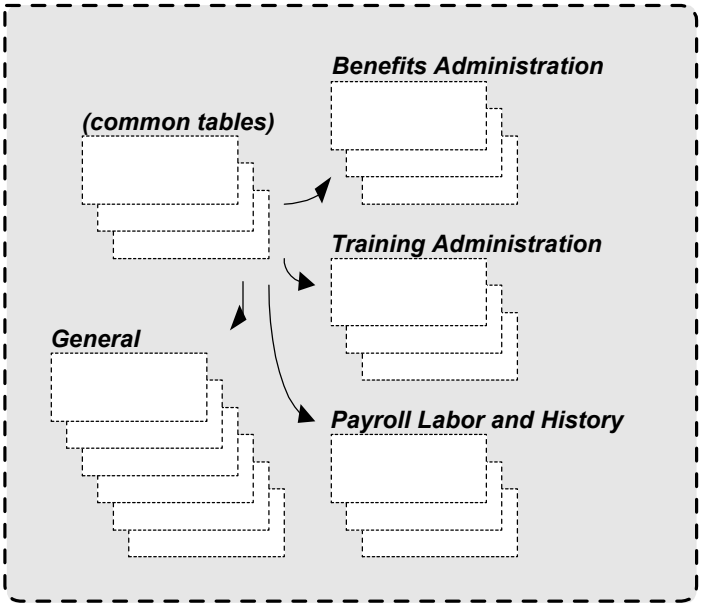
☞ *Refer to the Reporting Administration Data Mart Data Model for detailed information on the data mart.*

The Data Model

Reporting Administration Data Model is a metadata representation of the data mart. It consists of approximately 172 tables organized into four subject areas and a collection of common areas. The four subject areas are:

- General
- Payroll Labor and History
- Training Administration
- Benefits Administration

The following figure shows the Data Model organization:



A spreadsheet is delivered with Reporting Administration (the Cyborg Catalog Cross-Reference spreadsheet), showing the data elements of the data mart and catalogs. This tool is delivered in an electronic format so data elements can be added, or it can be re-sorted it to meet your needs. The spreadsheet can be found on CUBBS.

Impromptu

Impromptu

- Impromptu is an integrated part of Reporting Administration.
- It simplifies on-request reporting for extracted data.

The Impromptu tool is an integrated part of Reporting Administration. It simplifies on-request reporting for extracted data.

Impromptu uses catalogs, LAN-based repositories of business knowledge and data-access rules, to allow you to capture and report on information without having to know SQL syntax or understand cryptic field names. The data in the catalog is organized for business use, as well as for system efficiency.

In the past, access to business data, which is normally stored in various database structures, has been in the hands of database experts—hence decision makers and analysts have had to rely on reports generated by these experts.

Impromptu is a reporting tool which can be linked to many database types. It allows you to generate reports without the requirement for an in-depth knowledge of data structures. It allows you to generate the reports that you require without having to rely on database experts.

Reporting Administration uses Impromptu with Cyborg value-add items, allowing you to produce rich and informative reports on your system's data.

Cyborg catalogs

An Impromptu catalog (one or more) is required before reports can be written. The catalog presents a filtering of the raw database organization that allows easy, quick report generation.

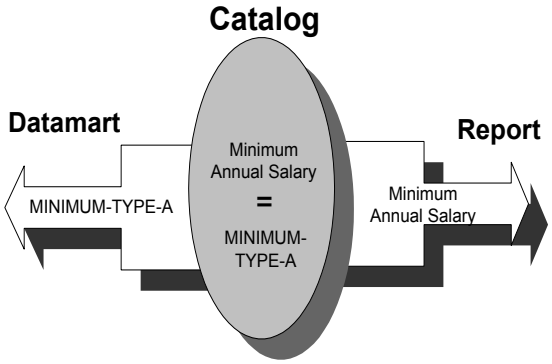
The Cyborg catalogs delivered with Reporting Administration are essential for Cognos Impromptu use. The following catalogs are delivered:

- General catalog (contains information most commonly used by the HR generalist)
- Payroll catalog (includes Labor and History)
- Training Administration catalog
- Benefits Administration catalog

Each catalog is a file containing the information Impromptu needs to present data logically when creating and running reports. In short, the catalogs provide logical views of the data. For example, if one relational table contains employee and salary data and a second table contains employee and department data, the catalog presents the logical view: employee data, salary data, and department data. Because the data is presented logically, the Impromptu user running a report does not need to know that the employee data is actually available from two sources (tables).

A catalog consists of LAN-based repositories of business knowledge and data-access rules (for example, table joins), that allow you to capture and report on information without having to know SQL syntax, or understand cryptic field names. By delivering the catalogs as part of Reporting Administration, Cyborg has eliminated the time-consuming task of interpreting and organizing the vast amount of data extracted from your system.

The catalogs provide a gateway between you and the database, providing data links from the database standpoint, and providing meaningful field and table aliases from your point of view. You can simply point and click to add information to a report, rather than search for database table joins and segment records. For example, if you want to include minimum annual salary information on a report, you do not need to know that the correct information is accessed from the MINIMUM-TYPE-A field; you need only access the information by selecting it from the relevant catalog. The catalog locates the correct data for your report from the data mart. This is depicted in the following diagram:



Distributed catalogs

The Cyborg-delivered catalogs may be configured at your organization as distributed catalogs. When you connect to the catalog for the first time, you will be prompted to create your own local copy of that catalog. You can then set up any number of catalog-level conditions, calculations, prompts, and so on, or re-label the data elements to suit your needs without affecting the original master catalogs.

Keep in mind, however, that the catalogs point to data tables. New sub-catalogs would have to point to certain columns of data and the tables and joins would have to be created. Contact your administrator if you feel this needs to be done for you.

Folder structure

Each Cyborg catalog consists of one file that contains several folders, within which the fields reside. Each of these folders may also have subfolders nested in it. The information has been designed to be organized logically so that the information can be found easily and intuitively. A number of filters, prompts, and calculations are delivered as part of the catalogs.

It should be noted that the organization of the data is not representative of the way the forms in the administrative solutions are set out—if you are looking to report on the fields in a particular form, for example the Welfare Plan Enrollment/Changes form (55-SCR), you would not find the data items relating to each of the fields in one catalog folder. Rather, the folders are organized in such a way as to allow you to think more about the business requirements of your report and to easily find the data you need.

General catalog

Top level folders in the General catalog include:

Folder Name	Contains	Examples of Fields
Company Information	Organization information fields.	Organization level numbers.
Job Table Information	Job-level and salary-level fields.	Minimum salary, job title.
Employee Personal Information	Personal employee-level fields.	Employee name and address information.
Employment Information	Employment-level fields.	Employment date, incumbency information.
Compensation And Salary Administration	Compensation and salary administration fields.	Employee annual salary, bonus information.
Employee Attendance Information	Employee attendance fields.	Date absent.
Employee Skills And Training	Employee skills and training fields.	Training information, education details.
PM-Org Unit Information	Position Administration organization unit information fields.	Organization unit number.
PM-Job Information	Position Administration job information fields.	Job name, job number.
PM Position Information	Position Administration position information.	Position budget, position skills.
PM Incumbencies	Position Administration incumbency-level fields.	Incumbency type.
Requisition/Applicant Tracking	Requisition and applicant tracking fields.	Requisition number, and applicant name.
EEO/AAP Reporting Data	Equal Employment Opportunity and Affirmative Action Program reporting data fields.	EEO/AAP demographic data.

Payroll catalog

Top level folders in the Payroll catalog include:

Folder Name	Contains	Examples of Fields
Company Information	Organization information fields.	Organization unit numbers.
Employee Personal Information	Personal employee-level fields.	Employee name, employee address.
Employment Information	Employment-level fields.	Job title, employment status information.
Compensation and Salary Administration	Compensation and salary administration fields.	Salary effective date, bonus/commission description.
Employee Payroll Information	Employee payroll information fields.	HED amount, tax ID.
Employee HED and Tax Summary Data	Hours, Earnings, and Deductions (HEDs) and tax summary data fields.	Tax ID, HED year.

Training Administration catalog

Top level folders in the Training Administration catalog include:

Folder Name	Contains	Examples of Fields
Course Administration	Course administration-level fields.	Course provider, prerequisite.
Class Administration	Class administration-level fields.	Name of trainer, class location.
Program Administration	Program administration-level fields.	Program description.
Employee Personal Information	Personal employee-level fields.	Employee name, employee address.
Employment Information	Employment-level fields.	Employee job title, employment date.
Employee Training Administration	Employee training administration fields.	Course name, class start date.
Employee Skills, Education And Certs	Employee skills, education and certification fields.	Employee education details, professional association information.

Benefits Administration catalog

Top level folders in the Benefits Administration catalog include:

Folder Name	Contains	Examples of Fields
Company Information	Organization information fields.	Organization levels, company address.
Employee Personal Information	Personal employee-level fields.	Employee name, employee address.
Employment Information	Employment-level fields.	Service and salary information.
EE Benefits Eligibility	Employee benefits eligibility fields.	Eligible plan name.
EE Benefits Enrollment, Coverage & Cost	Employee benefits enrollment, coverage, and cost fields.	Welfare plan name, thrift/savings enrollment information.
Employee Plan Details	Employee plan detail fields.	Retirement plan details, thrift/savings plan details.
Non-Discrimination Test Info	Non-discrimination test information fields.	Highly paid definition data, deferral percentage rates.
Dependents, Beneficiaries & Bond Holders	Dependant, beneficiary, and bond holder fields.	Dependent name, beneficiary address.
Plan Name and Basic Rules	Plan name and basic rule fields.	Plan type, plan insurance carrier.
Plan Coverage & Contribution Rules	Plan coverage and contribution rule fields.	Contribution rule, coverage rule.
Plan Contribution HED Set Up	Plan contribution-level fields.	HED type, contribution type.
Plan Eligibility Rules	Plan eligibility rule fields.	Eligibility type.
Plan Activity and Option Rules	Plan activity and option rule fields.	Activity status effective date.
Plan Flex Rules, Definitions & Formulas	Plan flex rule, definition, and formula fields.	Flex plan effective date, included plan name.
Deferred Plan Rules	Deferred plan rule fields.	Schedule name, break in service fields.
Plan Search Arguments & Co to Bene X Ref	Plan search argument and company to benefit cross-reference fields.	Service breaks control number, search arguments.

Cyborg Catalog Cross-Reference spreadsheet

An Excel spreadsheet is delivered with Reporting Administration which provides a cross-reference from the catalogs to the Administrative Solutions. By default it is sorted in field name and field label order, but, because it is in a spreadsheet format, you are able to sort it into an order that best suits your needs. You can also perform searches on it to find which folder in which catalog contains the data element you wish to report on.

The example below is a sample of the spreadsheet, showing the first few columns of data (the incomplete column is ‘Comments/Notes’ and there are two further columns which are not shown in this example—‘Data Mart Table Name’ and ‘Data Mart Column Name’):

Field Name	Field Label	Form ID	Catalog	Cognos Folder	Name called in catalog if different from field label	Derived field	Comments/Not
			Benefits Administration	Company Information	City-Company	Derived Field	Use only the "City" port (COMPANY-CITY/ST.
			Payroll	Company Information	City-Company	Derived Field	Use on the "City" portic (COMPANY-CITY/ST.
			Benefits Administration	Company Information	Complete Address-Company	Derived Field	(COMPANY-ADDRESS)+(COMPA ADDRESS-2)+(COMP CITY/STATE)+(COMP ZIP-CODE)
			Benefits Administration	Company Information	Province-Company	Derived Field	Use only the "Province portion of (COMPANY CITY/PROV)
			General	Company Information	Province-Company	Derived Field	Use only the "Province portion of (COMPANY CITY/PROV)
			Payroll	Company Information	Province-Company	Derived Field	Use only the "Province portion of (COMPANY CITY/PROV)
			Benefits Administration	Company Information	State-Company	Derived Field	Use only the "State" pc (COMPANY-CITY/ST.
			Payroll	Company Information	State-Company	Derived Field	Use on the "State" port (COMPANY-CITY/ST.
ABSENT-TYPE	Reason Absent>	93-SCR	Payroll	Employee Attendance Information	Reason Absent		Option List TA01
(no field)	Participation Credit:	65-SCR	Benefits Administration	Employee Plan Details Retirement Notice and Counseling Dates	Credit Years (1-2)		
(no field)	Participation Service:	65-SCR	Benefits Administration	Employee Plan Details Retirement Notice and Counseling Dates	Service Date (1-2)		
1ST-QUARTER-FICA	1st-Quarter FICA	602SCR 60FSCR	Benefits Administration	Employee Plan Details Considered Hours/Pay			
2ND-QUARTER-FICA	2nd-Quarter FICA	602SCR 60FSCR	Benefits Administration	Employee Plan Details Considered Hours/Pay			
3RD-QUARTER-FICA	3rd-Quarter-FICA	602SCR 60FSCR	Benefits Administration	Employee Plan Details Considered Hours/Pay			
4TH-QUARTER-FICA	4th-Quarter-FICA	602SCR 60FSCR	Benefits Administration	Employee Plan Details Considered Hours/Pay			
ABSENCE-REASON	Reason:	30RSCR	Training Administration	Employee Training Administration EE Training Results	Reason for Absence from Class		Option List TR12

Catalog details / Notes

In this example you will notice that the system-related cells are blank in some instances. This is because the data elements to which they refer are derived fields, that is, they are data elements that are calculated, or derived from, extracted data. This is discussed in more detail later in this chapter. Wherever possible, some further information is provided on these derived fields in the column headed ‘Comments/Notes’.

In addition, to further assist you in finding the correct data items for your report, those fields that use option lists will have the appropriate option list name in the ‘Field Name’ column.

Enhanced data

Derived data

Reporting Administration allows you to report on derived data. A straight system extract does not give you easy access to all the employee information you may need for reporting. Derived data would not be in the extract. For example, there are fields for employee age in the catalog that can be used in reports to show the employee age in years, in years and months, or in years, months, and days. These fields are derived from the employee's birth date data stored in your system. A derived data field avoids repeated calculations and simplifies reporting, giving you direct and easy access to employee information.

Effective dating

In order to perform as-of reporting on your data, the database must know the time period when the data in a table was effective (or if it still is effective). Each dated data record is extracted into the data mart with an effective begin and an effective end date. The effective begin date is the effective date of the record in your system and the effective end date is derived during the extract process. These dates are then stored along with the data in the data mart so that it is date stamped for any as-of reporting you may wish to perform.

Note: This does not apply to Position Administration data.

As-of reporting

When using or creating reports you may be presented with a prompt asking for the 'As Of Date'. This means that the data used in this report will be valid 'as of' this date.

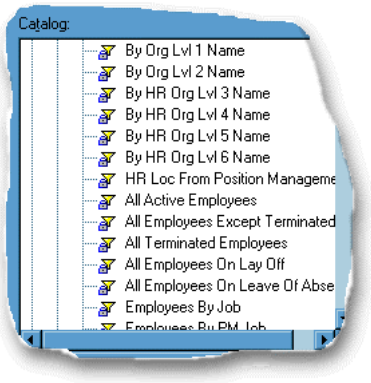
You can change the date in the 'As Of Date' field to view data 'as of' another date. You may want to change the 'As Of Date' to a date prior to the date shown to view data 'as of' that date. Future dates can also be entered in this field to view data 'as of' a future date.

Because effective start and end dates are captured during the extract/import process for all dated data in the data mart, you can perform as-of reporting on all the extracted information. For instance, you can generate reports on last year's total salary increase amounts, this year's salary totals, or the salary amounts your organization paid five years ago.

Note: As-of reporting is based on information entered into your system. For instance, if you entered a future effective date for an employee's salary increase, then extract the data from the system before that effective date, the employee's current salary on your report will not reflect that increase. This is because the salary increase is not in effect yet, even though it has been planned for and entered into the system.

Filtering data

The Cyborg-delivered catalogs contain some commonly used pre-defined filters. The following sample shows some of the filters that are in the General catalog:



A filter is a set of criteria you apply to a report to change the focus of the report and to emphasize information that is important to you by filtering out what is unnecessary. For example, you may only be concerned with reporting only on active employees, in which case you would select the 'All Active Employees' filter.

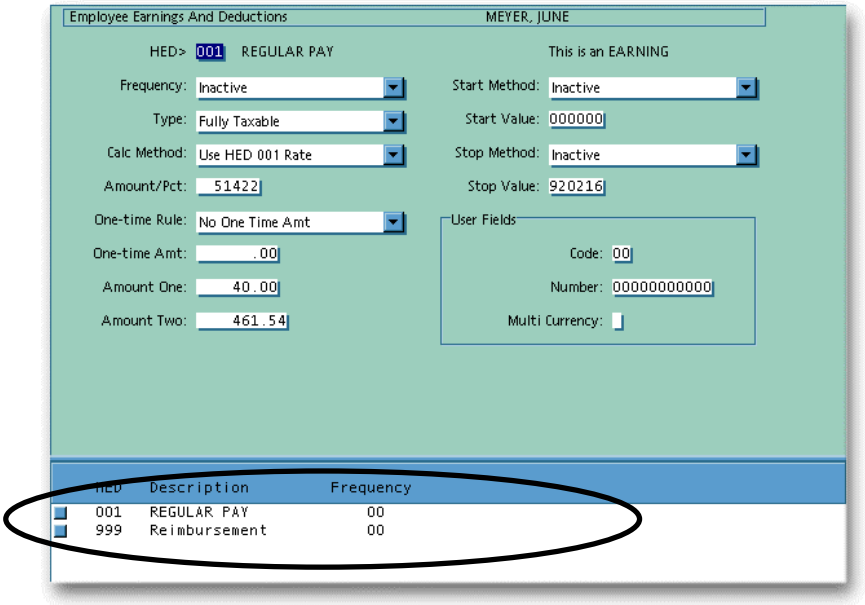
HotFiles

You may wish to create a report using information from more than one catalog. In order to do this you would need to get your administrator to create a HotFile.

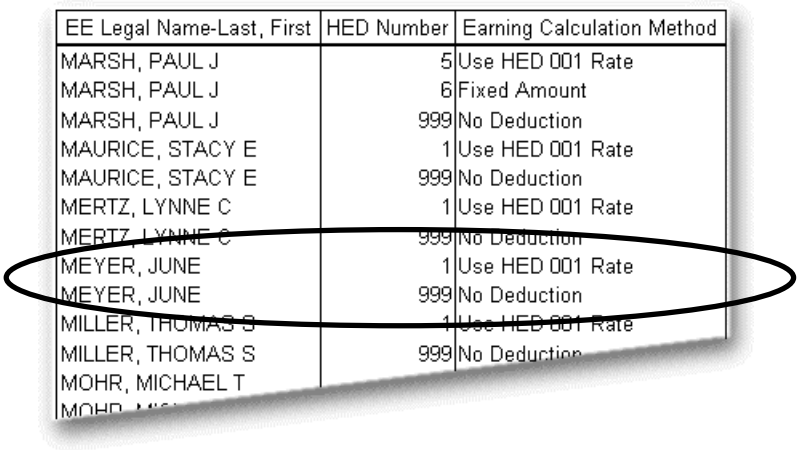
☞ *Refer to the Impromptu online help for further information on the use of HotFiles.*

Multiple occurrence segments

Some records have multiple occurrences, such as the HED field on the Employee Earnings And Deductions form (HH-SCR), as shown in the following example:



Using the Payroll catalog, if you were to produce a report using the HED number, the report will show all occurrences of the HED number for each employee:



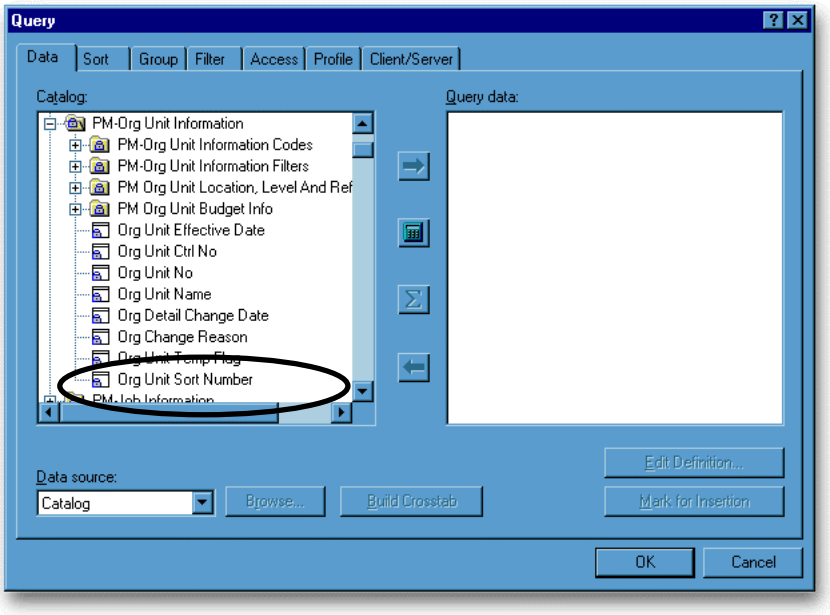
EE Legal Name-Last, First	HED Number	Earning Calculation Method
MARSH, PAUL J	5	Use HED 001 Rate
MARSH, PAUL J	6	Fixed Amount
MARSH, PAUL J	999	No Deduction
MAURICE, STACY E	1	Use HED 001 Rate
MAURICE, STACY E	999	No Deduction
MERTZ, LYNNE C	1	Use HED 001 Rate
MERTZ, LYNNE C	999	No Deduction
MEYER, JUNE	1	Use HED 001 Rate
MEYER, JUNE	999	No Deduction
MILLER, THOMAS S	1	Use HED 001 Rate
MILLER, THOMAS S	999	No Deduction
MOHR, MICHAEL T		

You may wish to use filters to ensure that you produce a report showing only the occurrences that you want.

Some multiple occurrence segments have effective dates which are handled by Reporting Administration using prompts for date ranges that are attached to the user class for each table with dated segments. If you select data from a table with these prompts you will be prompted for beginning and end dates for your report. If you enter the same beginning and end dates the report will return the latest occurrence prior to those dates. For example, entering a date of 2001-01-01 as both the beginning and end dates on the prompts dialog will return the latest occurrence prior to that date, even if the last occurrence was 15 years ago. Careful use of the date prompt dialog will give you the ability to report on the latest occurrence. A range of dates (for example, the last 10 years of salary records), or a middle of the stack date—for example, entering a date of 1996-04-01 (US and Canada) or 1996-01-04 (elsewhere), will return the latest occurrence prior to that date.

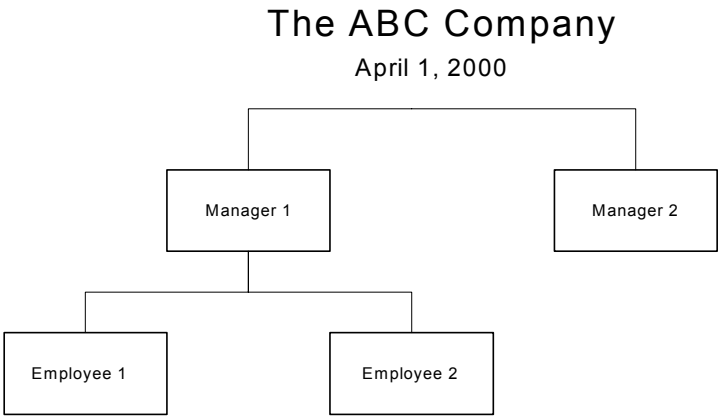
Strategic HR reports

Whenever reporting on strategic HR information, you should be sure to assign the Organization Unit Sort Number to the report's sorting sequence:



The Sort Order Sequence Numbers (SOSNs) are derived from the information on the Organization Structure form (M45SCR). The Organization Unit Sort Number is always the first of the sorting criteria. By making this the highest priority sorting parameter, we avoid the possibility of displaying information incorrectly.

Consider the following organization:



If we were to leave off the Organization Unit Sort Number, a report would display information in the following order, instead of the desired order:

ABC
- Manager 1
- Manager 2
  - Employee 1
  - Employee 2

With the Organization Unit Sort Number appropriately assigned as a sort criteria, the report correctly displays information in the following order:

ABC
- Manager 1
  - Employee 1
  - Employee 2
- Manager 2

CHAPTER 2

Introduction to Impromptu

Contents

Contents

1. Overview of Reporting Administration
2. Introduction to Impromptu
3. Organizing Data
4. Customizing Data
5. Crosstab Reports
6. Functions
7. Formatting
8. More About Filters
9. Snapshots
10. Drill-Through Reports
11. Frames
12. Course Close

Objectives

Objectives—Introduction

- Introduction to Impromptu
  - Learn what Impromptu is and what you can achieve with it
  - Become familiar with the Impromptu User Interface
  - Understand the relationship between 'the data source', Impromptu catalog and catalog components, and Impromptu Reports

Objectives—Introduction (continued)

Impromptu Reports

Open and navigate existing Impromptu Reports

Build a new Report using the Report Wizard

Build an ad hoc query

Add and remove columns from the report and the query

What is Impromptu?

"Impromptu is a powerful interactive query and reporting tool that lets you query data and create sophisticated reports, in an easy to use and sophisticated desktop interface."

"With Impromptu you can produce attractive, meaningful reports and publish them throughout the enterprise."

In the past access to business data, which is normally stored in various database structures, has been in the hands of database experts—hence decision makers and analysts have had to rely on reports generated by these experts or systems.

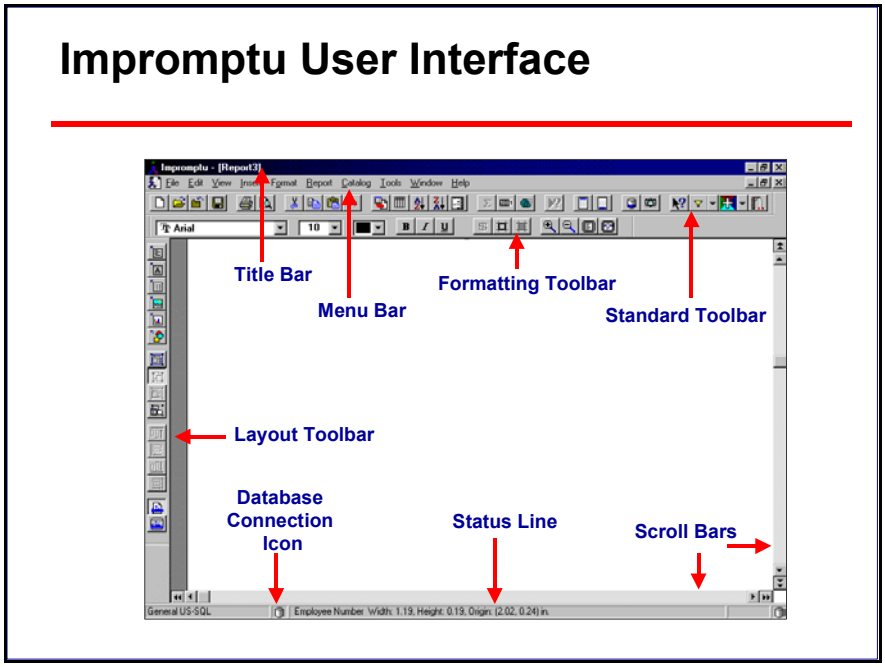
Impromptu is a reporting tool, which can be linked to many different database types. It allows you to generate reports without the requirement for an in-depth knowledge of database structures.

It allows you to generate the reports that you require without having to rely on the **Database Experts**.

It should be noted that a system administrator will still control what data is to be made available within Impromptu—the role of the **Impromptu Administrator** is covered further on the Impromptu Administrator Course.

Note: There are two different modules for Impromptu—Impromptu User and Impromptu Administrator.

Accessing Impromptu User



Double-click the **Impromptu Icon** from the Desktop, alternatively use the **Start** menu followed by the **Programs | Cognos | Impromptu** options, this will display the main Impromptu screen as shown above.

The Title Bar

The **Impromptu Title Bar** is very similar to the Title Bars displayed in Microsoft applications—it will show you the application and report name.

Note: Impromptu reports are saved with the file extension .imr.

The Menu Bar

The **Impromptu Menu Bar** is similar to those shown within other Microsoft applications. The following menus will appear when you first enter Impromptu:

- File
- View
- Catalog
- Tools
- Help

There are additional menus, which will be available to you when a report is open; these are as follows:

- Edit
- Insert
- Format
- Report
- Window

Standard, Format and Layout Toolbars

These are the standard toolbars for accessing the various options within Impromptu itself.

The toolbars hold the most commonly used menu options as buttons, allowing you to perform certain tasks quickly.

Note: To change the toolbars that are displayed use the View | Toolbars menu option.

To add buttons to the toolbars use the Tools | Toolbars menu option.
Or Right-click any existing toolbar and from the shortcut menu select the Customize option.

The Status Line

This will provide you with details on what information you are viewing at a given point in time.

The example below shows that you are accessing the Benefits Administration Catalog:

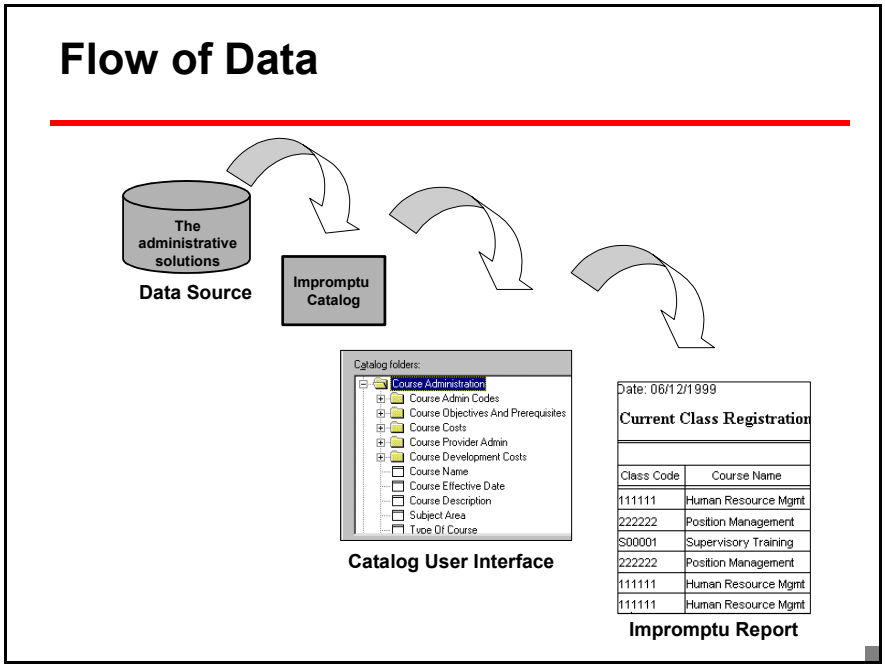
Note: To hide the Status Line use the View | Status Line menu option.

Getting Help

Impromptu has different kinds of help information:

Online Help:	At any time, you can access online help and search for help on a particular topic. Accessed using the **Help** menu followed by the **Books Online** option. These can be printed and used as Reference Guides.
Screen Help:	Accessed using the **Help** menu followed by the **What's This** option or alternatively press **SHIFT+F1.** The mouse pointer changes to a **?** (question mark). Click the pointer anywhere within Impromptu, such as on a column label/value or toolbar button, to get help about that element. Press **Esc** to return the mouse pointer to an arrow.
Find Help:	At any time, you can access the Help Contents and Index option and search for help on a particular option. Accessed using the **Help** menu followed by the **Contents and Index** option, or by pressing **F1**.

The Impromptu Catalog



The Catalog is the gateway to your data; it is the bridge between the source data and you. The catalog insulates you from the complexity of the database, such as, table joins and cryptic field names. Hence, you do not need to know where and how the data is actually stored.

The catalog is a representation of your data in business terms. It organizes and presents the data using the language of your business and reflects the structure of your organization, not the structure of your database.

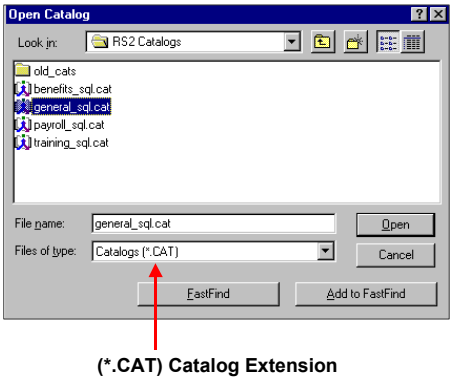
There can be more than one catalog for each database that holds your data; the usual rule is to have one catalog per application, and one per physical location.

Reporting Administration provides four catalogs—General, Training, Payroll, and Benefits—which cover all of the main reporting areas.

Note: The catalog does not contain the data itself—just the information required for Impromptu to get the information you want (that is, the name and location of the database containing the data). Impromptu is a read only tool—you can access the data in a database but not change it within the database.

Opening Catalogs

Open Catalog Dialog Box



(*.CAT) Catalog Extension

To open an existing catalog, select the **Catalog | Open** menu option. This will display the **Open Catalog** dialog box.

The Open Catalog dialog box is very similar to the open file dialog box displayed in Microsoft applications—it allows you to select the drives and directories to locate the catalog you require.

It will also provide you with an additional option called **FastFind**, this option will take you to the default **Cognos User Workspace** directory from which you can select the Catalogs sub-directory in which the Impromptu sample catalog(s) are stored.

When Impromptu is installed the standard Cyborg catalogs that this course refers to will also be installed.

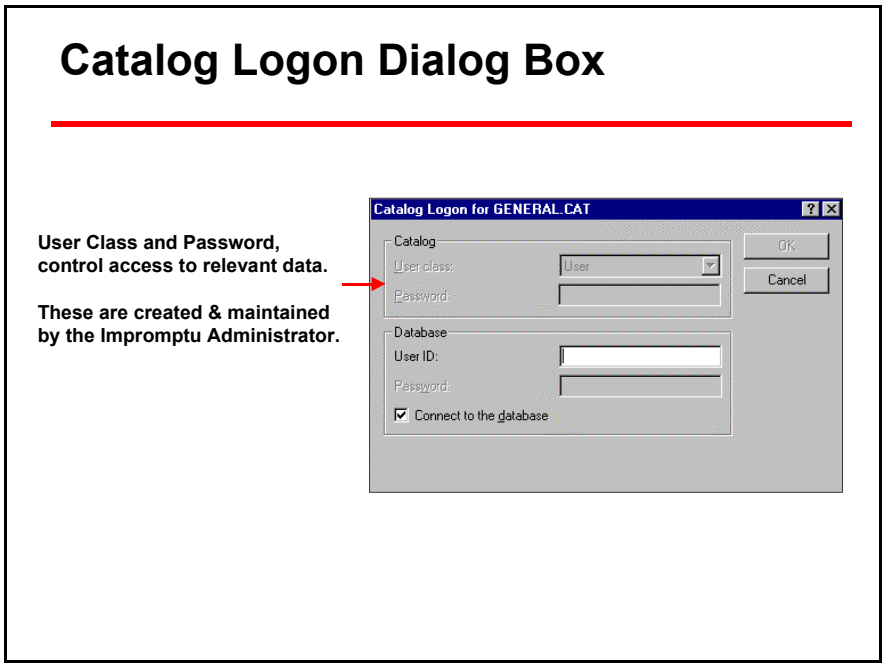
Once a catalog is selected and opened the screen will display the following message: 'The database is successfully attached' at the bottom of the screen—on the Status Line.

The descriptive name of the catalog you are accessing will also be displayed at the bottom left of the screen.

The following icon within the Status Line indicates that you are connected to the database.

To work disconnected from the database use the **Catalog | Disconnect** menu option. The icon will change to indicating that you are not connected to the database. If you reselect the **Catalog** menu, the **Disconnect** option will change to **Connect**.

User Classes



The **Catalog Logon** dialog box may be displayed when opening catalogs—this is dependent on the number of users assigned to this catalog and whether passwords have been assigned. If the catalog has only one user class, that is Creator, then the Catalog Logon dialog box will not be shown unless a password has been assigned for this user class.

Impromptu will allow access to a vast amount of information (dependant on the contents of your database). It may not always be appropriate to allow all users access to the entire data, for example the Payroll Department does not need to see the same data as the HR Department. This is controlled by the use of **User Classes**.

User Classes = A group of users who need to access the same information.

Example = Human Resource Managers, Human Resource Assistants, Payroll Clerks.

User classes are created and maintained by the Impromptu Administrator. The Administrator determines whether there are user class passwords, and which user classes can create new reports, or which are limited to using existing reports only.

Demo 2-1

The purpose of this demo is to get Impromptu running. Open the General Catalog, ensure that the Report Wizard is enabled to Customize the Toolbar.

Start Impromptu

1. Start Impromptu by double-clicking the **Impromptu** shortcut icon on your desktop, or by selecting **Start** | **Programs** | **Cognos** | **Impromptu**.

Connect to catalog

2. Next you need to connect to an existing catalog. The database icon on the Status Line will have a Red Cross , indicating that you are not connected at present.

   Select the **Catalog** | **Open** menu option. This will display the Open Catalog dialog box.

3. Select the **General_sql.cat** catalog and click **Open**.

Note: The delivered catalogs are named as follows: benefits_xxx.cat, general_xxx.cat, payroll_xxx.cat, or training_xx.cat, where 'xxx' is sql, or ora, depending on the platform on which it is installed.

4. You will be presented with the Catalog Logon dialog box. Select **User** from the **User class** drop-down list (if not done so already). The Catalog Logon will be set-up by the Impromptu Administrator if more than one user is to access the catalog.

   If necessary, enter the default User ID and click **OK**.

Note: Depending on how your administrator is maintaining the catalog, it may be necessary to enter a user ID and password for the database access as well.

   The following message is shown on the Status Line: 'The database is successfully attached'.

5. The database icon on the **Status Line** will no longer have a Red Cross, thus indicating that you are now connected to a database . The name of the catalog that you are connected to will also be displayed on the Status Line.

Enable the Report Wizard

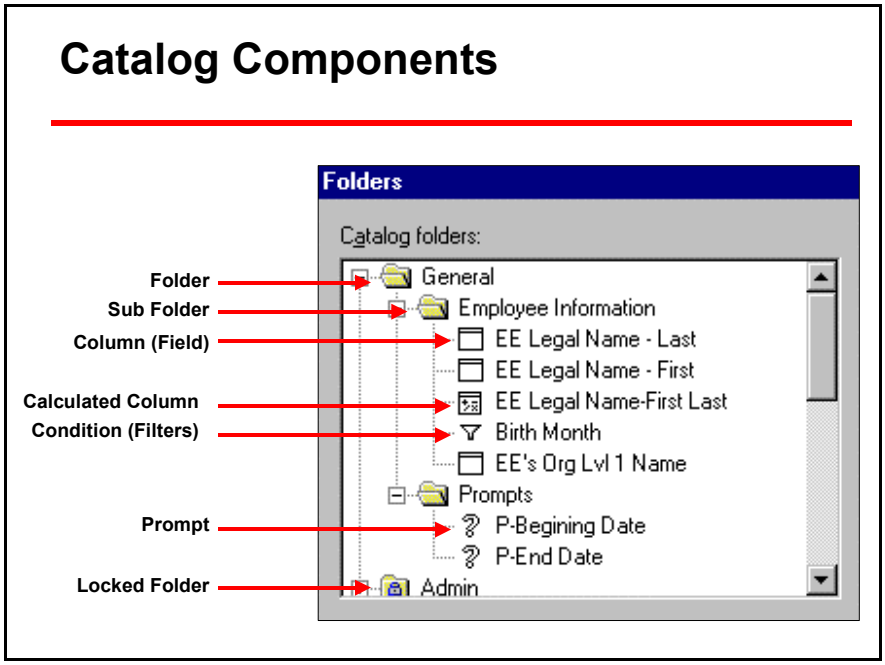
6. To enable the Report Wizard, select the **Tools | Options** menu option.
7. Click the **General** tab and click the **Use the Report Wizard to create standard reports** option if it is not already selected.

   This will enable the use of the Report Wizard to create standard reports.
8. Select **OK** to accept the changes you have made in the Options dialog box.

Amend existing toolbar

9. To change an existing toolbar, select the **Tools | Toolbars** menu option, or **Right-click** an existing toolbar and select the **Customize** option. Both these methods will display the **Customize Toolbars** dialog box.
10. Change the **Category** to **all items** and scroll down to the Sort icons.
11. Click and hold on the **Sort Descending** button and drag it to the **Standard** toolbar. Release when the mouse pointer is positioned to the right of the **Sort Ascending** button.
12. Repeat with the **Calculation** button.
13. Select **Close** to close the Customize Toolbars dialog box.

Catalog Components



The catalog itself composes of the following main five components:

- Folders
- Columns (Fields)
- Calculations
- Conditions (Filters)
- Prompts

Folders

Folders are meaningful groups of information and are denoted by the yellow folder icons (Locked Folders relate to distributed catalogs).

Folders can contain sub folders; for example the **Employee Personal Information** folder (within the **General_sql.cat** catalog) contains the sub-folders called **Primary Employee Address** and **Employee Birth Date Information**, which in turn hold individual columns and other components.

Columns (Fields)

Within each folder, individual items of information are presented as columns, sometimes referred to as **Data Items**. These columns reflect the actual columns available in The Solution Series data mart. Within the **Job Table Information** folder (within the **General_sql.cat** catalog) there are columns such as:

Catalog Folder/Subfolder	Report Column
Job Table Information	Job Title Salary Grade - Job Occupation Group - Job Job Type

Calculations

These are pre-defined calculations, created by the Impromptu Administrator that are stored within the catalog (in the various folders). Within the **Employee Personal Information - Employee Birth Date Information** folder (within the **General_sql.cat** catalog) there are calculations such as:

Catalog Folder/Subfolder	Report Column
Employee Personal Information Employee Birth Date Information	Birth Year - EE Employee Age - Years

Conditions (Filters)

These are pre-defined conditions (filters), created by the Impromptu Administrator that you can use to filter the data displayed in your reports. Within the **Employment Information - Employment Information Filters** folder (within the **General_sql.cat** catalog) there are conditions such as:

Catalog Folder/Subfolder	Report Column
Employment Information Employment Information Filters	All Active Employees All Employees on Leave of Absence Employees by Job

Prompts

Another type of filter that can be applied to Impromptu reports is called a prompt. A prompt will request you to enter data into the report when it is first opened by selecting or entering the appropriate categories. This information will then be used in either a filter, calculation or in the report as data itself.

There are several prompts included in the Cyborg catalogs. You can use one or more of these prompts when creating your reports. When you open a report containing these prompts, one or a series of dialogs display asking you to enter any parameters, such as a date or specific organizations, for the information you want displayed in your report.

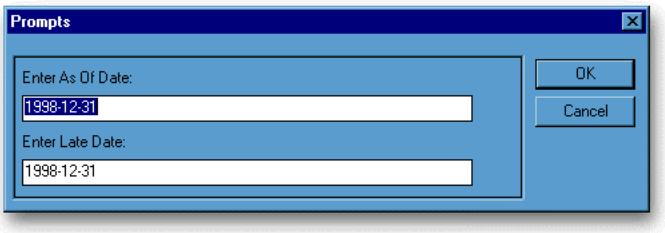
Within the **Prompts** folder (within the **General_sql.cat** catalog) there are prompts such as:

Catalog Folder/Subfolder	Report Column
Prompts	P - Beginning Date P - End Date P - Org Unit Name P - PM Position

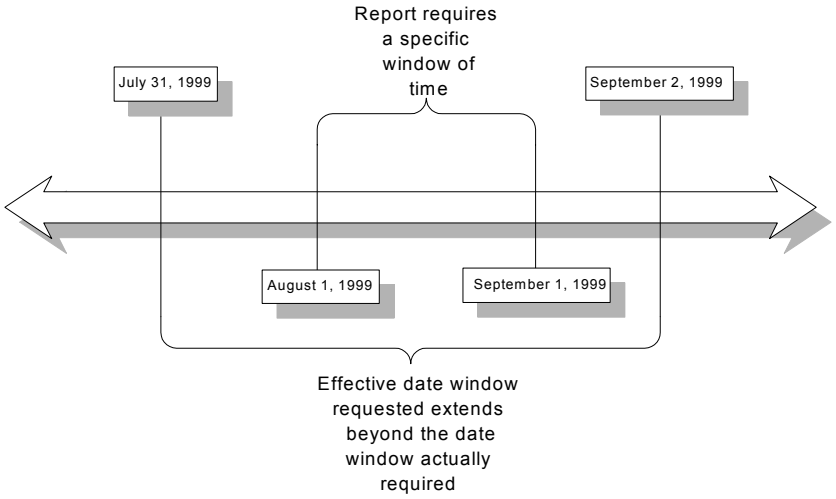
These catalog components can be accessed via the **Query** dialog box, which is covered in detail later in this guide.

Note: Several of the data mart tables have predefined date prompts at the 'User' class level. These filters will automatically prompt for a date range when data from the specific tables are accessed.

For example, if the P-Beginning Date and P-End Date prompts are used in a report, the following Prompts dialog will be displayed when the report is opened:



If you enter the same date in both fields, you are requesting information as of a specific date. Take care when entering a range of dates that the dates entered are adequate for the report requirements, or a blank report may be produced. For example, if the report requires data from August 1, 1999 through September 1, 1999, ensure that you will be able to view all the data you will need for your report by requesting an effective date range window from July 31, 1999 through September 2, 1999.

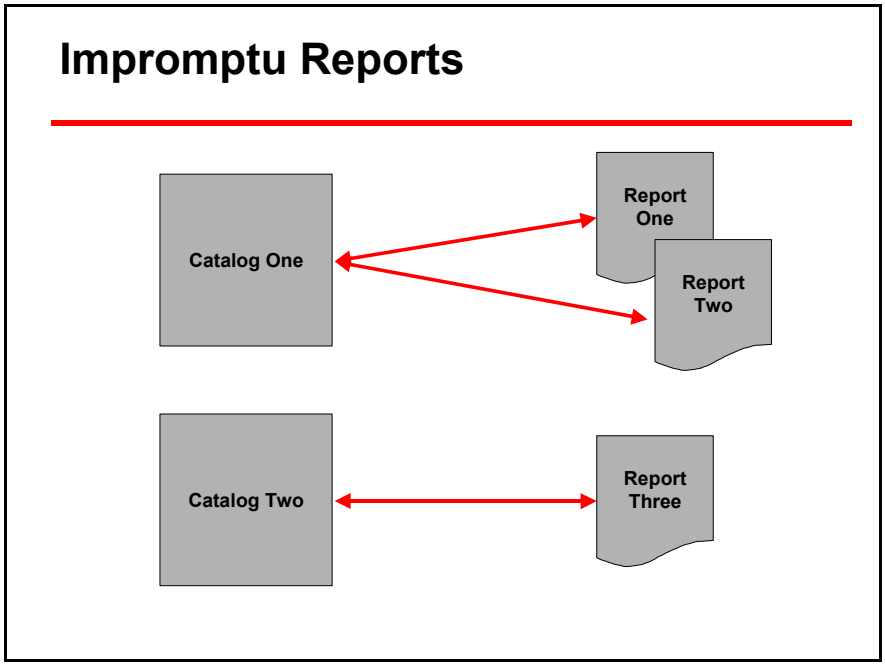


Closing Catalogs

Impromptu can only access one catalog at a time.

If you have a catalog open within Impromptu the **Catalog | Open** menu option will not be available. However, if you close the current catalog by selecting the **Catalog | Close** menu option, **Catalog | Open** will become available.

Impromptu Reports



Catalogs can be used to query the source data and create reports where the data can be viewed and modified; for example you can retrieve the Monthly Salary for all Employees and add a five percent Bonus.

Note: The new salary amount can be returned to your system database using our import feature. Please refer to the 'Optimizing System Features' documentation for information and instructions on importing data.

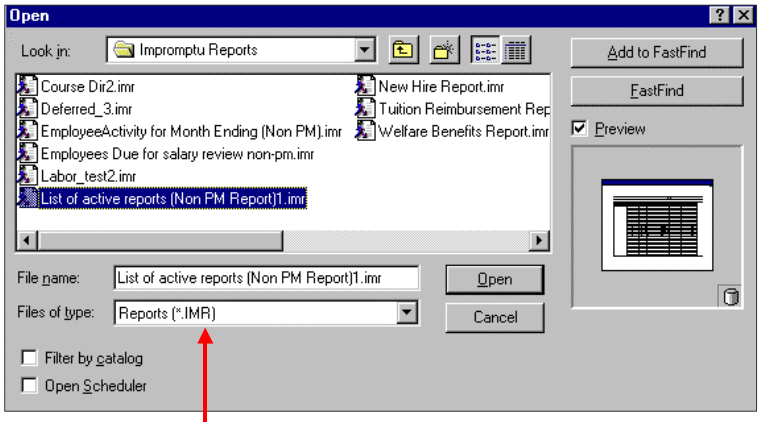
A catalog can have many reports associated to it, but each report is associated to one catalog. This association however can be changed to another catalog as required.

More than one catalog can be linked by the use of HotFiles; this however is an administrative feature.

You can open more than one report at the same time as long as they are associated to the same catalog.

Opening an Existing Report

Open Report Dialog Box



(*.IMR) Impromptu Report Extension

When opening an existing Impromptu report you do not have to select and open the catalog to which it is associated. This will automatically occur when the report is opened.

Select the **File** | **Open** menu option, or click the **Open Report** button on the Standard toolbar. The **Open** report dialog box will be displayed as shown above.

The Open report dialog box is very similar to the open file dialog boxes displayed in Microsoft applications—it allows you to select the drives and directories to locate the reports you require.

It will also provide you with an additional option called **FastFind**, this option will take you to the default **Cognos User Workspace** directory from which you can select the Reports sub-directory in which the Impromptu sample reports are stored.

Select the required **Impromptu Report** and click the **Open** option. The Catalog Logon dialog box for the associated catalog will be shown—select **OK**. This will open the report and the associated catalog.

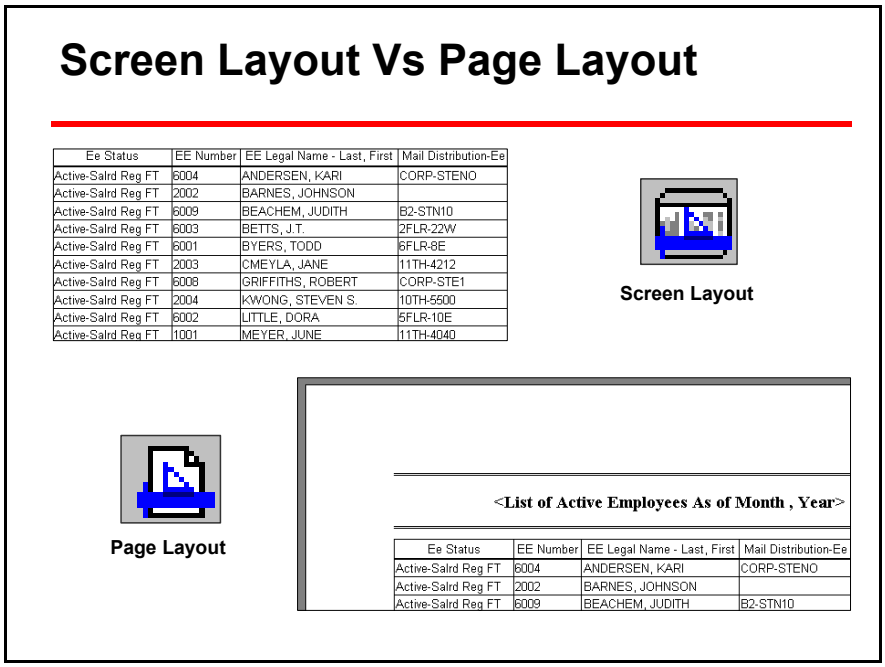
Also shown in the Open report dialog box are the following options:

Filter by catalog: This option will allow you to view reports associated only to the current open catalog and will be unavailable when no catalog is open.

Open Scheduler: This option will allow you to specify a date and time for this report to be run and will only be available if you have the **Cognos Scheduler** software installed.

Note: When Impromptu is installed Cognos Scheduler will also be installed.

Screen Layout Vs Page Layout



Ee Status	EE Number	EE Legal Name - Last, First	Mail Distribution-Ee
Active-Salrd Reg FT	6004	ANDERSEN, KARI	CORP-STENO
Active-Salrd Reg FT	2002	BARNES, JOHNSON	
Active-Salrd Reg FT	6009	BEACHEM, JUDITH	B2-STN10
Active-Salrd Reg FT	6003	BETTS, J.T.	2FLR-22W
Active-Salrd Reg FT	6001	BYERS, TODD	6FLR-8E
Active-Salrd Reg FT	2003	CMEYLA, JANE	11TH-4212
Active-Salrd Reg FT	6008	GRIFFITHS, ROBERT	CORP-STE1
Active-Salrd Reg FT	2004	KWONG, STEVEN S.	10TH-5500
Active-Salrd Reg FT	6002	LITTLE, DORA	5FLR-10E
Active-Salrd Reg FT	1001	MEYER, JUNE	11TH-4040

Ee Status	EE Number	EE Legal Name - Last, First	Mail Distribution-Ee
Active-Salrd Reg FT	6004	ANDERSEN, KARI	CORP-STENO
Active-Salrd Reg FT	2002	BARNES, JOHNSON	
Active-Salrd Reg FT	6009	BEACHEM, JUDITH	B2-STN10

Reports can be viewed in two different views in Impromptu—**Screen Layout** and **Page Layout**.

Screen Layout is intended for reports that are to be viewed on the screen rather than on a printout. The Horizontal and Vertical scrollbars (or the single arrows) enable you to view more data.

Screen Layout is indicated by the button on the vertical Layout toolbar (alternatively you can use the **View | Screen Layout** menu option).

To switch to the **Page Layout** view select the button on the vertical Layout toolbar (alternatively you can use the **View | Page Layout** menu option). The double arrows within the scrollbars enable you to move from one page to another.

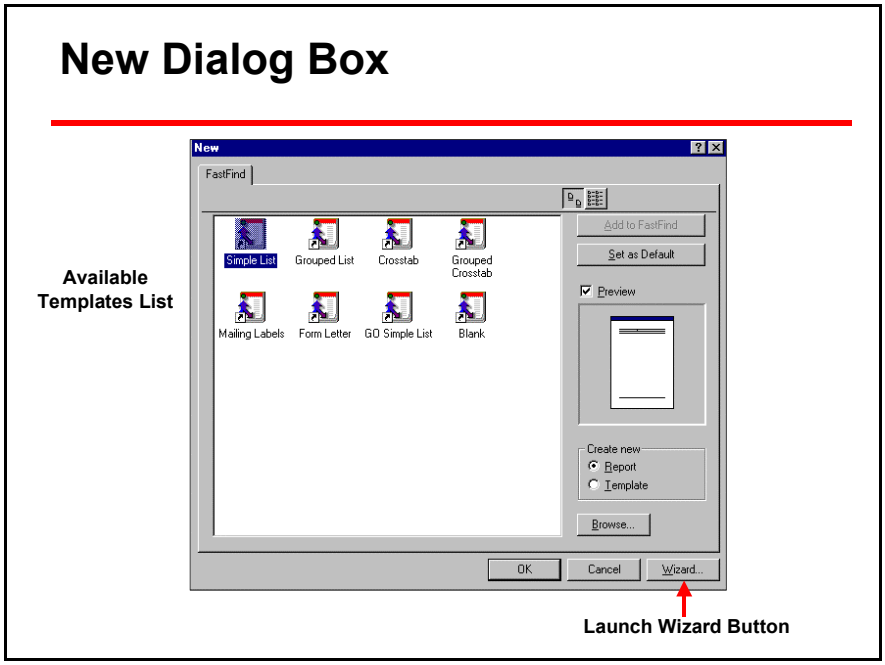
New reports created using the Simple List template default to the Page Layout view, as this template is stored in Page Layout view.

Existing reports will be opened in the view in which they were last saved.

Note: A quick way to scroll to the last record while in Screen Layout view is to press End on your keyboard.

The page layout view is not available if a printer is not attached/selected for your computer.

Creating a New Report



Within Impromptu new reports are created using two different methods—using the **File** | **New** menu option, or the **New** button.

The **File | New** menu option will allow you to select a predefined **Report Template** in the **New** dialog box, as shown above (standard templates are provided with Impromptu, however your Impromptu Administrator may create additional templates).

The **New** button will use the default template (usually the Simple List template) and call up the **Impromptu Report Wizard** that will take you through the report creation process step by step.

Note: The report wizard option must be flagged in the Tools | Options | General tab.

When creating a new Impromptu report, you must either have the associated catalog open, or select the required catalog when creating the report.

Practice 2-1

The purpose of this practice is to become familiar with the Cyborg catalogs.

Connect to each catalog in turn and find the following data items in the catalog:

General Catalog:

1. EE Legal Name - Last, First
2. EE Number
3. EE Complete Address
4. HR Org Lvl 3 Name
5. EE Annual Salary
6. Future Percent Change
7. EE Hourly Rate
8. Training Course Required
9. Position Name
10. Incumbency Type

Payroll catalog:

1. HED Hours Qtd
2. Bank Code
3. Bonus/Comm Amount
4. Perquisite Name
5. EE Number
6. Payroll Org Level 3 Number
7. Vacation Remaining
8. EE Salary Grade
9. Bonus/Commission Desc
10. SSN/SIN-History

Benefits Administration catalog

1. Eligible Plan Name
2. Plan Insurance Carrier
3. Thrift/Saving Contribution
4. Deduction Effective Date
5. Eligible Status
6. FSA Claim Number
7. Option Delay Time
8. Flex Plan Effective Date
9. Retirement Options
10. Break In Service Eff Date

Training Administration catalog:

1. Course Name
2. Cost of Course
3. Number Registered
4. Name Of Trainer
5. Class Coordinator
6. Course Result
7. Skill Proficiency
8. Year Graduated
9. Cert/License/Permit
10. Training Program

Hint: If you are having difficulty finding the data items, perform a search on the Cyborg Catalog Cross-Reference spreadsheet.

Demo 2-2

The purpose of this demo is to create a new List Report using the Report Wizard and change between the standard views.

Start the Report Wizard

1. Select the **File | New** menu option, and select the **Simple List** template, then click the **Wizard** button, or click the **New** button on the Standard toolbar.

   This will bring up the **Impromptu Report Wizard** dialog box, which will take you through the necessary steps for creating a report.

Enter the report title

2. Type the report title of **Employee Salary Details** and click **Next**.

   The report title you have entered will appear in the **Page Header** area of the finished report.

3. A choice of two different types of reports will appear. The **List** report should already be selected, if not, select it and click the **Next** option.

Access the catalog data items

The next screen is split into two areas, with the Catalog folders and their subsequent columns on the left.

4. Expand the **Employment Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.

5. Add the following columns:

Catalog Folder/Sub Folder	Report Column
Employment Information Employee Job Assignment Information	Job Salary Grade-EE Job Title-EE
Employee Personal Information	EE Number EE Legal Name - Last, First
Compensation And Salary Administration Employee Compensation	EE Annual Salary EE Hourly Rate EE Pay Frequency

You can select the columns in two ways: either **double-click** the required column, or click once to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

6. Once you have all seven columns on the right, click **Next**.
7. You do not want to have automatic totals in this report, so click the **Automatically Generate Totals** box to turn this option off.
8. You do not want to group columns at this stage, hence click **Finish**. This will generate the report on screen in Page Layout view.

Note: The report is displayed in Page Layout view, as the Simple List template selected is stored as a Page Layout view template.

Change the view

9. Select **Screen Layout** view from the **View** menu, or click the **Screen Layout** button. You will no longer be able to see headers and footers and the report maximizes the space available on the screen.
10. Select **Page Layout** view from the **View** menu, or click the **Page Layout** button.

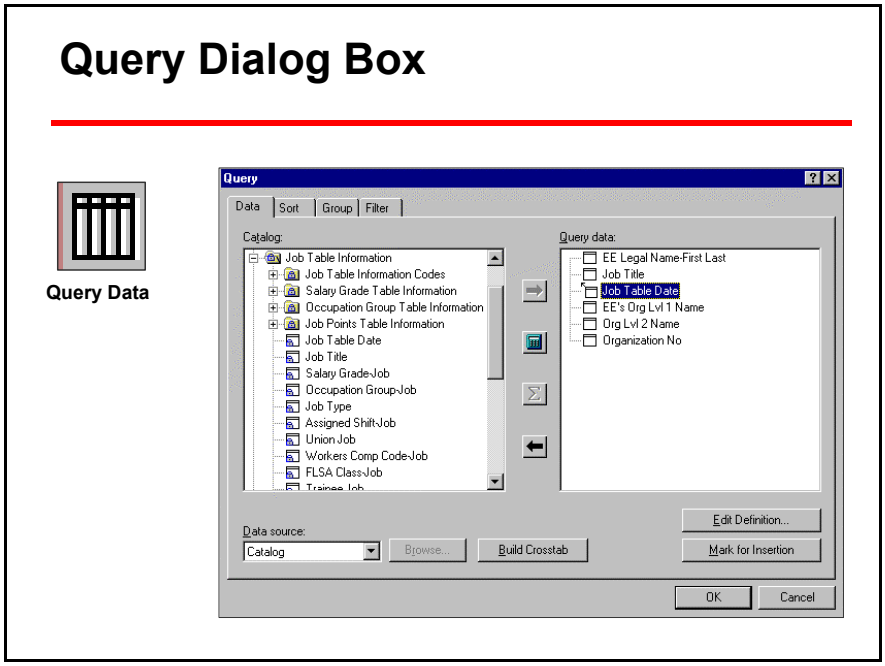
Note: The number of rows the current report contains is displayed on the Status Line (bottom right corner). If all rows do not fit onto one page the number is reflected as 100+. This will increase as you scroll down through the pages, displaying the total number of rows when you reach the last page.

Save the report

11. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting **Save** from the **File** menu.
12. Enter a File name of **Employee Salary Details**; change the **Save in** file location to **C:\Temp** and click **Save**.

    Notice the Title bar has now updated to reflect the changes you have made when saving this report.

Query Dialog Box



When a report template is selected the next stage is to add the required data items (columns) to the report.

The **Query** dialog box (**Data** tab) is where you select the data items (columns) from the Catalog folders window (left-hand window) to be included within your report by creating an ad hoc query.

There are two methods that can be used to add columns to reports:

- Double-click the required column.
- Single-click the required column and select the **Add** button.

When a column has been selected it will be shown in the **Query data** window (right-hand window). The order in which the columns are selected here determines the order in which they are displayed when the report is first run.

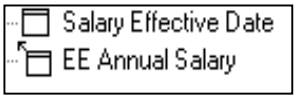
When all the required columns have been added, select **OK** to close the Query dialog box and create the report.

Adding Columns to an Existing Query

Once you have created a basic report you can add new columns to the query using the Query dialog box.

There are two methods that can be used to add columns to existing queries:

- Adding columns to the far right-hand side of the report.
  - Select the **Report** | **Query** menu option, alternatively select the **Query data** button on the Standard toolbar to display the **Query** dialog box and **Add** the new column to the Query data window.
  - Notice how the icon for this column differs from the rest, this means that it has been marked for insertion—for example, the **EE Annual Salary** column shown below:



  Select **OK** to add this column to your report.

Note: You may have to scroll to the right-hand side of the page to view this column.

- Adding columns to a specific position in the report.
  - Select the **Insert** | **Data** menu option, or alternatively select the **Data** button on the Standard toolbar. The mouse pointer will change to show a black no entry circle. Drag this pointer to the required position (usually between two columns) and let go. This will display the **Query** dialog box. **Add** the new column to the Query data window.
  - Select **OK** to add this column to your report at the specified position.

Removing Columns from a Report

Columns can be removed from your report in two ways:

- From the Report display only. This will remove the column from the report but leave it in the query.
  1. Select a data item within the column to be deleted.
  2. Press **Delete** on your keyboard; this will remove the column from the report.
  3. Select the **Report** | **Query** menu option, alternatively select the **Query data** button on the Standard toolbar to display the Query dialog box.
  4. Re-select this column and click the **Mark for Insertion** option. (Notice how the column icon changes to show that this column will now be added to the existing report.)
  5. Select **OK** to close the Query dialog box and return to the report, the column has been re-inserted in the report.
- From the Query. This will remove the column from both the Query and the Report display.
  1. Select the **Report** | **Query** menu option, alternatively select the **Query data** button on the Standard toolbar to display the Query dialog box.
  2. Select the required column from the Query data window and remove it using the **Remove** button (alternatively press the **Delete** key).
  3. Select **OK** to close the Query dialog box and return to the report, the column has been removed from both the Query and the Report Display.

Note: It is more efficient to remove all columns that are not required for a report from both the Query dialog box and the Report Display. Otherwise each time the report is run the query will be retrieving unnecessary data.

Moving Columns within a Report

Once a column has been added to a report it can be moved to a new position using the mouse (dragging and dropping).

Course Level	Course Name	Min No Of Students	Max No Of Students	Training Area
Intermediate	Human Resource Mgmt	3	5	Corporate Services
Introductory	Human Resource Mgmt	3	5	Corporate Services
Introductory	Position Management	1	9	Corporate Services
Introductory	Supervisory Training	2	7	Corporate Services

Line indicating where the column will be dropped.

Select a data item from within the column to be moved, holding down the left mouse button (mouse pointer will now display) drag the column to the new position (a dotted line will appear to indicate where the column will be moved to) and let go.

Note: The order in which the columns appear within the Query data window (Query dialog box | Data tab) does not change when columns are moved in the Report Display.

Demo 2-3

The purpose of this demo is to create a Simple List Report, remove, replace and add new columns.

Create a new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Company Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information	EE's HR Org Lvl 3 Name
Employee Personal Information	EE Number EE Legal Name - First EE Legal Name - Last
Primary Employee Address	EE Street Address City - EE
Employee Other Personal Information	EE Sex EE Race
Employee Birth Date Information	Birth Date - EE Employee Age - Years

You can select the columns in two ways: either **double-click** the required column, or click once to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

Move column

5. **EE Race** needs to come in between **EE's HR Org Lvl 3 Name** and **EE Number**.
   To move this column, click and hold on **Race** in the **Query data** window and drag and drop onto **EE Number**.

Note: Columns can also be re-arranged within the report.

6. Click **OK** to accept the Query data and display the report.

Delete a column from report

7. The **EE Legal Name - First** column is not required for this report. Click a data item in the **EE Legal Name - First** column and press **Delete** on the keyboard.

   The entire **EE Legal Name - First** column will have been deleted from the Report.

Re-insert column

8. Change the report view to screen view by selecting the **View | Screen Layout** menu option, or click the **Screen Layout** button.
9. Click the **Query data** button or select the **Report | Query** menu option.

   Notice that the **EE Legal Name - First** column is still in the Query data window.
10. To add the **EE Legal Name - First** column back into the report, select it and then click the **Mark for Insertion** button.

    This column is now marked with the insertion icon.
11. Click **OK** to accept the Query data and display the report.

    EE Legal Name - First is added to the end of the report as the last column—this can be moved back to its original position.

Reposition column

12. Select any data item in the **EE Legal Name - First** column, click, hold, and drag this column to the left of the **EE Legal Name - Last** column.

Delete column from report and query

13. This time, you are going to remove the **EE Legal Name - First, EE Legal Name - Last** and **Birth Date - EE** columns out of the Report and the Query.

    Click the **Query data** button or select the **Report** | **Query** menu option.

14. Select the **EE Legal Name- First** column and **Ctrl+Click** the **EE Legal Name - Last** and **Birth Date - EE** columns to multi-select them.
15. Click the **Remove** button to remove all selected columns from the Query and the Report.

Note: It is more efficient to remove columns from both the Query and the report. If the column is removed from the report only each time the report is run data for this column will be retrieved (as the column still exists in the query). This can result in the report taking longer to run.

16. Click **OK** to accept the Query data and display the report again.

Add new column

17. You now need to add a new column to the report. Return to the **Query** dialog box.
18. Select the **EE Legal Name - Last, First** column from the **Employee Personal Information** folder within the Catalog window on the left.
19. Add it to the Query data window on the right by **double-clicking** on **EE Legal Name - Last, First** from the Catalog window.

    Notice the Mark for Insertion icon on the **EE Legal Name - Last, First** column, when in the Query data window, has been done automatically for you.

20. Click **OK** to accept the Query data and display the report again.

Move column

21. Select any data item in the **EE Legal Name - Last, First** column, click, hold and drag this column to the left of the **EE Street Address** column.

    The **EE Legal Name - Last, First** column will now be positioned to the left of the **EE Street Address** column.

Save report

22. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting **File | Save** from the menu.
23. Enter the File name of **Employee Personal Details**; change the **Save in** file location to **C:\Temp** and click **Save**.
24. Close the **Employee Personal Details** report using the **Close** button; alternatively use the **File** | **Close** menu option.

Workshop 2-1: Creating a Simple List Report

Objective: **Create and save a simple list report as shown below using the General Catalog.**

Scenario: **You require a list of all employees within your organization and the department they work in. This simple list report contains information that can be used as a starting point for more specific reporting requirements.**

Your final report will look similar to the following example:

EE Legal Name-First Last	Employee Age-Years	EE Sex	EE Race	EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name
JAMES LEWIS	75	Male	White-Not Hispanic	3388	Region 3388
RUBIN NEWMAN	75	Male	White-Not Hispanic	3388	Region 3388
LIBBY LARKIN	74	Female	White-Not Hispanic	3388	Region 3388
MARIA CORTEZ	74	Female	Hispanic	3388	Region 3388
WALLCOTT DUNBAR	78	Male	Black-Not Hispanic	3333	Region 3333
GLEN JAROFF	78	Male	Black-Not Hispanic	3333	Region 3333
JAMES BENOWITZ	66	Male	White-Not Hispanic	3333	Region 3333
THOMAS HOWARD	66	Male	White-Not Hispanic	3333	Region 3333
LAURENCE PATEL	75	Male	Asian/Pacific Island	3388	Region 3388
ALAN REID	75	Male	White-Not Hispanic	3388	Region 3388
TODD EMORY	49	Male	White-Not Hispanic	3333	Region 3333
KAREN ANDERSON	48	Female	White-Not Hispanic	3388	Region 3388
BRENDA RUNYON	43	Female	White-Not Hispanic	3388	Region 3388
BRENDA RITTER	43	Female	White-Not Hispanic	3388	Region 3388
BARBARA WILSON	72	Female	Black-Not Hispanic	3333	Region 3333
DOROTHY PATTERSON	72	Female	Black-Not Hispanic	3333	Region 3333
MARIA BISHOP	65	Female	White-Not Hispanic	3388	Region 3388
STEVE LEWELYN	62	Male	White-Not Hispanic	3388	Region 3388

Columns to be added:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
Employee Birth Date Information	Employee Age - Years
Employee Other Personal Information	EE Sex EE Race
Employment Information Org Level And Unit Numbers	EE's HR Org Lvl 3 No
Employment Information	EE's HR Org Lvl 3 Name

Save this report as **C:\Temp\Workshop 2-1.imr**.

Step by Step Guide to Workshop 2-1

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
Employee Birth Date Information	Employee Age - Years
Employee Other Personal Information	EE Sex EE Race
Employment Information Org Level And Unit Numbers	EE's HR Org Lvl 3 No
Employment Information	EE's HR Org Lvl 3 Name

   You can select the columns in two ways: either **double-click** the required column, or click once to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

5. Click **OK** to accept the Query data and display the report.

Save report

6. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.
7. Enter a File name of **Workshop 2-1.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Workshop 2-2: Working with a Simple List Report

Objective: **Use the different options available to change list reports once they have been created.**

Scenario: **As Head of H.R. you are interested in setting up a deferred benefits plan. By looking at the Salaries, Age and Sex of employees in your organization you will have a better idea of who would be most affected by the changes. You have already created a report containing a list of employees and want to organize the report so it is easier to read and contains the required information.**

This workshop uses the report created in **Workshop 2-1**.

You want to modify this report so that it looks similar to the following example:

EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name	EE Legal Name-First Last	Employee Age-Years	EE Sex	EE Annual Salary	EE Race
3388	Region 3388	JAMES LEWIS	75	Male	33999.84	White-Not Hispanic
3388	Region 3388	RUBIN NEWMAN	75	Male	33999.84	White-Not Hispanic
3388	Region 3388	LIBBY LARKIN	74	Female	24499.92	White-Not Hispanic
3388	Region 3388	MARIA CORTEZ	74	Female	24499.92	Hispanic
3333	Region 3333	WALLCOTT DUNBAR	78	Male	25896.00	Black-Not Hispanic
3333	Region 3333	GLEN JAROFF	78	Male	25896.00	Black-Not Hispanic
3333	Region 3333	JAMES BENOWITZ	66	Male	40040.00	White-Not Hispanic
3333	Region 3333	THOMAS HOWARD	66	Male	40040.00	White-Not Hispanic
3388	Region 3388	LAURENCE PATEL	75	Male	43314.96	Asian/Pacific Island
3388	Region 3388	ALAN REID	75	Male	43314.96	White-Not Hispanic
3333	Region 3333	TODD EMORY	49	Male	40040.00	White-Not Hispanic
3388	Region 3388	KAREN ANDERSON	48	Female	39983.04	White-Not Hispanic
3388	Region 3388	BRENDA RUNYON	43	Female	20000.00	White-Not Hispanic
3388	Region 3388	BRENDA RITTER	43	Female	15000.00	White-Not Hispanic
3333	Region 3333	BARBARA WILSON	72	Female	20800.00	Black-Not Hispanic
3333	Region 3333	DOROTHY PATTERSON	72	Female	20800.00	Black-Not Hispanic
3388	Region 3388	MARIA BISHOP	65	Female	21578.96	White-Not Hispanic
3388	Region 3388	STEVE LLEWELYN	60	Male	24099.92	White-Not Hispanic
3333	Region 3333	WILLIAM MANNING	48	Male	25099.92	White-Not Hispanic
3333	Region 3333	ALEXANDER BLOOM	60	Male	37999.92	White-Not Hispanic
3333	Region 3333	TODD BYERS	47	Male	32000.00	White-Not Hispanic

After viewing the report you have decided that you want to add the following columns:

Catalog Folder/Subfolder	Report Column
Compensation And Salary Administration Employee Compensation	EE Hourly Rate EE Annual Salary

Rearrange the columns as follows (to make this easier you may want to change your report to **Screen Layout** view):

Move the **EE's HR Org Lvl 3 No** column to be the first column in the report.

Move the **EE's Org Lvl 3 Name** column to the right of the **EE's HR Org Lvl 3 No** column.

Move the **EE Race** column to the right of the **EE Annual Salary** column.

You are no longer interested in the **EE Hourly Rate** column—delete this column completely from your report. (*Hint: remove from query and report display.*)

Save this report using the **File | Save As** menu option as **C:\Temp\Workshop 2-2.imr**.

Step by Step Guide to Workshop 2-2

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the **Open report** dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select **Workshop 2-1.imr** and select **Open**.

Add data items

4. Click the **Query data** button or select the **Report | Query** menu option.
5. Expand the **Compensation And Salary Administration** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
6. Add the following columns:

Catalog Folder/Subfolder	Report Column
Compensation And Salary Administration Employee Compensation	EE Hourly Rate EE Annual Salary

You can select the columns in two ways: either **double-click** the required column, or click once to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

7. Click **OK** to accept the Query data and display the report.

Rearrange columns

8. Select **Screen Layout** view from the **View** menu, or click the **Screen Layout** button. You will no longer be able to see page headers and footers and the report will maximize the space available on the screen.
9. Select any data item in the **EE's Org Lvl 3 No** column, click, hold, and drag this column to the left of the **EE Legal Name - First Last** column.
10. Select any data item in the **EE's Org Lvl 3 Name** column, click, hold, and drag this column to the left of the **EE Legal Name - First Last** column.
11. Select any data item in the **EE Race** column, click, hold, and drag this column to the right of the **EE Annual Salary** column.

Remove column

12. Click the **Query data** button or select the **Report** | **Query** menu option.
13. The **EE Hourly Rate** column is no longer required for this report, select the **EE Hourly Rate** column from the Query data window.
14. Click the **Remove** button to remove the **EE Hourly Rate** column from the Query and the Report.
15. Click **OK** to accept the Query data and display the report again.

Save and close the report

16. Save this report using the **File | Save As** menu option (do not use the **Save** button on the Standard toolbar as this will result in the existing **Workshop 2-1** being overwritten).
17. Enter a File name of **Workshop 2-2.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.
18. Close out of the **Workshop 2-2.imr** using the **Close** button; alternatively use the **File | Close** menu option.

Summary—Questions

Summary Q & A—Introduction to Impromptu

- What is Impromptu?
- What does the catalog do?
- What are the different components of a catalog?
- How do you know id you are connected to a database?

Summary Q & A—Introduction to Impromptu

How can you create a new report?

What are the steps to creating a report?

Do you need to be connected to the appropriate catalog before opening an existing report?

Is there any difference between removing a column from the report or the query?

How do you re-arrange columns within a report?

Summary—Answers

Summary Q & A—Introduction to Impromptu

What is Impromptu?

- A powerful interactive database query and reporting tool that lets you access up-to-the minute data from any source on your Windows desktop

What does the catalog do?

- Insulates the users from the complexities of the database and SQL
- It is a representation of the data in real business terms
- A bridge to the database

Summary Q & A—Introduction to Impromptu

What are the different components of a catalog?

Folders, Columns, Calculations, Conditions (Filters) and Prompts

How do you know if you are connected to a database?

The Status Line will display the catalog name and the database connection icon will not have a red cross through it

Summary Q & A—Introduction to Impromptu

How can you create a new report?

- Select Template
- Select Data for Report
- Display Report

What are the steps to creating a report?

- New icon = default template (& perhaps wizard)
- File menu - New = selection of templates (& optional use of wizard)

Summary Q & A—Introduction to Impromptu

Do you need to be connected to the appropriate catalog before opening an existing report?

No

Impromptu will automatically prompt you to logon to the catalog if it is not already open

Summary Q & A—Introduction to Impromptu

Is there any difference between removing a column from the report or the query?

- Yes
- If removed from the report only, it will still be included in query
- If removed from the query, it will automatically be removed from the report as well

Summary Q & A—Introduction to Impromptu

How do you re-arrange columns within a report?

Select a data item within the column to be moved

Drag & drop the selected column when indicating line is in correct position

CHAPTER 3

Organizing Data

Contents & Objectives

Contents

1. Overview of Reporting Administration
2. Introduction to Impromptu
3. Organizing Data
4. Customizing Data
5. Crosstab Reports
6. Functions
7. Formatting
8. More About Filters
9. Snapshots
10. Drill-Through Reports
11. Frames
12. Course Close

Objectives—Organizing Data

In this section we will:

- Filter—to focus on critical information
- Sort—to organise order of appearance
- Group—group similar items together
- Group and Associate Data

Filtering Data

A filter is a set of criteria you apply to a report to change the focus of the report and to emphasize information that is important to you by filtering out what is unnecessary.

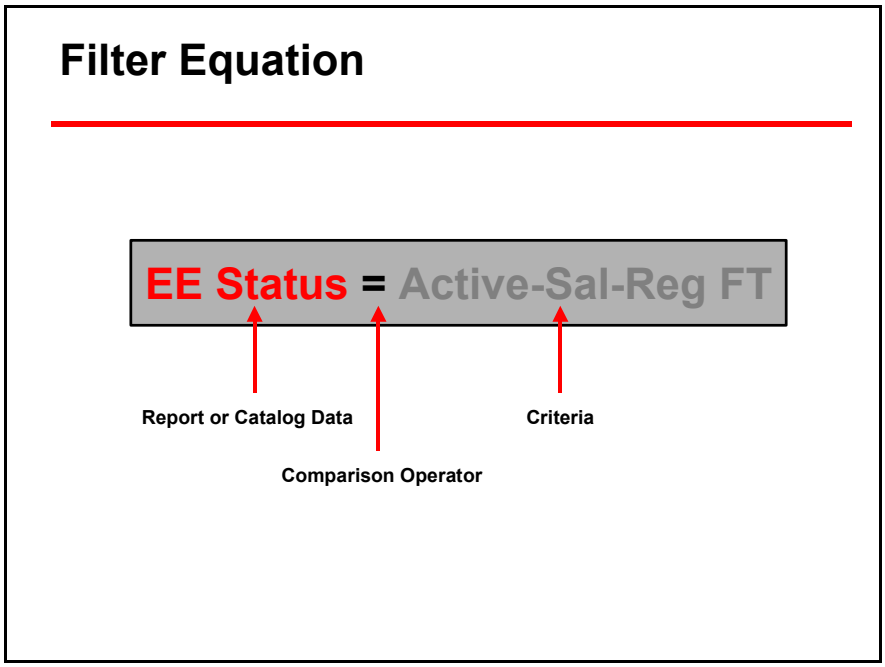
For example, you may only be concerned with Employees from the Finance Department for this company; hence you would filter by the Finance Department.

Filtering will allow you to view only the information that is important to you.

There are three methods you can use to do this:

- Using the **Filter** button.
- Using the **Filter Drop-Down** button.
- Using the **Query** dialog box **- Filter** tab (this is discussed further in the More About Filters section of this guide).

The Filter Expression



Impromptu filters are basic expressions that result in true or false values. When a row in the data matches the criteria it is included in the report. The Cyborg-delivered catalogs contain some commonly used pre-defined filters.

Filter expressions can be as simple or as complex as you require.

In the above example, the left side refers to the **Catalog/Report Column** and the right side the **Values**—either **numbers, dates, times or strings** (characters) which the Catalog/Report Column must match.

Comparison operators specify what happens to the values on either side of the expression. In the above example the comparison operator is the **= (equal sign)**, other operators such as > (**greater than**), < (**less than**) and so forth, can also be used when filtering data.

Logic—The Difference Between ‘And’, ‘Or’ and ‘In’

And

If you want to filter your report on more than one item from different columns you will use the **‘and’** operator.

For example, if you wish to view all of the Active-Sal Reg FT that live in the city of Chicago, the expression would be as follows: **EE Status = ‘Active-Sal Reg FT’ and City = ‘Chicago’**.

Or

If you want to filter your report on more than one item from one column you will use the **‘or’** operator.

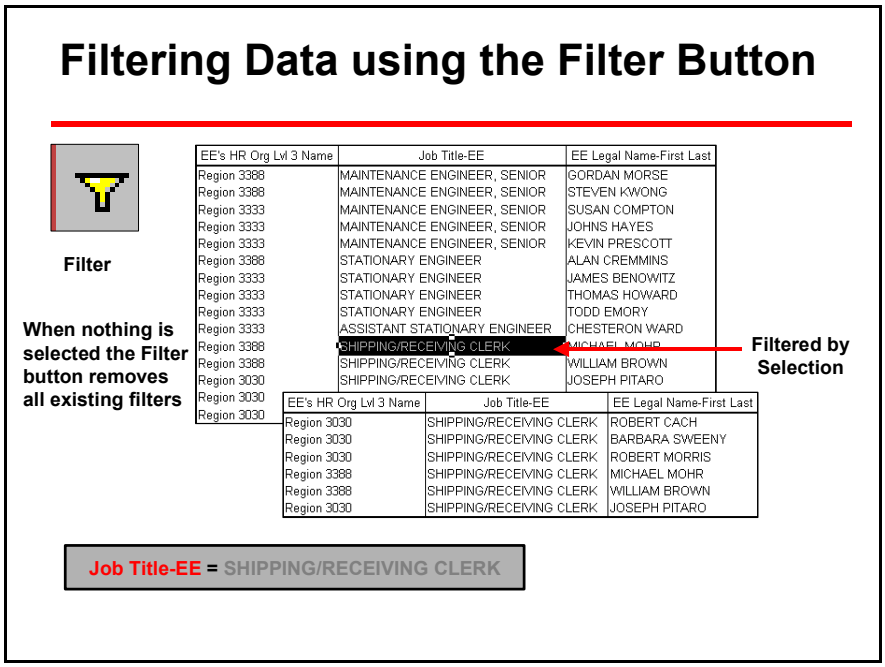
For example, if you wish to view Employees from the United States or Canada, the expression would be as follows: **Country = ‘United States’ or Country = ‘Canada’.**

In

Another way to achieve the same results as when using the **‘or’** operator is to use the ‘**in**’ operator. You will find that this operator is a lot quicker and easier to use.

For example, if you use the **‘in’** operator for the last example shown above, your expression would be as follows: **Country in (‘United States’ , ‘Canada’).**

Filtering Data using the Filter Button



Select one or more data items using **Ctrl+Click** from within one or more columns as shown above.

Click the **Filter** button (on the Standard toolbar).

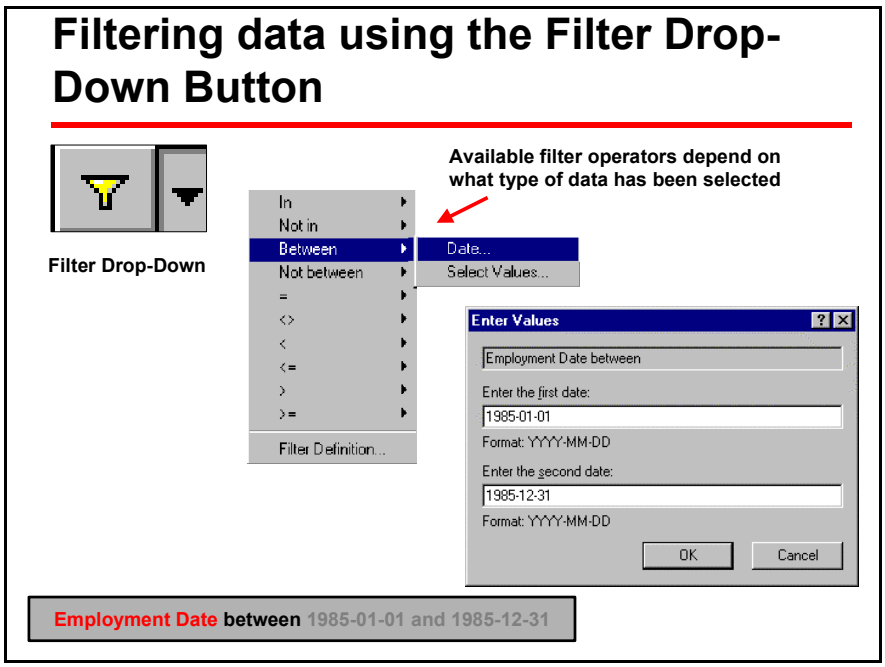
The data will be narrowed to view only the data items selected.

Note: The number of rows displayed will have been reduced.

To remove the filter re-select the **Filter** button (when no data items are selected).

Select **OK** to the message: **'The filter will be removed from this report'**.

Filtering Data using the Filter Drop-Down Button



Select a data item from a column to which the filter is to be applied.

Click the **Filter Drop-Down** button (on the Standard toolbar), this will display the available menu options as shown above.
The data can now be narrowed to view only the data items required.

Selection: This will apply a filter based on the data items you had selected prior to clicking the filter button.

String, Number or Date: This will apply a filter based on the values entered (a dialog box into which you can enter items will be displayed).

Select Values: This will provide a dialog box showing the different data items available in the selected column—the required items can then be selected.

To remove the filter you can select the **Filter** tab from the **Query** dialog, then click **Clear**.

Sorting Data

You can sort the information in your report to organize how the data is presented.

For example Employees for each Organizational Unit can be sorted by Employment Date.

By default, Impromptu does not sort data; it will be displayed in the order it was retrieved from the database.

You can sort data by:

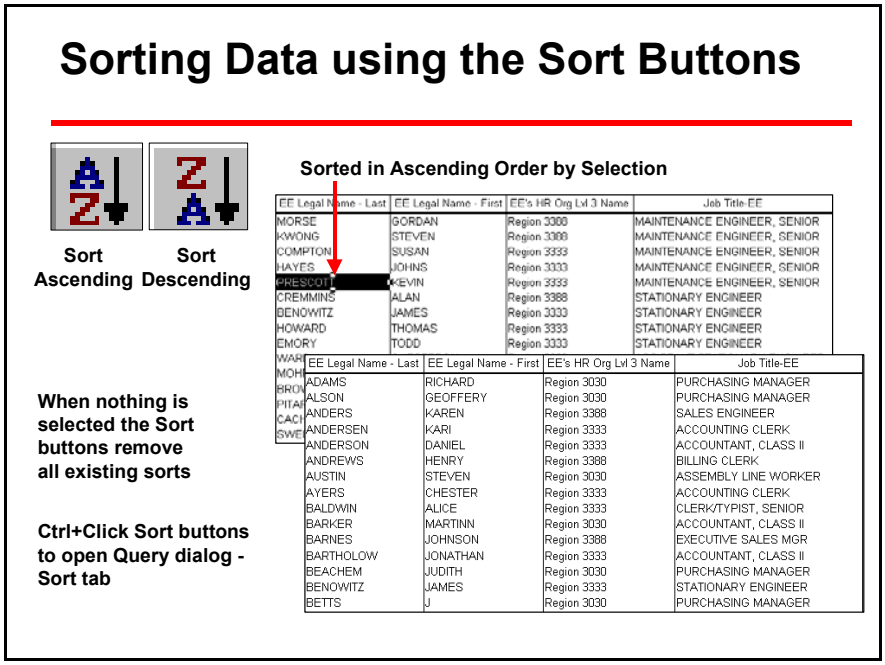
- **Characters** in ascending order (A to Z), or descending order (Z to A).
- **Numbers** in ascending order (0 to 10), or descending order (10 to 1).
- **Dates** from the earliest date to the latest (1995 to 1999), or latest date to the earliest (1999 to 1995).

Sorting will allow you to view the information in a more logical order.

There are two methods you can use to do this:

- Using the **Sort** (sort ascending), or (sort descending) buttons.
- Using the **Query** dialog box **- Sort** tab.

Sorting Data using the Sort Buttons



Select a data item from within the column to which the sort is to be applied.

Click the **Sort Ascending** button (on the Standard toolbar).

The data will be sorted into ascending order by the selected column.

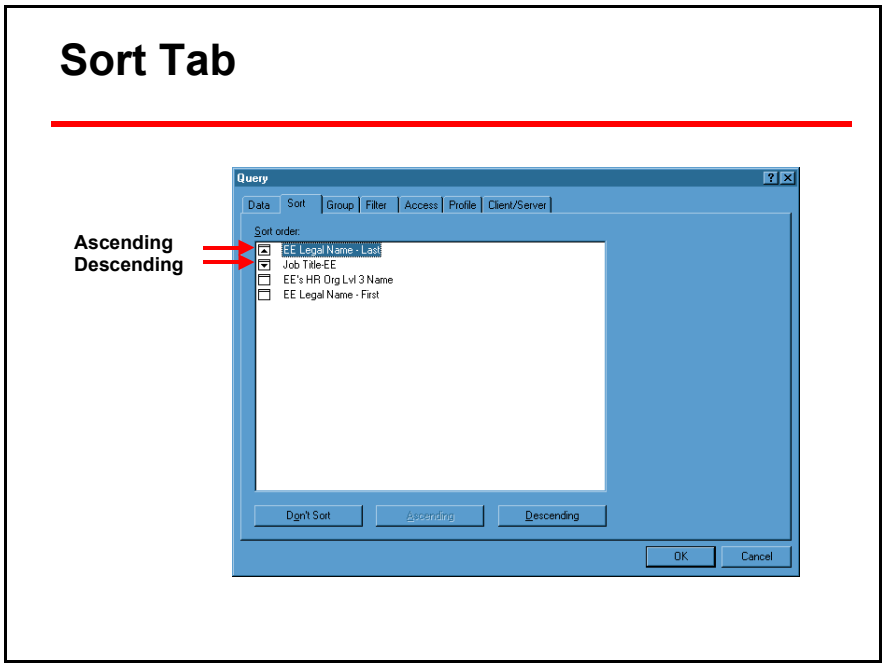
To remove the sort re-select the **Sort Ascending** button (while no data items are selected).

Select **Yes** to the message: **'All sort items will be deleted'**.

When you sort on more than one column the second sort is applied within the first sort as shown in the following example:

EE's HR Org Lvl 3 Name	Job Title-EE	EE Legal Name - Last, First	Employment Date
Region 3030	ACCOUNTANT, CLASS II	BARKER, MARTINN A	03/10/1983 12:00AM
Region 3030	ACCOUNTING CLERK	SWALTER, STEVEN Y	22/07/1980 12:00AM
Region 3030	ACCOUNTING CLERK	SANDERS, STEVEN S	22/07/1980 12:00AM
Region 3030	ACCOUNTING CLERK	HAMMER, JAMES B.	22/07/1983 12:00AM
Region 3030	ASSEMBLY LINE WORKER	LYNDEN, ANNETTE C.	23/11/1980 12:00AM
Region 3030	ASSEMBLY LINE WORKER	AUSTIN, STEVEN	17/12/1978 12:00AM
Region 3030	ASSEMBLY LINE WORKER	JONES, JERRY	01/01/1982 12:00AM
Region 3030	ASSEMBLY LINE WORKER	JOHNSON, WALTER D	10/01/1984 12:00AM
Region 3030	CLERK/TYPIST, SENIOR	JORDAN, WILLIAM M.	01/01/1981 12:00AM
Region 3030	CLERK/TYPIST, SENIOR	MAGUIRE, HENRY S.	28/02/1984 12:00AM
Region 3030	CLERK/TYPIST, SENIOR	SULLIVAN, MIKE M.	28/02/1984 12:00AM

Sorting Data using the Query Dialog Box



Data can be sorted using the **Query** dialog box | **Sort** tab, this will allow for the sorting to be applied when the report is created. There are two ways in which you can access the **Query** dialog box **| Sort** tab:

- **Report** | **Query** menu option | **Sort** tab.
- **Ctrl+Click Sort** **Ascending** or **Descending** buttons.

Select the column to which the sort is to be applied.

Select the sort type—**Ascending** or **Descending**.

The column will be moved to the top of the **Sort order** list and its column icon will now show an upward (sort ascending), or downward (sort descending) facing arrow depending on the sort order selected.

To remove the sort from a particular column select the required column and click the **Don't Sort** option.

The order in which the sorts are performed is dependent upon how far from the top of the Sort order list the column is. For the example on the previous page the Org Name column will be sorted 1st, with the Job Title column being sorted 2nd.

Sort columns can be dragged up and down the priority Sort order list by holding down the left mouse button.

Grouping Data

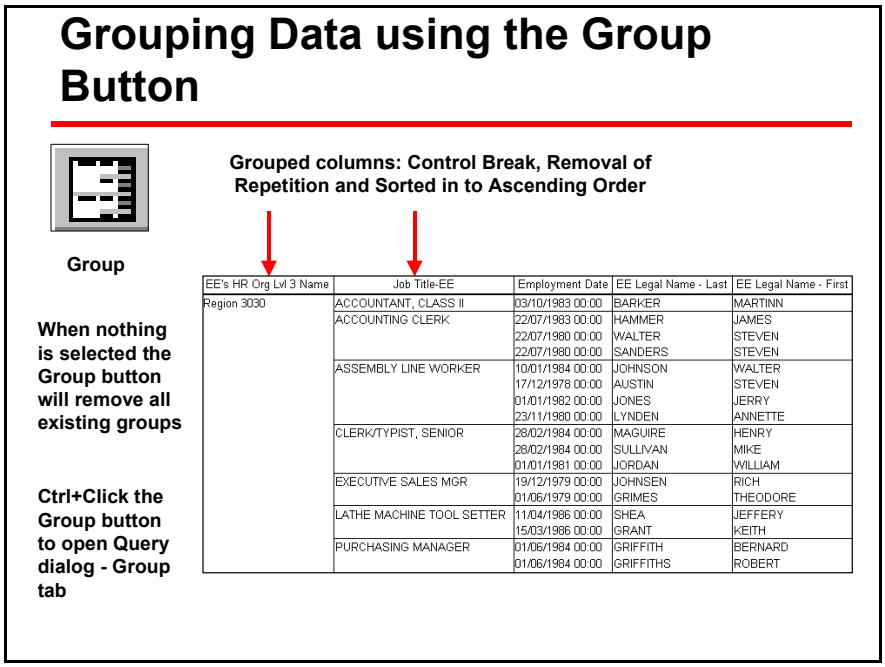
When data is grouped, Impromptu sorts the column to be grouped, removes duplicate values and inserts control breaks after each group.

For example, if you are looking at the Employee's HR Org Level 3 Name you could group all of them by their name, this would show the Organization Level once with all their respective Employees, thus eliminating duplicate data items for this column.

There are two methods you can use to do this:

- Using the **Group** button.
- Using the **Query** dialog box - **Sort** tab.

Grouping Data using the Group Button



Select a data item from within the column to which the grouping is to be applied.

Click the **Group** button (on the Standard toolbar).

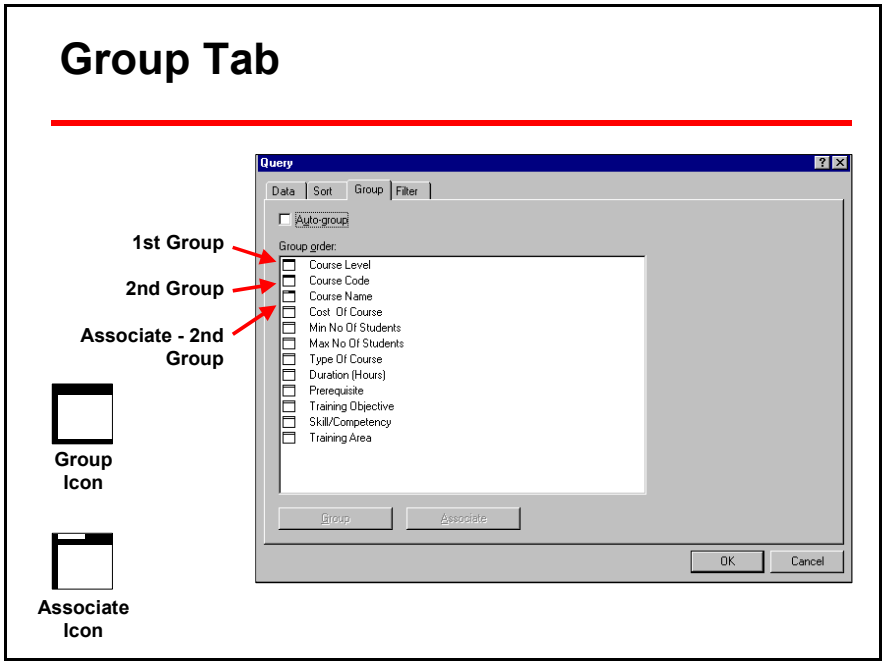
The column will be grouped by like data items (the report is also automatically sorted by this column).

To remove the grouping re-select the **Group** button (while no data items are selected).

Select **Yes** to the message: **'All grouped data will be ungrouped'**.

When you group more than one column the second grouping is applied within the first group as shown in the example above.

Grouping Data using the Query Dialog Box



Data can be grouped using the **Query** dialog box | **Group** tab, this will allow for the grouping to be applied when the report is created. There are two ways in which you can access the **Query** dialog box | **Group** tab:

- **Report** | **Query** menu option - **Group** tab.
- **Ctrl+Click Group** button.

Select the column to which the grouping is to be applied and select **Group**.

The column will be moved to the top of the **Group order** list and its column icon will now be shown with a thick black line indicating that it is a grouped column .

To remove the grouping from a particular column select the appropriate column and click the **Group** option which has now become the **Ungroup** button.

The order in which the grouping is performed is dependent upon how far from the top of the Group order list the column is. The example on the previous page shows that the Course Level column will be grouped 1st, with the Course Code column being grouped 2nd.

Note: The Course Name column has been associated to the Course Code column this is covered over the next few pages.

Grouped columns can be dragged up and down the priority Group order list by holding down the left mouse button.

Demo 3-1

The purpose of this demo is to Filter reports using the Filter button, and to Sort and Group records using the Query dialog box Sort and Group tabs.

Open report

1. Select **File | Open** from the menu, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Employee Salary Details.imr** report followed by the **Open** option.

Sort the data

4. Click the **Query data** button, or select the **Report | Query** menu option.

Note: Using the Group and Sort tabs in the Query dialog box is a much more efficient way of organizing your data, than using the buttons once a report has been generated. If the Sorting and Grouping is done at the initial time of setting up a report, the database will only be accessed once, thus saving valuable processing time.

Sort tab

5. Select the **Sort** tab.
6. Select **Job Title-EE** and click the **Ascending** button.

   An upward-pointing triangle will appear in the **Position Name** column icon, indicating the type of sort applied. Notice also that the order in which the columns are displayed will have changed.

Group tab

7. Select the **Group** tab.
8. Select **Job Salary Grade-EE** and click the **Group** button.

   A black bar will appear at the top of the **Position Grade** column icon, indicating that a Group has been applied.
9. Select and Group **Job Title-EE**.

10. Click back on the **Sort** tab. Notice that the **Job Salary Grade-EE** column has also been sorted, this has been done automatically as a result of the Grouping applied to this column.
11. Click **OK** to apply the changes to your report.

    There will be no more repeating values in the **Job Salary Grade-EE** or **Job Title-EE** columns. Both these columns will now also be sorted into ascending order.

Sort

12. Return to the Query dialog box and click the **Sort** tab, alternatively click the **Sort** icon while holding down **Ctrl** to go direct to the **Query** dialog box | **Sort** tab.
13. Select the **EE Annual Salary** column and click the **Descending** sort button.

    A downward-pointing triangle will appear within the **EE Annual Salary**, column icon indicating the type of sort applied.
14. Click **OK** to apply the changes to your report.

Filter button

15. You are interested in the **30 Grade** and want to focus on this range and not the other **Grades**.
16. Click one of the **30 Grade** data items in the **Job Salary Grade-EE** column and click the **Filter** button.
17. The **30 Grades** will now be the only ones displayed in the report, there will only be **12 records** displayed.
18. You could further narrow the focus by filtering down on the **Purchasing Manager** data item in the **Job Title-EE** column by clicking on one occurrence of this data item in the **Job Title-EE** column and clicking the **Filter** button.
19. The **Purchasing Manager** job will now be the only one displayed in the report.

Filter data

20. You would now like to concentrate on Employees who have an **Annual Salary** of less than $**45000.00**.
21. Select any data item from within the **EE Annual Salary** column followed by the **Filter Drop-Down** button.
22. Select the **< (less than)** sign and then select the **Number** option.
23. Type in **45000.00** and click **OK**.

Close report

24. Close the report without saving any of your changes, using the **Close** button, alternatively use the **File** | **Close** menu option.

Grouped and Associated Data

Grouped and Associated Data

Grouped Column Associated Column

Job Code	Job Title-EE	Employment Date	EE Legal Name-First Last	EE Annual Salary
10500	MAINTENANCE ENGINEER, SENIOR	21/09/1982 00:00	SUSAN COMPTON	13841.36
		01/12/1983 00:00	JOHNS HAYES	9194.12
		20/05/1984 00:00	KEVIN PRESCOTT	16640.00
		30/08/1984 00:00	GORDAN MORSE	20799.60
		30/06/1985 00:00	STEVEN KWONG	19655.64
10600	STATIONARY ENGINEER	15/01/1966 00:00	JAMES BENOWITZ	40040.00
		16/01/1966 00:00	THOMAS HOWARD	40040.00
		15/06/1973 00:00	TODD EMORY	40040.00
		01/12/1985 00:00	ALAN CREMMINS	34016.32
10650	ASSISTANT STATIONARY ENGINEER	01/03/1986 00:00	CHESTERON WARD	27508.00
15405	SHIPPING/RECEIVING CLERK	14/02/1982 00:00	ROBERT CACH	9056.32
		16/11/1983 00:00	BARBARA SWEENY	10201.88
		01/08/1984 00:00	ROBERT MORRIS	11086.40
		03/08/1984 00:00	MICHAEL MOHR	11089.52
		01/07/1985 00:00	WILLIAM BROWN	15694.90
		15/02/1986 00:00	JOSEPH PITARO	8840.00

The Associated Column has a one-to-one relationship with the grouped column

Association—This takes the first value within each group and makes the rest invisible (regardless of the values of the column). It is more efficient to associate these types of columns rather than use multiple groupings as this will save database processing time.

You can associate a column with any other grouped column within the report providing the column has a one-to-one relationship with the grouped column. If the column has a one-to-many relationship then only the first data item will appear. For example, if Employee Number is incorrectly associated to Job Code, only the first Employee Number will be shown even if many Employees hold the same Position.

The example above shows that the Job Title can be associated to Job Code as they have a one-to-one relationship—each Job Title can be linked to a Job Code. Two Job Titles cannot have the same Job Code without a different Job Code Extent.

Association is selected within the **Query** dialog box **- Group** tab.

Select the column to which the association is to be applied and select the **Associate** button.

The column icon of the associated column will be shown with a half-black line indicating that it is associated ❒.

To remove the association from a particular column select the appropriate column and click the **Dissociate** button.

When a grouping is removed all its associated columns will automatically be dissociated.

Demo 3-2

The purpose of this demo is to Group and Associate data in order to create a well ordered and efficient report.

Open catalog

1. Open the Training Administration catalog

Create new report

2. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
3. Select the **Simple List** template and click **OK**.

   The Query dialog box will appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - Last, First EE Number
Employee Training Administration EE Courses Scheduled/Taken	Course Name Training Year Course Start Date

You can select the columns in two ways, either double-click the required column, or click once to select it and then click the Add option. You can select multiple columns using the Ctrl and Shift keys.

Rearrange data

5. Move the **EE Number** column so that it appears before the **EE Legal Name - Last, First** column.

Group data

6. Select the **Group** tab while still inside the **Query** dialog box.
7. Select the **EE Number** and click **Group**.
8. Click **OK** to accept the Query data and display the report.

   The **EE Number** column is grouped and all repetitions are removed.

Associate

The **EE Legal Name - Last, First** column also has repetitive entries, but they are the same for each group of **EE Number**. The **EE Legal Name - Last, First** column has a one-to-one relationship with the **EE Number** column.

9. Click the **Query data** button, or select the **Report | Query** menu option.
10. Select the **Group** tab.
11. Select **EE Legal Name - Last, First** and then click **Associate**.

    Notice the half-black line at the top of the **EE Legal Name - Last, First** column icon. This denotes that an Association has been applied.

Note: The group and associate should really have been done at the same time, before executing the query and running the report.

12. Click **OK** to accept the Query data and display the report.

    There will no longer be any repeating values in the **EE Legal Name - Last, First** column.

Close report

13. Close the report without saving your changes, using the **Close** button, alternatively use the **File | Close** menu option.

Workshop 3-1: Organizing Data to change the Perspective of the Report

Objective: **Use the different options available to sort, group and reorganize data within list reports.**

Scenario: **Your company is going to consult its employees about introducing a deferred benefits plan. The plan could potentially affect employees with a salary between 25,000 and 75,000. In order to tell each employee what the changes mean to him or her, sort and group the report by age and sex as this is the starting point for calculating benefit contributions.**

Open the workshop saved earlier as **Workshop 2-1.imr**.

You want to modify this report so that it looks similar to the following example:

Employee Age-Years	EE Sex	EE Legal Name-First Last	EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name	EE Annual Salary
40	Male	ALAN EDWARD CREMMIN	3388	Region 3388	34016.32
42	Female	JUNE MEYER	3388	Region 3388	25000.00
	Male	J.T BETTS	3030	Region 3030	32000.00
		DAVID MARGOLIS	3388	Region 3388	40500.00
45	Female	LO CHOU	3388	Region 3388	37752.00
47	Male	CHESTERON WARD	3333	Region 3333	27508.00
		LEONARD THEISSEN	3388	Region 3388	30998.76
		TODD BYERS	3333	Region 3333	32000.00
48	Female	KAREN ANDERSON	3388	Region 3388	39983.04
	Male	WILLIAM MANNING	3333	Region 3333	25099.92
49	Male	TODD EMORY	3333	Region 3333	40040.00

Move the **Employee Age - Years** column to be the first column in the report.

Move the **EE Sex** column to be the second column in the report.

Sort the report into **Ascending** order by the **Employee Age - Years** column.

Add the following column to your report:

Catalog Folder/Subfolder	Report Column
Compensation And Salary Administration Employee Compensation	EE Annual Salary

You no longer require the **EE Race** column delete it from your report.

Group the report using the **Employee Age - Years** and **EE Sex** columns to eliminate repeating values.

Filter the report to include only **Annual Salaries between $25000 and $75000** (use the Filter Drop-Down button).

Apply a 3rd sort to the report as follows: **EE Annual Salary - Ascending**.

Save this report using the **Save As** option as **C:\Temp \Workshop 3-1.imr**.

Step by Step Guide to Workshop 3-1

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select **Workshop 2-1.imr** followed by the **Open** option.

Move columns

4. Select any data item in the **Employee Age - Years** column, click, hold, and drag this column to the left of the **EE Legal Name - First Last** column.
5. Select any data item in the **EE Sex** column, click, hold, and drag this column to the left of the **EE Legal Name - First Last** column.

Sort data

6. Select an item inside the **Employee Age - Years** column and click the **Sort Ascending** button.

Add data item

7. Click the **Query data** button or select the **Report | Query** menu option.
8. Expand the **Compensation And Salary Administration** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
9. Add the following column:

Catalog Folder/Subfolder	Report Column
Compensation And Salary Administration Employee Compensation	EE Annual Salary

You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

Remove column

10. The **EE Race** column is not required for this report, select the **EE Race** column from the Query data window.
11. Click the **Remove** button to remove the **EE Race** column from the Query and the Report.
12. Click **OK** to accept the Query data and display the report again.

Group data

13. Select a data item in the **Employee Age - Years** column and click the **Group** button.
14. Select a data item in the **EE Sex** column and click the **Group** button.

Filter data

15. Select any data item from the **EE Annual Salary** column and click the **Filter Drop-Down** button.
16. Select the **Between** option and then select the **Number** option.
17. Into the First Number field type **25000**.
18. Into the Second Number field type **75000**.
19. Click **OK**.

Sort data

20. Click the **Query data** button or select the **Report** | **Query** menu option.
21. Select the **Sort** tab.
22. Select the **EE Annual Salary** column and click the **Ascending** button.
23. Click **OK** to accept the Query data and display the report again.

Save and close report

24. Save this report using the **File** | **Save As** menu option (do not us the **Save** button on the Standard toolbar as this will result in the existing **Workshop 2-1.imr** being overwritten).
25. Enter a File name of **Workshop 3-1.imr**—change the **Save in** file location to **C:\Temp** and click **Save**.
26. Close **Workshop 3-1.imr**, using the **Close** button; alternatively use the **File** | **Close** menu option.

Workshop 3-2: Organizing Data to make Reports easier to Read

Objective: **Use the different options available to sort, group and reorganize data within list reports to make them easier to read.**

Scenario: **The accounts department needs to start calculating revised budgets for wages after the introduction of the deferred benefits plan. You have been asked to provide the necessary details. The accounts department wants to be able to provide revised budgets by organizational unit so employees should be listed in this fashion.**

Open the workshop saved earlier as **Workshop 2-2.imr**.

You want to modify this report so that it looks similar to the following example:

EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name	EE Sex	EE Legal Name-First Last	Employee Age-Years	EE Annual Salary
3030	Region 3030	Female	ANNA MARIE COLLINS	59	39657.60
			JUDITH TEACHEN	59	36720.00
			JUDITH BEACHEM	59	34000.08
			BARBARA SWEENY	56	10201.88
			ANNETTE LYNDEN	53	8710.00
		Male	RICH DANIEL JOHNSEN	66	68499.96
			THEODORE GRIMES	58	62999.82
			BERNARD GRIFFITH	58	50000.08
			ROBERT GRIFFITHS	58	50000.08
			RICHARD ADAMS	59	38221.44
			MARTINN BARKER	52	33000.00
			J.T BETTS	42	32000.00
			GEOFFERY ALSON	59	31999.92
			JAMES HAMMER	63	21172.84
			JEFFERY SHEA	44	20696.00
			KEITH GRANT	37	19760.00
			STEVEN SWALTER	63	18322.20
			STEVEN SANDERS	63	18322.20
			HENRY MAGUIRE	52	14099.80
			JERRY JONES	54	13302.64
			MIKE SULLIVAN	52	11544.00
			WILLIAM JORDAN	58	11440.00
			ROBERT MORRIS	63	11086.40

Group the following columns: **EE's HR Org Lvl 3 No, EE Sex**.

Move the **EE Sex** column to be the third column in the report.

Since the **EE's HR Org Lvl 3 Name** and **EE's HR Org Lvl 3 No** have a one-to-one relationship. Associate the **EE's HR Org Lvl 3 Name** column.

Sort the **EE Annual Salary** column into **Descending** order.

At this point run the report to the screen—there are still duplicates for the **EE's HR Org Lvl 3 Name**. This is due to the **EE Sex** column being grouped before the **EE's HR Org Lvl 3 Name** column was associated.

Re-display the Group tab and drag the **EE's HR Org Lvl 3 Name** column to appear above the **EE Sex** column and re-display the report - the duplicate **EE's HR Org Lvl 3 Names** will now have been eliminated.

Save this report using the **Save As** option as **C:\Temp\Workshop 3-2.imr**.

Step by Step Guide to Workshop 3-2

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select **Workshop 2-2.imr** followed by the **Open** option.

Group data

4. Select a data item in the **EE's HR Org Lvl 3 No** column and click the **Group** button.
5. Select a data item in the **EE Sex** column and click the **Group** button.

Move column

6. Select any data item in the **EE Sex** column, click, hold, and drag this column to the left of the **EE Legal Name - First Last** column.

Associate data

7. Click the **Query data** button or select the **Report | Query** menu option.
8. Select the **Group** tab.
9. Select **EE's HR Org Lvl 3 Name** and click the **Associate** button.

Sort data

10. Select the **Sort** tab.
11. Select **EE Annual Salary** and click the **Descending** button.
12. Click **OK** to accept the Query data and display the report.

    At this point there are still duplicates for the **EE's HR Org Lvl 3 Name**. This is due to the **EE Sex** column being grouped before the **EE's HR Org Lvl 3 Name** column was associated.

Group data

13. Click the **Query data** button or select the **Report** | **Query** menu option.
14. Select the **Group** tab.
15. **EE's HR Org Lvl 3 Name** needs to come in between **EE's HR Org Lvl 3 No** and **EE Sex** columns.

    To move this column, click and hold on **EE's HR Org Lvl 3 Name** in the Query dialog box - Group tab and drag and drop onto **EE's HR Org Lvl 3 No**.
16. Click **OK** to accept the Query data and display the report.

    The duplicate **EE's HR Org Lvl 3 Names** will now have been eliminated.

Save report

17. Save this report using the **File | Save As** menu option (do not us the **Save** button on the Standard toolbar as this will result in the existing **Workshop 2-2.imr** being overwritten).
18. Enter a file name of **Workshop 3-2.imr**. Change the **Save in** file location to **C:\Temp** and click **Save**.

Close report

19. Close the **Workshop 3-2.imr**, using the **Close** button, alternatively use the **File** | **Close** menu option.

Summary—Questions

Summary Q & A—Organizing Data

- What are Filters used for?
- What does Group do that Sort Doesn't?
- Is there any difference between using the Sort button and the Sort tab?
- What is the principle to Grouping and Associating?

Summary—Answers

Summary Q & A—Organizing Data

What are Filters used for?

- To narrow the focus of a report to critical data

What does Group do that Sort Doesn't?

- Adds a control break
- Removes repeating values

Summary Q & A—Organizing Data

Is there any difference between using the Sort button and the Sort tab?

Only in the processing, not to the end report

More efficient to avoid multiple visits to the database

Summary Q & A—Organizing Data

What is the principle to Grouping and Associating?

- There has to be a one-to-one relationship between the grouped and associated column

CHAPTER 4

Customizing Data

Contents & Objectives

Contents

1. Overview of Reporting Administration
2. Introduction to Impromptu
3. Organizing Data
4. Customizing Data
5. Crosstab Reports
6. Functions
7. Formatting
8. More About Filters
9. Snapshots
10. Drill-Through Reports
11. Frames
12. Course Close

Objectives—Customizing Data

In this section we will:

- Create Calculations
- Create Conditional Statements and use them in Calculations
- Add List Headers & Footers
- Add Report Summaries

Calculations

Calculations

- A calculation creates a new data item based on existing data items or calculations.
- There are three main types of calculations:
  - Arithmetic - / * + -
  - Logical If/Then/Else
  - Summary Sum, Average, Count

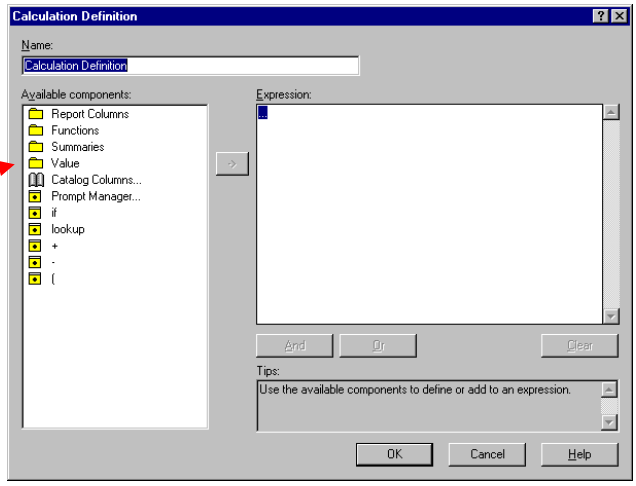
A calculation is a formula you define to perform operations on the stored data. You can use calculations to obtain information that is not directly available from your system's data source.

For example, you can define a calculation that shows the number of days between the Absence start date and today's date. Or define a calculation to show the Net Salary based on a Gross Salary value less any Tax deductions.

You can add, subtract, multiply and divide numeric data. You can also perform date, time and interval calculations. You can use calculations to compare one value with another to aid decision-making, to join them together for clarity, or to summarize information to show data such as totals and averages.

Adding a Calculated Column

Calculation Definition Dialog Box



Only logical components will be displayed—dependent on the preceding expression component

Calculated columns are added using the **Query** dialog box | **Data** tab | **Calculation** button this will display the **Calculation Definition** dialog box.

- **Name:** Enter a name for the calculated column.
- **Available components window:** Select the items to be used in the calculated expression.
- **Expression window:** Text box which shows expressions while they are being built and for future reference.

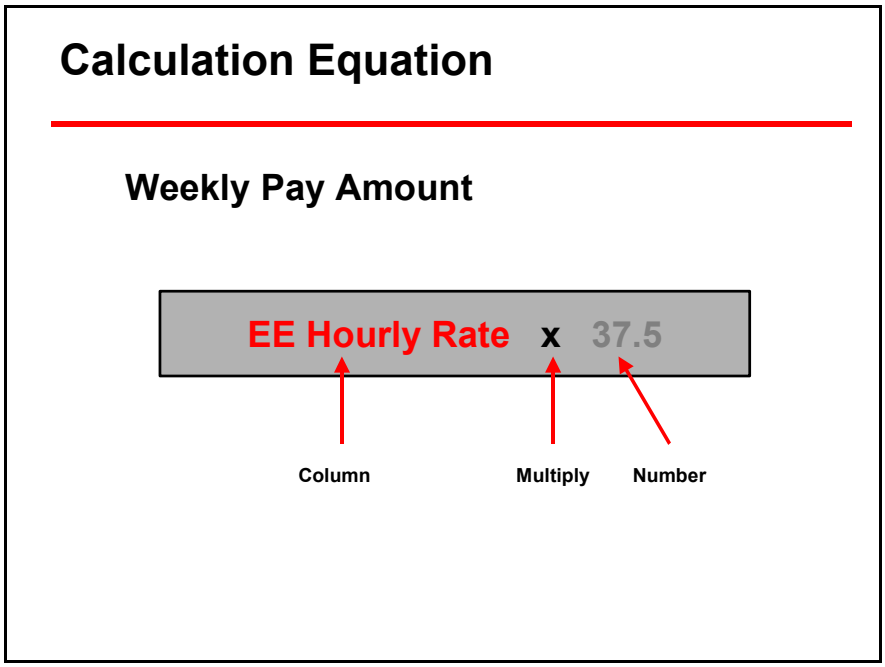
  The expression window can only be filled out using the mouse—you cannot type directly into it and it is **case-sensitive**.

  To delete items from the expression select them and press the **Delete** key.
- **And:** Adds an **'and'** to the expression.
- **Or:** Adds an **'or'** to the expression.
- **Clear:** This will delete the current expression from the expression window.

- **Tips:** This will provide tips as you build the expression.

  If there is an error in the expression then an error message will be displayed when you try to save the expression and create the calculated column.
- **OK:** Selecting **OK** will return you to the Query data window where a new column will be added with the name entered.
- **Cancel:** This will exit the Calculation Definition dialog box without saving your changes.
- **Help:** Accesses the help files.

The Calculation Expression



A calculation can be created using the following items from the **Available components** window within the Calculation Definition dialog box:

Report Columns:	**Columns within the report used in calculations** (for example, the Gross Salary and Tax Deductions columns are used to calculate Net Salary).
Functions:	**Add-days** (this will add a number of days to the date specified).
Values:	**Numbers, Strings, Dates**.
Summaries:	**Total, Average, Minimum, Maximum**.
Catalog Columns:	**Columns in the catalog (not report) used in calculations** (for example, the Gross Salary and Tax Deductions columns are used to calculate Net Salary).
Statements:	**If..Then..Else**.
Operators:	**+ (add), - (subtract), * (multiply), / (divide)**.

Demo 4-1

The purpose of this demo is to generate a new Calculated column.

Open the catalog

1. Open the Payroll catalog.

Create a new report

2. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
3. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.
4. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking**, or **clicking once** on the + to the left of the folder.

Add data items

5. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
	EE Number
Compensation & Salary Administration Employee Compensation	EE Pay Frequency
	EE Hourly Rate
	EE Annual Salary

You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

Create calculation

6. Click the **Calculate** button to open the Calculation Definition dialog box.
7. Type a column heading name of **Weekly Pay Amount**.
8. The calculation you are about to enter is going to work out what the Weekly Pay is, the Expression will be as follows:

   EE Hourly Rate * 37.5
9. Double-click the **Report Columns** folder in the Available components window, in order to expand it, and double-click the **EE Hourly Rate** column to add this to the Expression window.
10. Double-click the **multiply** * sign.
11. Double-click the **Value** option, double-click the **number** option, type **37.5** in the Expression window and press **Enter**.
12. Click **OK** to accept the calculation definition—this will return you to the Query dialog box - Data tab which will now show a new column called **Weekly Pay Amount.** Notice the icon for this column .

Display report

13. Click **OK** to accept the Query data and display the report.
14. Your report will now contain the new calculated column displaying the **Weekly Pay** A**mount**, based on the calculation added.

Save report

15. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting **File | Save** from the menu.
16. Enter a File name of **Weekly Pay Amount.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Close report

17. Close this report using the **Close** button, alternatively use the **File | Close** menu option.

Conditional Statements

If . . . Then . . . Else . . . Statements

```
if (Salary <= 20000) then (‘Low’) else if
(Salary between 20001 and 50000)
then ('Good') else if
(Salary > 50001) then ('High') else NULL
```

The **if…then…else…** statement enables you to choose between two or more results based on logical conditions that are entered.

The example shown above will return the result ‘Low’ if the Salary is less than $20000, ‘Good’ if the Salary is between $20001 and $50000, ‘High’ if the Salary is greater than $50001, otherwise it will return ‘NULL’.

Null can be used to indicate that the condition is false and nothing is required.

if (Job Title = ‘Purchasing Manager’) then (Salary * 1.15) else (Salary)

This statement will apply an increase of 15% to all those employed as Purchasing Managers while leaving Salaries for all other employees unchanged.

Demo 4-2

The purpose of this demo is to build a logical If…Then…Else statement.

Open report

1. Select **File | Open** from the menu, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Employee Salary Details.imr** report followed by the **Open** option.

Add column

4. Click the **Query data** button or select the **Report | Query** menu option.
5. You are going to add a calculated column to the report based on a conditional statement.

   Click the **Calculate** button to open the Calculation Definition dialog box.
6. Type a column heading name of **High or Low Annual Salary**.

Create calculation

7. The calculation you are about to enter is to create a new column based on the **EE Annual Salary** column which will return a result of **High** or **Low** in text:

   if (EE Annual Salary between 0 and 30000) then ('Low') else ('High')
8. In the Available components window, double-click **if** to add it to the Expression window.
9. Double-click the **Report Columns** folder in the Available components window to expand it and double-click the **EE Annual Salary** column to add it to the Expression window.
10. Double click the **between** option.
11. Double click **number**, enter **0** into the expression window and press **Enter**.
12. Double-click the **and** option.
13. Double-click **number**, enter **30000** into the expression window and press **Enter**.

14. Double-click the **close bracket)**.

    The **then** option will automatically be added to your expression. You are now prompted to enter a value to be placed in the column, describing the range of values that meet the criteria.

15. Double-click the **Value** folder to expand it and then double-click the **string** option. Speech marks are added to the Expression window into which text can be typed.
16. Enter the text **Low** and then press **Enter**.
17. Double-click the **close bracket)**.

    The **else** option will be automatically added to your expression. You are now prompted to enter a value to be placed in the column, describing the range of values that do not meet the criteria.

18. Double-click the **open bracket (**.
19. Double-click the **string** option, enter the text **High**, and then press **Enter**.
20. Click **OK** to accept the calculation definition—if the calculation entered is not complete you have missed off the **close bracket**.

    This has resulted in the following error message within the **Tips Box: There is an error in your expression at the highlighted token.**

21. Double-click the **close bracket)**.
22. Click **OK** to accept the calculation definition—a calculated column has been added to the Query data window.

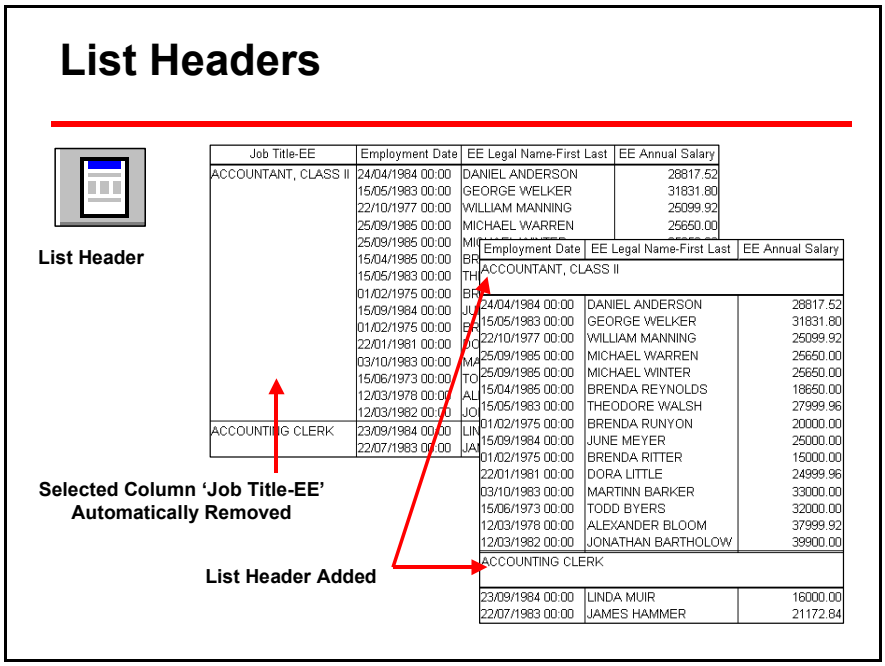
Display new column

23. Click **OK** to accept the Query data and display the report.
24. Your report will contain the new calculated column displaying the text **High** or **Low** depending on the **Annual Salary**, based on the calculation added.

Close report

25. Close the report without saving your changes using the **Close** button, alternatively use the **File** | **Close** menu option.

Adding List Headers



You can apply **List Headers** to list reports to show data in a more logical format. List headers can contain grouped data items as shown in the example above. They can also contain report objects such as text, pictures, charts, or calculations.

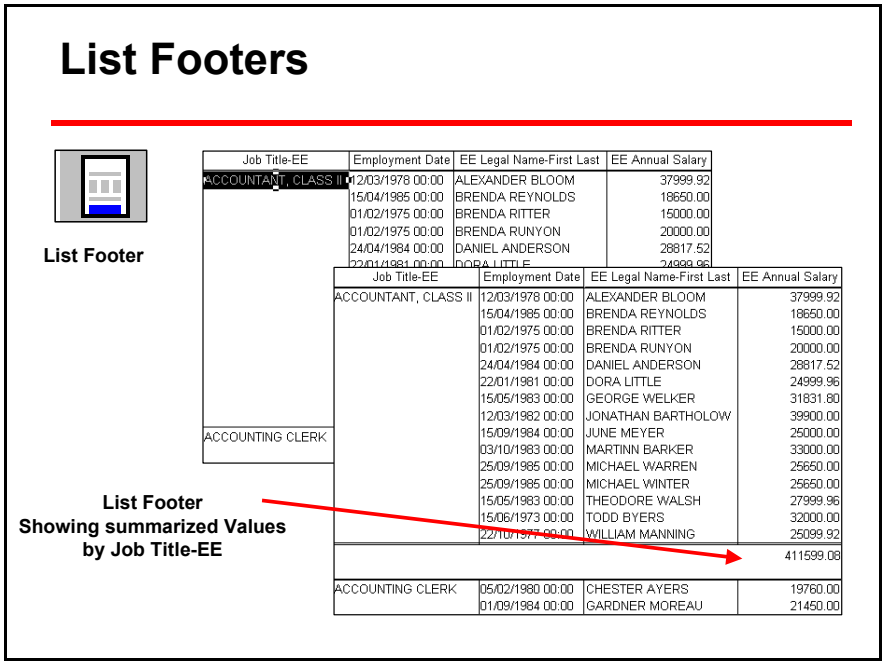
To add a list header to the report using a grouped column, select a data item from within the grouped column (if the column is not grouped it will automatically be grouped before being added to the List Header), and click the **List Header** button.

The column will be removed from the report and placed in the List Header.

You can also add other report objects to the List Header using the **Insert** menu, or by dragging and dropping then into the List Header.

To delete a list header, select the **List Header** and press **Delete** on the keyboard. (If the header contained a grouped column it will be removed from the report but can be re-added using the Query dialog box - Mark for Insertion option.)

Adding List Footers



You can also apply **List Footers** to list reports to show summarized data items, for example, a Summary Total of all the values for each column. List footers can also contain other report objects such as text, pictures, charts, or calculations.

To add a list footer to the report using a grouped column, select a data item from within the grouped column (if the column is not grouped it will automatically be grouped before being added to the footer), and click the **List Footer** button.

A blank list footer will be added to the report into which summaries can be added. You can also add other report objects to the list footer using the **Insert** menu, or by dragging and dropping then into the list footer.

To delete a list footer, select the **Footer** and press **Delete** on the keyboard.

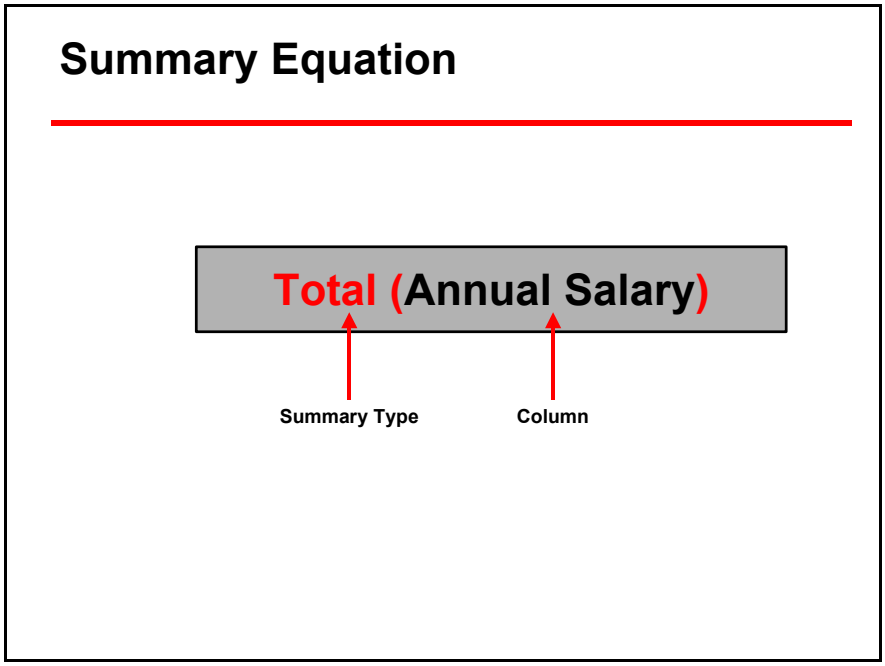
Adding a Blank List Header/Footer

Blank list headers and footer can be added to the report as follows:

1. Click in the Right Hand Margin immediately outside the last column—this will select the list frame within your report.
2. **Right-click** to display the shortcut menu—from this menu select the **Properties** option. This will display the **List Properties** dialog box.
3. Next select the **Header/Footer** tab.
4. Click the Green Header or Footer Text—a check will appear to the left of this text.
5. Select **OK** to close the **List Properties** dialog box.
6. A blank List Header or Footer will have been added to the report.

Note: Only one list header/footer will be added to the beginning and end of the report.

Summaries



Impromptu will allow you to add summaries to your reports, for example, you can add a Total Annual Salary paid, or a Running Total of Absences throughout a specific period.

A summary is a calculation that includes the type of summary (such as total or average), and the name of the data item (column) being summarized.

For example, the Summary for Total Amount of Annual Salary Paid would be displayed as follows: **Total (Annual Salary)**, as shown in the example above.

Summaries are saved in the report and not in the database.

Summaries can be moved from one place in the report to another—they will take the calculation with them.

Summary Types

Impromptu provides the following summary types which can be grouped into two areas:

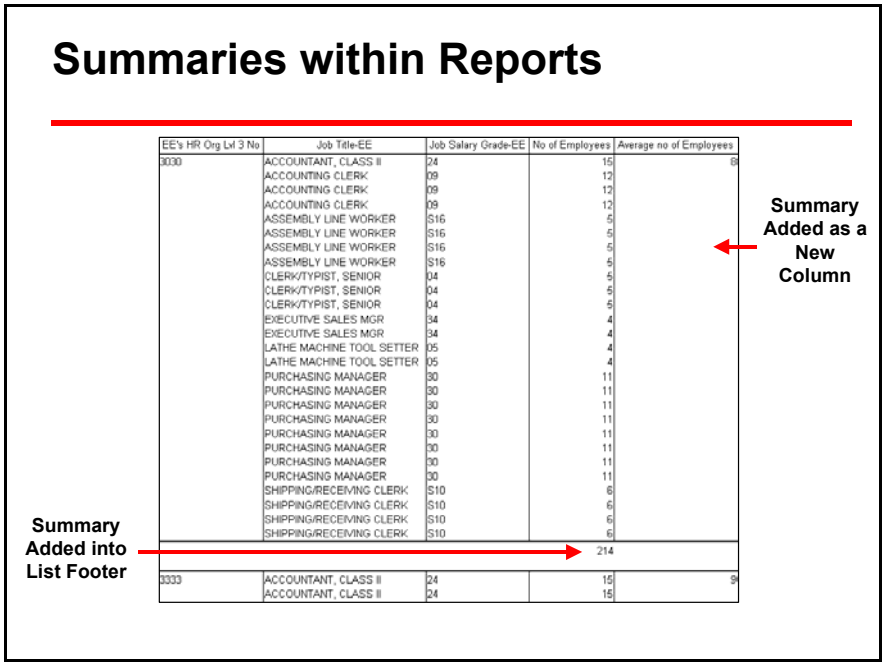
Summaries for rows in headers/footers:

Total	Minimum
Maximum	Average
Count	Standard deviation

Summaries for rows in new columns:

Rank value	Percentile
Percentage of the total	Running total
Running minimum	Running maximum
Running average	Running Count

Adding a Summary to Reports



EE's HR Org Lvl 3 No	Job Title-EE	Job Salary Grade-EE	No of Employees	Average no of Employees
3030	ACCOUNTANT, CLASS II	24	15	8
	ACCOUNTING CLERK	09	12	
	ACCOUNTING CLERK	09	12	
	ACCOUNTING CLERK	09	12	
	ASSEMBLY LINE WORKER	S16	5	
	ASSEMBLY LINE WORKER	S16	5	
	ASSEMBLY LINE WORKER	S16	5	
	ASSEMBLY LINE WORKER	S16	5	
	CLERK/TYPIST, SENIOR	04	5	
	CLERK/TYPIST, SENIOR	04	5	
	CLERK/TYPIST, SENIOR	04	5	
	EXECUTIVE SALES MGR	34	4	
	EXECUTIVE SALES MGR	34	4	
	LATHE MACHINE TOOL SETTER	05	4	
	LATHE MACHINE TOOL SETTER	05	4	
	PURCHASING MANAGER	30	11	
	PURCHASING MANAGER	30	11	
	PURCHASING MANAGER	30	11	
	PURCHASING MANAGER	30	11	
	PURCHASING MANAGER	30	11	
	PURCHASING MANAGER	30	11	
	PURCHASING MANAGER	30	11	
	PURCHASING MANAGER	30	11	
	SHIPPING/RECEIVING CLERK	S10	6	
	SHIPPING/RECEIVING CLERK	S10	6	
	SHIPPING/RECEIVING CLERK	S10	6	
	SHIPPING/RECEIVING CLERK	S10	6	
			214	
3333	ACCOUNTANT, CLASS II	24	15	9
	ACCOUNTANT, CLASS II	24	15	

Summaries can be added as individual columns, or as items in list footers.

To add a total summary as a list footer, select a data item from within the column to be summarized and select the **Summary** Σ button.

If the column is grouped a summary will be displayed for each grouping, if no grouping has been applied the summary will be placed into a list footer at the end of the report.

Note: The sum Σ button will add a total summary. Other buttons are available to add count summaries 1001 or rank summaries as required.

Ctrl+Σ will provide further summary options.

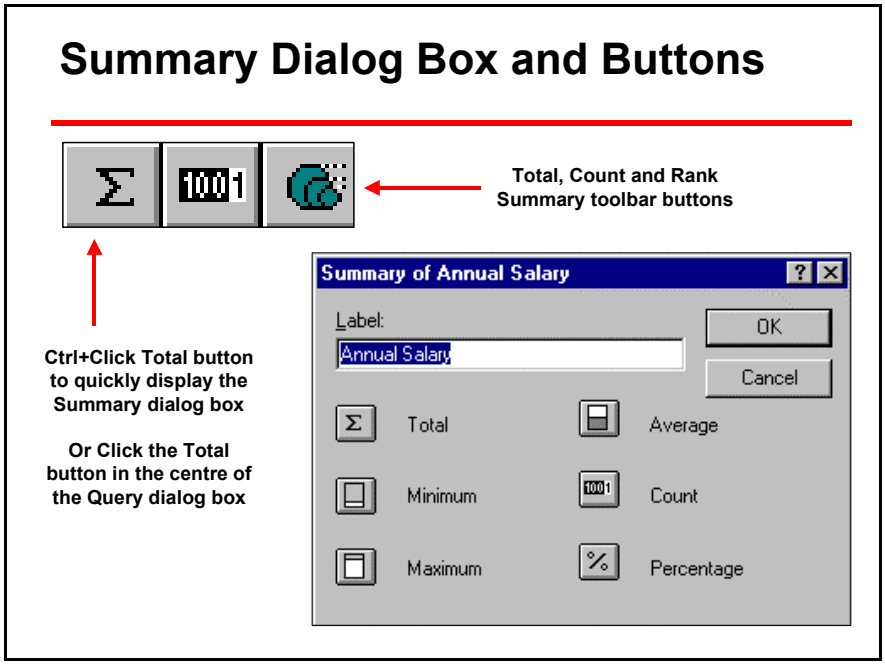
To add a summary as a new column use the **Insert | Calculation** menu option. Drag the mouse pointer to the required column position—this will display the **Calculation Definition** dialog box.

Add the summary as you would when adding a calculation.

Note: This method can also be used to add summaries to footers—drag the mouse to the footer area.

Each time a summary is added to the report an appropriate calculated column is added to the Query dialog box - Data tab.

Adding Summaries using the Query Dialog Box



Another method of adding summaries to Impromptu reports is to use the **Query** dialog box | **Data** tab.

Select the column you want to summarize and click the **Summary** button, this will display the **Summary** dialog box as shown above.

Into the **Label** field, type a name for the new summary column and select the required summary type (Total, Average, and so forth).

Click **OK.** This will return you to the report and a new column will be added displaying the summary.

Demo 4-3

The purpose of this demo is to add Summary Totals and List Headers to a Grouped report.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employment Information** folder in the Catalog by **double-clicking**, or **clicking once** on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information Employee Job Assignment Information	 Job Type-EE Job Title-EE
Employee Personal Information	EE Legal Name - First Last
Compensation & Salary Administration Employee Compensation	 EE Hourly Rate EE Annual Salary

   You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

Group data

5. Click the **Group** tab.
6. Group the **Job Type-EE** column and Associate the **Job Title-EE** column with it.
7. Select **OK** to accept the Query data and display the report.

Save report

8. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.

9. Enter a File name of **Salary Details.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Check report

10. Notice that the **Annual Salary** column is missing off the report (on the next page to the right).
11. Change the report to **Screen Layout** view in order to see more columns on the screen in one go.

    To make this report easier to read, you are going to add a list header to the **Job Type-EE** column. This will create logical divisions in the report, and allow you to see more columns on the screen in **Page Layout** view.
12. Change the view back to **Page Layout** view.

Add List Header

13. In the **Job Type-EE** column, click a data item to select the column.
14. Select the **List Header** button on the Standard toolbar.
15. The number of columns in the report has decreased, and each **Job Type-EE** is displayed as a list header. The List Headers separate each **Job Type-EE** grouping.

Add summary totals

16. To add summary totals to the report, you need to select a data item in the column that you want to total.

    Select a data item in the **EE Annual Salary** column.
17. Click the **Total** button on the Standard toolbar.

    A summary total for the **Annual Salary** has been automatically inserted into a list footer for each **Job Type-EE**.

Note: If the error 'Unknown Token' is returned containing the text 'invalid for the substring function' then:

Contact the Impromptu Administrator to change the processing options to Flexible Processing in the Client/Server tab of the Query dialog box.

18. Scroll down the report until you locate the first summary total. This is the **Total Annual Salary** for the Position **'Hourly Non Union – Billing Clerk'**.
19. Scroll to the end of the report to locate the final summary total. This is the total for the entire report that has been automatically inserted into a list footer at the end of the report.

Close report

20. Close the report without saving your changes using the **Close** button, alternatively use the **File** | **Close** menu option.

Demo 4-4

The purpose of this demo is to add a Summary Calculation column to an existing report.

Open report

1. Select the **File | Open** menu, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Salary Details.imr** report followed by the **Open** option.

Add calculation column

4. Click the **Query data** button or select the **Report | Query** menu option.
5. Click the **Calculate** button to open the Calculation Definition dialog box.
6. Type a column name of **% Annual Salary**.
7. In the Available components window, double-click the **Summaries** folder in order to expand it.
8. Double-click **percentage**. This will be added to the Expression window.
9. You are now prompted to insert a column or calculation.

   Double-click the **Report Columns** folder in the Available components window and double-click **EE Annual Salary** to insert a percentage based on the **EE Annual Salary** column.

   The Expression will now display: **percentage (EE Annual Salary)**.
10. Click **OK** to accept the Calculation Definition—a calculated column has been added to the Query data window.

Display report

11. Click **OK** again to accept the Query data and display the report.
12. Notice that the new **% Annual Salary** calculated column has been added to the far right of the existing columns.

    You could also have created the above calculation by first selecting **Calculation** from the **Insert** menu. This would then have given you the opportunity to place the calculated column into the report at the required position and not have it placed automatically at the end of the report.

Edit summary expression

13. To edit the summary expression if changes need to be made, you can **Right-click** the mouse on a data item in the new **% Annual Salary** column and then select **Data Definition** from the shortcut menu. Alternatively, select **% Annual Salary** from the **Query** dialog box | **Data** tab and then select the **Edit Definition** option.

Format column

14. To format the column, **Right-click** a data item in the **% Annual Salary** column.
15. Select **Format** from the displayed shortcut menu. This will display the **Format** dialog box.
16. Select the **Data** tab and select **0%** from the **Positive** option list.
17. Click **OK** to accept the formatting changes.

Add column

18. You could also add an additional column called **Minimum Annual Salary** as follows:

    Click the **Query data** button or select **Query** from the **Report** menu.
19. Click the **Calculate** button to open the Calculation Definition dialog box.
20. Type a column heading name of **Minimum Annual Salary**.
21. In the Available components window, double-click the **Summaries** folder in order to expand it.
22. Double-click **minimum**. This will be added to the Expression window.

    You are now prompted to insert a column or calculation.
23. Double-click the **Report Columns** folder within the Available components window and then double click **EE Annual Salary** to insert a minimum value based on the **EE Annual Salary**.

    The Expression window will now display: **Minimum (EE Annual Salary)**.

24. Click **OK** to accept the Calculation Definition—a calculated column has been added to the Query data window.
25. Click **OK** again to accept the Query data and display the report.

    Notice that the new **Minimum Annual Salary** calculated column has been added to the far right of the existing columns.

Create footer

As this column only returns one value for each **Job** you could create a footer for each **Job Type** grouping and move this value into it.

26. Select a data item from within the **Job Type-EE** column.
27. Select the **List Footer** button on the Standard toolbar—this will insert a list footer into the report for each **Job Type-EE**.
28. Select a data item in the **Minimum Annual Salary** column and drag this into the List Footer below the **% Annual Salary** column and let go.
29. Create a text frame for a label in the footer for **Minimum Annual Salary**.

Close report

30. Close the report without saving your changes using the **Close** button; alternatively use the **File** | **Close** menu option.

Demo 4-5

The purpose of this demo is to work with Position and Non-Position dependent Summary Associations.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information Employee Other Personal information	EE Sex
Employee Birth Date Information	Employee Age - Years
Employee Personal Information	EE Legal Name - First Last
Compensation And Salary Administration Employee Compensation	EE Annual Salary

You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

Group data

5. Click the **Group** tab.

   Notice that the Auto-group option is turned on. When you add a summary item in the **Data** tab, Impromptu automatically groups the data and associates the summary with the lowest level of grouping in the report. The Auto-group option will be turned off when a manual group is applied.

6. Group the **EE Sex** and **Employee Age - Years** columns.
7. Click **OK** to accept the Query data and display the report.

Format column to currency format

Format the **EE Annual Salary** to a currency format as follows:

8. Select a data item in the **EE Annual Salary** column.
9. Click the **Currency** button on the Standard toolbar.

Calculate average summary

10. To work out the average **EE Annual Salary** for each level of grouping within the report, ensure that a data item in the **EE Annual Salary** column is selected.
11. **Ctrl+Click** the **Total** button on the Standard toolbar. The **Summary of EE Annual Salary** dialog box will appear.
12. Select the **Average** button and then click **OK**.

    This will insert an **Average EE Annual Salary** as a list footer at each level of grouping.

    A summary will be automatically associated to its position in the report. If the summary is moved to a different position in the report, the value of the summary will change to reflect it's new position.

13. Scroll to the last **Female** entry. Select the **Female Average Total** of **$71,953.17**. Click **Select Parent** button on the vertical **Layout** toolbar. This will select the **Female List Footer**.

    Notice the Status Line listing **EE Sex Footer**.

14. Select the **Employee Age - Years Average Total** of **$25,896.00**. Click **Select Parent** button on the vertical **Layout** toolbar. This will select the **Employee Age - Years List Footer**.

    Notice the Status Line listing **Employee Age - Years Footer**.
15. Press **Esc** to clear your selection.
16. Select and drag the **$71,953.17** to the left of the total in the **Employee Age - Years List Footer** above.

    What was the **Females' Average Total** has now changed to be a second **Employee Age - Years Total**.
17. Select, drag and drop this **Average Total** back to its original position.

    The value will also change to reflect its new position in the report (**$71,953.17**).

Hint: Scroll to bottom of report and insert value into the blank footer.

Change the association

18. To change the association of this summary, **Right-click** the Female Average Total value **$71,953.17** and select **Data Definition**.
19. Select **EE Sex** from the **Association** drop-down list and click **OK**.
20. Drag the Female Average Total value (**$71,953.17**) back to the **Employee Age - Years List Footer**.

    The appropriate **EE Sex Value**, will now be repeated in all the **Employee Age - Years List Footers**.
21. The value will have remained at **$71,953.17** due to the fixed association, the value is always going to reflect **EE Sex**, no matter where it is moved to in the report.

Close report

22. Close the report without saving your changes using the **Close** button, alternatively use the **File** | **Close** menu option.

Workshop 4-1: Adding Summarized and Calculated Columns to Reports

Objective: **To create a list report and add summarized and calculated data items to it.**

Scenario: **You have been tasked with reviewing the wages policy in your organization to see if there should be a more structured compensation policy. An option is to base the wage policy upon the current average wage of each position. You are also considering different compensation packages depending on the wage band of each position. You wish to view the Positions by Organizational Unit.**

Your final report will look similar to the following example:

EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name	Job Title-EE	Average EE Annual Salary	High, Avg or Low
3030	Region 3030	ACCOUNTANT, CLASS II	$33,000.00	Average
		ACCOUNTING CLERK	$19,272.41	Low
		ASSEMBLY LINE WORKER	$9,705.28	Low
		CLERK/TYPIST, SENIOR	$12,361.27	Low
		EXECUTIVE SALES MGR	$65,749.89	High
		LATHE MACHINE TOOL SETTER	$20,228.00	Average
		PURCHASING MANAGER	$39,074.90	Average
		SHIPPING/RECEIVING CLERK	$9,796.15	Low
			$209,187.90	
3333	Region 3333	ACCOUNTANT, CLASS II	$29,994.91	Average
		ACCOUNTING CLERK	$18,093.33	Low
		ASSISTANT STATIONARY ENGINEER	$27,508.00	Average
		CLERK/TYPIST, SENIOR	$17,246.84	Low
		DRILLING MACHINE TOOL OPERATOR	$24,328.75	Average
		GRINDING MACHINE SETTER	$19,760.00	Low
		LATHE MACHINE TOOL SETTER	$16,634.80	Low
		MAINTENANCE ENGINEER, SENIOR	$13,225.16	Low
		SECRETARY, SENIOR	$19,324.07	Low
		STATIONARY ENGINEER	$40,040.00	High
			$226,155.86	

Columns to be added:

Catalog Folder/Subfolder	Report Column
Employment Information Org Level And Unit Numbers	EE's HR Org Lvl 3 No
Employment Information	EE's HR Org Lvl 3 Name
Employment Information Employee Job Assignment Information	Job Title-EE

Add a summary column to the report to show the **Average EE Annual Salary** (**Compensation & Salary Administration - Employee Compensation** folder) for each Position in each Organizational Unit. (*Hint: you are not adding the column itself but a summary of it.*)

Format the Average EE Annual Salary column values to display the £ sign. (*Hint: use the Currency button.*)

Add a **summary list footer** to the report to show the Average EE Annual Salary for each unit.

Note: This may add two list footers to your report one for the EE's Org Unit Number and one for the Org Unit Name—we only require the summary footer for EE's Org Unit Number, the additional footer can be deleted. Remember to delete the calculation from both the Query and Report display.

Insert a calculated column called **High, Avg or Low** based on the following expression:

if (Average EE Annual Salary < 20000) then ('Low') else if (Average EE Annual Salary between 20000 and 40000) then ('Average') else ('High')

Save this report as **C:\Temp\Workshop 4-1.imr**.

Step by Step Guide to Workshop 4-1

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employment Information** folder in the Catalog by double-clicking on it, or clicking once on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information Org Level And Unit Numbers	EE's HR Org Lvl 3 No
Employment Information	EE's HR Org Lvl 3 Name
Employment Information Employee Job Assignment Information	Job Title-EE

   You can select the columns in two ways: either **double-**click the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

5. Click **OK** to accept the Query data and display the report.

Add summary column

6. To add a summary column, click the **Query** data button, or select the **Report | Query** menu option.
7. Expand the **Compensation And Salary Administration - Employee Compensation** folders in the Catalog.
8. Select the column **EE Annual Salary** (click once to select) and click the **Summary** button.

   The Summary of **EE Annual Salary** dialog box will be shown.

9. Click the **Average** button—notice that the label is automatically altered to incorporate the type of summary you have chosen, and press **OK**.

10. Click **OK** to accept the Query data and display the report.

Format column

11. To format the **Average EE Annual Salary** column, select one of the data items in the column and select the **Currency** button.

Add summary footer

12. To add a summary footer to the report to show the **Average EE Annual Salary** for each unit, again select one of the data items within the **Average EE Annual Salary** column and select the **Total** button.

    You only require a summary value and list footer for the **EE's HR Org Lvl 3 No** therefore, the summary value and list footer for the **EE's HR Org Lvl 3 Name** can be deleted.

13. Click the **Query data** button or select **Query** from the **Report** menu.
14. On the right-hand side in the Query data window, select the summary value to be deleted—**Total (Average EE Annual Salary) EE's HR Org Lvl 3 Name** followed by the **Remove** button. This will remove the summary value from both the Query and the Report display.
15. Click **OK** to accept the Query data and display the report.
16. Remove any blank list footer on the screen by selecting them and pressing **Delete**.

Add calculated column

Next you are going to add a calculated column to the report based on a conditional statement.

17. Click the **Query data** button, or select the **Report | Query** menu open.
18. Click the **Calculate** button to open the Calculation Definition dialog box.
19. Type a column heading name of **High, Avg or Low**.
20. The calculation you are about to enter is to create a new column based on the **Average EE Annual Salary** column which will return a result of **High**, **Average** or **Low** in text:

    if (Average EE Annual Salary < 20000) then ('Low') else if (Average EE Annual Salary between 20000 and 40000) then ('Average') else ('High')

21. In the Available components window, double-click **if** to add it to the Expression window.
22. Double-click the **Report Columns** folder to expand it and double-click **Average EE Annual Salary** to add it to the Expression window.
23. Double-click the **<** (**less than**) option.

24. Double-click **number**, enter **20000** into the Expression window and press **Enter**.
25. Double-click the **close bracket)**.

    The **then** option will be automatically added to the Expression window.

    You are now prompted to enter a value to be placed in the column, describing the range of values that meet the criteria.
26. Double-click the **Value** folder to expand it and then double-click the **string** option. Speech marks are added to the Expression window into which text can be typed.
27. Enter the text **Low** and press **Enter**.
28. Double-click the **close bracket)**.

    The **else** option will automatically be added to the Expression window.
29. Double-click the **if** option.

    The **open bracket (** is automatically added to the Expression window.
30. Double-click the **Report Columns** folder to expand it and double click **Average EE Annual Salary** to add it to the Expression window.
31. Double-click the **between** option.
32. Double-click **number**, enter **20000** into the Expression window and press **Enter**.
33. Double-click the **and** option.
34. Double-click **number**, enter **40000** in the Expression window and press **Enter**.
35. Double-click the **close bracket)**.

    The **then** option will be automatically added to the Expression window.

    You are now prompted to enter a value to be placed in the column, describing the range of values that meet the criteria.
36. Double-click the **string** option. Speech marks are added to the Expression window into which text can be typed.
37. Enter the text **Average** and press **Enter**.
38. Double-click the **close bracket)**.

    The **else** option will be automatically added to the Expression window.

    You are now prompted to enter a value to be placed in the column, describing the range of values that do not meet the criteria.
39. Double-click the **open bracket (**.
40. Double-click the **string** option and enter the text **High** and press **Enter**.
41. Double-click the **close bracket)**.
42. Click **OK** to accept the calculation definition.

The Query data window will now contain the new calculated column displaying the text **High**, **Average** or **Low** depending on the **Average EE Annual Salary**, based on the calculation added.

43. Click **OK** to accept the Query data and display the report.

Save report

44. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File** | **Save** menu option.
45. Enter a File name of **Workshop 4-1.imr**; change the **Save** in file location to **C:\Temp** and click **Save**.

Workshop 4-2: Adding Summarized Columns to Existing Reports

Objective: **To add a summary count column to an existing report.**

Scenario: **After the first stage of the employee compensation reviews each departmental manager is going to have to forward his or her suggestions on a role by role basis. By adding a position count to a report you created earlier you can easily see how many roles each departmental manager has to review.**

Open the workshop saved earlier as **Workshop 4-1.imr**.

Add a Summary Count column to the report so that it looks similar to the following example:

EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name	Job Title-EE	Average EE Annual Salary	High, Avg or Low	Job Count
3030	Region 3030	ACCOUNTANT, CLASS II	$33,000.00	Average	8
		ACCOUNTING CLERK	$19,272.41	Low	
		ASSEMBLY LINE WORKER	$9,705.28	Low	
		CLERK/TYPIST, SENIOR	$12,361.27	Low	
		EXECUTIVE SALES MGR	$65,749.89	High	
		LATHE MACHINE TOOL SETTER	$20,228.00	Average	
		PURCHASING MANAGER	$39,074.90	Average	
		SHIPPING/RECEIVING CLERK	$9,796.15	Low	
			$209,187.90		
3333	Region 3333	ACCOUNTANT, CLASS II	$29,994.91	Average	10
		ACCOUNTING CLERK	$18,093.33	Low	
		ASSISTANT STATIONARY ENGINEER	$27,508.00	Average	
		CLERK/TYPIST, SENIOR	$17,246.84	Low	
		DRILLING MACHINE TOOL OPERATOR	$24,328.75	Average	
		GRINDING MACHINE SETTER	$19,760.00	Low	
		LATHE MACHINE TOOL SETTER	$16,634.80	Low	
		MAINTENANCE ENGINEER, SENIOR	$13,225.16	Low	
		SECRETARY, SENIOR	$19,324.07	Low	
		STATIONARY ENGINEER	$40,040.00	High	
			$226,155.86		

Insert a calculated column called **Job Count** with the following summary expression:

Count (Job Title-EE)

To get the report shown at the start of this workshop, ensure that the summary is associated to **EE's HR Org Lvl 3 Name** as opposed to **Job Title-EE**. (*Hint: changed using the data definition for this column.*)

Save this report using the **File**, **Save As** option as **C:\Temp\Workshop 4-2.imr**.

Step by Step Guide to Workshop 4-2

Open report

1. Select the **File | Open** menu, or click the **Open** button. This will display the **Open report** dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select **Workshop 4-1.imr** followed by the open option.

Add calculated column

4. Click the **Query data** button or select the **Report | Query** menu option.

   You are going to add a calculated column to the report based on a count statement.
5. Click the **Calculate** button to open the Calculation Definition dialog box.
6. Enter a column heading name of **Job Count**.

   The calculation you are about to enter is to create a new column based on the **Job Title-EE** and will return a count of the number of Positions: **Count (Job Title-EE)**
7. In the Available components window, double-click **Summaries** in order to expand it.
8. Double-click **count**. This will be added to the Expression window.

   You are now prompted to insert a column or calculation.
9. Double-click the **Report Columns** folder in the Available components window and then double-click **Job Title-EE** to insert a count based on the Position Name column.

   The Expression window will display: **count (Job Title-EE)**.
10. Click **OK** to accept the Calculation Definition—a calculated column has been added to the Query data window.

Display report

11. Click **OK** to accept the Query data and display the report.
12. Your report will now contain the new calculated column displaying a count based on the **Job Title-EE**.

Note: If your Job Count shows a number on every row, the association of the summary needs to be changed.

Change association

13. To change the association of this summary from **Job Name** to **Org Unit Name**, **Right-click** a data item in the **Job Count** column and select **Data Definition**.

14. Select **EE's HR Org Lvl 3 Name** from the **Association** option list and click **OK**.

    The count will now change to represent the count of **Jobs** by **Org Lvl 3 Names**.

Save report

15. Save this report using the **File** | **Save As** menu option (do not use the **Save** button on the Standard toolbar as this will result in the existing **Workshop 4-1.imr** being overwritten).
16. Enter a File name of **Workshop 4-2.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Close report

17. Close the **Workshop 4-2.imr** using the **Close** button, alternatively use the **File** | **Close** menu option.

Summary—Questions

Summary Q & A—Customizing Data

- Why would you create a calculation?
- Name the three main types of calculation.
- Name two calculations suitable for a footer or header.
- Name two calculations suitable for a new column.

Summary—Answers

Summary Q & A—Customizing Data

Why would you create a calculation?

- A calculation is used when a new data item needs to be created based on existing data items

Name the three main types of calculation.

- Arithmetic, Logical, Summary

Summary Q & A—Customizing Data

Name two calculations suitable for a footer or header.

Total, Count, Minimum, Maximum, Average

Name two calculations suitable for a new column.

Rank, Percentage of the Total, Running Total, Running Minimum, Running Maximum, Running Average, Running Count

CHAPTER 5

Crosstab Reports

Contents & Objectives

Contents

1. Overview of Reporting Administration
2. Introduction to Impromptu
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Objectives—Crosstab Reports

In this section we will:

- Define a Crosstab Report
- Examine the different ways to create a Crosstab Report

Crosstab Reports

List Report Vs Crosstab Report

EE's HR Org Lvl 3 Name	Job Title-EE	No of Employees
Region 3030	ACCOUNTANT, CLASS II	15
	ACCOUNTING CLERK	12
	ASSEMBLY LINE WORKER	5
	CLERK/TYPIST, SENIOR	
	EXECUTIVE SALES MGR	
	LATHE MACHINE TOOL SETTER	
	PURCHASING MANAGER	
	SHIPPING/RECEIVING CLERK	
Region 3333	ACCOUNTANT, CLASS II	
	ACCOUNTING CLERK	
	ASSISTANT STATIONARY ENGINEER	
	CLERK/TYPIST, SENIOR	
	DRILLING MACHINE TOOL OPERATOI	
	GRINDING MACHINE SETTER	
	LATHE MACHINE TOOL SETTER	
	MAINTENANCE ENGINEER, SENIOR	
	SECRETARY, SENIOR	
	STATIONARY ENGINEER	

List Report

Crosstab Report

Job Title-EE	Region 3030	Region 3333	Region 3388
ACCOUNTANT, CLASS II	1	10	4
ACCOUNTING CLERK	3	6	3
ASSEMBLY LINE WORKER	4		1
ASSISTANT STATIONARY ENGINEER		1	
BILLING CLERK			2
CLERK/TYPIST, SENIOR	3	1	1
DRILLING MACHINE TOOL OPERATOR		4	
EXECUTIVE SALES MGR	2		2
FIELD CONTACT TECHNICIAN			5
GRINDING MACHINE SETTER		1	
LABOR RELATIONS SPECIALIST			1
LATHE MACHINE TOOL SETTER	2	1	1
MAINTENANCE ENGINEER, SENIOR		3	2
OCUPATIONL SAF & HLTH INSPECTR			1
PURCHASING MANAGER	8		3
SALES ENGINEER			4
SECRETARY, SENIOR		3	3
SHIPPING/RECEIVING CLERK	4		2
STATIONARY ENGINEER		3	1
SUPERVISOR, GENERAL OFFICE			1
TRAFFIC CLERK			1
WHOLESALE TRADE SALES WORKER			3

In a Crosstab Report the Rows, Columns, and Cells are Interrelate

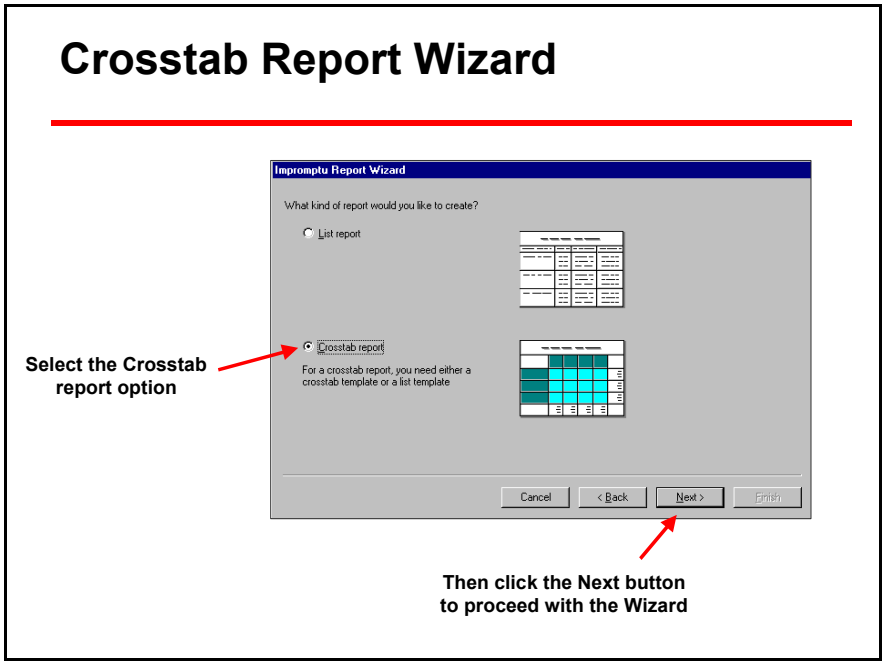
The report you can see above on the right is called a **Crosstab Report**—a list in rows and columns format with an optional summary row and column.

A **summary row and column** can be added to the above example showing the total number of employees for each Organization Unit and job description.

Crosstabs allow you to view the same information but from a different perspective.

Crosstab reports can be created using the **Crosstab Template** or using the **Report Wizard**. The easiest way to build a crosstab report is to use the **Report Wizard**.

Creating a Crosstab using the Report Wizard



Create a new report using the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.

From this dialog select the **Wizard** option, this will start the Report Wizard.

Enter a title for your report and select **Next**.

From the 2nd screen in the **Report Wizard** dialog select the **Crosstab report** option.

Select data items that are to be used as the **Crosstab Report—rows, columns,** and **cells (values)** and select the **Next** option.

Filter the report if required to narrow down the data shown or select **Finish** to create the crosstab report.

Demo 5-1

The purpose of this demo is to create a Crosstab Report using the Report Wizard.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and then click the **Wizard** button.

   The Impromptu Report Wizard appears, prompting you for a title to the report.
3. Enter a report title of **New Crosstab** and click **Next**.
4. Select the **Crosstab report** option and then click **Next**.

   You are now prompted to place data into rows, columns and cells as required. Row and column totals are automatically turned on.

Add data items

5. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
6. Click once to select the required column and then click on the appropriate crosstab position button as listed below:

Catalog Folder/Subfolder	Report Column	Position
Employment Information	EE's HR Org Lvl 3 Name	Column
Employment Information Employee Job Assignment Information	Job Title-EE	Row
Compensation And Salary Administration Employee Compensation	EE Annual Salary	Cell

   You can select the columns in two ways: either **double-click** on the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

7. The **EE Annual Salary** field will automatically be changed to **Count EE Annual Salary**.
8. Turn off both summary checkboxes.

Display report

9. Click **Finish** to display the crosstab report.
10. Examine the **Total Annual Salaries** within each **Job Title**.

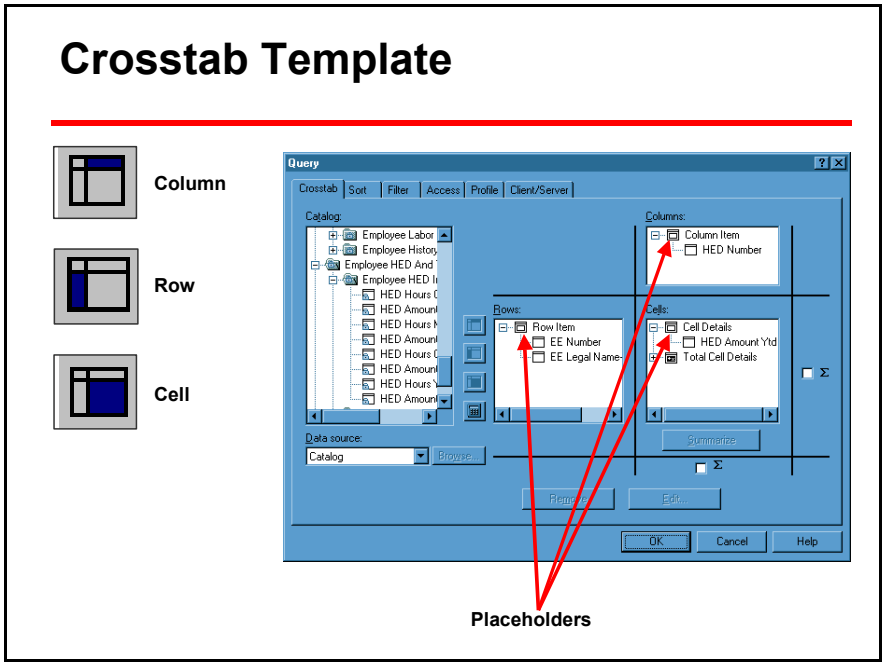
Change to standard list report

11. Click the **Query data** button, or select the **Report** | **Query** menu option, and view how the Data tab has been changed, and is now shown as a **Crosstab** holding within the relevant crosstab options.
12. The **Build List Report** button will allow you to change this report back to a standard list report. Select this option and the Crosstab reverts back to a Data tab.
13. Click **OK** to accept the Query data and display the report.

Close file

14. Close the report without saving your changes, using the **Close** button, alternatively use the **File** | **Close** menu option.

Creating a Crosstab using the Crosstab Template



Create a new report using the **File | New** menu option, or click the **New** button. This will display the **New** report dialog box showing the available templates.

From this dialog select the **Crosstab Template**, and select **OK**. This will display the **Query** dialog box—the **Data** tab will be displayed as a **Crosstab** as shown above.

Placeholders are a guide to where the information will be displayed, for example, the Crosstab template has placeholders for column, row, and cell items.

Each placeholder should be replaced with a data item (column from the catalog).

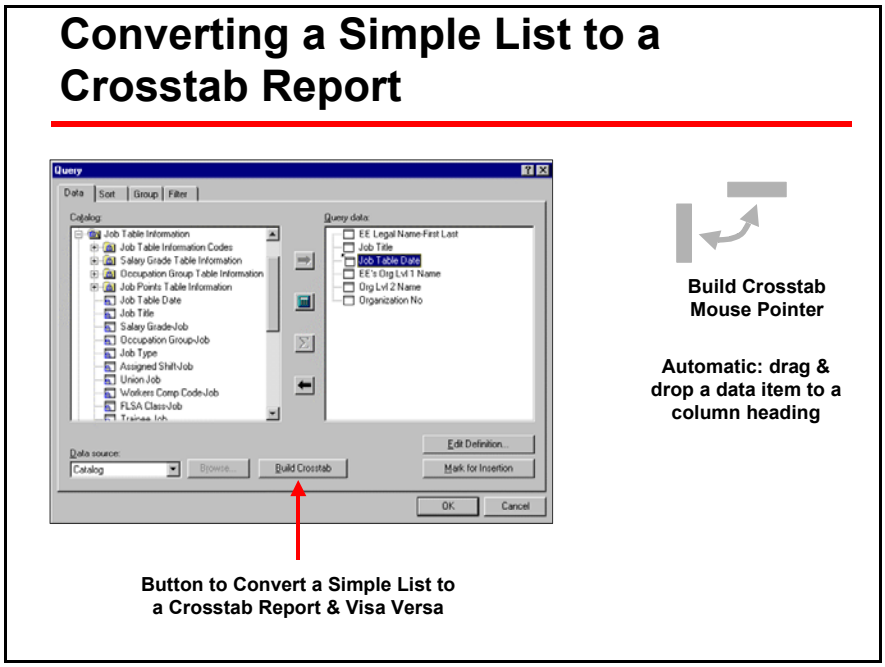
To replace the Crosstab placeholders—select the required data item from the **Available Columns** window on the left, followed by the position buttons detailed below:

- Use Data Item as individual columns within crosstab.
- Use Data Item as individual rows within crosstab.
- Use Data Item as cells (values) within crosstab.
- Denotes whether a summary row or column is required.

Once you have entered the required information select **OK** to build the crosstab report.

Changes can be made to the data items used to create the crosstab report by reselecting the **Query data** button, or select the **Report | Query** menu option. This will re-display the **Query** dialog box **- Crosstab** option allowing the relevant changes to be made.

Switching between Simple List Reports and Crosstab Reports



The **Build List Report / Build Crosstab Options** in the **Query** dialog box can be used to change the format of the report. Alternatively when the report is in List format, click and drag a row heading on to the existing column headings line (mouse pointer will now display) and let go. This will convert the List report into a Crosstab report. This technique is called 'pivoting' data.

Demo 5-2

The purpose of this demo is to create a Crosstab Report using the Report Template.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Crosstab** template and then click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and the crosstab rows, columns, and cells window on the right.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
4. Click once to select the required column and then click on the appropriate crosstab position button as listed below:

Catalog Folder/Subfolder	Report Column	Position
Employee Personal Information Employee Other Personal Info.	EE Sex	Column
Employment Information Employee Job Assignment Information	Job Title-EE	Row
Compensation & Salary Admin. Employee Compensation	EE Annual Salary	Cell

Add summary row and column

5. Check both the **Summary checkboxes** to add a summary row and column to the report.
6. Click **OK** to accept the Query data and display the report.

   Examine the **Annual Salaries for Males/Females** paid for each Job Title.

Add title

7. Unlike the crosstab report created using the report wizard, no title has been created for this report—see later demos on formatting which cover in more detail how to add titles to reports.

Change report format

8. Again the **Build List Report / Build Crosstab Options** can be used to change the format of the report. Alternatively, when the report is in List format, click and drag a row heading on to the column heading line and let go. This will convert the List report into a Crosstab report.

Close report

9. Close the report without saving your changes using the **Close** button, alternatively use the **File** | **Close** menu option.

Workshop 5-1: Creating a Crosstab

Objective: **To create a new crosstab report as shown below.**

Scenario: **As Company director you wish to ensure that you are an equal opportunities employer. As a starting point for investigation you create a crosstab which displays the number of Employees in each position by their race and sex.**

Your final report will look similar to the following example:

EE-Sex	EE-Race	Active-Hrly PT	Active-Hrly Reg FT	Active-Salrd Reg FT	Disabld-Salrd Reg FT	LOA-Hr Reg FT W/Pay	Retired-Salrd Reg FT
Female	Asian/Pacific Island	1		1		1	
	Black-Not Hispanic		1	3			2
	Hispanic		1	1			
	White-Not Hispanic	1	2	18	1		1
		2	3	4	1	1	2
Male	Asian/Pacific Island		1	2			
	Black-Not Hispanic		5	10			1
	Hispanic			3			
	White-Not Hispanic	3	2	31			3
		1	3	4	0	0	2
		3	6	8	1	1	4

Columns to be added using the Crosstab dialog:

Catalog Folder/Subfolder	Report Column	Position
Employment Information Employment Status Info	EE Status	Column
Employment Information	EE's HR Org Lvl 3 Name	Row
Compensation And Salary Administration Employee Compensation	EE Annual Salary	Cell

At this point display the report to the screen.

Using the Crosstab dialog amend the rows and cells displayed as follows:

Catalog Folder/Subfolder	Report Column	Position
Employee Personal Information Employee Other Personal Information	EE Sex	Row
	EE Race	Row
Employee Personal Information	EE Number	Cell

Ensure that you delete the existing **Org Unit Name** row and **EE Annual Salary** cell items first.

Also flag the add summary row for all columns.

Save this report as **C:\Temp\Workshop 5-1.imr**.

Step by Step Guide to Workshop 5-1

Create new report

19. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
20. Select the **Crosstab** template and click **OK**.

    You are now prompted to place data into the rows, columns and cells as required. Row and column totals are automatically turned off.

Add data items

21. Expand the **Employment Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
22. Click once to select the required column and then click the appropriate crosstab position button as listed below:

Catalog Folder/Subfolder	Report Column	Position
Employment Information Employment Status Info	EE Status	Column
Employment Information	EE's HR Org Lvl 3 Name	Row
Compensation And Salary Administration Employee Compensation	EE Annual Salary	Cell

23. Ensure that the summary checkboxes are not selected, then click **OK** to accept the Query data and display the report.

Remove data

24. To amend the row data select the **Query data** button or select **Query** from the **Report** menu.
25. Select the Rows data item **EE's HR Org Lvl 3 Name** and click **Remove**.
26. Select the Cells data item **Total EE Annual Salary** and click **Remove**.

Add columns

27. Add the following columns:

Catalog Folder/Subfolder	Report Column	Position
Employee Personal Information Employee Other Personal Information	EE Sex	Row
	EE Race	Row
Employee Personal Information	EE Number	Cell

28. Click once to select the required column and then click on the appropriate crosstab position button.

    Notice that the column **EE Number** has been changed into **Count EE Number**. This is because Impromptu recognizes that **EE Number** is not a numeric field and cannot be totaled.

Add summary row

29. To add the summary row for all columns ensure that the summary row checkbox is selected ☑ Σ.
30. Click **OK** to accept the Query data and display the report.

Save report

31. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File** | **Save** menu option.
32. Enter a File name of **Workshop 5-1.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Workshop 5-2: Creating a Crosstab

Objective: **To create a crosstab report with more than one summary value as shown below.**

Scenario: **As company director you continue with your equal opportunities review. You wish to compare the average salary amounts for positions by race and gender.**

You want to modify this report so that it looks similar to the following example:

EE-Sex	EE-Race	Active-Hrly PT		Active-Hrly Reg FT	
		Count EE Number	Average EE Annual Salary	Count EE Number	Average EE Annual Salary
Female	Asian/Pacific Island	1	$13,841.36		
	Black-Not Hispanic			1	$10,201.88
	Hispanic			1	$17,246.84
	White-Not Hispanic	1	$8,710.00	2	$16,056.04
		2	$11,275.68	3	$14,501.59
Male	Asian/Pacific Island			1	$20,799.60
	Black-Not Hispanic			5	$16,540.78
	Hispanic				
	White-Not Hispanic	3	$8,667.53	2	$11,071.32
		1	$8,667.53	3	$16,137.23
		3	$10,406.30	6	$15,319.41

Columns to be added using the Crosstab dialog:

Catalog Folder/Subfolder	Report Column	Position
Compensation And Salary Admin. Employee Compensation	EE Annual Salary	Cell

Ensure that you change the cell **Total(EE Annual Salary**) to **Average(EE Annual Salary)**. You may also wish to change the name of the calculated column.

Ensure that no summary rows or columns are displayed for this report.

Format all values to be displayed in currency format.

Save this report using the **Save As** option as **C:\Temp\Workshop 5-2.imr**.

Step by Step Guide to Workshop 5-2

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Workshop 5-1.imr** report followed by the **Open** option.

Add data item

4. Click the **Query data** button or select the **Report | Query** menu.
5. Expand the **Compensation And Salary Administration** folder in the Catalog window by **double-clicking** on it, or **clicking once** on the + to the left of the folder.
6. Add the following columns:

Catalog Folder/Subfolder	Report Column	Position
Compensation And Salary Admin. Employee Compensation	EE Annual Salary	Cell

Click once to select the required column and then click on the appropriate crosstab position button.

Change total summary to average summary

7. From within the Cells window of the **Query** dialog - Crosstab, select the **Total EE Annual Salary** column. Click **Edit**.
8. From within the Expression window in turn Click **Total**, **(- open bracket**, **) - close bracket**, and press the **Delete** button on your keyboard leaving only the **EE Annual Salary** within the Expression window.
9. Ensure that **EE Annual Salary** is selected then double-click the **Summaries** folder in the Available components window, in order to expand it.
10. Double-click **average** to add it to your expression.

    The Expression window will now display **average (EE Annual Salary)**.

11. Amend the name of the calculation from **Total EE Annual Salary** to **Average EE Annual Salary**.
12. Click **OK** to accept the calculation definition—this will return you to the Query dialog - Crosstab.

Display summary values

13. Ensure that the summary checkboxes ☐ Σ are selected.
14. Click **OK** to accept the Query data and display the report.

    Your report will now contain the summary values **Count EE Number** and **Average EE Annual Salary** for each Position.

Format column

15. To format the **Average EE Annual Salary** column, select one of the data items in the column and select the **Currency** button. Repeat this for all the **Average EE Annual Salary** columns.

Save report

16. Save this report using the **File** | **Save As** menu option (do not use the **Save** button on the standard toolbar as this will result in the existing **Workshop 5-1.imr** being overwritten).
17. Enter a File name of **Workshop 5-2.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Close report

18. Close the **Workshop 5-2.imr**, using the **Close** button, alternatively use the **File** | **Close** menu option.

Summary—Questions

Summary Q & A—Crosstab Reports

- Why use a Crosstab report?
- Name one method of creating a New Crosstab report.
- Name one method of converting an existing List report to a Crosstab report.
- What is the minimum number of columns you need to create a Crosstab report?
- Can you add more columns later?

Summary—Answers

Summary Q & A—Crosstab Reports

Why use a Crosstab report?

- Gain different perspective on your data
- Present information in a more compact format

Name one method of creating a New Crosstab report.

- Using the Impromptu Crosstab Wizard
- Using the Impromptu Crosstab Template

Summary Q & A—Crosstab Reports

Name one method of converting an existing List report to a Crosstab report.

Select the Build Crosstab button in the Query dialog box

Drag and drop a data item on to a column title

Summary Q & A—Crosstab Reports

What is the minimum number of columns you need to Create a Crosstab report?

- 3—column, row, and cell

Can you add more columns later?

- Yes

CHAPTER 6

Functions

Contents & Objectives

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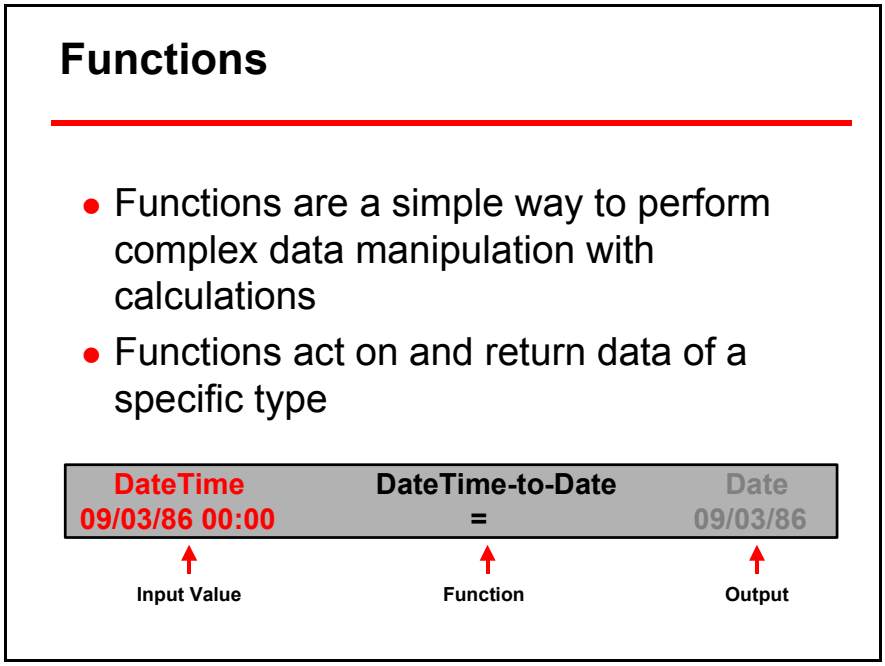
Objectives—Functions

In this section we will:

- Identify different types of Functions
- Identify Impromptu Data Types
- Examine how to use Functions and add value to a report

Functions



Pre-defined calculations called **Functions** are available in Impromptu, they take one or more values, perform a calculation on them and return a result.

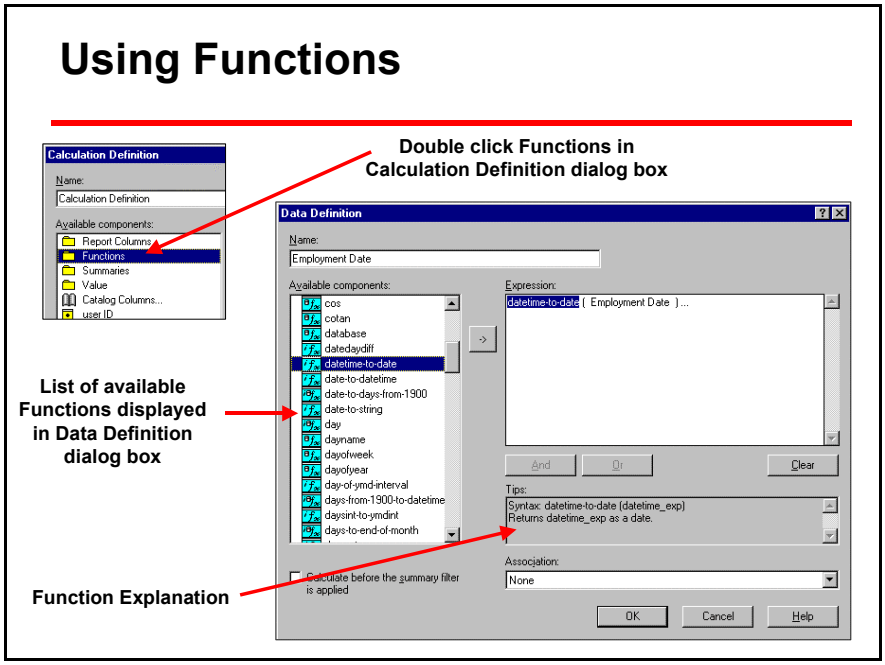
Functions are grouped into the types of data on which they can perform these calculations. For example, the Date Functions will only perform calculations if the values they read are valid date items.

There are six data types which Impromptu uses:

- Numeric
- Character
- Date
- Datetime
- Time
- Interval (which are timespans as far as your system is concerned

Note: Time values are unique to Impromptu—no time values are stored with your system's data.

Using Functions in Impromptu



Functions can be included anywhere in a calculation, if they are used with the appropriate data types.

Functions are applied in the Data Definition dialog box.

Applying and Editing Functions

Open Data Definition dialog box

1. Select an existing column from the **Query** dialog box | **Data** tab. Or add a new column and then select it from the Query - Data tab.
2. Click the **Edit Definition** button, this will enable the Data Definition dialog box.

OR

1. **Right-click** a data item in the report itself.
2. Select **Data Definition** from the shortcut menu, this will enable the **Data Definition** dialog box.

Apply function

3. Select the column name in the Expression window.
4. Double-click **Functions** from the Available components window.
5. Select one of the Functions from the Available components window.

Information on function

6. Examine the Tips window to find out what the function does, how to use it and what data types it uses.

Function Types

Numeric Functions

Perform mathematical/statistical analysis on numeric values.

Round Down will round values down to the required decimal places

Syntax: round-down (numeric_exp, integer_exp)

Example: round-down(salary, 1) would change the salary from $166.67 to $166.6

Ceiling will return a number rounded to the next highest integer

Syntax: ceiling (numeric_exp)

Example: ceiling (salary) would change the salary from $166.67 to $167

String Functions

Perform operations on string (character) values.

Right will return the right most characters of a string as specified

Syntax: right (string_exp, integer_exp)

Example: right (United States, 6) would return only the word States from this string

Substring will return a portion of the specified string value

Syntax: substring (string_exp, interger_exp1, interger_exp2)

Example: substring (‘HELLO’, 2, 2) would return EL

Date Functions

Perform operations on date and datetime values.

Add Days will add a specified number of days to a date item

Syntax: add-days (date_exp, integer_exp)

Example: add-days (01-JAN-1999, 31) would return the date 01-FEB-1999

Year will return the year from the date item

Syntax: year (date_exp)

Example: year (01-JAN-1999) returns the year 1999

Note: The function called today will display the system date—this can then be used in calculations which require a comparison between a particular date and today's date.

Combining Functions

Functions of different types can be combined—this will allow values of two different types to be compared.

Examples of combined Impromptu functions are as follows:

date-to-datetime date-to-string

datetime-to-date number-to-date

number-to-datetime number-to-String

string-to-number

Demo 6-1

The purpose of this demo is to use the Numeric and Date Functions in a Simple List Report.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking**, or **clicking once** on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
Employee Personal Information Employee Birth Date Information	Birth Date - EE
Employment Information Service Information	Employment Date
Compensation & Salary Administration Employee Compensation	EE Salary Per Period

   You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

Apply round-up function

5. Select the **EE Salary Per Period** from the Query data window, and click the **Edit Definition** button.
6. Select **EE Salary Per Period** in the Expression window and double-click the **Functions** folder in the Available components window.

   By selecting the **EE Salary Per Period** first, any function you add will come in front of **EE Salary Per Period** in the Expression window.

7. Double-click **round-up**.

   The Expression window will now display **round-up (EE Salary Per Period, <integer_exp>)**.
8. Select **<integer_exp>,** if not done so already, and double-click **number** in the Available components window—the number **0** is automatically added to the Expression window.
9. Select **OK** to accept your changes and return to the Query dialog.

   The round-up function will round up the **Salary** figure to an integer.
10. Click **OK** to accept the Query data and display the report.

Format dates

11. Select one data item from the **Birth Date - EE** and **Employment Date** columns, by using **Ctrl** or **Shift**.
12. With these items still selected, **Right-click** the mouse over one of them and select the **Format** option.

    The Format dialog box will appear.
13. From the **Data** tab, change the **Normal** format from **General** to **mm/dd/yyyy** (US and Canada) or dd/mm/yyyy (elsewhere).
14. Click **OK** to accept these changes.
15. Press **Esc** to remove the selection.

    All dates will be shown in the format **mm/dd/yyyy** (US and Canada) or **dd/mm/yyyy** (elsewhere).

Add calculated column

16. Click the **Query data** button or select the **Report | Query** menu option to return to the Query dialog box.
17. Click the **Calculate** button to open the Calculation Definition dialog box.
18. Enter a column heading name of **Length of Service (Days)**.

    In order to work out how many days a person has been employed, you are going to use the Date Function called **Day**, and subtract the **Employment Date** column from the **Today Date** function.

19. Select **day** from the **Functions** folder in the Available components window.

Note: If you click once on a function the Tips window will display the syntax required for this function and a brief description of what the function can be used to for.

20. Double-click the **Functions** folder in the Available components window and double-click **Today**.
21. Click the last **Close Brackets** sign in the Expression window, in order to place the next item inside the brackets.
22. Double-click the **- (minus sign)** from the Available components window.
23. Select **Employment Date** from the **Report Columns** folder in the Available components window.

    The Expression window will now display **day (today ( ) - Employment Date)**
24. Click **OK** to return to the Query dialog—a new calculated column called **Length of Service (Days)** has been added.
25. Click **OK** to accept the Query data and display the report.

    Examine the new column showing the number of days an Employee has worked for the Organization.

Sort

26. **Sort** the **Length of Service (Days)** column into **Descending order** in order to highlight long-serving Employees.

Close report

27. Close the report without saving your changes using the **Close** button; alternatively use the **File** | **Close** menu option.

Workshop 6-1: Using Functions in Reports

Objective: **To use the Years-Between and Today Functions to filter an existing report by dates.**

Scenario: **A redundancy program is to be implemented in your company to shed 100 jobs. Part of the redundancy policy is to take 50% of these redundancies from people who have been with the company for less than 20 years. You need to produce a list of all employees who meet this criteria.**

Open the workshop saved earlier as **Workshop 4-2.imr**, if not open already.

Your final report will look similar to the following example:

EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name	Job Title-EE	Average EE Annual Salary	High, Avg or Low	Position Count	Employment
3030	Region 3030	ACCOUNTANT, CLASS II	$33,000.00	Average	7	03/10/1983
		ACCOUNTING CLERK	$19,272.41	Low		22/07/1980 22/07/1980 22/07/1983
		ASSEMBLY LINE WORKER	$9,964.76	Low		23/11/1980 01/01/1982 10/01/1984
		CLERK/TYPIST, SENIOR	$12,361.27	Low		01/01/1981 28/02/1984 28/02/1984
		LATHE MACHINE TOOL SETTER	$20,228.00	Average		15/03/1986 11/04/1986
		PURCHASING MANAGER	$39,074.90	Average		26/09/1983 26/09/1983 26/09/1983 19/02/1984 19/02/1984 11/03/1985 01/06/1984 01/06/1984
		SHIPPING/RECEIVING CLERK	$9,796.15	Low		14/02/1982 16/11/1983 01/08/1984 15/02/1986
			$143,697.49			
3333	Region 3333	ACCOUNTANT, CLASS II	$29,264.18	Average	9	15/05/1983 15/05/1983

In the Filter tab enter the following expression:

years-between (Employment Date, today ( )) < 20

(*Hint: use the clear option in the Filter tab to clear the existing expression.*)

Close **Workshop 4-2.imr** without saving your changes.

Step by Step Guide to Workshop 6-1

Open report

1. Locate and open **Workshop 4-2.imr** from the **C:\Temp** directory, if not already open.
2. Click the **Query data** button or select the **Report | Query** menu option.

Add data item

3. Add the following data item:

Catalog Folder/Subfolder	Report Column
Employment Information Service Information	Employment Date

4. Click **OK** to accept the Query data and display the report.

Format column

5. Select any data item in the **Employment Date** column.
6. Right-click and select **Data Definition…** from the shortcut menu.
7. Select **Employment Date** in the Expression window.
8. Double-click **Functions.**
9. Double-click **datetime-to-date**.
10. Click **OK**.

Apply function

11. Click the **Query data** button or select the **Report | Query** menu option.
12. Click on the **Filter** tab to switch to it.
13. Use the **Clear** button to remove the existing filter expression in the Filter Definition window.
14. Double-click the **years-between** function from the **Functions** folder in the Available components window.
15. Double-click the **Report Columns** folder in the Available components window.
16. Double-click the **Employment Date** column.
17. Double-click the **today** function from the **Functions** folder in the Available components window.
18. Double-click the **<** (**less than**).

19. Double-click **number**, enter **20** into the Filter Definition window and press **Enter**.

    The Filter Definition window will now display:

    years-between (Employment Date, today ( )) < 20

20. Click **OK** to accept the Query data and display the report.

Close report

21. Close **Workshop 4-2.imr** without saving your changes using the **Close** button, alternatively use the **File | Close** menu option.

Summary—Questions

Summary Q & A—Functions

- What is a Function?
- When might you use a Function?
- Name three types of Functions.
- Name three Data Types.
- What Date data can Impromptu use?

Summary—Answers

Summary Q & A—Functions

What is a Function?

- A command that takes one or more values, performs an operation and returns a result

When might you use a Function?

- To perform data manipulation that is otherwise impossible to do
- To calculate intervals between dates

Summary Q & A—Functions

Name three types of Functions.

Numeric
String
Date

Summary Q & A—Functions

Name three Data Types.

- Numeric
- String
- Interval
- Date, Datetime, Time

What Date data can Impromptu use?

- System Date
- Date Fields within the database

CHAPTER 7

Formatting

Contents & Objectives

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1. Overview of Reporting Administration
2. Introduction to Impromptu
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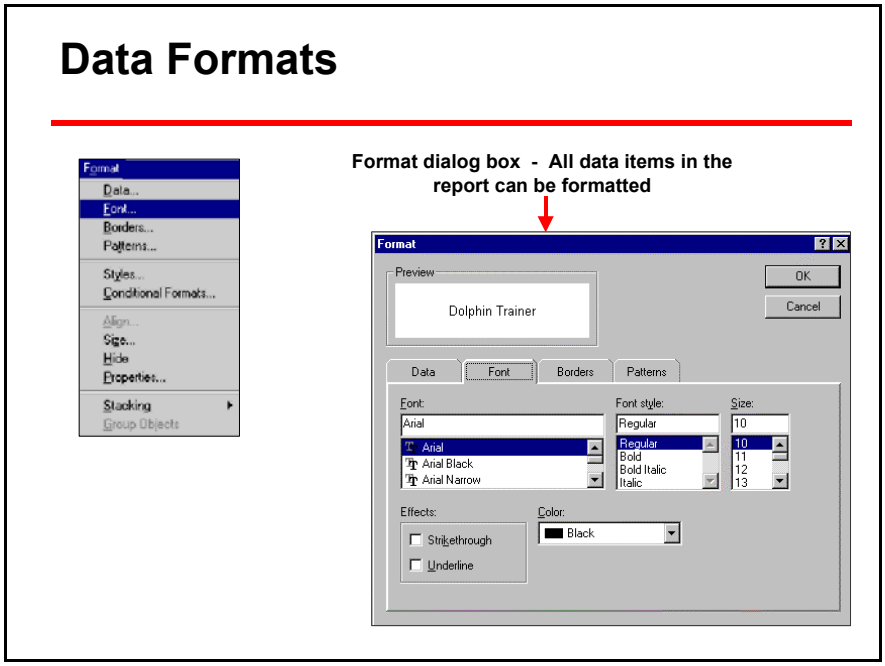
4. Customizing Data
5. Crosstab Reports
6. Functions
7. Formatting
8. More About Filters
9. Snapshots
10. Drill-Through Reports
11. Frames
12. Course Close

Objectives—Formatting

In this section we will:

- Examine Data Formats
- Create and Apply Styles
- Identify Exceptional Data
- Work with Columns
- Examine Page Breaks
- Align Report Objects

Data Formats



All the data items in a report can be formatted.

Select the data item and **Right-click** to show the shortcut menu and select the **Format** option. This will display the Format dialog box as shown above.

From this dialog you can see tabs giving you options to change:

Data: Format Options, Decimal Places, Format Preview.

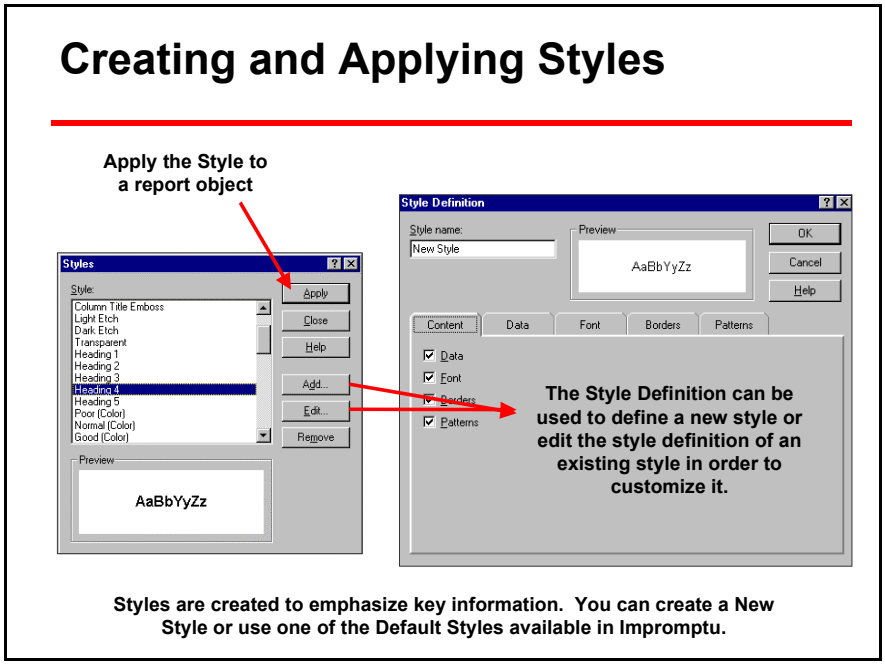
Font: Font, Font Style, Size, Underline, Strike-through, Color, Font Preview.

Borders: Set Borders, Border Styles, Border Colors.

Patterns: Pattern, Foreground Color, Background Color, Pattern Preview.

Note: An alternative way in which these features can be accessed is to use the Format menu, followed by the appropriate tab: Data, Font, Borders or Patterns.

Creating and Applying Styles



Styles can be defined and added to reports to emphasize key information. Styles contain specific formats that can be applied to selected parts of your report. For example, you may want headings to appear in a particular way—instead of changing each heading you can create and apply a style to the required headings.

To add a style use the **Format | Styles** menu option. This will display the **Styles** dialog box, which can be used to modify existing styles or create new styles. You can decide what options are available in the **Style | Data**, **Font**, **Borders**, and **Patterns** tabs.

To create a new style—select the **Add** option from the main **Styles** dialog box, enter a name for your style in the **Style Name** field, and select the type of formatting this style is to have available.

To apply a style to a particular part of your report—select the data item (use **Ctrl+Click** to select multiple data items) and select the **Format | Styles** menu option. This will display the **Styles** dialog box. Select the required style and click the **Apply** option.

To remove a style from data items—reselect the data items. Select the **Format | Styles** menu option. This will display the **Styles** dialog box. Select the style called **None** and click the **Apply** option. This will remove the style from the data items as required.

Note: Styles are held on your local machine in the Impromptu.ini file—they are not saved in the report.

Demo 7-1

The purpose of this demo is to Create and Apply a New Style.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking**, or **clicking once** on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
Employment Information Employee Job Assignment Information	Job Type-EE Job Title-EE
Employee Personal Information Employee Birth Date Information	Employee Age - Years
Employee Other Personal Information	EE Race EE Sex

You can select the columns in two ways: either double-click the required column, or click once to select it and then click the Add option. You can select multiple columns using the Ctrl and Shift keys.

5. Click **OK** to accept the Query data and display the report.

Create new style

You are going to create a new style, which you will apply to all the column headings.

6. To create a new Style, select the **Format | Styles** menu option.

   The Styles dialog box will appear.

   You are going to Add a new style.

7. Click **Add** to open the **Style Definition** dialog box.
8. Type in a **Style name** of **Column Headings**.
9. Click the **Data, Font, Borders** and **Patterns** checkboxes to make these tabs available.
10. Click the **Data** tab and make sure that **General** is the option showing for the **Positive** field.
11. Click the **Font** tab and change the options to be **Bold, Font Size** of **14,** with a Color of **Green**.
12. Click the **Borders** tab and change the Border Color to **Lime Green** and select the **Box** button.
13. Click the **Patterns** tab and select the Color **Yellow** from the **Background** pull-down list and the **Third Option** from the **Pattern** pull-down list.
14. Click **OK** to accept your changes and return to the Styles dialog box. The new style called **Column Headings** will have been added to the end of the **Style** window.
15. Click **Close** to return to the report.

Apply style to selected area

16. Select the heading row **EE Legal Name - First Last**, **Job Type-EE**, **Job Title-EE**, **etc.**

Note: A quick way to select a row is to position the pointer to the left of the first column heading, the pointer will change to a right pointing arrow, at this point left-click.

17. Select the **Format | Styles** menu option.
18. Scroll to the bottom of the list and select the new **Column Headings** style.

Note: A quick way to scroll to the last record is to click an existing style heading and press End on your keyboard.

19. Click the **Apply** option to apply this style to the selected area in the report.
20. Select **Close** to return to the report.
21. Press **Esc** to clear the selection and see the changes that the new style has made.

Save report

22. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File** | **Save** menu option.
23. Enter a File name of **Employees.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Close report

24. Close the report using the **Close** button; alternatively use the **File** | **Close** menu option.

Demo 7-2

The purpose of this demo is to Apply and Edit an Existing Style.

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Employees.imr** report followed by the **Open** option.

Edit style

4. To edit the Style, select the **Format | Styles** menu option.
5. Scroll to the bottom of the list and select the new **Column Headings** style and then click the **Edit** button.

   You will be placed back in to the **Style Definition** dialog box.
6. Turn the **Borders** and **Patterns** tabs off by clicking on the appropriate checkboxes.
7. Click **OK** to accept these changes and return to the **Styles** dialog box.
8. Click **Close** to return to the report.

Apply style

9. Reselect the column headings row that you applied the style to earlier.
10. Select the **Format | Styles** menu option.
11. From the **Style** window choose the style called **None** and click **Apply**.

    This will remove all styles applied to the selected text.
12. Next select the new **Column Headings** style and click **Apply**.
13. Select **Close** to return to the report.
14. Press **Esc** to clear the selection and see the changes that the edit to the **Column Headings** style has made.

Add title

15. **Double-click** the **<Type here to customize title>** and select the existing text. Type in a new title of **Employees Report**.
16. Press **Esc** to remove the cursor from the title.

Save report

17. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.
18. Close the report using the **Close** button; alternatively use the **File | Close** menu option.

Open report

19. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
20. Change the **Look in** folder to the report location **C:\Temp**.
21. Select the **Employee Personal Details** report followed by the **Open** option.

Change page layout

22. Change to Page Layout view by clicking on the **Page Layout** view button, if not already done.

Amend title

23. **Double-click** the **<Type here to customize title>** and then select the existing text. Type in a new title of **Employee Personal Details**.
24. Press **Esc** to remove the cursor from the title.

Apply style

25. Select the Column Headings Row **EE Sex, Organization No, EE Race, etc**.
26. Select the **Format | Styles** menu option.
27. Scroll to the bottom of the Styles window and select the new **Column Headings** style.
28. Click the **Apply** option to apply this style to the selected area in the report.
29. Select **Close** to return to the report.
30. Press **Esc** to clear the selection and see the changes that the new style has made.
31. Select the title **Employee Personal Details** (click once to select) and apply a style of **Light Emboss** using the **Format** menu - **Styles** option.

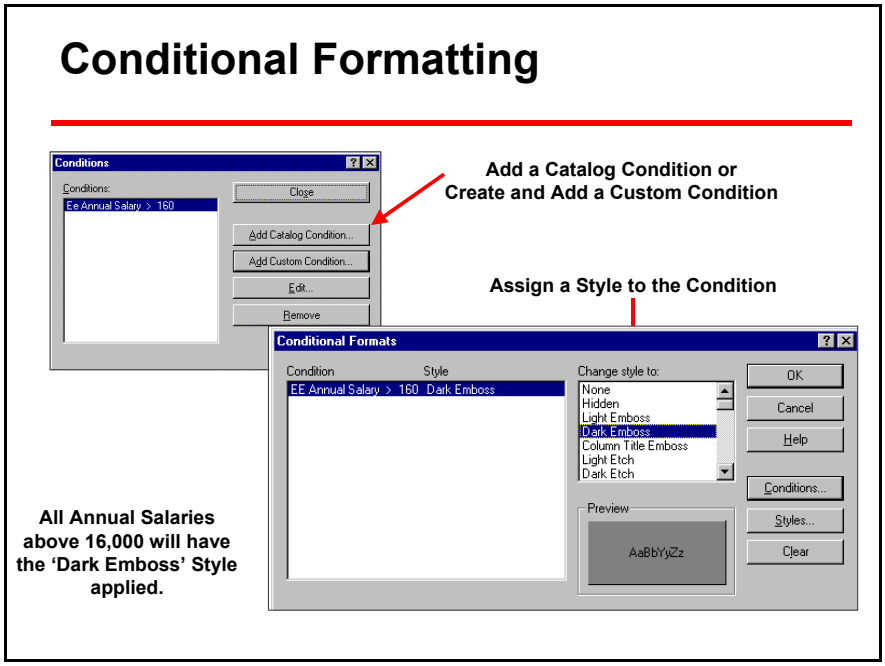
Save report

32. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File** | **Save** menu option.

Close report

33. Close the report using the **Close** button; alternatively use the **File** | **Close** menu option.

Conditional Formatting



A conditional format can be used to highlight specific data value ranges in your report.

You can create a conditional format to highlight data that falls in value ranges that you specify. These values ranges are specified using the **Condition Definition** dialog box.

Select the data item from in the column to which the conditional format is to be applied. Use **Ctrl+Click** to select more than one data item in more than one column, if entire rows that meet the specified condition are to be highlighted.

Select the **Format | Conditional Formats** menu option. This will display the **Conditional Formats** dialog box as shown above.

From this dialog select the **Conditions** option. This will display the **Conditions** dialog box. The next step is to specify whether the condition to be used is a **Custom Condition** or a **Catalog Condition (pre-defined condition)**.

Select the appropriate catalog condition or create the custom condition using the Condition Definition dialog box. For example, **Bonuses > 1,000**. This will add the condition to the conditions dialog box that can now be closed, using the **Close** option.

This will return you to the **Conditional Formats** dialog box, with the selected condition being added to the dialog box.

From the **Change style to** window select the required **Style** (a preview of the style is shown). If you want to create a new style use the **Styles** option, this will display the **Styles** dialog box (see earlier section on Styles for further information).

Select **OK** to close the **Conditional Formats** dialog box—your report will now be shown with the relevant formatting applied to it.

To remove a conditional format—reselect the **Format | Conditional Formats** menu option, and change the style to **None**. This will leave the conditional format to be applied at a later stage.

To completely remove the Conditional Format select the **Format - Conditional Formats** menu option followed by the **Conditions** option—select the required condition and click **Remove**.

Demo 7-3

The purpose of this demo is to Apply a Conditional Format in order to highlight data that meets a particular condition.

Open report

1. Select **Open** from the **File** menu, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Employee Salary Details.imr** report followed by the **Open** option.
4. Click a data item in the **EE Hourly Rate** column.

Create conditional format

You are going to create a conditional format that will highlight all data that shows a high hourly rate.

5. Select the **Format | Conditional Formats** menu option and then click **Conditions**.

   This will open the **Conditions** dialog where you have a choice of adding a condition from the catalog, or creating a new one. Conditions from the catalog will only be available if the Impromptu Administrator has previously created them.
6. Click **Add Custom Condition** to open the **Condition Definition** dialog box.

   The conditions are created in the Expression window.
7. Double-click the **Report Columns** folder in the Available components window in order to expand it.
8. Double-click **EE Hourly Rate** to add it to the Expression window.
9. Double-click the **>** (**Greater than**).
10. Double-click the **number** option, a **0** will be added to the Expression window.
11. Enter **15** into the expression window and press **Enter**.

    The Expression window will now display: **EE Hourly Rate > 15.**

    The name of the condition can be amended as required from in this dialog using the **Name** field.
12. Click **OK** to accept the Calculation Definition.

    The Conditions dialog appears, the newly created condition is displayed in the Conditions window.

13. Click **Close** to return to the Conditional Formats dialog.

    The newly created condition is displayed in the left window in this dialog box with a style of **None**.

Assign style to Conditional Format

The next step is to assign a style to the Conditional Format.

14. Select **Grass Green 1** from the **Change style to** window.
15. Click **OK** to accept the condition and style and display the report.
16. Press **Esc** to clear the selection.

    All figures in the **EE Hourly Rate** column that are **Greater than 15** will have the Conditional Format Style applied to them.

Close report

17. Close the report without saving your changes using the **Close** button; alternatively use the **File** | **Close** menu option.

Headers and Footers

As discussed earlier Headers and Footers are Form Frames into which objects such as text and report variables can be added.

Report variables are items such as the System date or time, page numbers and page counts, columns and calculations.

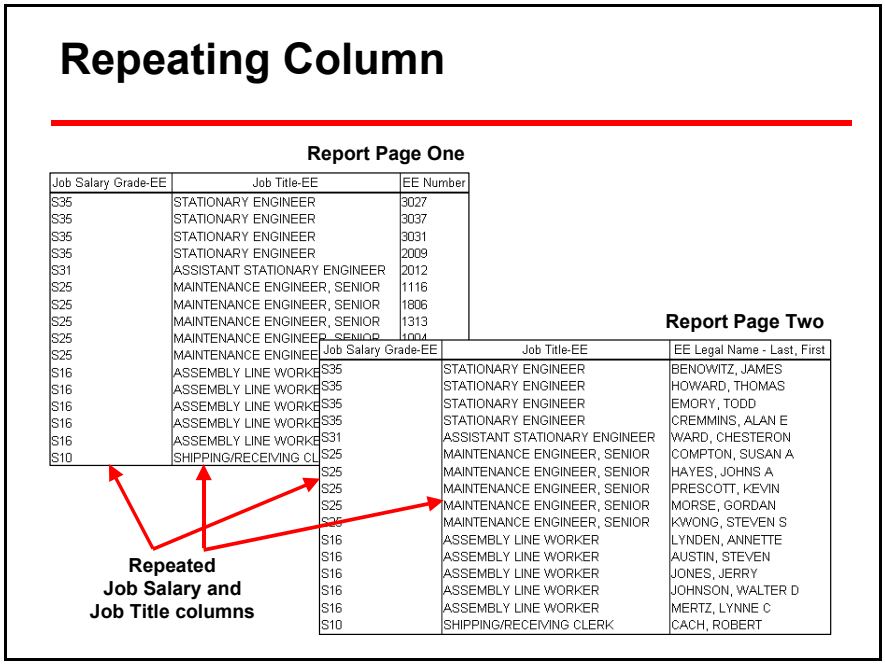
Different Header/Footer Types:

Headers and Footers can be added to List Frames to give List Headers and Footers (see earlier sections on Adding List Headers and Footers).

Page Headers and Footers can also be added to pages using the **File | Page Setup** menu option - **Page Setup** tab, and clicking the **Page Header** or **Page Footer** text.

To insert report variables such as the system date, system time, catalog name, and so on into page headers select the **Insert | More Objects** menu option. Select the required item and click the **Insert** option. Drag and drop the mouse pointer to the required location.

Working with Columns



Columns in your report can also be formatted as follows:

Repeating Column Titles

When a report runs over more than one page horizontally, you can decide whether columns are to be repeated on each page.

This option is accessed using the **List Properties** dialog. Select a data item in the List report. Click the **Select Parent** button on the Layout toolbar—the entire List Frame will now be highlighted. Select the **Format | Properties** menu option.

Select the **Printing** tab—select the columns to be repeated on every page.

Note: When the repeated columns are formatted the same changes will be applied to the original columns.

Column Headings

These can be formatted or a style can be applied to them.

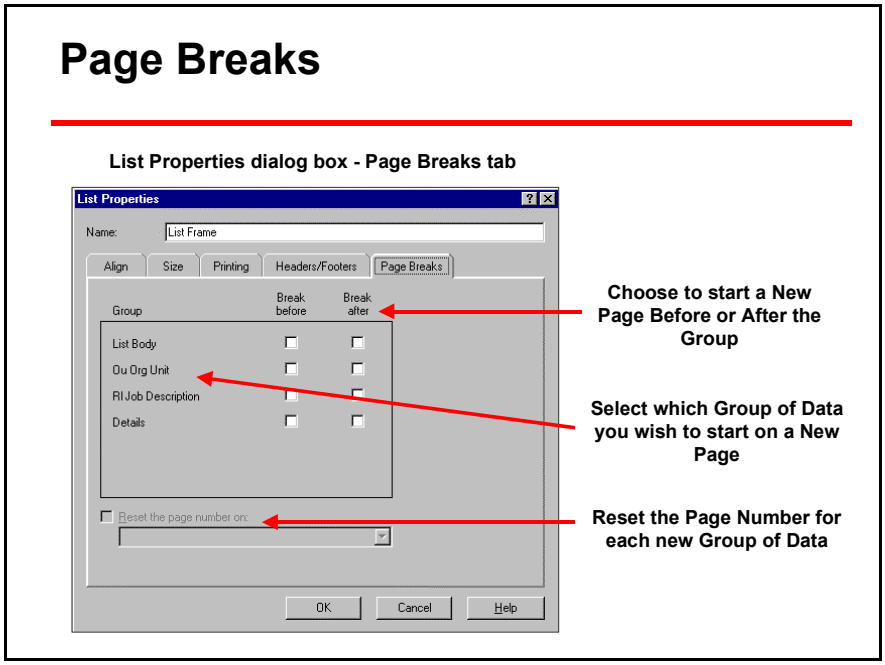
(See earlier Section on Creating and Applying Styles for further information.)

Column Sizes

The size (width/height) can be altered using the sizing handles.

Handles will appear when a data item in the required column is selected—dragging the handles for one data item will increase the entire column width/height.

Page Breaks



Page breaks can be added to reports to start different groupings on new pages, for example, an Employee report can be broken down to show the Employees for each Organizational Unit on a new page.

This option is accessed using the **List Properties** dialog. Select a data item in the List report. Select the **Select Parent** button on the Layout toolbar—the entire List Frame will now be highlighted. Select the **Format | Properties** menu option.

Select the **Page Break** tab—this will display the above dialog.

The page break can be inserted into the report before or after the groups of data.

You can also reset the page numbers for each new group of data.

Demo 7-4

The purpose of this demo is to Format a Simple List Report by inserting report variables, working with fonts and creating page breaks.

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Employee Salary Details.imr** report followed by the **Open** option.

Group data items

4. Select a data item in the **Job Salary Grade-EE** column and click the **Group** button.

   This will remove duplicate entries and group the same **Grades** together, thus making the report a lot easier to read.

Change view

5. Change to Page Layout view by clicking on the **Page Layout** view button, if not already done.

Change page header text

6. To change the Page Header text to something more meaningful, double-click in **<Type here to customize title>** and select the existing text.
7. Type in a new title of **Employee Salary Details**.
8. Press **Esc** to clear the selection.

   The information in the Page Header and the Page Footer will be repeated on every page in the report.

Add report variable to header

9. To add a report variable to the page header, select the **Insert | More Objects** menu option.
10. Click **Report file name** from the **Available objects** window and click **Insert**.

    The mouse pointer will change to a text frame icon.

11. Click once in the Page Header area, under the **Date**. The Report Path and File name will be inserted into a text frame starting at the position you clicked with the mouse pointer.
12. Select the **Date** text frame and look at the Format toolbar, to see what font options have been applied.

    Arial, 8pts, Black, Centered
13. Apply the same formatting to the **Report file name** text frame, by selecting the text frame and then clicking on the appropriate buttons on the Format toolbar.
14. Move the **Report file name** text frame to the left so that all the text can be seen on the screen.

Align objects

15. To align objects, select both the **Report file name** text frame and the **Date** text frame, using **Ctrl+Click** to multi select.
16. Click the **Align Right** button on the Layout toolbar. Both text frames will now be automatically aligned at the right edge of the header.

Reposition title

17. Drag the **Employee Salary Details** title towards the left-hand side of the screen to re-position it manually.

Format column

To format the data in columns, you need only change one data item, all the rest will change automatically.

18. Select one of the **Job Title-EE** data items and apply the format **Bold**.
19. Select one data item from the **EE Annual Salary** and **EE Hourly Rate** columns (second page horizontally), by using **Ctrl** or **Shift**.
20. Click the **Currency** button.

    The data in the two columns will be shown in currency format with two decimal places.
21. With these items still selected, **Right-click** the mouse over one of them and select the **Format** option.

    The Format dialog will appear.

22. From the **Data** tab, change the format to **$#,##0** for the positive field and **-$#,##0** for the negative field.
23. Click **OK** to accept these changes and return to the report.
24. Press **Esc** to clear the selection.

Add page breaks

You need to set a page break to start a new page at each change in **Job Salary Grade-EE**.

25. Select any data item in the report and click the **Select Parent** button on the Layout toolbar.

    This will select the **Primary List Frame**.
26. **Right-Click** in the selected area and select **Properties**. The **List Properties** dialog box will appear.
27. From the **Page Breaks** tab, select the **Break After** option next to **Job Salary Grade-EE**.
28. Select **Reset the page number on** to start new numbers for each grouping—also enter when the new numbers are to be started. In this example it will be **Job Salary Grade-EE**.
29. Click **OK** to accept these changes and return to the report.
30. Press **Esc** to clear the selection.

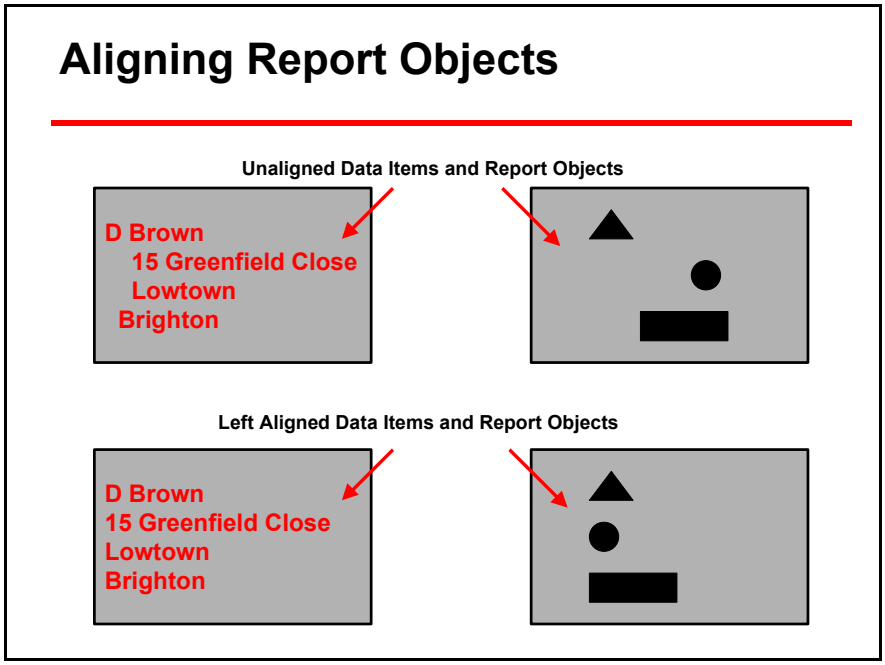
    Only one **Job Salary Grade-EE** will be displayed on this page. Do not worry if the **Job Salary Grade-EE** value is empty as this tells us that no **Job Salary Grade-EE** has been entered for this grouping.
31. Click the **Page Up** and **Page Down** buttons on the **Vertical Scrollbar** to move from one **Job Salary Grade-EE** page to another.

    If the **Job Salary Grade-EE** does not appear to be split into pages, check that you are in Page Layout view and not Screen Layout view.

Close report

32. Close the report without saving your changes using the **Close** button; alternatively use the **File** | **Close** menu option.

Aligning Report Objects



Selected objects used in a report whether they are text or data items can be aligned using the **Format** menu | **Align** tab, or using the **Align** buttons on the Layout toolbar.

Demo 7-5

The purpose of this demo is to improve the look of a report with different formatting techniques.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Mailing Labels** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right. The Query data window will display placeholders for this template—these are predefined when the template is created.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by **double-clicking**, or **clicking once** on the + to the left of the folder.
4. Select the **EE Legal Name - First Last**, left-click and drag this onto the **Name** placeholder in the Query data window.
5. Repeat this process for the remaining **Employee Address** details:

Catalog Folder/Subfolder	Report Column
Employee Personal Information Primary Employee Address	EE Street Address - Address Line 1 EE Street Address - Address Line 2 City-EE - City State-EE - State or Province Zip-EE - Zip or Postal Code City/Province-EE - Country

   You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.

Note: Placeholders that are not shown in bold do not need to be filled, as these are optional placeholders. The OK option will not be available until all compulsory (bold) placeholders are filled.

6. Click **OK** to accept the Query data and display the report.

Delete repeated information

7. The data in **Address Line 1** and **Address Line 2** is the same. In order to delete the repeated information, click the **Query data** button or select the **Report | Query** menu option.
8. Select the **2nd EE Street Address** from the **Query data** window and select the **Remove** button to remove the item from the Query.

Amend details

The same **Employee Address** will be shown in all labels. This can be amended to display the Address details of one Employee in each label as follows:

9. Select any data item in the first label and click the **Select Parent** button on the Layout toolbar.

   This will select the **Primary Address Labels** frame.
10. **Right-click** in the selected area and select **Properties**. The **Form Properties** dialog box will appear.
11. Change the **Scope of data** to **Data in Group**, ensure that **EE Legal Name - First Last** is selected.
12. Click **OK** to accept these changes and display the report.

    An automatic group will have been set on **EE Legal Name - First Last**.
13. Press **Esc** to clear the selection.

Remove word

14. Select the word **Attention** on one of the labels and press **Delete** on the keyboard to remove it.

    Notice any change you make to one label will be reflected in all of the others.

Remove style

15. To remove an existing style, select the **Employee Name: Alan Edward Cremmins**.
16. Select the **Format | Styles** menu option.
17. Choose **None** from the Styles window, click **Apply** and then **Close**.

Align text frames

18. Drag and drop the name **Alan Edward Cremmins** to go above the first line of the Address, place it slightly to the left of the other lines.

    Do not worry about the exact position or alignment, as you are going to align all the text frames automatically.
19. Select each line in the first Address label, using **Ctrl+Click**.
20. Click the **Align Left** button on the Layout toolbar.
21. Select the **Format** | **Align** menu option, and select the **Vertical Sections** option list.
22. Select **Evenly space** and ensure the **in** option is set to **Box**, click **OK** to accept these changes.

    All lines of the Address will now be evenly spaced out and nicely aligned.

Center lines

You now want to center the lines of the Address vertically in the Address label.

23. With all lines of the Address still selected, re-select the **Format** | **Align** menu option, and click the **Vertical Sections** option list.
24. Select **Align center** and ensure the **of** option is set to **Box**. Click **OK** to accept these changes.

    The lines of the Address will be centered one on top of another.

Group lines

This is not what you are looking for; you need to group the lines together first.

25. Click the **Undo** button on the Standard toolbar to remove the last action.
26. Select all the lines of the Address using **Ctrl+Click**.
27. Click the **Group Objects** button on the Layout toolbar.
28. Then select **Align** from the **Format** menu, and click the **Vertical Sections** pull down list.
29. Select **Align center**, the **of** option is set to **Parent**, click **OK** to accept these changes.

    All lines of the Address now be evenly spaced out and aligned.

Remove border

30. To remove the border around the Address, click the **Borders** button on the Format toolbar.

Close report

31. Close this file without saving your changes using the **Close** button; alternatively use the **File** | **Close** menu option.

Workshop 7-1: Applying Conditional Exceptions to Reports

Objective: **To create a new list report and use conditional exceptions to highlight exceptional data in a report as shown below.**

Scenario: **As the company director you have instigated a company-wide compensation policy review. You will shortly be having a meeting to discuss the findings of the review. To prepare, you wish to look at salaries over $30,000 as you think that more senior staff should be reviewed individually.**

Your final report will look similar to the following example:

Light Emboss = EE Annual Salary > $30,000

Job Type-EE	EE Number	EE Legal Name-First Last	EE Annual Salary
Region 3030			
Salaried Exempt	1975	THEODORE GRIMES	62999.82
Salaried Exempt	1112	RICH JOHNSEN	68499.96
Hourly Union	1378	ANNETTE LYNDEN	8710.00
Salaried Non Exempt	3005	STEVEN WALTER	18322.20
Salaried Non Exempt	6005	STEVEN SANDERS	18322.20
Salaried Non Exempt	1257	WILLIAM JORDAN	11440.00
Hourly Union	1234	STEVEN AUSTIN	8926.84
Hourly Union	1258	ROBERT CACH	9056.32
Salaried Non Exempt	1236	JAMES HAMMER	21172.84
Salaried Exempt	1848	ANNA COLLINS	39657.60
Salaried Exempt	3009	JUDITH TEACHEN	36720.00
Salaried Exempt	6009	JUDITH BEACHEM	34000.08
Salaried Exempt	1184	MARTINN BARKER	33000.00
Hourly Union	1115	BARBARA SWEENY	10201.88

Columns to be added:

Catalog Folder/Subfolder	Report Column
Employment Information	EE's HR Org Lvl 3 Name
Employment Information Employee Job Assignment Information	Job Type-EE
Employee Personal Information	EE Number EE Legal Name - First Last
Compensation And Salary Administration. Employee Compensation	EE Annual Salary

At this point display the report to the screen.

Add a **List Header** for the **EE's HR Org Lvl 3 Name** column (use the Header button).

Create and apply a conditional format (custom condition) called **Total EE Annual Salary > 30000** to an entire row as follows:

EE Annual Salary > 30000 apply the **Light Emboss** style.

Add a **text description** to the **List Header** detailing what the Conditional Formats applied to the report are. For example, **Light Emboss = Total EE Annual Salary > $30,000**.

(*Hint: Insert a Text Frame into the List Header.*)

Save this report as **C:\Temp\Workshop 7-1.imr**.

Step by Step Guide to Workshop 7-1

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

Add data items

3. Expand the **Employment Information** folder in the Catalog List by **double-clicking** on it, or **clicking once** on the + to the right of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information	EE's HR Org Lvl 3 Name
Employment Information Employee Job Assignment Information	Job Type-EE
Employee Personal Information	EE Number EE Legal Name - First Last
Compensation And Salary Administration Employee Compensation	EE Annual Salary

*You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns using the **Ctrl** and **Shift** keys.*

5. Click **OK** to accept the Query data and display the report.

Add List Header

6. Select any data item from the **EE's HR Org Lvl 3 Name** column and select the **Header** button.
7. Select any row of data.

Create Conditional Format

8. To create a Conditional Format, select the **Format | Conditional Formats** menu option.

   The Conditional Formats dialog box will be displayed.

9. Click the **Conditions** button. The **Conditions** dialog box will be displayed.
10. Click the **Add Custom Condition** button. The **Condition Definition** dialog box will be displayed.

11. Double-click the **Report Columns** folder in the Available components window in order to expand it.
12. Double-click **EE Annual Salary** to add it to the Expression window.
13. Double-click **> (Greater Than)**.
14. Double-click **number**, a **0** will be displayed in the Expression window.
15. Type **30000** into the Expression window.
16. Select **OK** to accept the **Condition Definition**.

    The Custom Condition now appears in the **Conditions** dialog.
17. Select **Close** to return to the **Conditional Formats** dialog.

Apply style

18. To apply a style of Light Emboss**,** select the condition and select **Light Emboss** from the **Change style to** window.
19. Click **OK** to accept the Conditional Formatting and display the report.

    This conditional format will now be applied to the report.

Add text description to the List Header

20. To add a description to the Page Header detailing what the conditional formats applied to the report are, select any data item on the screen followed by the **Select Parent** button.
21. **Right-click** and select **Properties** from the shortcut menu.
22. Select the **Headers/Footers** tab.
23. Select the **List Header** text. A **Green check** will appear next to the List Header text
24. Click **OK** to accept the changes and display the report.
25. Resize the **List Header**.
26. Insert a Text Frame into the header using the **Text Frame** button or select **Text Frame** from the **Insert** menu.
27. On line one, type in **'Light Emboss = EE Annual Salary > $30,000'**.

Save report

28. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.
29. Enter a File name of **Workshop 7.1.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.

Summary—Questions

Summary Q & A—Formatting

- What is a Style?
- What would you use Conditional Formatting for?
- Describe two ways to add Headers & Footers to your report.
- Name three ways of manipulating columns.
- In a report, if you wanted a new page for each Employee what would you do?
- What are the four vertical alignment options?

Summary—Answers

Summary Q & A—Formatting

What is a Style?

- A style is a pre-defined set of formatting characteristics applied to report objects

What would you use Conditional Formatting for?

- To highlight exceptional data within a report

Summary Q & A—Formatting

Describe two ways to add Headers/Footers to your report

Select Primary List Frame, right-click, and select Properties, followed by the Headers/Footers tab

Select any data item in the Primary List Frame and then select the Edit | Parent menu option. Select Format | Properties menu option, followed by the Header/Footer tab.

Summary Q & A—Formatting

Name three ways of manipulating columns

- Attributes of each column heading can be altered
- Use the sizing handles
- Repeat column titles when printing a report

Summary Q & A—Formatting

In a report, if you wanted a new page for each Employee what would you do?

Set a Page Break after the Employee Name Group using the List Properties | Page Break tab

What are the four vertical alignment options?

Align Top Edge, Centre, and Bottom Edge

Evenly Space

CHAPTER 8

More About Filters

Contents & Objectives

Contents

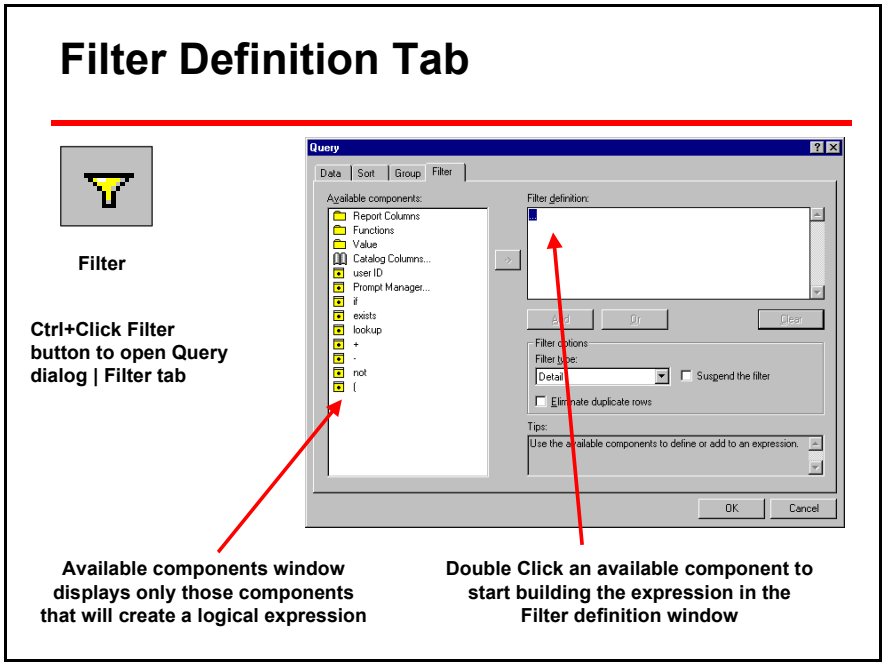
1. Overview of Reporting Administration
2. Introduction to Impromptu
3. Organizing Data
4. Customizing Data
5. Crosstab Reports
6. Functions
7. Formatting
8. More About Filters
9. Snapshots
10. Drill-Through Reports
11. Frames
12. Course Close

Objectives—More About Filters

In this section we will:

- Explore and use the Filter Definition dialog
- Examine filter types—detail and summary
- Create prompt filters

Filtering Data using the Query Dialog Box



Filters are added to the query using the **Query** dialog box **| Filter** tab, this will allow for more advanced and detailed filters to be applied.

Filter Definition Tab

There are a number of ways in which you can access the **Query** dialog box **| Filter** tab:

- **Report | Query** menu option **| Filter** tab.
- **Ctrl+Click Filter** button.

The screen displayed in the Filter tab is referred to as the **Filter definition**. It allows you to create filter expressions similar to the one discussed earlier.

Available Components

Impromptu provides you with a list of available components, what components you see are dependent on the type of expression you are building.

- Report Columns: The selected columns in your report.
- Functions: Predefined mathematical calculations.
- Values: Constants that you can use in your expression (Numbers, Strings, Dates).
- Catalog Columns: All the columns from the related catalog.
- Operators: +,-,*,/

Filter Definition

Text box which shows expressions while they are being built and for future reference.

The Filter definition can only be created using the mouse—you can not type directly into it. It is also **case-sensitive**.

To delete items from the expression, select them and press the **Delete** key.

And: Adds an **'and'** to the expression.

Or: Adds an **'or'** to the expression.

Clear: This will delete the current expression from the Expression window.

Suspend If a report has a filter applied you can choose to run it without the filter by clicking on the option: **Suspend the filter**. This will suspend the filter rather than delete it completely.

Tips: This will provide tips as you build the expression.

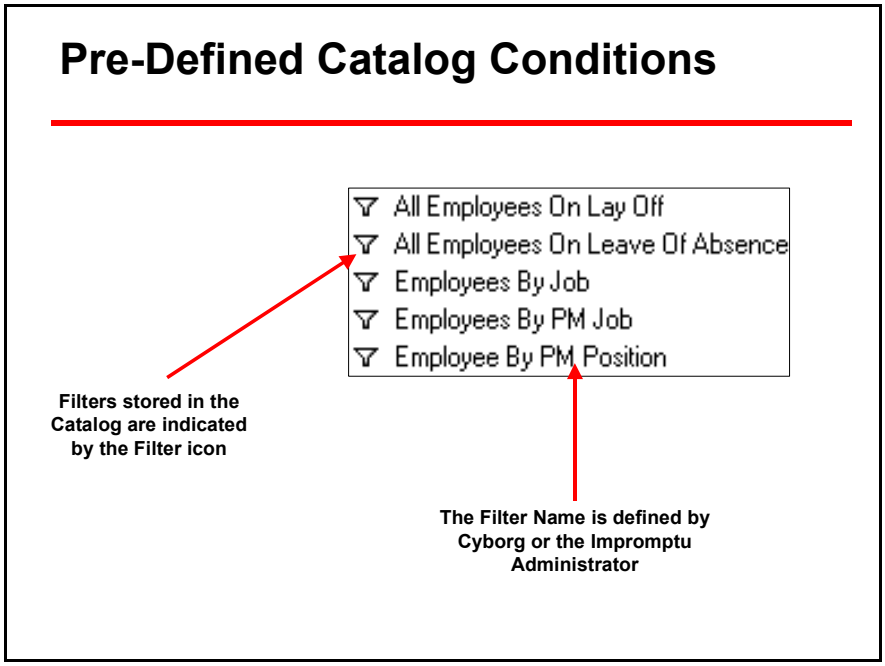
If there is an error in the expression entered then an error message will be displayed when you try to save the expression and apply the filter.

OK: Selecting **OK** will return you to the report where the filter added will be applied.

Cancel: This will exit the Filter tab without saving changes.

Help: Accesses the help files.

Pre-Defined Catalog Conditions



These are pre-defined conditions (filters), delivered by Cyborg, or created by the Impromptu Administrator that you can use to filter the data displayed in the various reports.

They are stored with other columns in the folder structure of the catalog, having the filter button as their column icon.

To add a pre-defined condition to your report **Ctrl+Click** the **Filter** button—this will display the Filter tab.

Double-click **Catalog Columns**—search for the pre-defined condition (condition column will be shown with the filter icon as their column icon). Select the condition and click **OK** to add it to the Filter definition window.

Click **OK** to close out of the Filter tab and apply this filter to the report.

Demo 8-1

The purpose of this demo is to create a Filter in the Filter tab using a Predefined Catalog Condition.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by double-clicking, or clicking once on the + to the left of the folder.
4. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
Employment Information Org Level And Unit Numbers	EE's HR Org Lvl 3 No
Employee Job Assignment Information	Job Type-EE
Employee Personal Information Employee Birth Date Information	Employee Age-Years
Employee Other Personal Info.	EE Race

You can select the columns in two ways: either double-click the required column, or click once to select it and then click the Add option. You can select multiple columns with the use of Ctrl and Shift keys.

Assign filter

5. Click the **Filter** tab in order to assign a Filter using a predefined catalog condition.
6. Double-click the **Catalog Columns** option from the Available components window.
7. Expand the **Employee Personal Information - Employee Personal Information Filters Folder** and double-click the **All Males** Catalog Condition to add to the Filter definition window.

   All Males has been set up by Cyborg Systems Inc, and will filter on all male employees.

8. Double-click **and**.
9. Double-click the **Report Columns** folder in the Available components window in order to expand it.
10. Double-click the **Employees Age-Years** column.
11. Double-click the **< (Less than)**.
12. Double-click **number**, a **0** will be added to the Filter definition window.
13. Type in **56** at the flashing cursor in the Filter definition window and press **Enter**.

    The Filter definition window will now display: **All Males and Employees Age-Years < 56**.
14. Click **OK** to accept the Query data and display the report.

Note: If filters and sorts are created at the same time as setting up the Query data, the database will only be accessed once when initially running the report. This is beneficial than going back into the Query dialog or using the Filter and Sort buttons at a later stage, once the Query has been set up.

There will now be records for only males under the age of 56 in your report.

View filter definition

To view this Filter definition select the drop down arrow next to the Filter button without selecting any data items (press **Esc** to clear any selections if required)—the only option available will be the **Filter definition** option. This will take you into the Filter tab.

15. Press the **Clear** button to remove this filter.
16. Click **OK** to accept the Query data and display the report.

All the records will now be displayed in your report.

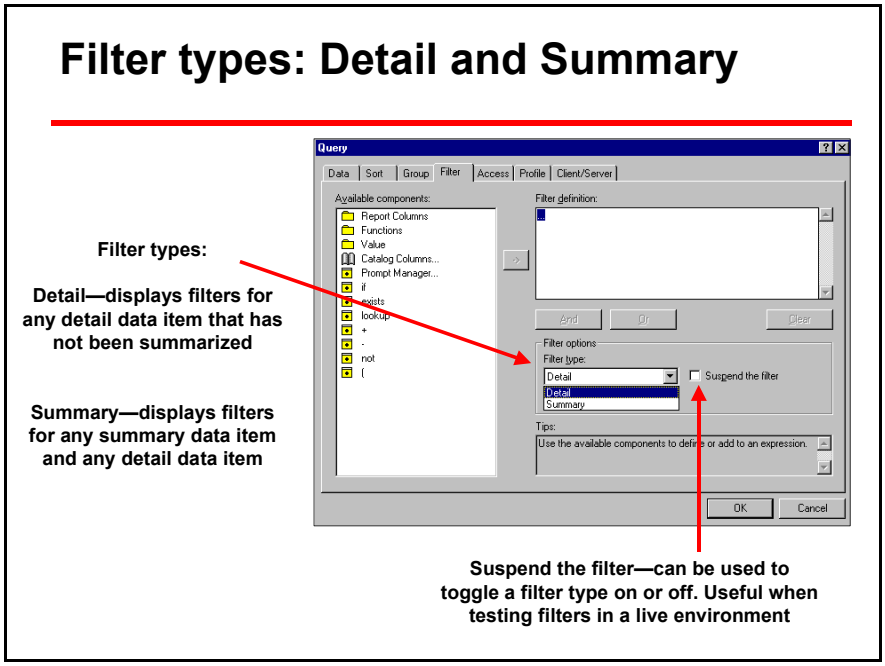
17. Change to **Screen Layout** view and press **End** on the keyboard to move quickly to the last record in a report.

Note: Home will take you back to the first record.

Close report

18. Close out of the report without saving your changes using the **Close** button; alternatively use the **File | Close** menu option.

Filter types: Detail and Summary



Filters can be applied to individual lines in a report—this is called a **detailed filter** (see the earlier section on Organizing Data for further information).

Filters can also be applied to summary lines—this is called a **summary filter**.

For example, if a summary was added to a report to show Salary amounts then this could be used in a filter to include only Salary amounts which were greater than $10,000.

This selection is made from in the **Query** dialog box | **Filter** tab.

Demo 8-2

The purpose of this demo is to create and use a Detail and Summary Filter.

Open report

34. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
35. Change the **Look in** folder to the report location **C:\Temp**.
36. Select the **Employee Personal Details.imr** report followed by the **Open** option.

Remove columns

37. Click the **Query data** button or select the **Report | Query** menu option.

    You need to remove the **EE Number, EE Street Address** and **City-EE** columns from the report.
38. Use **Ctrl** to select these columns from the **Query data** window and then click the **Remove** button.

Add calculated column

39. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information Org Level And Unit Numbers	EE's HR Org Lvl 3 No
Company Information	HR Org Lvl 3 Name
Compensation And Salary Administration Employee Compensation	EE Annual Salary

40. Group the **EE's HR Org Lvl 3 No** column and associate **HR Org Lvl 3 Name** to it.
41. Click **OK** to accept the Query data and display the report.

Add filter

You are only interested in employees that get **Total Salaries** of over **$30,000** for the **Region 3388** groupings.

42. **Ctrl+Click** the **Filter** button in order to open the **Query** dialog automatically at the **Filter** tab.
43. Expand the **Report Columns** folder and add **EE's HR Org Lvl 3 Name** to the Filter definition window by double-clicking on it.

44. Double-click **in.**
45. Double-click the **(- Open Bracket.**
46. Double-click the **select string** option.
47. Type **Region 3388**, and press **Enter**.
48. Double-click the **) - Close Bracket**.

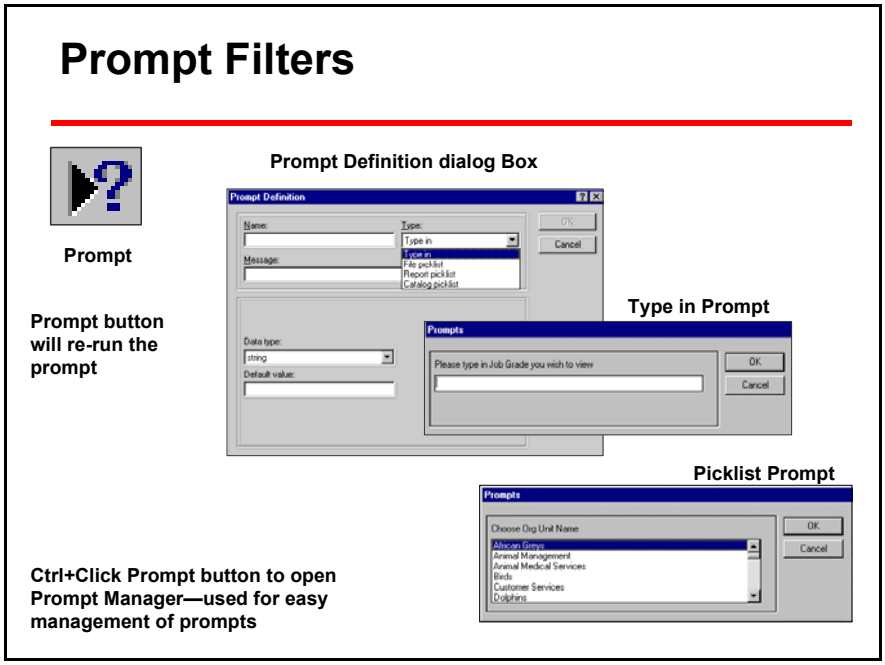
    The Filter definition window will now display: **EE's HR Org Lvl 3 Name in ('Region 3388')**.

Add summary

49. Choose **Summary** from the **Filter type** drop-down list. This will clear the Filter definition window.
50. Expand the **Report Columns** folder and add **EE Annual Salary** to the Filter definition window by double-clicking on it.
51. Double-click **> - (Greater than)**.
52. Double-click **number**, a **0** will be displayed in the Filter definition window.
53. Type in **30000** and press **Enter**.

    The Filter definition window will now display: **EE Annual Salary > 30000**.
54. Click **OK** to accept the Query data and display the report.
55. Leave this report open for the next demo.

Prompt Filters



Prompt Filters can be added to reports to allow you to filter the report each time you access it.

There are two types of prompt filters: **Type-in Prompts** and **Picklist Prompts**.

Type-in prompts are where you have to type in the filter criteria, these are often used to enter start and end ranges of dates and values.

Picklist prompts are where you select one or more filter criteria from a given list.

There are three different type of picklist prompt filters:

Catalog Picklist: This will display the catalog column data items from which you can select items.

Report Picklist: This will display a subset of data items from the database that are included in the report.

File Picklist: This will display a list of choices from a text file saved in comma-delimited ASCII format.

The prompts will automatically be shown when the report is first accessed. However, they can be reapplied using the **Prompt** button or the **Report** menu **- Prompt** option.

Cyborg Pick reports

There are a number of Cyborg-delivered picklist prompts within the catalogs which present you with an option list of data items from which you select one or more values. The values listed in the picklist prompts are retrieved from Cyborg-delivered reports. There are 24 such pick reports delivered with Reporting Administration. Typically, these are installed in the C:\Pick Reports directory.

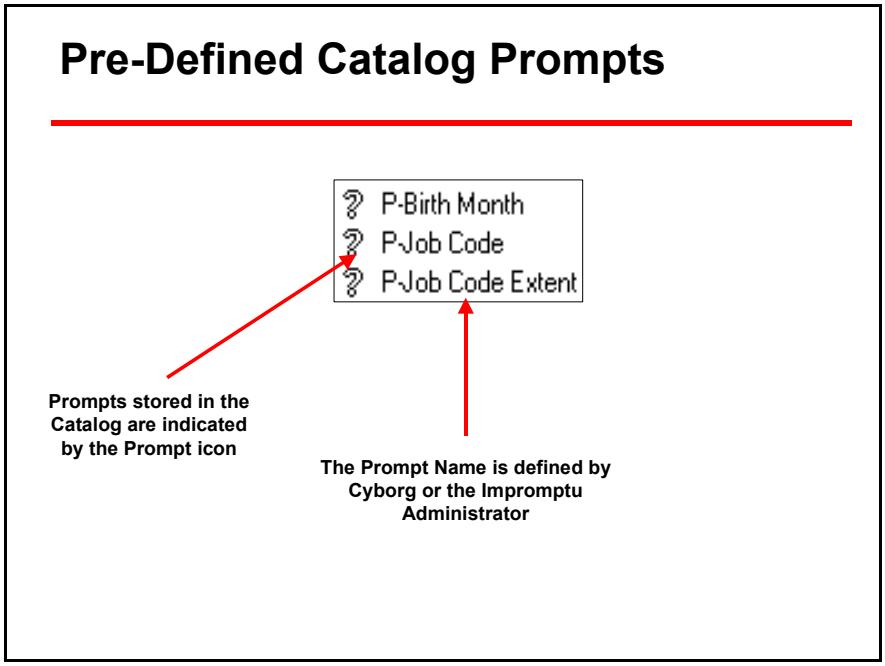
Adding Prompt Filters to Your Report

Prompts are created and stored using the Prompt Manager—this is accessed using the **Report | Prompt Manager** menu option.

The Prompt Manager will create and manage prompts for each report—prompts created in one report using the prompt manager can not be accessed in other reports.

From the **Prompt Manager** dialog select the **New** option to display the **Prompt Definition** dialog box.

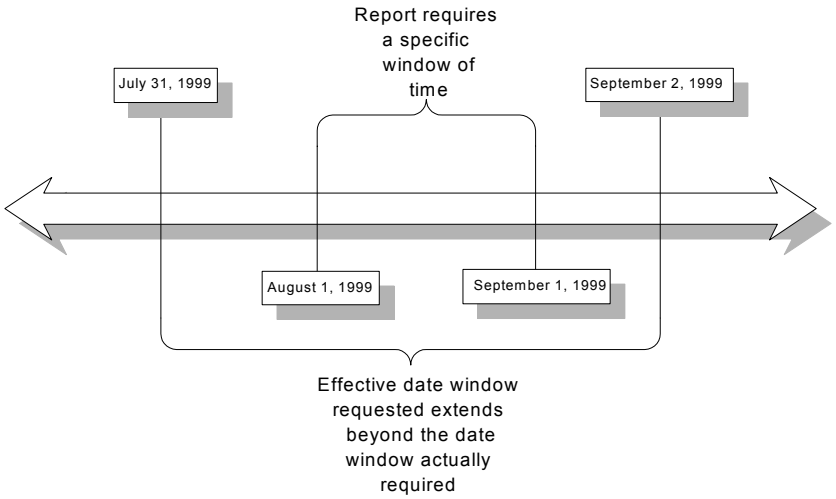
Catalog Prompts



If prompts are to be used in many different reports then they are usually stored as pre-defined columns in the catalog as delivered by Cyborg, or defined by the Impromptu Administrator—they are shown with the **Question Mark** icon as shown above.

In order to present the appropriate data for the report you wish to execute, Cyborg has developed prompts in each catalog. You can use one or more of these prompts when creating your reports. When you open a report containing these prompts, one or a series of dialogs display asking you to enter any parameters, such as a date or specific organizations, for the information you want displayed in your report.

If you enter the same date for both fields in a prompt asking for a beginning and end date, you are requesting information as of a specific date. Take care when entering a range of dates that the dates entered are adequate for the report requirements, or a blank report may be produced. For example, if the report requires data from August 1 1999 through September 1 1999, ensure that you will be able to view all the data you will need for your report by requesting an effective date range window from July 31 1999 through September 1 1999.



Catalog prompts are selected from in the Filter tab.

Demo 8-3

The purpose of this demo is to create a Prompt Filter using a predefined catalog prompt.

Clear filter

1. With the report open from demo 8.2, **Ctrl+Click** the **Filter** button in order to open the **Query** window automatically at the **Filter** tab.
2. Click **Clear** to remove the **Detail** filter type.
3. Change the filter type to **Summary** from the **Filter type** option list.
4. Click **Clear** to remove the **Summary** filter type.
5. Change the filter type back to **Detail**.

Add filter definition

6. Expand the **Report Columns** folder and add **EE's HR Org Lvl 3 Name** to the Filter definition window by double-clicking on it.
7. Double-click **in**.
8. Double-click the **(- Open Bracket.**
9. Double-click the **Catalog Columns** option. This will open the **Catalog Columns** dialog.
10. Expand the **Prompts** folder. Select **P-HR Org Lvl 3 Name** and click **OK** to add it to the Filter definition dialog.
11. Double-click the **) - Close Bracket** to finish the Filter definition.

    The Filter definition window will now display: **EE's HR Org Lvl 3 Name in (?\Prompts\P-HR Org Lvl 3 Name?)**
12. Click **OK** to accept the Query data and display the report.

Select prompt option

The Prompts dialog will automatically appear.

13. Select **3030** from the **Select HR Org Lvl 3 Name** list and click **OK**.
14. The report is filtered to **Region 3030**.

Run prompt

15. To run the Prompt again click the **Prompt** button on the Standard toolbar.
16. Select a different **Organization Unit Name** in the Prompts dialog and click **OK**.

    The report will be filtered to the last **Organization Unit Name** that you selected in the **Select HR Org Lvl 3 Name** list.

Close report

17. Close out of the report without saving the changes using the **Close** button, alternatively use the **File** | **Close** menu option.

Demo 8-4

The purpose of this demo is to create and use a Type-in Prompt Filter for a range of dates.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Add data items

3. Expand the **Employee Personal Information** folder in the Catalog by double clicking, or clicking once on the + to the left of the folder.
4. You need to add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
Employee Birth Date Info.	Birth Date-EE

You can select the columns in two ways: either double-click the required column, or click once to select it and then click the Add option. You can select multiple columns with the use of Ctrl and Shift keys.

Edit date definition

5. Select the **Birth Date-EE** column from the **Query data** window, and click the **Edit Definition** button.

   We need to ensure that the Date format of the Data is the same as the Date format of the user input. For this reason the Impromptu **datetime-to-date** function will be used in the **Birth Date-EE** column
6. Select **Birth Date-EE** in the Expression window and double-click the **Functions** folder in the Available components window.
7. Double-click **datetime-to-date**.

   The Expression window will now display **datetime-to-date (Birth Date-EE).**
8. Click **OK** to accept the changes and return to the Query data dialog.

9. Click **OK** again to accept the Query data and display the report.

Create dated prompt

10. To set up the **Born From**, type in prompt, select the **Report | Prompt Manager** menu option, and click **New**.

    The **Prompt Definition** dialog box will appear.

    You could also have: **Ctrl+Clicked** on the **Filter** button and double-clicked **Prompt Manager** from the Available components window.
11. Enter the name of **Born From** in the **Name** field.
12. Enter the text **Please enter the born from date (YYYY-MM-DD)** in the **Message** field.
13. Ensure that the **Type** is set to **Type in** and that the **Data type** is **date**.

    Leave the default value as the current date.
14. Click **OK** to accept the new prompt and return to the **Prompt Manager** dialog box.
15. To set up the **Born To** type in prompt, select **New**
16. Enter the name of **Born To** in the **Name** field.
17. Enter the text **Please enter the born to date (YYYY-MM-DD)** in the **Message** field.
18. Ensure that the **Type** is set to **Type in** and that the **Data type** is **date**.

    Leave the default value as the current date.
19. Click **OK** to accept the changes and return to the Query data dialog.
20. Click **OK** to accept the Query data and display the report.

Create prompt filter

21. To create a prompt filter using the two Type In Prompts, **Ctrl+Click** the **Filter** button to open the **Query** window automatically at the **Filter** tab.
22. Expand the **Report Columns** folder and add **Birth Date-EE** to the Filter definition window by double-clicking on it.
23. Double-click **between**.
24. Double-click **Prompt Manager**.

    This will open the Prompt Manager displaying the two date prompts that were created earlier.
25. Select **Born From** and click **OK** to add this to the Filter definition window.
26. Double-click **and**.
27. Double-click **Prompt Manager.**

28. Select **Born To** and click **OK** to add this to the Filter definition window

    The Filter definition window will now display: **Birth Date-EE between ?Born From? and ?Born To?**

29. Click **OK** to accept the Query data and display the report.

    The **Prompts** dialog will automatically be displayed.

Enter prompt dates

30. Enter a **Born From date** of **1950-01-01** in the first text window.
31. Enter a **Born To date** of **1970-01-01** in the second text window.
32. Click **OK** to accept the Filter dates, the report will run showing only the relevant records.

Run prompt

33. To run the Type In Prompt Filter again, click the **Prompt** button and enter the new start and end dates.
34. Click **OK** to apply the Filter and display the report.

Close report

35. Close out of the report without saving your changes using the **Close** button, alternatively use the **File** | **Close** menu option.

Demo 8-5

The purpose of this demo is to Create a Catalog Picklist in order to select one or more specific items.

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Employee Salary Details.imr** report followed by the **Open** option.
4. Click the **Query data** button or select the **Report | Query** menu option.

Add column

5. You need to add the **EE's HR Org Lvl 3 No** column to the report.
6. Open the **Employment Information – Org Level And Unit Numbers** folder and double-click the **EE's HR Org Lvl 3 No** column to add it to the Query data window.

Add filter

7. Select the **Filter** tab.
8. Expand the **Report Columns** folder and add **EE's HR Org Lvl 3 No** to the Filter definition window by double-clicking on it.
9. Double-click **in**.
10. Double-click the **(- Open Bracket**.
11. Double-click the **Prompt Manager**.
12. Enter the **Name** of **Regions** the Prompt Definition dialog box.
13. Type **Select one or more Regions** in to the **Message** field.
14. Change the **Type** to **Catalog picklist**.
15. Select **EE's HR Org Lvl 3 No** from the **Employment Information – Org Level And Unit Numbers** folder and then click the **Use** option.
16. Click **OK** and then **OK** again to return to the Filter tab.

    The Filter definition window will now display: **EE's HR Org Lvl 3 in (?Region?)**.
17. Double-click the **) - Close Bracket** to complete the Filter definition.
18. Click **OK** to accept the Query data and display the report.

The Prompts dialog will automatically be displayed.

Complete prompt dialog

19. Select **3030** and **3388** from the prompt, using **Ctrl+Click** to multi-select.
20. Click **OK** to apply the filter and display the report.

Run prompt

21. To rerun the prompt filter again, click the **Prompt** button and choose any other **Regions**.
22. Click **OK** to apply the filter and display the report.

Close report

23. Close out of the report without saving your changes using the **Close** button, alternatively use the **File** | **Close** menu option.

Workshop 8-1: Different Filter Types

Objective: **To use and identify the different filter types.**

Scenario: **As company director you are continuing to investigate equal opportunities in your company. You want to look at senior positions with low salaries to see if there is any bias in race and gender.**

Open the workshop saved earlier as **Workshop 5-2.imr**.

We want to view only Annual Salaries less than or equal to $40000 and Job Salary Grades of between 30 and 36, as shown in the screen below:

EE Sex	EE Race	Active-Salrd Reg FT	
		Count EE Number	Average EE Annual Salary
Female	White-Not Hispanic	7	$37,789.67
Male	Hispanic	2	$35,110.68

The following filter types will be used to achieve this:

Filter Type: Detail
Job Salary Grade-EE between 30 and 36

Filter Type: Summary
Average EE Annual Salary <= 40000

(Hint: Job Salary Grade-EE can be added from the Catalog Columns list.)

To match the screen shown above, remove the summary row for each column.

Close out of the report without saving your changes.

Step by Step Guide to Workshop 8-1

Open report

1. Select the **File | Open** menu option, or click the **Open** button. This will display the Open report dialog box.
2. Change the **Look in** folder to the report location **C:\Temp**.
3. Select the **Workshop 5-2.imr** report followed by the **Open** option.

Add Detail filter

4. Select the **Report | Query** menu option, or select the **Query data** button.
5. Select the **Filter** tab.
6. Ensure that the **Filter type** box is showing **Detail**.
7. In the Available components window, double-click **Catalog Columns**, open the **Employment Information – Employee Job Assignment Information** folder and double-click the **Job Salary Grade-EE** column.
8. Double-click **between**.
9. Double-click **string**—speech marks will be added to the Filter definition window.
10. Type **30** into the speech marks and press **Enter**.
11. Double-click **and**.
12. Double-click **string**—speech marks will be added to the filter definition window.
13. Type in **36** into the speech marks and press **Enter**.
14. To enter a **Summary** filter, change the **Filter type** to **Summary** using the drop-down arrow.

Add Summary filter

15. Again from the Available components window select **Report Columns** and then double-click **Average EE Annual Salary** to add it to the Filter definition window.
16. Next double-click **<= - (less than or equal to)**
17. Double-click **number**, a **0** will be added to the Filter definition window.
18. Type in **40000** and press **Enter**.
19. Select **OK** to accept the Query data and display the report.

Remove summary rows

20. If necessary, remove the summary row for each column, select the **Report** menu and choose **Query**, or select the **Query data** button.
21. Deselect the **Summary row/column** checkboxes and select **OK**.

Close report

22. Close out of the report without saving your changes using the **Close** button, alternatively use the **File | Close** menu option.

Summary—Questions

Summary Q & A—More About Filters

- Why is it more efficient to build the filter into the initial query?
- Why is the Filter Definition dialog used?
- Where are pre-defined conditions stored?
- Which type of filter enables you to see:
  - a) Summary columns
  - b) Detail columns

Summary Q & A—More About Filters

Name the two main prompt filter types and their differences.

How do you access the Prompt Manager?

Who can create a catalog prompt?

Where would you use a Type In Prompt as opposed to a Catalog Picklist Prompt?

Summary—Answers

Summary Q & A—More About Filters

Why is it more efficient to build the filter into the initial query?

- You only have to access the database once.

Why is the Filter Definition dialog used?

- To access predefined conditions stored in the catalog
- To access catalog prompts
- To create and edit prompts
- To access the prompt manager and create prompt filters

Summary Q & A—More About Filters

Where are pre-defined conditions stored?

In the catalog, in folders

Which type of filter enables you to see:

a) Summary columns

summary filters

b) Detail columns

detail and summary filters

Summary Q & A—More About Filters

Name the two main prompt filter types and their differences.

- Type In—you type in values that exactly match values in the database
- Picklist—you choose from a list of values

How do you access the Prompt Manager?

- From the Report menu
- The Filter tab in the Query dialog box
- Ctrl+Click the Prompt button

Summary Q & A—More About Filters

Who can create a catalog prompt?

The Impromptu Administrator

Where would you use a Type In Prompt as opposed to a Catalog Picklist Prompt?

For Dates/Numeric values

CHAPTER 9

Snapshots

Contents & Objectives

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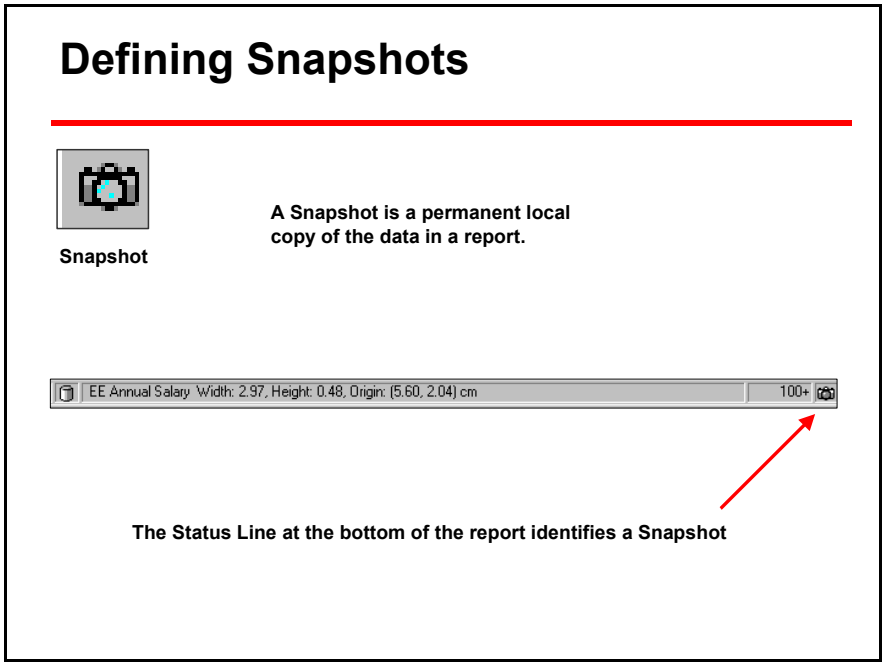
Objectives—Snapshots

In this section we will:

- Define snapshots
- Insert a snapshot timestamp

Snapshot



A **Snapshot** is a hard copy of your report and the data it contains (static data). This will allow you to take the report file away from the usual environment (the network) and continue to work with it and the data it holds.

As snapshots contain the data as well as the report definition they are larger in size than the normal **.imr** reports you may have created.

Creating a Snapshot

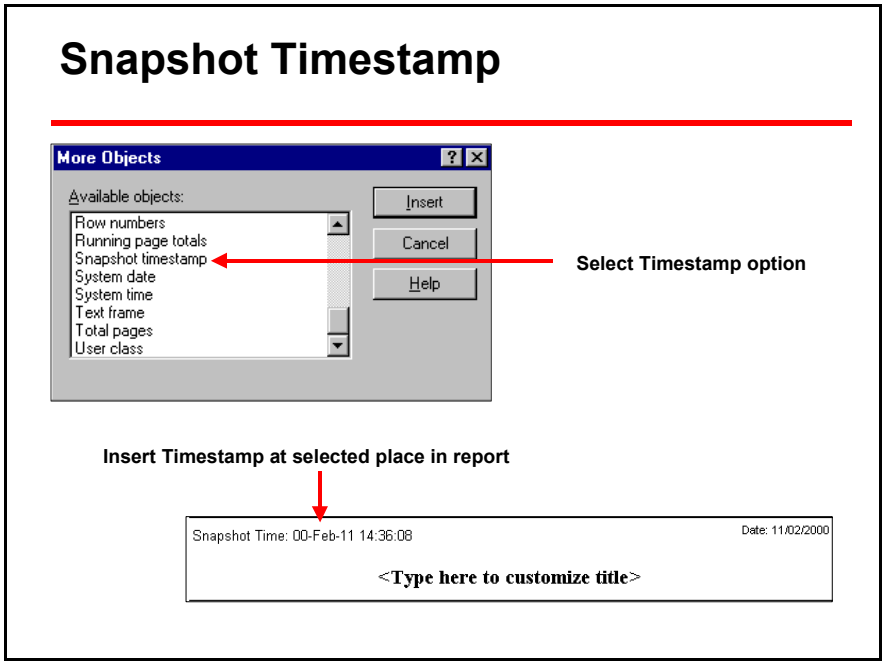
Create a normal report following the standard process.

Select the **Snapshot** button on the Standard toolbar—ensure that the button is now indented.

Note: A snapshot icon will be shown on the Status Line (bottom right corner of screen) and the database icon is also shown indicating that we are still connected to the database.

A Snapshot can also be applied using the Report | Query menu option | Access tab.

Snapshot Timestamp



A **Snapshot Timestamp** will help you to identify when the Snapshot was taken. If you update/refresh a Snapshot report the Snapshot Timestamp will also update.

Position the insertion point where you want to place the Snapshot Timestamp.

Use the **Insert** | **More Objects** menu option and select the **Snapshot Timestamp** from the More Objects dialog box.

Move the mouse pointer to the required location for the Snapshot Timestamp, which is normally the Page Header or Footer.

Demo 9-1

The purpose of this demo is to create a snapshot report, for data in a specified date range.

Set advanced tabs option

1. Select the **Tools | Options** menu option.
2. Select the **General** tab.
3. Ensure that the **Show advanced tabs in the Query dialog box** is selected.
4. Close out of this option, accepting the changes made, by clicking **OK**.

Create new report

5. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
6. Select the **Simple List** template and click **OK**.

   The **Query** dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

   The Query dialog box should show the three advanced tabs: **Access, Profile** and **Client Server**.

Add data items

7. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employee Personal Information	EE Legal Name - First Last
Compensation And Salary Administration Employee Compensation	EE Annual Salary
Employee Skills And Training Training Information	Training Course Name Start Date-Training

8. Filter the report using the following expression:

   Start Date - Training between 1989-05-01 and 1989-06-15.

Group data

Group the report by **EE Legal Name - First Last** and **EE Annual Salary**.

9. Switch to the Sort tab - **EE Legal Name - First Last** and **EE Annual Salary** have been automatically sorted. For Impromptu to group data it must be sorted first hence this is done automatically.
10. Click **OK** to accept the Query data and display the report.

Add title

11. Double-click the title area **<Type here to customize title>** and replace this with a new title of **1989 Training Start Dates**.
12. Press **Esc** to accept the edit.

Check current data source

13. Return to the Query dialog box, using the **Query data** button or select the **Report | Query** menu option.
14. Switch to the **Access** tab—notice the **Data source** is currently set to **Database.** Close out of the **Query** dialog box, using the **Cancel** option.

Insert snapshot time

It may be useful to insert the time that this report was saved as a snapshot.

15. Select the **Insert | More Objects** menu option. This will display the More Objects dialog box.

16. Scroll down to find the **Snapshot timestamp** and select **Insert**.

    The mouse pointer will change to a Text Frame button.

17. Click once into the Page Header Area, to the top left corner. The **Snapshot Date** and **Time** will be inserted into a Text Frame starting at the position you clicked with the mouse pointer.
18. Select the **Snapshot** button. This will indent the button and display the snapshot icon in the **Status Line,** bottom-right corner.

Save report

19. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.
20. Enter a File name of **1989 Training Start Dates.imr**; change the **Save in** file location to **C:\ Temp** and click **Save**.

Close report

21. Close out of this report using the **Close** button; alternatively use the **File** | **Close** menu option.

Disconnect from the database

22. Disconnect from the database using the **Catalog | Disconnect** menu option.

Re-open report

23. Re-open the **1989 Training Start Dates.imr** report.

    The report holds all the data even though you are not connected to the database.

Open Query dialog

24. Re-display the Query dialog box using the **Query data** button or select the **Report | Query** menu option.

    Notice the difference in the **Data** tab—new columns cannot be added and existing columns cannot be deleted (the exception to this rule is calculated columns).

25. Switch to the **Access** tab - the **Data Source** has changed from **Database** to **Local Snapshot**.
26. Close out of the Query dialog box using the **Cancel** option.

Connect to the catalog

27. To remove the snapshot and refresh the report with the latest data from your database, you must first connect back to the database using the **Catalog | Connect** menu option.

Note: Until you do this, the snapshot button will be unavailable (grayed out).

28. The **Snapshot** button is now available. Select it once to remove the snapshot.

    At this point you could simply refresh the snapshot report with the latest data or completely remove the snapshot and point the report back at your database.

    For this example you will select the **Remove Snapshot** option.

Add column

29. You could now access the **Query dialog** and add a new column to the report. Select the **Query data** button or select the **Report | Query** menu option.
30. Add the **Job Type-EE** column from the **Employment Information – Employee Job Title Information** folder to the report.

Change page orientation

31. Since the **Job Type-EE** column does not appear on page one of the report you will change the page orientation to **Landscape** using the **File | Page Setup** menu option.

Reapply the snapshot

32. You could now re-apply the snapshot using the **Snapshot** button or alternatively using the **Query** dialog **| Access** tab and selecting the **Local Snapshot** option.

    This will automatically indent the **Snapshot** button and make the report a snapshot.

Save and close report

33. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.
34. Close out of this report using the **Close** button; alternatively use the **File | Close** menu option.

Workshop 9-1: Creating Snapshots

Objective: **To create a snapshot of your data at a given point in time.**

Scenario: **You require a list of Employees with you at all times. You are often on the road and do not have access to your company's network. For this reason you need to create a snapshot so you can have access to this information anywhere.**

Open the workshop saved earlier as **Workshop 2-1.imr.**

Convert this report to a **Snapshot** report.

Remember to insert the **Snapshot Timestamp** into the Report Page Header.

Save this report as **C:\ Temp \ Workshop 9-1.imr**.

Step by Step Guide to Workshop 9-1

Set advanced tabs option

1. Select the **Tools | Options** menu option.
2. Select the **General** tab**.**
3. Ensure that the **Show advanced tabs in the query** dialog box is flagged on.
4. Close out of this option by clicking **OK**.

Open report

5. Select the **File** | **Open** menu option, or click the **Open** button. This will display the **Open report** dialog box.
6. Change the **Look in** folder to the report location **C:\ Temp.**
7. Select the **Workshop 2-1.imr** followed by the **Open** option.

Check current settings

8. Click the **Query data** button or select the **Report | Query** menu option.

   The Query dialog box should show the three advanced tabs: **Access, Profile and Client Server**.
9. Switch to the **Access** tab - notice the **Data source** is currently set to **Database**.
10. Close out of the Query dialog box using the **Cancel** option.

Insert snapshot timestamp

It may be useful to insert the time that this report was saved as a snapshot.

11. Select the option the **Insert | More Objects** menu option. This will display the More Objects dialog box.
12. Scroll down to find the **Snapshot timestamp** and click **Insert**.

    The mouse pointer will change to a Text Frame button.
13. Click once into the page header area, to the top left corner. The **Snapshot Date** and **Time** will be inserted into a Text Frame starting at the position you clicked with the mouse pointer.

Create snapshot

14. Select the **Snapshot** button—this will indent the button and display the snapshot icon in the **Status Line** – bottom-right corner.

Save and close report

19. Save this report using the **File** | **Save As** menu option (do not use the **Save** button on the standard toolbar as this will result in the existing **Workshop 2-1.imr** being overwritten).
17. Enter a File name of **Workshop 9-1.imr**; change the **Save in** file location to **C:\ Temp** and click **Save**.
18. Close out of this report using the **Close** button; alternatively use the **File** | **Close** menu option.

Disconnect from catalog

19. Disconnect from the database using the **Catalog** | **Disconnect** menu option.

Open report

20. Re-open **C:\ Temp \ Workshop 9-1.imr.**

    The report holds all the data even though you are not connected to the database.
21. Re-display the Query dialog box using the **Query data** button or select **Query** from the **Report** menu.

    Notice the difference in the Data tab—new columns cannot be added and existing columns cannot be deleted (the exception to this rule is calculated columns).

22. Switch to the **Access** tab—the **Data Source** has changed from **Database** to **Local Snapshot**.
23. Close out of the Query dialog box using the **Cancel** option.

Close report

24. Close out of this report using the **Close** button; alternatively use the **File | Close** menu option.

Summary—Questions

Summary Q & A—Snapshots

- What is a Snapshot?
- Why use a Snapshot?
- Name the visual indicators for Snapshots.
- Can you add new data to a Snapshot?
- How do you update a Snapshot?

Summary—Answers

Summary Q & A—Snapshots

What is a Snapshot?

- A permanent local copy of the data in a report

Why use a Snapshot?

- Access and manipulate data when disconnected from the database
- To save historical data
- E-mail the report as a file attachment

Summary Q & A—Snapshots

Name the visual indicators for Snapshots.

Snapshot timestamp

Snapshot button remains indented on toolbar

Snapshot icon on Status Line

Preview box in the Open dialog box contains snapshot icon

Summary Q & A—Snapshots

Can you add new data to a snapshot?

- No, you are not attached to the database

How do you update a Snapshot?

- Remove the snapshot
- Add desired column(s) from catalog
- Re-apply the snapshot

CHAPTER 10

Drill-Through Reports

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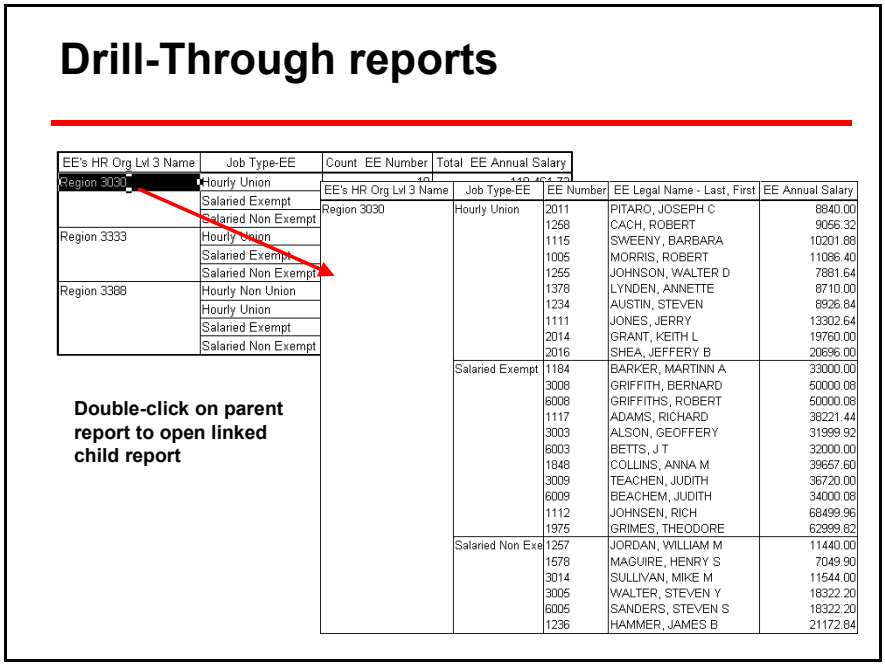
Objectives—Drill-Through Reports

In this section we will:

- Define Drill-through reports

Drill-Through reports



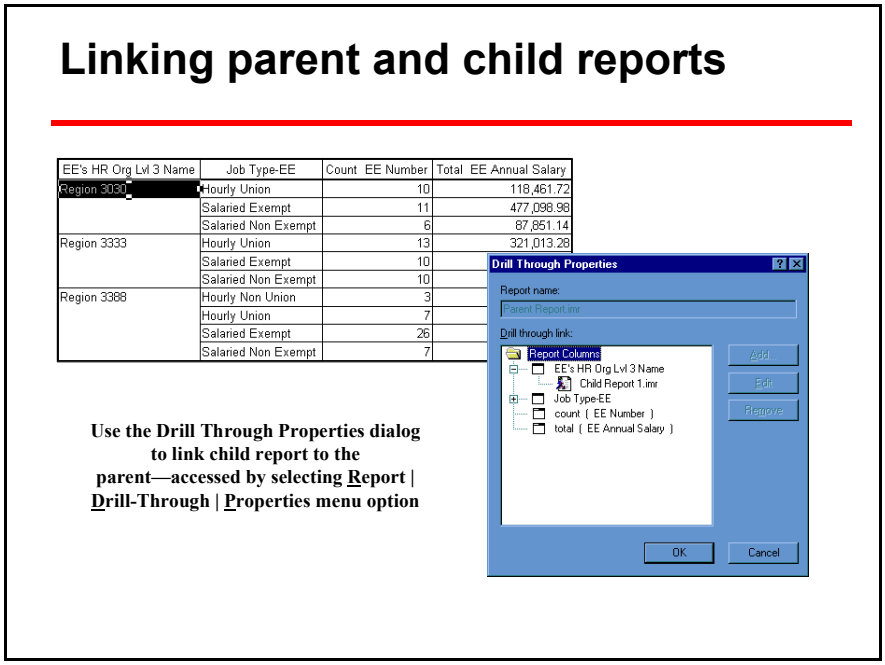
A system of related reports may be created by using a technique called Drill-Through. Commonly, this technique is used between a parent report that shows summaries of data and one or more child reports that show the related detail data. The child report is executed using a special ‘drill-through’ link that filters the data based on a selected column in the parent report.

The example above shows of a parent report with a n employee count and total salary, for each job type by HR Organizational level 3.

A separate child report has also been created to show the details of this same data. Executing the child report separately would show the following report:

EE's HR Org Lvl 3 Name	Job Type-EE	EE Number	EE Legal Name - Last, First	EE Annual Salary
Region 3030	Hourly Union	2011	PITARO, JOSEPH C	8840.00
		1258	CACH, ROBERT	9056.32
		1115	SWEENY, BARBARA	10201.88
		1005	MORRIS, ROBERT	11086.40
		1255	JOHNSON, WALTER D	7881.64
		1378	LYNDEN, ANNETTE	8710.00
		1234	AUSTIN, STEVEN	8926.84
		1111	JONES, JERRY	13302.64
		2014	GRANT, KEITH L	19760.00
		2016	SHEA, JEFFERY B	20696.00
	Salaried Exempt	1184	BARKER, MARTINN A	33000.00
		3008	GRIFFITH, BERNARD	50000.08
		6008	GRIFFITHS, ROBERT	50000.08
		1117	ADAMS, RICHARD	38221.44
		3003	ALSON, GEOFFERY	31999.92
		6003	BETTS, J T	32000.00
		1848	COLLINS, ANNA M	39657.60
		3009	TEACHEN, JUDITH	36720.00
		6009	BEACHEM, JUDITH	34000.08
		1112	JOHNSEN, RICH	68499.96
		1975	GRIMES, THEODORE	62999.82
	Salaried Non Exe	1257	JORDAN, WILLIAM M	11440.00
		1578	MAGUIRE, HENRY S	7049.90
		3014	SULLIVAN, MIKE M	11544.00
		3005	WALTER, STEVEN Y	18322.20
		6005	SANDERS, STEVEN S	18322.20
		1236	HAMMER, JAMES B	21172.84

Linking the Parent and Child Reports



The parent report may be linked to the child report using a **drill-through filter**.

Drill-through filters are created using the **Report | Drill-Through | Properties** dialog while in the parent report.

In the following example the parent report column **Job Type** will be used to drill-through to the child report. The child report will be filtered and show only the detail for the selected Job Type.

1. Select the parent report column (for example, Job Type-EE) in the **Drill-Through Properties** dialog. This column will be selected to activate the drill-through to the child report. Only one may be selected per filter.
2. Click **Add**.
3. Select the parent report columns to be included in the drill-through filter in the **Add Drill-Through Report** dialog. Multiple columns may be included in the filter.
4. Select the child report name using **Browse** and click **OK**.

Using the Drill-Through Reports

While viewing the parent report, the child report detail data may be accessed by selecting (**double-clicking**) a specific job type. The child report will show the detail data for that job type

for all Level 3 Organizations. The parent report can again be accessed using the Window selection list.

The following example shows the child report results when the **Job Type Hourly Union** was selected (**double-clicked**) in the parent report. The child report shows all the detail for Hourly Union for all organization level 3's.

Org Lvl 3	Org Lvl 3 Name	Job Type	Job Title-EE	EE Number	EE Legal Name	Annual Salary
3030	Region 3030	Hourly Union	ASSEMBLY LINE WORKER	1378	LYNDEN, ANNETTE	8710.00
				1234	AUSTIN, STEVEN	8926.84
				1255	JOHNSON, WALTER D	7881.64
				1111	JONES, JERRY	13302.64
			LATHE MACHINE TOOL SETTER	2014	GRANT, KEITH L	19760.00
				2016	SHEA, JEFFERY B	20696.00
			SHIPPING/RECEIVING CLERK	1258	CACH, ROBERT	9056.32
				1115	SWEENY, BARBARA	10201.88
				1005	MORRIS, ROBERT	11086.40
				2011	PITARO, JOSEPH C	8840.00
3333	Region 3333	Hourly Union	ASSISTANT STATIONARY ENGINEER	2012	WARD, CHESTERON	27508.00
			DRILLING MACHINE TOOL OPERATOR	3029	DUNBAR, WALLCOTT A	25896.00
				3039	JAROFF, GLEN	25896.00
				3023	DANIELS, JEFFREY C	21619.00
				3033	YOUNG, J T	23904.00
			GRINDING MACHINE SETTER	3022	WENDT, GARY D	19760.00
			LATHE MACHINE TOOL SETTER	3024	SPENSER, WILLIAM M	16634.80
			MAINTENANCE ENGINEER, SENIOR	1116	COMPTON, SUSAN A	13841.36
				1806	HAYES, JOHNS A	9194.12
				1313	PRESCOTT, KEVIN	16640.00
			STATIONARY ENGINEER	3027	BENOWITZ, JAMES	40040.00
				3037	HOWARD, THOMAS	40040.00
				3031	EMORY, TODD	40040.00
3388	Region 3388	Hourly Union	ASSEMBLY LINE WORKER	1006	MERTZ, LYNNE C	13832.00
			LATHE MACHINE TOOL SETTER	2010	PENDARVIS, MARTIN M	16380.00
			MAINTENANCE ENGINEER, SENIOR	1004	MORSE, GORDAN	20799.60
				2004	KWONG, STEVEN S	19655.64
			SHIPPING/RECEIVING CLERK	1010	MOHR, MICHAEL T	11089.52
				2005	BROWN, WILLIAM R	15694.90
			STATIONARY ENGINEER	2009	CREMMINS, ALAN E	34016.32

Hints and Tips

- A parent report may have drill-through links to multiple child reports.
- Summarized columns may not be used as drill-through links
- The same column must be included in both parent and child reports to be used as a link
- The child report may display additional columns not in the parent.
- A child report may be a parent to another drill-through child report.

Workshop 10-1: Creating a Drill-Through report

Objective: **To create a summary report and use it to drill-through to a detailed information report.**

Scenario: **To create a summary list report that shows the total number of employees and total annual salary for each job type in each department (HR Organization Level 3 Name). In addition, you want to be able to select a job type and see the employee details for that job type across all the departments**

Summary report:

EE's HR Org Lvl 3 No	EE's HR Org Lvl 3 Name	Job Type-EE	Count EE	Total EE Salary
3030	Region 3030	Hourly Union	10	118461.72
		Salaried Exempt	11	477098.98
		Salaried Non Exempt	6	87851.14
3333	Region 3333	Hourly Union	13	321013.28
		Salaried Exempt	10	299949.08
		Salaried Non Exempt	10	183779.04
3388	Region 3388	Hourly Non Union	3	48520.08
		Hourly Union	7	131467.98
		Salaried Exempt	26	990517.18
		Salaried Non Exempt	7	1776340.40

Drill-Through Detailed Report for Job Type ‘Hourly Union’:

Org Lvl 3	Org Lvl 3 Name	Job Type	Job Title-EE	EE Number	EE Legal Name	Annual Salary
3030	Region 3030	Hourly Union	ASSEMBLY LINE WORKER	1378	LYNDEN, ANNETTE	8710.00
				1234	AUSTIN, STEVEN	8926.84
				1255	JOHNSON, WALTER D	7881.64
				1111	JONES, JERRY	13302.64
			LATHE MACHINE TOOL SETTER	2014	GRANT, KEITH L	19760.00
				2016	SHEA, JEFFERY B	20696.00
			SHIPPING/RECEIVING CLERK	1258	CACH, ROBERT	9056.32
				1115	SWEENY, BARBARA	10201.88
				1005	MORRIS, ROBERT	11086.40
				2011	PITARO, JOSEPH C	8840.00
3333	Region 3333	Hourly Union	ASSISTANT STATIONARY ENGINEER	2012	WARD, CHESTERON	27508.00
			DRILLING MACHINE TOOL OPERATOR	3029	DUNBAR, WALLCOTT A	25896.00
				3039	JAROFF, GLEN	25896.00
				3023	DANIELS, JEFFREY C	21619.00
				3033	YOUNG, J T	23904.00
			GRINDING MACHINE SETTER	3022	WENDT, GARY D	19760.00
			LATHE MACHINE TOOL SETTER	3024	SPENSER, WILLIAM M	16634.80
			MAINTENANCE ENGINEER, SENIOR	1116	COMPTON, SUSAN A	13841.36
				1806	HAYES, JOHNS A	9194.12
				1313	PRESCOTT, KEVIN	16640.00
			STATIONARY ENGINEER	3027	BENOWITZ, JAMES	40040.00
				3037	HOWARD, THOMAS	40040.00
				3031	EMORY, TODD	40040.00

Summary (Parent) report columns from the General catalog:

EE’s HR Org Lvl 3 No
EE’s HR Org Lvl 3 Name
Job Type-EE
Count (EE Number)
Total (EE Annual Salary)

Detailed (Child) report columns from the General catalog:

EE’s HR Org Lvl 3 No
EE’s HR Org Lvl 3 Name
Job Type-EE
EE Number
EE Legal Name – Last, First
EE Annual Salary

Create a drill-through link using the Job Type-EE column in the summary report to access the detailed report.

Note: The labels for the report columns must match the field names in the catalog in order to be used in a drill-through link.

Step by Step Guide to Workshop 10-1

Create Parent report

15. Open the General catalog.

2. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
3. Select the **Simple List** template and click **OK**.

Add data items

4. Add the following columns to the parent report:

   EE's HR Org Lvl 3 No

   EE's HR Org Lvl 3 Name

   Job Type-EE

5. Add the following summaries to the parent report:

   Count (EE Number)

   Total (EE Annual Salary)

Group data

6. Group the parent report by **EE's HR Org Lvl 3 No** and associate the **EE's HR Org LVL 3 Name** to it.
7. Group the parent report by **Job Type-EE**.
8. Click **OK** to accept the Query data and display the parent report.

Save report

9. Save the report as **C:\Temp\Parent Report.imr.**

Create Child report.

10. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
11. Select the **Simple List** template and click **OK**.

Add data items

12. Add the following columns to the child report:

EE's HR Org Lvl 3 No

EE's HR Org Lvl 3 Name

Job Type-EE

Job Title-EE

EE Number

EE Legal Name – Last, First

EE Annual Salary

Group data

13. Group the child report **by EE's HR Org Lvl 3 No** and associate the **EE's HR Org LVL 3 Name** to it.
14. Group the child report by **Job Type-EE**.
15. Click **OK** to accept the Query data and display the child report.

Save report

16. Save this report as **C:\Temp\Child Report.imr**

Create the Drill-Through link using the Job Type-EE column.

17. Display the parent report.
18. Select **Report | Drill Through | Properties** and highlight the report column **Job Type-EE**.
19. Click **Add**.
20. In the **Add Drill Through Report** dialog, select the report column **Job Type-EE** to be included in the drill through filter.
21. Use the **Browse** button to create a path to the Child Report.
22. Click **OK** to add the drill-through report and **OK** again to close the Drill Through Properties dialog.

Test the drill-through report link

23. Display the Parent Report.
24. Double click on an entry in the **Job Type-EE** column. The Child Report should display showing that job type for every organization level 3 number with details of all job titles, employee numbers, employee names, and annual salaries for that job type.

Close reports

25. Close out of the reports using the **Close** button; alternatively use the **File | Close** menu option.

Summary—Questions

Summary Q & A—Drill-Through reports

- What is a drill-through report?
- How do you link parent and child reports?

Summary—Answers

Summary Q & A—Drill-Through reports

What is a drill-through report?

- A system of linked, related reports

How do you link parent and child reports?

- Using a drill-through filter
- Report | Drill-Through | Properties dialog

CHAPTER 11

Frames

Contents & Objectives

Contents

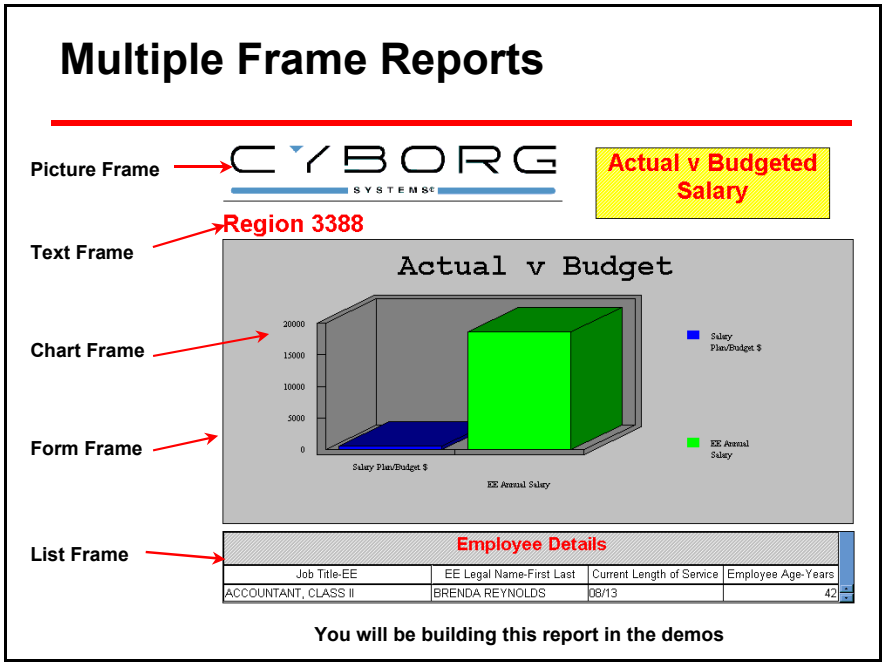
1. Overview of Reporting Administration
2. Introduction to Impromptu
3. Organizing Data
4. Customizing Data
5. Crosstab Reports
6. Functions
7. Formatting
8. More About Filters
9. Snapshots
10. Drill-Through Reports
11. Frames
12. Course Close

Objectives—Frames

In this section we will:

- Examine and Use Different Frame Types
- Work with Frame Properties
- Add Data to Frames and change Scope of Data
- Create a Form using Multiple Frame Types

Frames

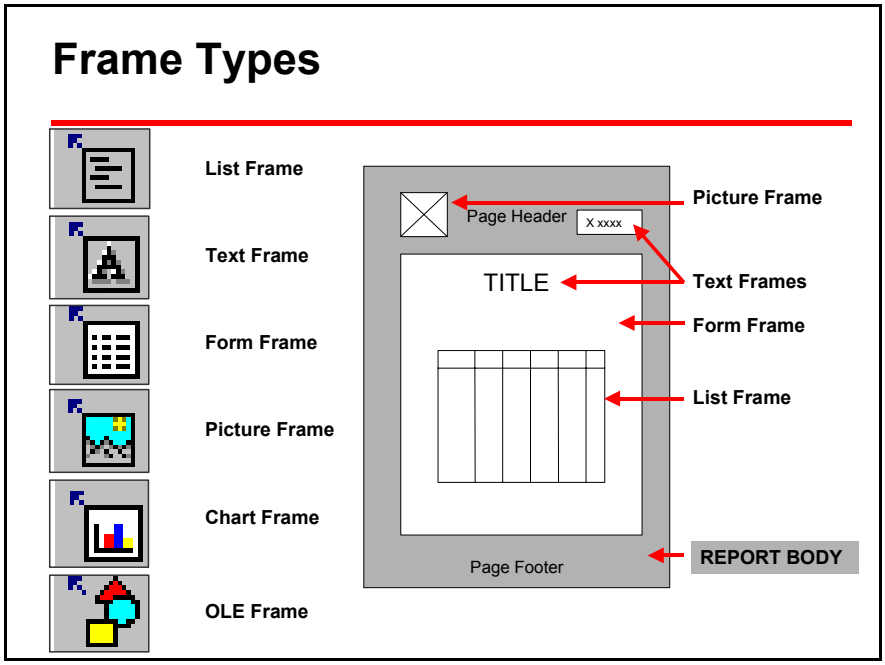


Frames are containers for report objects such as data, text, pictures, and charts.

Multiple frames can be placed in the report body (report body being the entire report page(s) area).

Note: Buttons relating to frames are shown on the Layout toolbar (vertical bar shown on left-hand side of the screen).

Types of Frames



	List Frames:	Data items are shown in tabular format—rows and columns, like a spreadsheet. List frames can also have headers/footers—these are form frames.
	Text Frames:	All text/numeric values in Impromptu are shown in text frames—includes static items such as titles and dynamic items such as data items, and so forth.
	Form Frames:	Can hold all other frames in the report. Can be used to contain the entire report body and all frames associated to the report. Also used for report headers and footer.
	Picture Frames:	Frame for showing graphics (bitmap images).
	Chart Frames:	Visual representation of the data (graphs).
	OLE Frames:	Object Linking and Embedding frame.

Default Frames

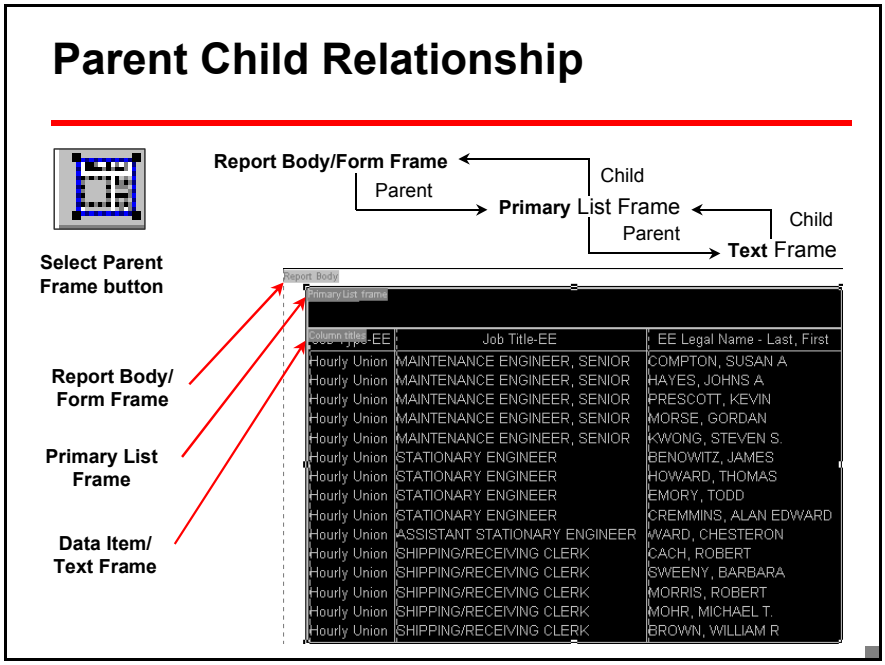
When a simple list report is created using the Simple List template the following frames are automatically created:

- **Form Frame** for report body contains all other frames apart from headers and footers.
- **Form Frame** for header.
- **Form Frame** for footer.
- **List Frame** for data items as they are added.

To view the frames used in a report select the **View | Boundary Lines** menu option.

Note: Frames can be inserted into reports using the Frame buttons on the Layout toolbar or by selecting the Insert menu followed by the appropriate Frame option.

Frame Combinations



Frames can be inserted into a report or in existing frames.

When a frame is inserted in another frame, Impromptu creates a **Parent - Child Relationship** between the two frames.

Frames that contain other frames are called **Parent Frames.**

Child Frames are contained in Parent Frames and can only hold/display data that is available to the Parent Frame.

To show the relationship between frames select a frame followed by the **Select Parent Frame** button on the **Layout** toolbar (vertical bar shown on left hand-side of the screen).

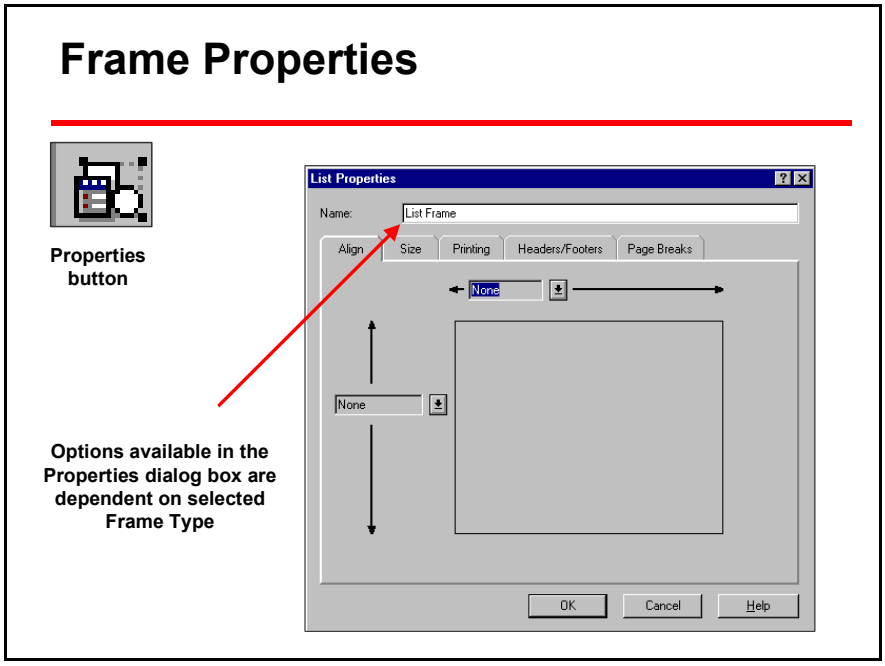
The **Snap to Parent** button can be used to make the selected frame the same height and width as its Parent.

Not all frames can have other frames inserted into them, only form frames and list frames can contain other frames. Chart, picture and text frames cannot have other frames inserted into them.

For this reason headers and footers are normally held in form frames with text frames inserted into them.

Note: Two text frames can be combined together.

Frame Properties



Frames have the following properties that can be changed:

- Format.
- Size.
- Alignment of data in the frame.
- Alignment of frame in its parent frame.
- Location.
- Layout of data items in text frames i.e. right/left justification.
- Amount of data shown in the frame.

To change the properties of a given frame—select the **Frame** and click the **Frame Properties** button on the **Layout** toolbar, or **Right-click** the selected frame and from the shortcut menu select the **Properties** option (alternatively select the Frame followed by the **Format | Properties** menu option). This will display the relevant Frame Property dialog box as shown above.

Demo 11-1

The purpose of this demo is to examine different frames by looking at a new report and opening an existing report which has multiple frames.

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Simple List** template and click **OK**.

   The Query dialog box will now appear displaying the Catalog details on the left and a window for the Query data on the right.

Display blank Simple List report

3. Click **Cancel** to close out of the **Query** dialog box and display a blank Simple List report based on the template.

View Frames

4. Select the **View | Boundary Lines** menu option.

   Identification labels will now be displayed for each frame used in the report.
5. The **Date** in the **Header** area should have a **Text Frame Label**, click the Text Frame and look at the details in the Status Line.
6. Click the **Report Body Frame**; notice the Status Line displays the name **Primary List Frame**.

   The Primary List Frame is the holding area for data when it is added to the report using the Query dialog - Data tab.

Close report

7. Close out of this report without saving your changes using the **Close** button; alternatively use the **File | Close** option menu.

Open report

8. Select the **File | Open** menu option, or click the **Open** button. The Open report dialog box will be displayed.
9. Change the **Look in** folder to the report location **C:\Temp**.
10. Select the **Employee Salary Details.imr** report followed by the **Open** option.

View in Page Layout view

11. Change the report to Page Layout view if not done so already, by clicking the **Page Layout** view button.

View frames

12. Select the **View | Boundary Lines** menu option.

    Identification labels will now be displayed for each frame used in the report.
13. Notice the different types of frames in this report: **Text Frame** and **Primary List Frame**. There is also a **Report Body Frame**, which is currently hidden by the Primary List Frame.

Select List Frame

14. Click a data item in the List Frame and click the **Select Parent** button, this is located on the Layout toolbar on the left of the screen, or use the **Edit | Select Parent** menu option.

    The List Frame should now be selected. The Status Line at the bottom of the screen will also be informing you which frame is currently selected, along with it's size and position.
15. Click the **Select Parent** button again.

    Notice that the **Report Body** is now selected (the Status Line will indicate this).

Remove boundary lines

16. Press **Esc** on the keyboard to clear the selection.
17. Remove the boundary lines by selecting the **View | Boundary Lines** menu option (the checkmark will be removed).

Close report

18. Close out of the report without saving your changes using the **Close** button; alternatively use the **File | Close** menu option.

Adding Data to Frames

A **Primary Frame** will be the default frame into which new data items will be added as they are added to the Query (Query dialog | Data tab).

The first frame added to a report will become the Primary Frame; however, another frame can be allocated the status of primary frame by using the **Report | General** menu option - **General** tab.

Depending on the sort of frame, new data will be added to different locations in the frame.

Form Frames will add data to the top left corner of the frame.

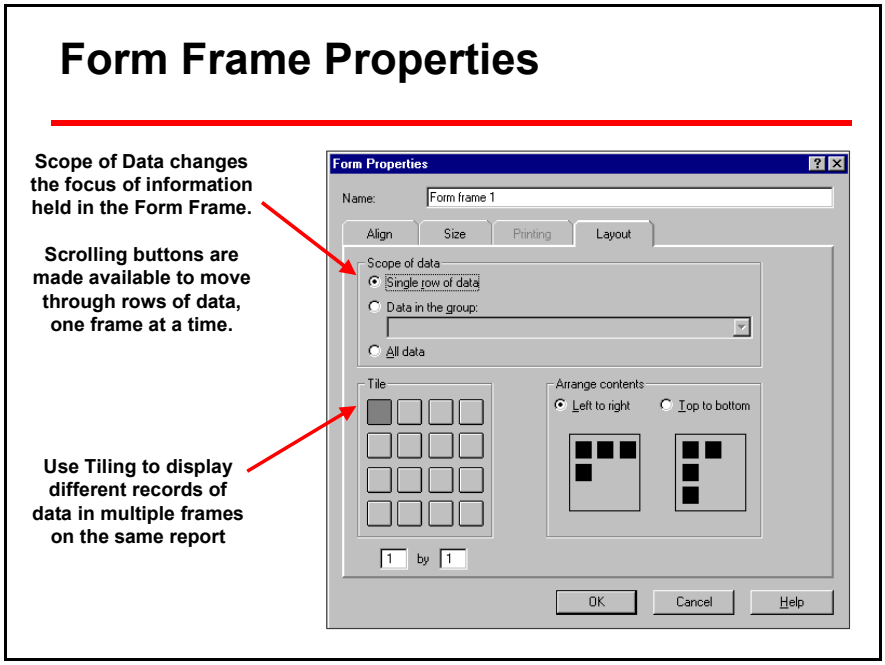
List Frames will add data to the right of the last column.

Text Frames will add to the left of the text already in the frame.

Note: A report can be created and no primary frames assigned (Report | General menu option - General tab set to None). However it should be noted that when no primary frame has been assigned when data is added to the Query it will not automatically be inserted, you must manually insert the data into a particular frame.

This will give you total control over what data is added to which frame.

Tiling Form Frames



More than one form frame can be shown on a particular page of a report and used to display different records from your system's data source in each. This is known as **Tiling** and is useful when creating mailing label type reports.

The first step would be to add a single form frame to the report, next select this frame and click the **Frame Properties** button (on the Layout toolbar).

Select the **Layout** tab, this should display the above dialog box.

Next select the required **Scope of Data** option—these are detailed later in this section.

For mailing labels use the **Single row of data** option—this will make the **Tile** option in this tab available. Select the number of tiles to reflect the number of required form frames.

This can be done by clicking the tile that represents the last tile in the set or by entering the number of horizontal and vertical tiles required, that is, 2 by 2.

Scope of Data

The scope of data option can be used to determine what data is displayed in each form frame.

Available options:

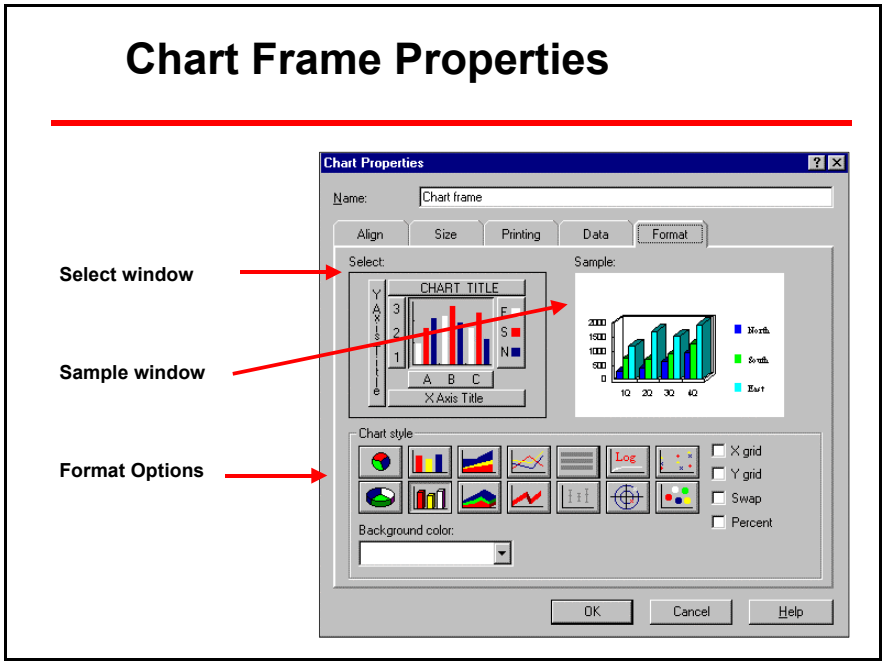
Single row of data: Will show a particular row from your system's data source in each form frame.

For example, when creating labels, each form frame should only contain details about one Particular Employee, Organizational Unit or Position.

Data in the group: Will show all rows of data that is related to the grouped item in one frame.

All data: Will show all data in one form frame—this option will make the tiling options unavailable.

Chart Frames



The appearance of charts in an Impromptu report can be modified by using the **Chart Frame Properties** | **Format** tab.

Select the Chart Option to be modified, for example Chart Style, Chart Title, and so forth, in the **Select** window, the bottom half of the tab will change according to the selection made.

As you make your changes the **Sample** window will update accordingly.

Demo 11-2

The purpose of this demo is to create a Form Frame from scratch, insert a List Frame and a Chart Frame, and Add Data.

Create new report

1. Open the General catalog.
2. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
3. Select the **Blank** template and click **OK**.
4. Click **Cancel** to close the Query dialog.

Create Form Frame

5. Click the **Form Frame** button on the Layout toolbar, or select the **Insert | Form Frame** menu option.
6. Starting in the top left-hand corner, draw a **Form Frame** that nearly fills the window.

   The initial Form Frame is going to be used to link and group all of the data together.

Add data items

7. The next step is to add data to your frame. Click the **Query data** button or select the **Report | Query** menu option.

8. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information	EE's HR Org Lvl 3 Name
Employee Personal Information	EE Number
Employment Information Employee Job Assignment Information	Job Title-EE Job Type EE
Compensation And Salary Administration Employee Compensation	EE Annual Salary

You can select the columns in two ways: either **double-click** the required column, or **click once** to select it and then click the **Add** option. You can select multiple columns with the use of **Ctrl** and **Shift** keys.

9. Add the following calculations:

Calculation	For
Minimum EE Annual Salary	Job Title-EE
Average EE Annual Salary	Job Title-EE
Maximum EE Annual Salary	Job Title-EE

Sort data

10. Sort **Job Title-EE** into **Ascending** order using the **Sort** tab.

Display report

11. Click **OK** to accept the Query data and display the report.

    All columns will appear one under the other in the top left corner of the Form Frame; this will only show the first record of each data item.

12. Click the **Accountant, Class II** data item at the top of the Form Frame and notice the **Job Title-EE** label in the **Status Line**.

    While looking at the Status Line, click the other data items to find out what columns they refer to.

Create group

13. Click the **Select Parent** button on the Layout toolbar in order to select the **Primary Form Frame**, or click in the background area and look at the Status Line to confirm that you have selected the Form Frame.

14. **Right-click** the background area of the **Primary Form Frame** and select **Properties** from the shortcut menu.

15. The Form Frame Properties dialog will be displayed. Select the **Layout** tab notice that the **All data** option for the **Scope of data** is selected.
16. Change the **Scope of data** to **Data in the group**, ensure that **Job Title-EE** is selected as the group.
17. Click **OK** to accept these changes and re-display the report.

    An automatic group will have been set on **Job Title-EE**.
18. Press **Esc** to remove the selection.
19. Using the navigation buttons, move through the records, notice that there is only one occurrence of **Accountant, Class II**, this is due to the automatic grouping.

Create List Frame

20. Ensure you are looking at the first record by clicking on the **First Record** button on the navigation bar.
21. Click the **List Frame** button on the Layout toolbar, or select the **Insert** | **List Frame** menu option.
22. Draw a **List Frame** inside the existing Form Frame.

Add data items

23. Add all the data items, with the exception of **EE's HR Org Lvl 3 Name**, to the **List Frame** by dragging and dropping the **Form Frame** data items into the List Frame.

    As you drag the items into the list frame, you will get multiple lines of data with scrollbars.
24. Re-size the **List Frame** to display all columns and at least four rows of data.

Format Salary columns

25. Select a data item in the **Average Annual Salary** column.
26. Right-click and select the **Format** option from the shortcut menu.
27. Select the **Data** tab and format so that it displays as **$xx,xxx.xx**.
28. Click **OK**
29. Repeat these four steps for each of the **Annual Salary columns**.

Add Chart Frame

30. Click the **Chart Frame** button or select the **Insert | Chart Frame** menu option.
31. Draw a **Chart Frame** above the **List Frame**.

    The **Chart Properties** dialog will appear, all numeric columns from the Query data are applied to the **Chart data** window. Ensure that **EE Annual Salary**, **Minimum Annual Salary**, **Average Annual Salary**, and **Maximum Annual Salary** are included in the Chart data window.
32. Click on the **Format** tab and select **3-D Bar Chart** button from the **Chart style**.
33. Select the color **silver** from the **Background color** option list.
34. Click on **chart title** from the **Select box**. Type **Regional Salary Analysis**.
35. Click **OK**.

Configure title

36. Select the remaining data item in the **Form Frame**, that is, **EE's HR Org Lvl 3 Name** (for example, Region 3030).
37. Resize it using the **grab handles** so that it stretches right across the top of the chart frame.
38. Right-click and select **Format** from the shortcut menu.
39. Click the **Patterns** tab and select the fourth option from the **Pattern** option list, change the **Foreground** color to white, and the **Background** color to silver.
40. Click the **Font** tab. Change the **Color** to red and the **Size** to 20pt.
41. Click the **Borders** tab and select the **Box** option.
42. Click **OK**.
43. Right-click and select **Properties** from the shortcut menu.
44. Click the **Layout** tab and select **Center** justification.
45. Click **OK**.

Save report

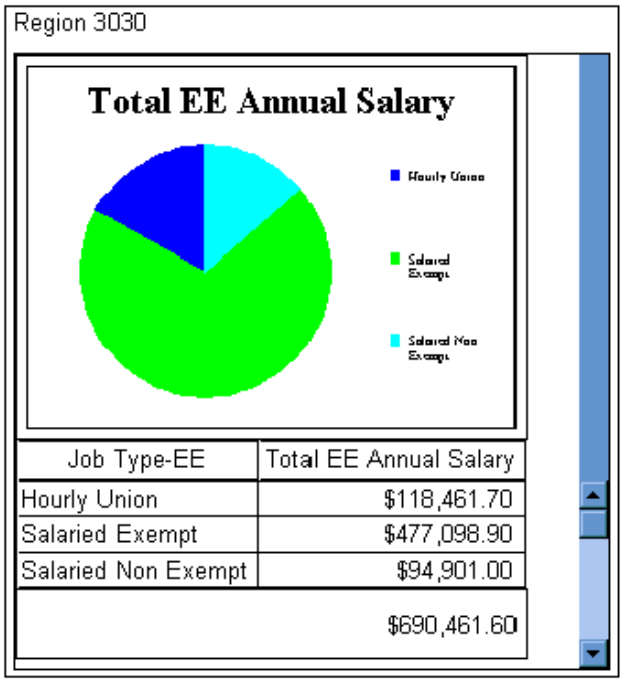
46. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.
47. Enter a File name of **New Forms Demo.imr**, change the **Save in** file location to **C:\Temp** and click **Save**.
48. Leave this report open for the next demo.

Workshop 11-1: Creating a Combined List & Chart Frame Report

Objective: **To create a new report containing a chart and simple list as shown below.**

Scenario: **As departmental manger you have been awarded a budget increase. You require more staff to help with the operations of the department. To help you effectively allocate the funds you wish to see a visual representation of your current salary bill.**

Your final report will look similar to the example shown below:



Create a **New** report using the **Blank Template**.

At the Query dialog box select **Cancel** to display a blank report screen—this should be displayed in **Screen Layout** view.

Insert a **Form Frame**—ensure this is the size of the screen on view.

Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information	EE's HR Org Lvl 3 Name
Employee Job Assignment Information	Job Type-EE
Compensation & Salary Administration Employee Compensation	Total EE Annual Salary

Group both the **EE's HR Org Lvl 3 Name** and **Job Type-EE** columns and then display the report to the screen.

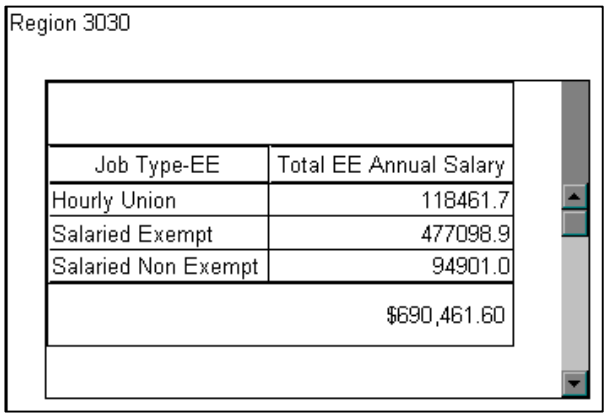
Ensure the **Total EE Annual Salary** is associated to the **Job Type-EE** (Edit Definition).

Change the **Scope of Data** (for the **Primary Form Frame**) to **EE's HR Org Lvl 3 Name** using the **Form Frame Properties** dialog box **- Layout** tab. This should display the scrollbars at the right of the screen allowing you to scroll through the different Organizational Units.

Insert a **List Frame** to the bottom half of the screen as shown in the previous example.

Drag the **Job Type-EE** and **Total EE Annual Salary** columns into the List Frame.

Using the **List Frame Properties** dialog **- Headers/Footers** tab remove the **horizontal scrollbar**, the following screen should now be displayed:



Using the **List Frame Properties** dialog **- Headers/Footers** tab, add a **List Header** and **Footer** to the screen.

Resize the List Header, Body and Footer.

Insert the following **calculated column** into the new List Footer to display the Summary Totals for each Organizational Unit:

Total (Total EE Annual Salary)

(Hint: use the Insert | Calculation menu option.)

Format all values to currency format and align the Summary Total value.

Insert a **Chart Frame** into the List Header.
The Chart Frame should only contain **Total EE Annual Salary** and should be in the format of a **Pie Chart** without Feelers and their Labels.
If your pie chart does not match that shown in the example, ensure that the **Mode** option is set to **Column** in the **Chart Properties** dialog **| Data** tab.
Save this report using the **Save As** option as **C:\Temp\Workshop 11-1.imr**.

Step by Step Guide to Workshop 11-1

Create new report

1. Select the **File | New** menu option, or click the **New** button. This will display the **New report** dialog box showing the available templates.
2. Select the **Blank** template and click **OK**.
3. **Cancel** out of the Query dialog box to go directly to the blank report.

Display in Screen Layout

4. Click the **Screen Layout** view button, if not selected already.

Insert Form Frame

5. Click the **Form Frame** button on the Layout toolbar, or select the **Insert | Form Frame** menu option.
6. Starting in the top left-hand corner, draw a **Form Frame** that nearly fills the window.

   The initial **Form Frame** is going to become the **Primary Frame** and be used to link and group all of the data together.
7. Select the background of the **Form Frame**—the Status Line should confirm that this is the **Primary Form Frame**.
8. Press **Esc** to clear the selection.

Add data items

The next step is to add data to your frame.

9. Click the **Query data** button or select the **Report | Query** menu option.
10. Expand the **Employment Information** folder in the Catalog by **double-clicking** on it, or **clicking once** on the + to the left of the folder.

11. Add the following columns:

Catalog Folder/Subfolder	Report Column
Employment Information	EE's HR Org Lvl 3 Name
Employee Job Assignment Information	Job Type-EE
Compensation And Salary Administration Employee Compensation	Total EE Annual Salary

To Total the **EE Annual Salary**, select **EE Annual Salary** (click once) and select the **Summary** Σ button.

The **Summary of EE Annual Salary** dialog box will appear—click the **Total** button and then select **OK**.

Group data

12. Group both the **EE's HR Org Lvl 3 Name** and **Job Type-EE** columns using the **Group** tab.
13. Click **OK** to accept the Query data and run the report.

    All **3** columns should appear one under the other in the top left corner of the Form Frame; this will currently show only the first record for each column.

Check association

14. To check the association of the **Total EE Annual Salary** summary **Right-click** the data item for the **Total EE Annual Salary** and select **Data Definition**.

Note: Look at the description on the Status Line to ensure that the correct data item has been selected.

15. To change the association of this summary from **Automatic (For Report)** to **Job Type-EE** select **Job Type-EE** from the **Association** drop-down list and click **OK**.
16. **Right-click** the background area of the Form Frame and select **Properties**.

Change scope of data

17. Switch to the **Layout** tab, notice that the **All data** option for the **Scope of data** is selected.
18. Change the **Scope of data** to **Data in Group**; ensure that **EE's HR Org Lvl 3 Name** is selected.
19. Click **OK** to accept these changes and redisplay the report—scrollbars will have been added to the report.
20. Press **Esc** to clear the selection.

Insert List Frame

You now need to insert a **List Frame** to the bottom half of the screen.

21. Click the **List Frame** button on the Layout toolbar, or select the **Insert** | **List Frame** menu option.
22. Draw a **List Frame**, roughly the same size as the one on the example report.

Add columns to the List Frame

23. Drag the **Job Type-EE** and **Total EE Annual Salary** columns into the list frame.

    As you drag these items into the list frame, you will get multiple lines of data with scrollbars.

Remove horizontal scrollbar

24. To remove the horizontal scrollbar select the **List Frame**, **Right-click** and select **Properties**.
25. Switch to the **Headers/Footers** tab if not done so already.
26. De-flag the **Horizontal scrollbar** option.

Add List Header and Footer

27. From in this **Headers/Footers** tab, to add a **List Header** and **Footer** to the screen click the **List Header** and **List Footer** text. A check will appear to the left of this text.
28. Select **OK** to accept these changes and re-display the report. A **List Header** and **Footer** will be added to the report.

Resize list header, body, and footer

29. To resize the List header, body and footer, select and drag the resizing handles as necessary.

Insert calculated column

30. Next select the **Insert** | **Calculation** menu option, click in the **List Footer**. The Calculation Definition dialog box will appear.
31. Double-click the **Summaries** folder with the Available components window in order to expand it.
32. Double-click the **total** summary.
33. Next double-click **Report Columns** in the Available components window in order to expand it
34. Double-click the **Total EE Annual Salary** column.

    The Expression window will now display: **total (Total EE Annual Salary)**.
35. Click **OK** to accept the calculation and display the report.

Format values

36. To format all values **Ctrl+Click** the new **Summary Total** and a data item in the **Total EE Annual Salary** column and click the **Currency** $ button.
37. To align the **Summary Total**, select the data item, **Right-click** and select **Properties**.
38. Select the **Align** tab.
39. For the horizontal alignment select **Align right side** from the option list.

    The horizontal alignment should now display **Right** of **Parent**. From the **Parent** option list select the **Column: Total EE Annual Salary** column.
40. Click **OK** to accept these changes and redisplay the report—the **Total Summary** value should now be in align with the **Total EE Annual Salary** column values.

Insert Chart Frame

41. The next step is to add the **Pie Chart**—click the **Chart Frame** button or select the **Insert | Chart Frame** menu option.
42. Draw a **Chart frame** in the **List Header**.

    The **Chart Properties** dialog will appear, all numeric columns from the Query data are applied to the **Chart data** window.
43. On the **Data** tab, ensure that **Chart data** window contains only the **Total EE Annual Salary** column and the **Mode** is set to **By Column**.

Change chart style to Pie

44. On the **Format** tab, change the **Chart style** to **Pie**.
45. Select **ABC** and de-select the **Show Labels** option to turn off feelers and their labels.
46. Click **OK** to accept these changes and redisplay the report.

Save and close report

47. Save this report by clicking on the **Save** button on the Standard toolbar, or by selecting the **File | Save** menu option.
48. Enter a File name of **Workshop 11-1.imr**; change the **Save in** file location to **C:\Temp** and click **Save**.
49. Close out of the **Workshop 11-1** using the **Close** button; alternatively use the **File** menu - **Close** option.

Summary—Questions

Summary Q & A—Frames

- What are the six different frame types?
- Which two frames can contain child frames?
- What is the scope of data used for?
- How can you select the parent of a list frame?
- How can you tell what frame type you have selected?

Summary—Answers

Summary Q & A—Frames

What are the six different frame types?

- List, Text, Form, Picture, Chart, OLE

Which two frames can contain child frames?

- Form, List

What is the scope of data used for?

- Changes the focus of information held in each form frame

Summary Q & A—Frames

How can you select the parent of a list frame?

Highlight a data item in the List Frame and click the Select Parent button or Edit | Parent menu option

How can you tell what frame you have selected?

Check the Status Line at the bottom of the Impromptu Screen

CHAPTER 12

Course Close

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1. Overview of Reporting Administration
2. Introduction to Impromptu
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9. Snapshots
10. Drill-Through Reports
11. Frames
12. Course Close

Review—Introduction to Impromptu

Review—Introduction to Impromptu

- Introduction to Impromptu
  - Learn what Impromptu is and what you can achieve with it
  - Become familiar with the Impromptu User Interface
  - Understand the relationship between the data source, Impromptu catalog and catalog components, and Impromptu Reports

Review—Introduction to Impromptu

Impromptu Reports

Open and navigate existing Impromptu Reports

Build a new Report using the Report Wizard

Build an ad hoc query

Add and remove columns from the report and the query

Review—Organizing Data

Review—Organizing Data

- Filter data—to focus on critical information
- Sort data—to organize the order of appearance
- Group data—to group like items together
- Differentiate between Grouped and Associated Data

Review—Customizing Data

Review—Customizing Data

- Create Calculations
- Create Conditional Statements and use them in Calculations
- Add List Headers & Footers
- Add Report Summaries

Review—Crosstab Reports

Review—Crosstab Reports

- Define a Crosstab Report
- Examine the different ways to create a Crosstab Report

Review—Functions

Review—Functions

- Identify different types of Functions
- Identify Impromptu Data Types
- Examine how to use Functions to add value to a report

Review—Formatting

Review—Formatting

- Examine Data Formats
- Create and Apply Styles
- Identify Exceptional Data
- Work with Columns
- Examine Page Breaks
- Align Report Objects

Review—More About Filters

Review—More About Filters

- Explore and Use the Filter Definition dialog
- Examine filter types—detail and summary
- Create prompt filters

Review—Snapshots

Review—Snapshots

- Define snapshots
- Insert a snapshot timestamp

Review—Drill-Through Reports

Review—Drill-Through Reports

- Define drill-through reports

Review—Frames

Review—Frames

- Examine and Use Different Frame Types
- Work with Frame Properties
- Add Data to Frames and change Scope of Data
- Create a Form using Multiple Frame Types

Where to go from here

Where to go from here

- Course Documentation—‘Using Reporting Administration’
- Online Documentation—Help menu, Books Online option
- Cyborg Help Desk

End of Course Evaluation

End of Course Evaluation

Please complete the End of Course Evaluation and hand it to your instructor.

APPENDIX A

Extra for Experts

Introduction

This section has some additional exercises to give you extra practice at using Impromptu.

Exercise 1. Matching

Tasks:

Match each of the numbered items with its corresponding description.

1. **Rank**
2. **Running-total**
3.
4.
5. **Total (Qty) for report**

A. **Returns the average value.**

B. **Symbolizes an associated summary that is position dependent.**

C. **Returns the numeric position of each value relative to the magnitude of other values in the target column group, where the highest value equals 1.**

D. **Returns a grand total.**

E. **Adds the value for the current row to the total of the previous report rows.**

Hints are listed on the next page.

Exercise 1, (cont'd)

Hints:

1. Use the assistance provided by Impromptu: PowerBar buttons, PowerBar button descriptions (in the PowerBars dialog box), tips provided in the expression editor, and online Help.

Exercise 2. Create a Summary Filter Using the Expression Editor.

Your manager would like to review a report showing by Organization which Salary Grades have an Annual Salary of at least $50,000.

Tasks:

1. Create a simple list report, and add the appropriate data items to the Query Data list.
2. Create a summary filter for Total Annual Salary.
3. Apply a filter to extract only Total Annual Salary at least $50,000. Your finished report should look similar to the sample below:

Org No	Org Level 1 Name	Org Level 2 Name	Salary Grade	Total Annual Salary
999999	ACME MANUFACTURING	PRODUCTION MFTG ORGANIZATION	02	313,940.00
			03	402,161.76
			04	600,321.28
			05	479,637.60
			06	434,720.00
			07	37,537,453.20
			08	1,571,218.00
			09	3,221,520.28
			18	530,198.24
			20	1,241,662.92
			22	1,429,969.20
			24	5,449,732.76
			26	1,587,798.24
			28	2,663,100.00
			30	8,459,330.24
			34	5,983,792.80
			S10	1,052,728.04
			S16	371,359.04
			S25	928,911.00
			S31	605,176.00
			S35	2,510,119.04

4. Close the report. Do not save.

Hints are listed on the next page.

Exercise 2, (cont'd)

Hints:

1. Create a new report using the Simple List report.
2. Add Organization Number, Organization Level 1 and 2 Names, and Salary Grade to the Query Data list.
3. Create a Total Annual Salary Summary filter using the Smart Summary dialog box.
4. Apply a filter for Total Salary > 50000.

Exercise 3. Use the Expression Editor to Create a Detail and a Summary Filter.

Your manager would like to review a report showing by Organization which Salary Grades higher than 19 have at least $50,000 in Total Annual Salary, and at least $20,000 in Average Annual Salary.

Tasks:

1. Create a simple list report, and add the appropriate data items to the Query Data list.
2. Create a Smart Summary Total for Annual Salary, and add it to the Query Data list.
3. Create a Smart Summary Average for Annual Salary, and add it to the Query Data list.
4. Create a detail filter to show Salary Grades above 19 only.
5. Create a summary filter to show only Total Annual Salary at least $50,000 and Average Annual Salary at least $20,000.
6. Your report should look similar to the sample below:

Org No	Org Level 1 Name	Org Level 2 Name	Job Salary Grade	Total Salary	Average Salary
999999	ACME MANUFACTURING	PRODUCTION MFTG ORGANIZATION	20	1,241,662.92	25,867.98
			22	1,429,969.20	32,499.30
			24	5,449,732.76	24,884.62
			26	1,587,798.24	35,284.41
			28	2,663,100.00	40,350.00
			30	8,459,330.24	38,277.51
			34	5,983,792.80	69,578.99
			S31	605,176.00	27,508.00
			S35	2,510,119.04	38,032.11

7. Close the report. Do not save.

Hints are listed on the next page.

Exercise 3, (cont'd)

Hints:

1. Add Organization Number, Organization Level 1 and 2 Names, and Salary Grade to your Simple List.
2. Add a Smart Summary Total for Annual Salary.
3. Add a Smart Summary Average for Annual Salary.
4. Create a detail filter to show Salary Grades higher than 19.
5. Create a Summary Filter so that only Total Annual Salary is at least 50,000 and Average Annual Salary is at least 20,000 are included for a Salary Grade.

Exercise 4. Analyze Annual Salaries.

You have been asked to create a report that allows your boss to analyze the Annual Salary of all your company's employees. Using this initial report, you will produce several altered reports, each of which answers a different business question.

Tasks:

1. Create a report that shows Sex, Number, Name, and Annual Salary for each employee.
2. What is the average Annual Salary for all of the employees that are listed?
3. What is the average Annual Salary for all of the employees if everyone was given a 5% increase?
4. Display the adjusted and unadjusted averages together in the footer. Edit the averages to label them as follows: Adjusted Average: Average:
5. What is the running total for the first three salaries listed in the report? You will have to turn off Auto-Group.
6. What is the running total of the top three employees?
7. Display the subtotals of Annual Salary for each Gender.
8. Which Gender is ranked first when you compare the total of Annual Salary for each Gender?

Hints are listed on the next page.

Exercise 4, (cont'd)

Hints:

1. Create a Simple List report that includes Sex, Employee Number, Employee Name, and Annual Salary. The report should look similar to the sample below.

Gender	Employee Number	Employee Name	Annual Salary
Female	1001	MEYER, JUNE	12,000.00
Male	1002	MOORE, SAMUEL	12,000.00
Female	1003	MUIR, LINDA	12,000.00
Male	1004	MORSE, GORDAN	20,799.60
Male	1005	MORRIS, ROBERT	11,086.40
Female	1006	MERTZ, LYNNE C.	13,832.00
Female	1007	MORITZ, KATHERINE C.	45,000.00
Female	1008	MAURICE, STACY E.	19,240.00
Male	1009	MOREAU, GARDNER	21,450.00

2. Create an average for the Annual Salary column. The result should look similar to the sample below:

Gender	Employee Number	Employee Name	Annual Salary
Female	1001	MEYER, JUNE	12,000.00
Male	1002	MOORE, SAMUEL	12,000.00
Female	1003	MUIR, LINDA	12,000.00
Male	1004	MORSE, GORDAN	20,799.60
Male	1005	MORRIS, ROBERT	11,086.40
Female	1006	MERTZ, LYNNE C.	13,832.00
Female	1007	MORITZ, KATHERINE C.	45,000.00
Female	1008	MAURICE, STACY E.	19,240.00
Male	1009	MOREAU, GARDNER	21,450.00
			18,600.89

3. Select the summary value in the footer and use the Data Definition dialog box to multiply this value by 1.05. The results should look similar to the sample below.

Gender	Employee Number	Employee Name	Annual Salary
Female	1001	MEYER, JUNE	12,000.00
Male	1002	MOORE, SAMUEL	12,000.00
Female	1003	MUIR, LINDA	12,000.00
Male	1004	MORSE, GORDAN	20,799.60
Male	1005	MORRIS, ROBERT	11,086.40
Female	1006	MERTZ, LYNNE C.	13,832.00
Female	1007	MORITZ, KATHERINE C.	45,000.00
Female	1008	MAURICE, STACY E.	19,240.00
Male	1009	MOREAU, GARDNER	21,450.00
			19,530.93

4. Create another Average for Annual Salary, which will give you the Adjusted average. Double-click on the values in the footer to enter the edit mode and add the labels. The results should look similar to the sample below.

Gender	Employee Number	Employee Name	Annual Salary
Female	1001	MEYER, JUNE	12,000.00
Male	1002	MOORE, SAMUEL	12,000.00
Female	1003	MUIR, LINDA	12,000.00
Male	1004	MORSE, GORDAN	20,799.60
Male	1005	MORRIS, ROBERT	11,086.40
Female	1006	MERTZ, LYNNE C.	13,832.00
Female	1007	MORITZ, KATHERINE C.	45,000.00
Female	1008	MAURICE, STACY E.	19,240.00
Male	1009	MOREAU, GARDNER	21,450.00
		Adjusted Average	19,530.93
		Average	18,600.89

5. Clear the Auto-Group checkbox before creating a running-total calculation from the Query dialog box. The results should look similar to the sample below:

Gender	Employee Number	Employee Name	Annual Salary	Running Total
Female	1001	MEYER, JUNE	12,000.00	12000.00
Male	1002	MOORE, SAMUEL	12,000.00	24000.00
Female	1003	MUIR, LINDA	12,000.00	36000.00
Male	1004	MORSE, GORDAN	20,799.60	56799.60
Male	1005	MORRIS, ROBERT	11,086.40	67886.00
Female	1006	MERTZ, LYNNE C.	13,832.00	81718.00
Female	1007	MORITZ, KATHERINE C.	45,000.00	126718.00
Female	1008	MAURICE, STACY E.	19,240.00	145958.00
Male	1009	MOREAU, GARDNER	21,450.00	167408.00
		Adjusted Average	19,530.93	
		Average	18,600.89	

6. Sort in descending order on Annual Salary to create a result as shown below:

Gender	Employee Number	Employee Name	Annual Salary	Running Total
Female	1007	MORITZ, KATHERINE C.	45,000.00	45000.00
Male	1009	MOREAU, GARDNER	21,450.00	66450.00
Male	1004	MORSE, GORDAN	20,799.60	87249.60
Female	1008	MAURICE, STACY E.	19,240.00	106489.60
Female	1006	MERTZ, LYNNE C.	13,832.00	120321.60
Female	1001	MEYER, JUNE	12,000.00	132321.60
Male	1002	MOORE, SAMUEL	12,000.00	144321.60
Female	1003	MUIR, LINDA	12,000.00	156321.60
Male	1005	MORRIS, ROBERT	11,086.40	167408.00
		Adjusted Average	19,530.93	
		Average	18,600.89	

7. Use the PowerBar to group on Gender and then total the Annual Salary column. The results are shown below:

Gender	Employee Number	Employee Name	Annual Salary	Running Total
Female	1007	MORITZ, KATHERINE C.	45,000.00	45000.00
	1008	MAURICE, STACY E.	19,240.00	64240.00
	1006	MERTZ, LYNNE C.	13,832.00	78072.00
	1001	MEYER, JUNE	12,000.00	90072.00
	1003	MUIR, LINDA	12,000.00	102072.00
			102,072.00	
Male	1009	MOREAU, GARDNER	21,450.00	21450.00
	1004	MORSE, GORDAN	20,799.60	42249.60
	1002	MOORE, SAMUEL	12,000.00	54249.60
	1005	MORRIS, ROBERT	11,086.40	65336.00
			65,336.00	
		Adjusted Average	19,530.93	
		Average	18,600.89	

8. From the Data Definition dialog box, create a new summary in the gender footer to rank on Annual Salary and then sort ascending to show the first ranked gender. The results are shown below:

Gender	Employee Number	Employee Name	Annual Salary	Running Total
Female	1007	MORITZ, KATHERINE C.	45,000.00	45000.00
	1008	MAURICE, STACY E.	19,240.00	64240.00
	1006	MERTZ, LYNNE C.	13,832.00	78072.00
	1001	MEYER, JUNE	12,000.00	90072.00
	1003	MUIR, LINDA	12,000.00	102072.00
			1.00	
Male	1009	MOREAU, GARDNER	21,450.00	21450.00
	1004	MORSE, GORDAN	20,799.60	42249.60
	1002	MOORE, SAMUEL	12,000.00	54249.60
	1005	MORRIS, ROBERT	11,086.40	65336.00
			2.00	
		Adjusted Average	19,530.93	
		Average	18,600.89	

Workforce Data Mart Data Model

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PART 1

Introduction

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CHAPTER 1

About This Manual

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Welcome

This manual has been designed as a reference tool for the Workforce Data Mart.

Who should use this manual?

Primarily, this manual is designed to be used by a database administrator responsible for setting up, customizing, and maintaining the data mart.

A secondary user might be a subject matter expert involved in determining requirements for a potential customization to the data mart for reporting purposes.

Prerequisite skills

Users of this manual should possess a variety of technical skills and authorities, depending on the roles they will play.

Database administrator

- SQL programming experience
- Knowledge of bulk load utilities
- Specific relational database knowledge
- Data model interpretation skills

Subject matter expert

- Thorough understanding of data captured within The Solution Series

Additional documentation and training courses

The following documentation and training courses are available from Cyborg Systems to help you understand Reporting Administration.

Documentation

Document	Description
Customizing Reporting Administration	This document provides: ■ an overview of the required component changes required when a customization is performed. ■ detailed instructions for performing different types of customizations.
Reporting Administration Release Guides (specifically for NT, UNIX, AS400 and OS390)	These documents provide: ■ instructions for adding the functionality of Reporting Administration to an existing system. ■ guidance for a current Reporting Administration release 1 user to migrate to this version.

Note: The distribution of the Customizing Reporting Administration document is limited to only those customers or internal Cyborg staff who attend a certification class.

If you do not have a copy of these documents, you can obtain one from Customer Support.

Training Courses

Related Course	Description
Impromptu Report Builder	Covers topics on: ■ basic Impromptu concepts ■ report organization ■ building complex reports
Impromptu Administration	Covers topics on: ■ catalogs, folders, and columns ■ working with joins ■ calculations and conditions ■ user profiles ■ performance enhancements ■ deployment and maintenance
Introduction to PowerPlay	Covers topics on: ■ fundamental concepts of multidimensional analysis ■ PowerPlay interface ■ dimensions and measures ■ levels and categories ■ drilling down and slicing and dicing ■ sorting, ranking, and filtering ■ layout and formatting
PowerPlay Administration	Covers topics on: ■ design, development, and implementation ■ using Transformer ■ dimension structures ■ the dimension diagram ■ customizing dimensions, levels, measures, and categories ■ creating PowerCubes ■ alternate drill downs ■ performance and production issues ■ deployment
Customizing Reporting Adminstration	Covers: ■ an in-depth overview of the components of Reporting Administration and how the system is designed ■ detailed instructions for performing different types of customizations

If you wish to attend any of these courses, contact Customer Support or visit our website www.Cyborg.com for details of course dates and availability.

How this manual is organized

This manual has been organized to make it as easy to use as possible. The chapters are grouped accordingly into the following parts:

Part	Chapters	Description
1. Introduction	1–2	Overview of the data mart structure and design
2. Tables and Data Elements	3–4	Details of the tables and columns/data elements
3. Appendices	A	Entity relationship diagrams of the data mart data model submodels

Following are descriptions of the chapters within the parts:

Part 1: Introduction

The chapters in Part 1 describe this manual and provide an overview of the design and structure of the data mart.

Read this chapter		To learn about
1	About This Manual	■ How the manual is organized ■ Where to find what you are looking for ■ Who should use the manual ■ Where to get help
2	Overview of the Data Model	■ Delivered submodels ■ Scope of the data contained within the data mart ■ How the data mart is designed (naming conventions, and so forth) ■ How The Solution Series segments and tables are mapped to the data mart tables

Part 2: <Title>

The chapters in Part 2 describe the details of the structure of the data mart and columns.

Read this chapter		To learn about
3	Data mart Tables	Details of each table and data element alphabetically, by table name.
4	Data Elements	Details of each data element (Solution Series field) in the data mart alphabetically, by data element name. It will list the field (data element) names.

Part 3: Appendices

The appendix in Part 3 contains the following quick reference.

Use this appendix		To learn about
A	Entity Relationship Diagrams	How the tables and data elements relate to each other in the data mart

How to use this manual

This manual has been designed as a reference manual as well as a training manual. It has been written to facilitate self-study before and after classroom training.

Table of contents

The manual has been carefully designed for ease of use. All our manuals are written to be task oriented to help you complete your business tasks using our software.

The table of contents lists all the tasks and their respective chapters.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 ensures you get the most out of the information we have provided. Chapter 2 provides a high level overview. Read it to get the big picture before reading the detailed instructional chapters.

Conventions used in this manual

The underlying page layout and design of this manual are meant to be as intuitive as possible for you. Our intent is to make it easy to navigate through the manual and concentrate on learning and doing.

Cross-references

Wherever appropriate, we provide cross-references to help you find additional information or further discussion of a specific topic.

☞ *Refer to a cross-reference to find more detail or more discussion on a given topic.*

Notes

Whenever there is important information you should be aware of, we provide a note.

Note: *You will find tips or quick techniques covered in notes.*

How to get additional help

If you can not find the answers to your questions in this manual, contact Customer Support, who will be able to answer specific questions and give you general advice on training.

Please visit our web site www.Cyborg.com for the latest schedule of available courses and course descriptions.

Suggestions and feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to Customer Support.

CHAPTER 2

Overview of the Data Model

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Introduction to Overview of the Data Model

This chapter describes the components of the data mart and the rules that were applied to the data mart design.

Terms you should understand

To understand this chapter, you should be familiar with the following terms:

denormalizing	The process of taking a normalized logical design and intentionally disobeying the rules to increase performance.
First normal form	When a database is in First Normal Form, all repeating groups have been moved into separate tables.
normalization	Removal of any redundancies from the data; requires every data element to be referenced by a primary key.

Submodels

The data model is delivered in two formats: the entire data model, and 35 submodels, or subset data models, created to be meaningful and easy for inclusion/exclusion in your data mart. The submodels are:

- Benefit Administration
- Benefit Plan Contribution Data
- Benefit Plan Coverage/Rule
- Benefit Plan Eligibility (Company Rules)
- Employee Benefit Plan Eligibility
- Benefit Plan Set-up
- Benefit Plan Testing
- Company Setup Information
- Company Tax
- Compensation and Salary Administration
- Dependent, Beneficiaries & Bond Holder
- EEO/AAP Data
- Employee Attendance Information
- Employee Benefit Plan Information
- Employee Org/Location Information
- Employee Personal Information
- Employee Skills, Training, Education and Certification
- Employee Tax Information
- Employee History Information
- Employee Labor Information
- Employee-Medical Information
- HEDs
- Job and Salary Table Information
- Plan Flex Rules, Definitions, Formulas and Balances
- Position Administration-Incumbency
- Position Administration-Job
- Position Administration-Org Unit

- Position Administration-Position
- Position Administration-Position Requirements
- PowerPlay Model--Workforce Planning Organization (PM)
- PowerPlay Model--Workforce Planning Organization (Non PM)
- Requisition/Applicant Administration
- Training Administration
- Training Administration-Course Information
- Training Administration-Class Information

☞ *Refer to Appendix A: Entity Relationship Diagrams for graphic representations of the submodels.*

Scope of the data in the data mart

This release of the Workforce Data Mart includes The Solution Series data from HR, Payroll Personnel, Payroll, Benefits, Training, and Position Administration components.

This release includes all data elements in the Release 1 data mart. The requirements for Release 1 were not written to specific forms. However, for the sake of consistency the information from the following forms was in Release 1:

02-SCR, 04-SCR, 05-SCR, 05CSCR, 08-SCR, 40-SCR, 41-SCR, 43-SCR, 45-SCR, 95-SCR, 96-SCR, AF-SCR, AX-SCR, EF-SCR, ET-SCR, M2ESCR, M2MSCR, M2TSCR, M10SCR, M18SCR, M20SCR, M22SCR, M23SCR, M24SCR, M25SCR, M26SCR, M27SCR, M28SCR, M29SCR, M30SCR, M31SCR, M33SCR, M40SCR, M44SCR, M46SCR, M47SCR, M48SCR, M49SCR, M81SCR, TG-SCR

This release also includes the data elements outlined in the following tables:

Training Administration Data	
Form ID	**Title**
10RSCR	Course Directory
11RSCR	Course Development Costs
14RSCR	Coordinator Index
19RSCR	Provider Index
13RSCR	Class Schedule
15RSCR	Program Schedule
10RSCR	Course Directory
31RSCR	Training Required
The table information reflected in the 20RSCR	Class Registration/Cancellation.
The table information reflected in the 16RSCR	Program Registration/Cancellation

Training Administration Data (continued)	
Form ID	**Title**
30RSCR	Training Results/History
23RSCR	Process Class Evaluation Results
34RSCR	Employee Training Class Costs

Employee Resourcing	
Form ID	**Title**
EF-SCR	Employee Information
01-SCR	New Hire
05-SCR	Job Assignment/Changes
05CSCR	Location/Assignment Changes
04-SCR	Rehire/Reinstatement/Recall
08-SCR	Status Changes
95-SCR	Leaves and Returns
96-SCR	Separations and Terminations
93-SCR	Absences
93ASCR	Authorized Time-Off Hours Remaining
93USCR	Unauthorized Time-Off Hours Taken
02-SCR	Additional Personal and ID Information
03-SCR	Phone Numbers and Employment Information
EM-SCR	Employee Contact Information
10-SCR	Spouse/Dependent Information
BACSCR	Alternative Compensation Tools

Employee Development	
Form ID	**Title**
28-SCR	Certificates, Licenses, and Permits
29-SCR	Professional Association Memberships
30-SCR	Formal Education
31-SCR	Training Scheduled/Taken
32-SCR	Tuition Information
33-SCR	Skills and Competencies
49-SCR	Performance Appraisal Results
50-SCR	Schedule/Track Performance Appraisals

Employee Compensation	
Form ID	**Title**
40-SCR	Salary Assignment/Changes
45-SCR	Budgeted Salary Information
43-SCR	Scheduled Salary Review Data
41-SCR	Salary Information
26-SCR	Bonus/Commission Information
27-SCR	Perquisites: Monetary
TG-SCR	System Options
AX-SCR	Company-To-Rules Cross-Reference for HR
TA-SCR	Job Code Table
TC-SCR	Job Points
TBASCR	Salary Grade-Annual Form
TBBSCR	Salary Grade-Per Pay Period
TBCSCR	Salary Grade-Hourly Form
TE-SCR	Occupation Group Table
TW-SCR	EEO Prior Year Totals table
TX-SCR	EEO Location Table
TY-SCR	EEO/AAP Demographic Data

Position Administration	
Form ID	**Title**
M48SCR	Organization Unit-Setup/Maintenance
M46SCR	Organization Unit – Basic Details
M47SCR	Organization Budget
M49SCR	Organization Unit – Document Reference
M44SCR	Organization Unit – Default Level Names
M18SCR	Job – Setup/Maintenance
M10SCR	Job – Basic Details
M28SCR	Position – Setup/Maintenance
M20SCR	Position – Basic Details
M30SCR	Position – Location
M23SCR	Position – Skills/Competencies Required
M25SCR	Position – Education Required
M2TSCR	Position – Training Required

Position Administration (continued)	
Form ID	**Title**
M2ESCR	Position – Experience Required
M24SCR	Position – Membership Required
M26SCR	Position – License Required
M22SCR	Position – Evaluation
M27SCR	Position – Succession
M33SCR	Position – Next Review
M29SCR	Position – Document Reference
M31SCR	Position – Funding
M34SCR	Position – Budget
M2MSCR	Position – Miscellaneous Information
M81SCR	Position – Complement Limits
M40SCR	Incumbency – Basic Details

Requisition Administration	
Form ID	**Title**
R10SCR	Requisition – Basic Details
R11SCR	Requisition Candidate – Basic Details

Benefit Plan Setup and Maintenance	
Form ID	**Title**
AY-SCR	Company – To-Rules Cross-Reference for Benefits
TK-SCR	Benefit Plan Rules
TL-SCR	Benefit Plan Eligibility Rules
TS-SCR	Benefit Plan Prototype Contribution HED
TM-SCR	Coverage and Contribution Factors
TTASCR	Activity/Resulting Plan Status Rules
TTOSCR	Options/Resulting Plan Status Rules
TJ-SCR	Benefits Retirement Dates Rules Table
TN-SCR	Benefits Participation Rules Table
TU-SCR	Benefits Plan Breaks – In-Service Rules
FCCSCR	Flex Plan Credits Calculation
TKFSCR	Flex Benefits Master Plan Rules
TP-SCR	Flex Master/Group Plan Components

Benefit Plan Setup and Maintenance (continued)	
Form ID	**Title**
TO-SCR	Considered Earnings/Hours Accumulators Definition
60-SCR	Considered Earnings/Hours Accumulators
602SCR	Considered Earnings/Hours FICA for Tax 103
60FSCR	Considered Earnings/Hours FICA for OASDI
A83SCR	Company HED Benefits CE/H Accumulation Definition
FCCSCR	Benefit Plan Flex Rules

Employee Benefits Enrollment and Maintenance	
Form ID	**Title**
90-SCR	Pending Plan Enrollment/De-Enrollment
55-SCR	Welfare Plan Enrollment/Changes
58-SCR	Beneficiary/Bond-Owner Information
59DSCR	Covered Dependents by Plan
59BSCR	Beneficiary/Plan Cross Reference
53-SCR	Plan Coverage Amount Entry
54-SCR	Deduction Information from Benefit Plans
59KSCR	HIPAA
86-SCR	COBRA Notification Response Dates
10CSCR	Spouse/Dependent COBRA Information Dates
64-SCR	Deferred Plan Enrollments/Changes
79-SCR	T/S Plan Contributions/Fund Allocation
51-SCR	Components of Highly Paid Definition
52-SCR	Average Deferral Percentage Ratios
64CSCR	Deferred Plan Contribution Amt/Pcts
62-SCR	Plan Service Date Form
61-SCR	Service Interruptions
65-SCR	Plan Retirement/Notice/Counseling Dates
63-SCR	Plan Vesting Information
66-SCR	Plan Retirement Elections/Payments
TV-SCR	Non-discrimination Test Components
55FSCR	Flex Benefit Enrollments/Changes
55CSCR	Flexible Benefit Annual Plan Credit
80-SCR	Thrift/Savings Plan Account Activities

Employee Benefits Enrollment and Maintenance (continued)	
Form ID	**Title**
81-SCR	Thrift/Savings Plan Transfers
79-SCR	T/S Plan Contributions/Fund Allocation
SB-SCR	Savings Bond Information
HH-SCR	Employee Earnings and Deductions
56-SCR	FSA Claims
57-SCR	FSA Balance

Company Information	
Form ID	**Title**
AA-SCR	Company Name and Address

Security Tools	
Form ID	**Title**
ESECUR	Employee Security

Employee Payroll	
Form ID	**Title**
GG-SCR	Payroll Home Location/Pay Allocations
JJ-SCR	Employee Tax Record Maintenance
H1-SCR	Employee Pay Rate or Salary Form
H9-SCR	Direct Deposit Information
HT-SCR	HEDs To-Date Inquiry
JT-SCR	Taxes To-Date Inquiry
HL-SCR	History and Labor Options
PE-SCR	Pay Period – End Maintenance
EE2SCR	Employee Information

Payroll Setup Processing	
Form ID	**Title**
T1-SCR	Tax Specification Information
A8-SCR	Company Earnings
AF-SCR	Company Options
AJ-SCR	Company Pay Frequencies

Labor	
Segment	**Data Stored**
E Segment	CTL 1-2, EMPLOYEE-NUMBER
EEA Segment	History, Hours, Rate, and Salary
G Segment	Control Levels 3 through 6 and Function
H Segment	Hours and Earnings
L Segment	User-defined segment

History	
Segment	**Data Stored**
E Segment	CTL 1-2, EMPLOYEE-NUMBER
EEA Segment	History, Hours, Rate, and Salary
H Segment	Hours and Earnings
J Segment	Tax Bodies

☞ *Refer to Chapter 3: Data Mart Tables for a description of the content in each of the data mart tables.*

☞ *Refer to Chapter 4: Data Elements for detailed descriptions of all the data elements in the Workforce Data Mart.*

Data mart design

This release of the Workforce data mart defines end users' needs and group data elements into logical units (tables).

The data mart is in first normal form at a minimum. That means that all repeating groups have been moved into separate tables.

We have reduced some redundant data by introducing multiple tables for The Solution Series segments, which resulted in small tables with compact rows.

All tables are normalized up to third normal form according to the application.

Some denormalization methods may have been used to modify the physical database design in an effort to improve performance.

Naming conventions

In order to keep data mart columns and Solution Series data fields synchronized, especially for the convenience of the data extraction process, all data mart columns have the same name as Solution Series data field names, unless the data field has a name with more than 18 characters.

All derived fields are named by their definitions.

The column order in each table matches the data field order stored in The Solution Series as much as is possible.

Data field redefinition

Some data fields are used differently in different countries or different situations. Basically there are two cases. First, the data field is used for the same purpose, but has a different name.

For example, in the US we use Social Security Number, but Canada uses Social Insurance Number.

Another example is that in the payroll module, EARNING_METHOD_CODE and DEDUCTION_METHOD_CODE both are in the same displacement. If the HED_NUMBER is 001–500, we extract based on earning, otherwise based on deduction.

To indicate that the data field is a dual-purpose field, we named it using both definitions, such as SSN_OR_SIN, ZIP_OR_POST, and so forth.

In the second case, two data fields are defined in the same place with different meaning. For example, the field used in the US for RACE_CODE is used in Canada for LANGUAGE_CODE.

Direct deposit data is stored in the same place as some general payroll data.

To satisfy all these uses, these cases are separated into multiple data fields in the data mart.

Performance tuning

The data mart extends the user's capacity to produce useful and meaningful HR reports through the Cognos reporting tools by extracting much more data from The Solution Series than was possible with the first release.

Response time for queries is always an important criterion in reporting, so we will use the following techniques in order to improve the overall database performance:

- Indexes
  In SQL Server databases, clustered indexes can improve performance for range retrievals and can be more efficient for joins than non-clustered indexes. We deliver a clustered index for the primary keys in each table to facilitate efficient and effective date reporting.

- Denormalization
  Normalization reduces data redundancy, but also ends up increasing the number of joins required to pull related data elements back together for output. We have to intentionally disobey the normalization rules to minimize joins and improve performance. This release of the data mart is a read only database, so the impact to data integrity from redundant data can be minimized.

  Using denormalization techniques can also speed up retrieval time. The denormalization methods we used in the data mart are: combining tables, duplicating portions of a table, and creating derived columns or summary columns.

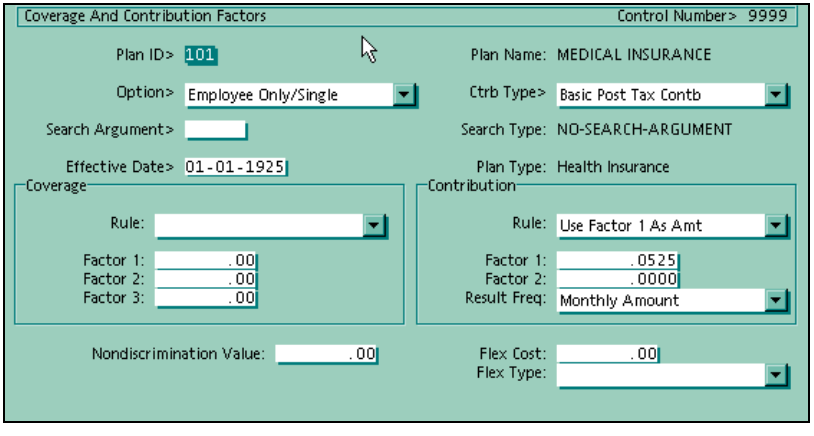
Denormalization examples

Following are some specific examples where denormalization techniques were used to improve performance.

Combining tables in a 1-to-1 relationship case

On the Coverage and Contribution Factors form (TM-SCR), both Plan coverage and Plan Contribution have a 1-to-1 relationship with the Plan Basic Information entity. In the data mart we combine these entities together into one entity.

Following is the Coverage and Contribution Factors form (TM-SCR):



Duplicating portions of a table

In the EMPLOYEE table we duplicated the EMPLOYEE_NAME, PREFIX_NAME, FIRST_NAME, MID_NAME, LAST_NAME and SUFFIX_NAME columns from the EMP_NAME_ADDR table, since employee name will come with the employee information most of the time in the reports.

Derived or summary columns

Derived or summary columns contain data duplicated for the purpose of avoiding repeated calculations. We have some derived fields in the data mart, such as MIN_ANNUAL_SALARY, MID_ANNUAL_SALARY, MAX_ANNUAL_SALARY.

Security implications

The Data mart and Catalogs are delivered with no access restrictions placed on them. The Cognos security prevents unauthorized access through the catalogs but does not prevent sensitive data from being directly accessed using SQL.

The Security Officer or database administrator is responsible for the company's internal system security.

Cognos security will handle the security associated with the use of the Cognos products. There will be a separate security profile for each Impromptu Catalog and PowerPlay Model (Authenticator).

Administrators must define user classes and user profiles by their users' data requirements, department or division, and function. A user class inherits the privileges and the restrictions of its parent class.

Inheritance means that each user class, by default, gets the same set of privileges. This allows the administrator to apply changes to parent classes, and the changes will automatically cascade through all child classes, including any of their child classes. Then, any changes can be made to the child class without affecting the parent class.

There are two main reasons for not using the internal security:

1. First, SQL Server 7.0 allows at most 256 tables involved in a single query.
   If we used The Solution Series security, such as row level security, which would allow certain users to access certain data (that is, by Control_1 and Control_2), we would need to add a user table, a class table, and a view for each data mart table in the data mart.

   This means that even when a user retrieved data from one data mart table, there would be three tables/views involved in the query. Because of this limitation, users would not be able to access data from more than five tables/views in their reports.

2. Second, The Solution Series user classes may not match exactly with reporting user classes. Using Cognos security will give our customers more security options.

Effective dating

In Release 1 of Reporting Administration, we had an effective begin date and an effective end date for each dated table. These have been retained in this release.

Prompts allow the end user to enter the date range he or she wants to report to. The Impromptu administrator must set up effective date filters using these prompts at the table level for each user class in his or her company, so users can filter data by date ranges.

The filter statement is:

```
Prompt_begin_date<=Table_effect_end_date and
Prompt_end_date>=Table_effect_begin_date
```

Mapping Solution Series segments/tables to data mart tables

There are four different mappings between Solution Series segments/tables and data mart tables:

- Multiple segments/tables to one data mart table
- One segment/table to one data mart table
- One segment/table to multiple data mart tables
- Multiple segments/tables to multiple data mart tables

Multiple segments/tables to one data mart table

Because of the size limitation of a segment/table in The Solution Series, long data records were stored in multiple segments/tables. In the data mart, these are combined into a single table.

For example, where there are three segments (LO1, LO2 and LO3) for dependent data in The Solution Series, they are combined to be in one dependent table in the data mart.

Also, there are some duplicated segments in The Solution Series, since they are used for different forms. We have consolidated them into one table in the data mart.

For example, the LQ1 segment for Welfare Plan Enrollments (55-SCR) and the LQ4 segment for Deferred Plan Enrollments (64-SCR) are duplicates. In the data mart, the segment data appears only once.

One segment/table to one data mart table

For example, segment LZO for professional association membership data has one corresponding table in the data mart.

One segment/table to multiple data mart tables

In order to normalize the data in the data mart for reporting purposes, one segment/table in The Solution Series may be broken into multiple tables in the data mart.

For example, segment LQA for T/S Plan Contributions/Fund Allocation data will have two tables in the data mart. One will be the table for T/S Fund Allocation data; another will be the table for Fund Percentage data.

Multiple segments/tables to multiple data mart tables

Because of the size limitation of segments/tables, data stored in multiple segments/tables may need to be normalized in the data mart.

For example, T*C-A, T*C-B, T*C-C, T*C-D, and T*C-E for training course information are multiple tables in the data mart, such as a table for Course Offering data, a table for Course Offer Skills data, a table for Course Cost data, and so forth.

Issues

Due to the data integrity issue of The Solution Series, in this release we do not maintain the data integrity between data mart tables. This means that there are no foreign key constraints applied in the data mart.

There are few many-to-many relationships between tables existing in the data mart. Since there are no foreign key constraints, we did not decompose them by introducing any extra entities in this release.

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CHAPTER 3

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Introduction to Data Mart Tables

This chapter provides details of each table and data element alphabetically, by table name, that comprise the Workforce data mart.

The Workforce Data Mart Tables

Following are the tables within the Workforce data mart, along with a brief description of their content. The forms in The Solution Series from which the data is extracted and the Impromptu catalogs where the data can be located are also indicated.

DM2_ABSENCES

Describes an event of absence from work.

Solution Series form(s)	93-SCR
Catalog(s)	General, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
ABSENT_DATE	DATETIME	
ABSENT_TYPE_CODE	CHAR	002
ABSENT_TYPE	VARCHAR	020
ABS_KEY	CHAR	001
ABS_KEY_DESC	VARCHAR	020
ABSENT_HOURS	NUMERIC	04,2
ABSENT_APPROVAL_CD	CHAR	002
ABSENT_APPROVAL	VARCHAR	020
ABSENT_REASON	VARCHAR	015
ABSENT_DAY	CHAR	009
ABSENT_TC_IND	CHAR	001
ABSENT_TC_IND_DESC	VARCHAR	020
ABSENT_APPROV_USER	CHAR	004
ABSENT_APPR_USER_D	VARCHAR	020
ABSENT_ENTERED_BY	CHAR	004
ABSENT_DAY_CODE	CHAR	003
ABSENT_DAY_DESC	VARCHAR020	
ABSENT_POINTS	NUMERIC	4,1

DM2_ACCUMULAT_RULE

Defines the accumulation rule to be used for a particular benefit plan.

Solution Series form(s)	TO-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TO_TABLE_DATE	DATETIME	
TO_TABLE_UNTIL	DATETIME	
ACCUM_FREQUENCY_CD	CHAR	1
ACCUM_FREQUENCY	VARCHAR	20
BUCKET_ID	CHAR	1
TO_ACCUMULATOR_0	CHAR	1

DM2_ALLERGY

Allergies of an employee.

Solution Series form(s)	15-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
EMERGENCY_DATE	DATETIME	
EMERGENCY_UNTIL	DATETIME	
ALLERGY_CODE_1	CHAR	002
ALLERGY_1	VARCHAR	020

DM2_ALTERNA_COMPEN

Additional salary information specific to an employee.

Solution Series form(s)	BACSCR
Catalog(s)	Benefits, General, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
PREV_YEAR_EFFECT	DATETIME	
PREV_YEAR_UNTIL	DATETIME	
PREVIOUS_YR_SALARY	NUMERIC	9,2
FROZEN_SALARY	NUMERIC	9,2
MULTI_INC_TOT_SAL	NUMERIC	9,2
MULTI_INC_TOT_HRS	NUMERIC	6,2
ALTERNATE_COMP_IND	CHAR	1
ALTERNATE_COMP_DES	CHAR	20
MULTI_AVERAGE_RATE	NUMERIC	7,4

DM2_APP_CONTACT

Contact information for an applicant.

Solution Series form(s)	008SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
APPL_HOME_AREA_CD	NUMERIC	03,0
APPL_HOME_PHONE_NO	CHAR	008
APPL_WORK_AREA_CD	NUMERIC	03,0
APPL_WORK_PHONE_NO	CHAR	008

DM2_APP_CONTACT (continued)

Column	Data Type	Length
APPL_WORK_EXT	CHAR	004
APPL_MAIL_CONTACT	CHAR	001
MAIL_CONTACT	VARCHAR	020
APPL_PHONE_CONTACT	CHAR	001
PHONE_CONTACT	VARCHAR	020
HOME_CONTACT_HOURS	VARCHAR	015
WORK_CONTACT_HOURS	VARCHAR	015

DM2_APPRAISAL

Performance appraisal information specific to an employee.

Solution Series form(s)	50-SCR
Catalog(s)	General

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
NEXT_APPRAISAL_DT	DATETIME	
NEXT_APPRAISAL_TP	CHAR	002
NEXT_APPRAISAL	VARCHAR	020
APP_REVIEWER_NAME	VARCHAR	030
AP_DISTRIB_DATA	CHAR	010
AP_DISTRIB_DATE	DATETIME	
RETURN_DT_EXPECTED	DATETIME	
ACT_RETURNED_DATE	DATETIME	

DM2_ASSOCIATION

Professional association membership information specific to an employee.

Solution Series form(s)	29-SCR
Catalog(s)	General, Training

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
ASSOCIATION_CODE	CHAR	004
ASSOCIATION	VARCHAR	020
ASSOCIATION_DATE	DATETIME	
ASSOCIATION_NUMBER	CHAR	010
ASSOCIATION_EXPIRE	DATETIME	

DM2_AUTH_TIME_OFF

Describes remaining authorized time away from work.

Solution Series form(s)	93ASCR
Catalog(s)	General, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
REMAINING_YEAR_END	DATETIME	
REMAIN_AS_OF_DATE	DATETIME	
REMAIN_UNTIL	DATETIME	
REMAINING_TYPE	VARCHAR	20
REMAINING_AMOUNT	NUMERIC	05,2

DM2_AVG_DEFERR_PCT

Employee and company contribution designations to a particular deferred benefit plan.

Solution Series form(s)	52-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
ADP_YEAR	NUMERIC	04,0
ADP_EARNINGS	NUMERIC	10,2
ADP_PRE_TX_CONTRIB	NUMERIC	08,2
ADP_PRE_TAX_RATIO	NUMERIC	06,5
ADP_PST_TX_CONTRIB	NUMERIC	08,2
ADP_POST_TAX_RATIO	NUMERIC	06,5
ADP_CO_CONTRIB	NUMERIC	08,2
ADP_COMPANY_RATIO	NUMERIC	06,5
ADP_DATE_CREATED	DATETIME	

DM2_BENEF_PLAN_HED

The HED to be used for deductions for a specific benefits plan.

Solution Series form(s)	TK-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	004
PLAN_ID	CHAR	003
TK_TABLE_DATE	DATETIME	
TK_TABLE_UNTIL	DATETIME	
HED_TYPE	VARCHAR	20
HED_NUMBER	NUMERIC	03,0
HED_NAME	VARCHAR	015

DM2_BENEF_PLN_SEAR

Defines the search arguments to be used for a particular benefit plan.

Solution Series form(s)	TK-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TK_TABLE_DATE	DATETIME	
TK_TABLE_UNTIL	DATETIME	
SEARCH_NAME	VARCHAR	20
SEARCH_TYPE_CD	CHAR	2
SEARCH_TYPE	VARCHAR	20
SEARCH_ARGUMENT	CHAR	6

DM2_BENEF_TBL_CTRL

Rules table for benefits plans.

Solution Series form(s)	AY-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
AY_CROSS_REF_DATE	DATETIME	
AY_CROSS_REF_UNTIL	DATETIME	
RETIRE_DATE_RULE	CHAR	4
PLAN_RULES	CHAR	4
ELIGIBILITY_RULES	CHAR	4
PLAN_FACTORS	CHAR	4
PARTICIP_RULES	CHAR	4
ANNUITANT_FACTORS	CHAR	4

DM2_BENEF_TBL_CTRL (continued)

Column	Data Type	Length
PROTO_HED_CONTRIB	CHAR	4
ACTIVITIES_OPTIONS	CHAR	4
SERVICE_BREAK_RULE	CHAR	4
MASTER_PLAN	CHAR	4
MASTER_PLAN_RULES	CHAR	4
FLEX_CREDIT_CALC	CHAR	4

DM2_BENEFICIAR_PCT

Allocation of percents of a benefit plan amount to an employee's beneficiaries.

Solution Series form(s)	59BSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
ALLOCATION_DATE	DATETIME	
ALLOCATION_UNTIL	DATETIME	
BENEFICIARY_XREF_1	CHAR	003
PCT_ALLOCATED_1	NUMERIC	04,1

DM2_BENEFICIARY

Information specific to a person who has been designated as a beneficiary by the employee.

Solution Series form(s)	58-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
BENEF_KEY	CHAR	003
BENEF_RELATION_CD	CHAR	002
BENEF_RELATIONSHIP	VARCHAR	020
BENEFICIARY_NAME	VARCHAR	030
BENEF_SSN_OR_SIN	VARCHAR	012
BENEF_SEX_CODE	CHAR	001
BENEF_SEX	VARCHAR	020
BENEF_BIRTH_DATE	DATETIME	
BENEF_AREA_CODE	CHAR	003
BENEF_PHONE_NUMBER	CHAR	008
BENEF_ADDRESS	VARCHAR	030
BENEF_ADDRESS_2	VARCHAR	030
BENEF_CITY	VARCHAR	20
BENEF_ST_OR_PROV	VARCHAR	20
BENEF_CITY_ST_PROV	VARCHAR	030
BENEF_ZIP_POST	VARCHAR	12

DM2_BENEFIT_PLAN

Basic information required for all benefit plans.

Solution Series form(s)	55-SCR, 57-SCR, 61-SCR, 64-SCR, 64CSCR, 65-SCR, 66-SCR, 80-SCR, 81-SCR, 90-SCR, TK-SCR, TP-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	004
PLAN_ID	CHAR	003
TK_TABLE_DATE	DATETIME	
TK_TABLE_UNTIL	DATETIME	
PLAN_NAME	VARCHAR	020
PLAN_TYPE_CODE	CHAR	002
PLAN_TYPE	VARCHAR	020
PLAN_YEAR_END	CHAR	005
PLAN_CLASS_CODE	CHAR	001
PLAN_CLASS	VARCHAR	020
TK_ACCUM_NAME	CHAR	003
INSURE_CARRIER	CHAR	002
INSURANCE_CARRIER	VARCHAR	020
SERVICE_DATE_CODE	CHAR	001
SERVICE_DATE	VARCHAR	020
FLEX_PLAN_MASTER	CHAR	003
GROUP_PLAN_MASTER	CHAR	003
TK_DEFAULT_OPTION	CHAR	002
TK_DEFAULT_OPT_DES	VARCHAR	020
TK_PRE_POST_IND	CHAR	001
TK_PRE_POST_DESC	VARCHAR	020

DM2_BONUS

Monetary bonus information paid to an employee.

Solution Series form(s)	26-SCR
Catalog(s)	General, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
BONUS_HED_XREF	CHAR	003
BONUS_HED_NAME	VARCHAR	020
BONUS_DATE	DATETIME	
BONUS_AMT_AWARDED	NUMERIC	08,2
DATE_BONUS_PAID	DATETIME	
AUTHORIZE_LOCATION	CHAR	004
AUTHORIZING_LOC_DE	VARCHAR	020
AUTHORIZED_BY	VARCHAR	030
BONUS_YEAR CHAR	002	
BONUS_MONTH CHAR	002	
BONUS_QUARTER	CHAR	001

DM2_BREAK_IN_SVC

Defines how breaks in service will effect eligibility for a particular benefit plan.

Solution Series form(s)	TU-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
MAJOR_ACTIVITY	CHAR	1
TU_TABLE_DATE	DATETIME	
TU_TABLE_UNTIL	DATETIME	
SEQ_NBR	CHAR	1

DM2_BREAK_IN_SVC (continued)

Column	Data Type	Length
TU_KEY_SEPARATOR	CHAR	1
ACTIVITY_1L	CHAR	2
ACTIVITY_1H	CHAR	2
RULE_1	CHAR	2
RULE_1_DESC	VARCHAR	20
DELAY_TIME_1	CHAR	8
DATE_CALC_1	CHAR	1
DATE_CALC_METHOD_1	VARCHAR	20

DM2_CAN_EMP_TAX_QTR

Canadian tax quarter summary information for an employee.

Solution Series form(s)	JJ-SCR, JT-SCR, various others depending on the tax
Catalog(s)	Payroll

Column	Data Type	Length
TAX_YEAR	NUMERIC	04,0
TAX_QTR	NUMERIC	02,0
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
TAX_TYPE	CHAR	001
TAX_TYPE_EDIT	VARCHAR	020
TAX_CODE	CHAR	006
TAX_METHOD_CODE	CHAR	001
TAX_METHOD	VARCHAR	020
TAX_DEPENDENTS	NUMERIC	02,0

DM2_CAN_EMP_TAX_QTR (continued)

Column	Data Type	Length
FEDERAL_NET_CLAIM	NUMERIC	07,0
ADD_FED_TAX	NUMERIC	07,0
PROV_TAX_AMOUNT	NUMERIC	07,0
CPP_QPP_IND_CODE	CHAR	001
EMPLOYMENT_INS_CD	CHAR	001
NON_INDEXED_AMOUNT	NUMERIC	5,2
FED_ANN_DEDUCTIONS	NUMERIC	5,2
PROV_NET_CLAIM	NUMERIC	5,2
QC_OTH_DEDUCTIONS	NUMERIC	05,0
OTH_FD_TX_CRED_K3	NUMERIC	05,0
FED_HD_PRESC_AREA	NUMERIC	05,0
J_USER_CODE	CHAR	001
J_CHANGE	CHAR	001
FED_LCF_TAX_CREDIT	NUMERIC	11,2
PENS_ADJUSTMENT	NUMERIC	11,2
PRV_LCP_TAX_CREDIT	NUMERIC	11,2
EST_ANNUAL_INCOME	NUMERIC	11,2
PENSIONABLE_EARNS	NUMERIC	11,2
QC_OTH_TAX_CREDITS	NUMERIC	11,2
TAXABLE_BENEF_CUR	NUMERIC	11,2
TAXABLE_BENEF_MTD	NUMERIC	11,2
TAXABLE_BENEF_QTD	NUMERIC	11,2
TAXABLE_BENEF_YTD	NUMERIC	11,2
EMPLOYEE_WAGES_CUR	NUMERIC	11,2
EMPLOYEE_WAGES_MTD	NUMERIC	11,2
EMPLOYEE_WAGES_QTD	NUMERIC	11,2
EMPLOYEE_WAGES_YTD	NUMERIC	11,2
TAXABLE_WAGES_CUR	NUMERIC	11,2
TAXABLE_WAGES_MTD	NUMERIC	11,2

DM2_CAN_EMP_TAX_QTR (continued)

Column	Data Type	Length
TAXABLE_WAGES_QTD	NUMERIC	11,2
TAXABLE_WAGES_YTD	NUMERIC	11,2
TAX_CUR	NUMERIC	11,2
TAX_MTD	NUMERIC	11,2
TAX_QTD	NUMERIC	11,2
TAX_YTD	NUMERIC	11,2
CPP_QPP_WAGES_CUR	NUMERIC	11,2
CPP_QPP_WAGES_MTD	NUMERIC	11,2
CPP_QPP_WAGES_QTD	NUMERIC	11,2
CPP_QPP_WAGES_YTD	NUMERIC	11,2
EI_WAGES_CUR	NUMERIC	11,2
EI_WAGES_MTD	NUMERIC	11,2
EI_WAGES_QTD	NUMERIC	11,2
EI_WAGES_YTD	NUMERIC	11,2
CPP_QPP_DEDUCT_CUR	NUMERIC	11,2
CPP_QPP_DEDUCT_MTD	NUMERIC	11,2
CPP_QPP_DEDUCT_QTD	NUMERIC	11,2
CPP_QPP_DEDUCT_YTD	NUMERIC	11,2
EI_DEDUCTION_CUR	NUMERIC	11,2
EI_DEDUCTION_MTD	NUMERIC	11,2
EI_DEDUCTION_QTD	NUMERIC	11,2
EI_DEDUCTION_YTD	NUMERIC	11,2
WEEKS_WORKED_CUR	NUMERIC	06,2
WEEKS_WORKED_MTD	NUMERIC	06,2
WEEKS_WORKED_QTD	NUMERIC	06,2
WEEKS_WORKED_YTD	NUMERIC	06,2

DM2_CAN_EMPLOYEE_TAX

The Canadian taxes that apply to a particular employee.

Solution Series form(s)	JT-SCR, various others depending on the tax
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
TAX_TYPE	CHAR	001
TAX_TYPE_EDIT	VARCHAR	020
TAX_CODE	CHAR	006
TAX_METHOD_CODE	CHAR	001
TAX_METHOD	VARCHAR	020
TAX_DEPENDENTS	NUMERIC	02,0
FEDERAL_NET_CLAIM	NUMERIC	07,0
ADD_FED_TAX	NUMERIC	07,0
PROV_TAX_AMOUNT	NUMERIC	07,0
CPP_QPP_IND_CODE	CHAR	001
CPP_QPP_IND	VARCHAR	020
EMPLOYMENT_INS_CD	CHAR	001
EMPLOYMENT_INS	VARCHAR	020
NON_INDEXED_AMOUNT	NUMERIC	5,2
PROV_NET_CLAIM	NUMERIC	5,2
QC_OTH_DEDUCTIONS	NUMERIC	05,0
OTH_FD_TX_CRED_K3	NUMERIC	05,0
FED_HD_PRESC_AREA	NUMERIC	05,0
J_CHANGE	CHAR	001
FED_LCF_TAX_CREDIT	NUMERIC	11,2
PENS_ADJUSTMENT	NUMERIC	11,2
PRV_LCP_TAX_CREDIT	NUMERIC	11,2
EST_ANNUAL_INCOME	NUMERIC	11,2
PENSIONABLE_EARNS	NUMERIC	11,2

DM2_CAN_EMPLOYEE_TAX (continued)

Column	Data Type	Length
QC_OTH_TAX_CREDITS	NUMERIC	11,2
TAXABLE_BENEF_CUR	NUMERIC	11,2
TAXABLE_BENEF_MTD	NUMERIC	11,2
TAXABLE_BENEF_QTD	NUMERIC	11,2
TAXABLE_BENEF_YTD	NUMERIC	11,2
EMPLOYEE_WAGES_CUR	NUMERIC	11,2
EMPLOYEE_WAGES_MTD	NUMERIC	11,2
EMPLOYEE_WAGES_QTD	NUMERIC	11,2
EMPLOYEE_WAGES_YTD	NUMERIC	11,2
TAXABLE_WAGES_CUR	NUMERIC	11,2
TAXABLE_WAGES_MTD	NUMERIC	11,2
TAXABLE_WAGES_QTD	NUMERIC	11,2
TAXABLE_WAGES_YTD	NUMERIC	11,2
TAX_CUR	NUMERIC	11,2
TAX_MTD	NUMERIC	11,2
TAX_QTD	NUMERIC	11,2
TAX_YTD	NUMERIC	11,2
CPP_QPP_WAGES_CUR	NUMERIC	11,2
CPP_QPP_WAGES_MTD	NUMERIC	11,2
CPP_QPP_WAGES_QTD	NUMERIC	11,2
CPP_QPP_WAGES_YTD	NUMERIC	11,2
EI_WAGES_CUR	NUMERIC	11,2
EI_WAGES_MTD	NUMERIC	11,2
EI_WAGES_QTD	NUMERIC	11,2
EI_WAGES_YTD	NUMERIC	11,2
CPP_QPP_DEDUCT_CUR	NUMERIC	11,2
CPP_QPP_DEDUCT_MTD	NUMERIC	11,2
CPP_QPP_DEDUCT_QTD	NUMERIC	11,2
CPP_QPP_DEDUCT_YTD	NUMERIC	11,2
EI_DEDUCTION_CUR	NUMERIC	11,2
EI_DEDUCTION_MTD	NUMERIC	11,2

DM2_CAN_EMPLOYEE_TAX (continued)

Column	Data Type	Length
EI_DEDUCTION_QTD	NUMERIC	11,2
EI_DEDUCTION_YTD	NUMERIC	11,2
WEEKS_WORKED_CUR	NUMERIC	06,2
WEEKS_WORKED_MTD	NUMERIC	06,2
WEEKS_WORKED_QTD	NUMERIC	06,2
WEEKS_WORKED_YTD	NUMERIC	06,2

DM2_CAN_HIS_TAX

The Canadian tax portion of an employee's history record.

Solution Series form(s)	JT-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2 CHAR	004	
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHAR	004
PERIOD_END_DATE	DATETIME	
PAYMNT_DATE	DATETIME	
TAX_TYPE	CHAR	001
TAX_CODE	CHAR	006
TAXABLE_BENEFITS	NUMERIC	11,2
EMPLOYEE_WAGES	NUMERIC	11,2
TAXABLE_WAGES	NUMERIC	11,2
TAX	NUMERIC	11,2
CPP_QPP_WAGES	NUMERIC	11,2
EI_WAGES	NUMERIC	11,2
CPP_QPP_DEDUCT	NUMERIC	11,2
EI_DEDUCTION	NUMERIC	11,2
WEEKS_WORKED	NUMERIC	06,2

DM2_CERTIFICATION

A certificate, license or permit associated with an employee.

Solution Series form(s)	28-SCR
Catalog(s)	General, Training

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CLP_TYPE	CHAR	004
CERT_LICENSE_PERM	VARCHAR	020
CLP_DATE_RECORDED	DATETIME	
CLP_NUMBER	CHAR	010
CLP_DATE_EXPIRED	DATETIME	
CLP_STATUS_CODE	CHAR	001
CLP_STATUS	VARCHAR	020
CLP_STATE_PROV_CD	CHAR	002
CLP_STATE_PROV	VARCHAR	020

DM2_CITIZENSHIP

Information specific to the citizenship and ‘right to work’ status of an employee.

Solution Series form(s)	02-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
RECORD_DATE	DATETIME	
RECORD_UNTIL	DATETIME	
MARITAL_CODE	CHAR	001
MARITAL_STATUS	VARCHAR	020

DM2_CITIZENSHIP (continued)

Column	Data Type	Length
TOTAL_DEPENDENTS	NUMERIC	02,0
CITIZENSHIP_CODE	CHAR	002
CITIZEN_COUNTRY	VARCHAR	020
VISA_TYPE	CHAR	002
VISA	VARCHAR	020
VISA_EXPIRE	DATETIME	
MILITARY_STATUS_CD	CHAR	001
MILITARY_STATUS	VARCHAR	020
SECURITY_CLEARANCE	CHAR	001
CLEARANCE	VARCHAR	020
CLEARING_AGENCY	VARCHAR	020
PRIOR_NAME	VARCHAR	020
ID_VERIFIED	CHAR	001
ID_VERIFIEDS	VARCHAR	020
ID_PROVIDED	CHAR	001
ID_PROVIDEDS	VARCHAR	020
ID_EMPLOYMENT	CHAR	001
ID_EMPLOYMENTS	VARCHAR	020
ID_IDENTITY	CHAR	001
ID_IDENTITYS	VARCHAR	020

DM2_CLASS_EVALU

Employee's evaluation of a particular class.

Solution Series form(s)	23RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_CODE_DSC	VARCHAR	20
CE_COURSE_START	DATETIME	
CS_TRAIN_LOCATION	CHAR	2

DM2_CLASS_EVALU (continued)

Column	Data Type	Length
CS_TRAIN_LOC_DESC	VARCHAR	20
CS_CLASS	CHAR	1
CE_EVAL_NUMBER	CHAR	3
CE_EVALUATION_1	CHAR	1
CE_EVAL_1_DESC	VARCHAR	20
CE_EVALUATION_2	CHAR	1
CE_EVAL_2_DESC	VARCHAR	20
CE_EVALUATION_3	CHAR	1
CE_EVAL_3_DESC	VARCHAR	20
CE_EVALUATION_4	CHAR	1
CE_EVAL_4_DESC	VARCHAR	20
CE_EVALUATION_5	CHAR	1
CE_EVAL_5_DESC	VARCHAR	20
CE_EVALUATION_6	CHAR	1
CE_EVAL_6_DESC	VARCHAR	20
CE_EVALUATION_7	CHAR	1
CE_EVAL_7_DESC	VARCHAR	20
CE_EVALUATION_8	CHAR	1
CE_EVAL_8_DESC	VARCHAR20	
CE_EVALUATION_9	CHAR	1
CE_EVAL_9_DESC	VARCHAR	20
CE_EVALUATION_10	CHAR	1
CE_EVAL_10_DESC	VARCHAR	20
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010

DM2_CLASS_SCHD_COST

Costs associated with a specific class.

Solution Series form(s)	13RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CS_COURSE_START	DATETIME	
CS_TRAIN_LOCATION	CHAR	2
CS_CLASS	CHAR	1
CS_COST_TYPE_1	CHAR	2
CS_COST_TYPE_1_DSC	VARCHAR	20
CS_COST_1	NUMERIC	7,2
CS_COST_CATEGORY1	CHAR	1
CS_COST_CATEGORY1D	VARCHAR	20

DM2_CLASS_SCHD_TIME

Time, day, location of a class.

Solution Series form(s)	13RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CS_COURSE_START	DATETIME	
CS_TRAIN_LOCATION	CHAR	2
CS_CLASS	CHAR	1
SEQ_NUMBER	NUMERIC	1,0
CS_DAY_DETAILS_1	CHAR	10
CS_START_TIME_1	CHAR	5

DM2_CLASS_SCHD_TIME (continued)

Column	Data Type	Length
CS_END_TIME_1	CHAR	5
CS_LOCATION_1	CHAR	3
CS_LOCATION_1_DESC	VARCHAR	20
CS_ROOM_1	CHAR	4

DM2_CLASS_SCHEDULE

The schedule of classes specific to a particular course.

Solution Series form(s)	13RSCR, 14RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_CODE_DES	VARCHAR	20
CS_COURSE_START	DATETIME	
CS_TRAIN_LOCATION	CHAR	2
CS_TRAIN_LOC_DESC	VARCHAR	20
CS_CLASS	CHAR	1
CS_SESSION	CHAR	2
COURSE_END_DATE	DATETIME	
COURSE_STATUS	CHAR	1
COURSE_STATUS_DESC	VARCHAR	20
CS_MAX_STUDENTS	NUMERIC	3,0
CS_MIN_STUDENTS	NUMERIC	3,0
COURSE_NBR_BOOKED	NUMERIC	3,0
COURSE_NO_ATTEND	NUMERIC	3,0
LATEST_BOOKING_NO	NUMERIC	3,0
CS_TRAINING_AREA	CHAR	2
CS_TRAINING_AREA_D	VARCHAR	20

DM2_CLASS_SCHEDULE (continued)

Column	Data Type	Length
CS_TRAINER	CHAR	10
CS_TRAINER_DESC	VARCHAR	20
COURSE_COORD	CHAR	5
COURSE_COORD_DESC	VARCHAR	20
TRAINER_DAYS	NUMERIC	5,1
CS_COURSE_DURATION	NUMERIC	4,1
GROUP_AVERAGE	NUMERIC	4,1
EVALUATION_REQD	CHAR	1
EVALUATION_REQD_D	VARCHAR	20
SCHED_COMMENTS	VARCHAR	55

DM2_COBRA_QUALIFY

Required details and dates specific to the Consolidated Omnibus Budget Reconciliation Act (COBRA).

Solution Series form(s)	86-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
QUALIF_EVENT_CD	CHAR	002
QUALIFYING_EVENT	VARCHAR	020
EVENT_DATE	DATETIME	
NOTIFIED_HR	DATETIME	
NOTIFIED_INS_CO	DATETIME	
NOTIFIED_EE_RIGHTS	DATETIME	
RESPOND_DATE_LAST	DATETIME	
RESPOND_DATE_ACT	DATETIME	

DM2_COBRA_QUALIFY (continued)

Column	Data Type	Length
ACCEPTED_COVERAGE	CHAR	001
EVENT_NUMBER	NUMERIC	02,0
QUAL_EVNT_TO_COBRA	DATETIME	
PQB	CHAR	003

DM2_COM_TAX_QTR

Tax information defined at the company level.

Solution Series form(s)	Various forms depending on the tax
Catalog(s)	Payroll

Column	Data Type	Length
TAX_YEAR	NUMERIC	04,0
TAX_QTR	NUMERIC	02,0
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
TAX_TYPE	CHAR	001
TAX_CODE	CHAR	006
TAX_BASIC	CHAR	003
COMPANY_TAX_ID	CHAR	007
TAX_BODY	VARCHAR	015
TAX_FILING_NUMBER	VARCHAR	025
TAX_UI_NUMBER	VARCHAR	025
FLAT_RATE	CHAR	005
USE_TAX	CHAR	001
USE_TAX_STATUS	VARCHAR	020
TAX_MISC2	NUMERIC	01,0
DEFAULT_PERCENT	NUMERIC	05,4
UI_RATE	NUMERIC	06,4
DISAB_RATE	NUMERIC	07,4
MAX_DISAB_TAX	NUMERIC	11,2

DM2_COM_TAX_QTR (continued)

Column	Data Type	Length
MAX_DISAB_WAGE	NUMERIC	11,2
MAX_UI_WAGE	NUMERIC	11,2
TAX_MISC	NUMERIC	11,2
DISAB_RECIP	NUMERIC	01,0
UI_REC	NUMERIC	01,0
RES_SINGLE	NUMERIC	01,0
RES_MAR	NUMERIC	01,0
RES_HEAD	NUMERIC	01,0
NONRES_SINGLE	NUMERIC	01,0
NONRES_MAR	NUMERIC	01,0
NONRES_HEAD	NUMERIC	01,0
TABLE_7	NUMERIC	01,0
TABLE_8	NUMERIC	01,0
TABLE_9	NUMERIC	01,0
TAX_CLASS_1	NUMERIC	01,0
TAX_CLASS_2	NUMERIC	01,0
TAX_CLASS_3	NUMERIC	01,0
TAX_CLASS_4	NUMERIC	01,0
TAX_CLASS_5	NUMERIC	01,0
TAX_CLASS_6	NUMERIC	01,0
TAX_CLASS_7	NUMERIC	01,0
TAX_CLASS_8	NUMERIC	01,0
TAX_CLASS_9	NUMERIC	01,0
TAX_FLAG_1	CHAR	001
TAX_FLAG_2	NUMERIC	01,0
TAX_FLAG_3	NUMERIC	01,0
TAX_BASIC_END	NUMERIC	01,0

DM2_COMPANY

A group or subset of the employees of an organization. It is used to identify pay companies for payroll, applicant companies for recruitment.

Solution Series form(s)	AA-SCR, AX-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
COMPANY_VERSION	CHAR	2
COMPANY_NAME	VARCHAR	60
COMPANY_NAME_2	VARCHAR	30
COMPANY_ADDRESS	VARCHAR	30
COMPANY_ADDRESS_2	VARCHAR	30
COMPANY_CITY	VARCHAR	25
STATE_OR_PROV	VARCHAR	20
ZIP_POST_CODE	VARCHAR	12
CONTROL_1_NAME	VARCHAR	12
CONTROL_2_NAME	VARCHAR	12
CONTROL_3_NAME	VARCHAR	12
CONTROL_4_NAME	VARCHAR	12
CONTROL_5_NAME	VARCHAR	12
CONTROL_6_NAME	VARCHAR	12

DM2_COMPANY_HED

Defines Hours, Earnings, and Deductions at the company level.

Solution Series form(s)	A83SCR
Catalog(s)	Benefits, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
HED_NUMBER	NUMERIC	03,0
CATEGORY_CODE	CHAR	002
CATEGORY_DESC	VARCHAR	020
HED_NAME	VARCHAR	015
VACATION_FLAG_CODE	CHAR	001
VACATION_FLAG	VARCHAR	020
PERMANENT_ORDER	NUMERIC	03,0
TEMPORARY_ORDER	NUMERIC	03,0
TC_2_HOURS	CHAR	001
TC_2_HOURS_EDIT	VARCHAR	020
TC_2_AMOUNT	CHAR	001
TC_2_AMOUNT_EDIT	VARCHAR	020
EARNINGS_RATE_FLSA	CHAR	001
EARNINGS_FLSA_RATE	VARCHAR	020
TAX_FREQUENCY_CODE	CHAR	001
FREQUENCY_FOR_TAX	VARCHAR	020
DEFAULT_FREQUENCY	NUMERIC	02,0
DEFAULT_FREQ_DESC	VARCHAR	020
DEFAULT_TYPE	CHAR	002
DEFAULT_TYPE_DESC	VARCHAR	020
DEFAULT_METHOD	CHAR	002
DEFAULT_METHOD_DES	VARCHAR	020
DEFAULT_AMOUNT_PCT	NUMERIC	07,0
AUTOMATIC_SETUP_CD	CHAR	001

DM2_COMPANY_HED (continued)

Column	Data Type	Length
AUTOMATIC_SET_UP	VARCHAR	020
PERIOD_TABLE_CODE	CHAR	001
PERIOD_END_TABLE	VARCHAR	020
ADD_TOTAL_HOURS_CD	CHAR	001
ADD_TOTAL_HOURS	VARCHAR	020
HED_REGISTER	CHAR	001
YES_NO_EDIT	VARCHAR	020
HED_TIMING_CODE	CHAR	001
HED_TIMING	VARCHAR	020
HED_TAX_FLAG_CODE	CHAR	001
HED_TAX_FLAG	VARCHAR	020
ACCRUAL_OPTION_CD	CHAR	001
ACCRUAL_OPTION	VARCHAR	020
SHIFT_DIFF_CODE	CHAR	001
SHIFT_DIFFERENTIAL	VARCHAR	020
CE_H_EARN_BUCKET	CHAR	001
CE_H_HRS_ACCUMULAT	CHAR	001
CE_H_HOURS_CODE	VARCHAR	020
ABSENCE_TYPE_CODE	CHAR	002
ABSENCE_TYPE	VARCHA	R020
GL_ACCOUNT	VARCHAR	012
CATEGORY_HOLD	CHAR	002

DM2_COMPANY_TAX

Defines taxes at the company level.

Solution Series form(s)	T1-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
TAX_TYPE	CHAR	001
TAX_CODE	CHAR	006
TAX_BASIC	CHAR	003
COMPANY_TAX_ID	CHAR	007
TAX_BODY	VARCHAR	015
TAX_FILING_NUMBER	VARCHAR	025
TAX_UI_NUMBER	VARCHAR	025
FLAT_RATE	CHAR	005
USE_TAX	CHAR	001
USE_TAX_STATUS	VARCHAR	020
TAX_MISC2	NUMERIC	01,0
DEFAULT_PERCENT	NUMERIC	05,4
UI_RATE	NUMERIC	06,4
DISAB_RATE	NUMERIC	07,4
MAX_DISAB_TAX	NUMERIC	11,2
MAX_DISAB_WAGE	NUMERIC	11,2
MAX_UI_WAGE	NUMERIC	11,2
TAX_MISC	NUMERIC	11,2
DISAB_RECIP	NUMERIC	01,0
UI_REC	NUMERIC	01,0
RES_SINGLE	NUMERIC	01,0
RES_MAR	NUMERIC	01,0
RES_HEAD	NUMERIC	01,0
NONRES_SINGLE	NUMERIC	01,0

DM2_COMPANY_TAX (continued)

Column	Data Type	Length
NONRES_MAR	NUMERIC	01,0
NONRES_HEAD	NUMERIC	01,0
TABLE_7	NUMERIC	01,0
TABLE_8	NUMERIC	01,0
TABLE_9	NUMERIC	01,0
TAX_CLASS_1	NUMERIC	01,0
TAX_CLASS_2	NUMERIC	01,0
TAX_CLASS_3	NUMERIC	01,0
TAX_CLASS_4	NUMERIC	01,0
TAX_CLASS_5	NUMERIC	01,0
TAX_CLASS_6	NUMERIC	01,0
TAX_CLASS_7	NUMERIC	01,0
TAX_CLASS_8	NUMERIC	01,0
TAX_CLASS_9	NUMERIC	01,0
TAX_FLAG_1	CHAR	001
TAX_FLAG_2	NUMERIC	01,0
TAX_FLAG_3	NUMERIC	01,0
TAX_BASIC_END	NUMERIC	01,0

DM2_CONSIDER_ACCUM

Considered earnings and accumulator information used to determine employee eligibility for a particular benefit plan.

Solution Series form(s)	60-SCR, 602SCR, 60FSCR
Catalog(s)	Benefits

Column	Data Type	Length
COUNTRY_ID	CHAR	1
SSN_OR_SIN	CHAR	12
ACCUMULATOR_NAME	CHAR	3
ACCUMULATOR_DATE	DATETIME	
CE_H_RECORD_TYPE	CHAR	1
CE_H_RECORD_TYPE_D	VARCHAR	20
CONSIDERED_EARNING	NUMERIC	13,2
CONSIDERED_HRS_WKD	NUMERIC	8,2
CONSIDERED_HRS_PD	NUMERIC	8,2
CE_H_1000_HOUR_DT	DATETIME	

DM2_CONSIDER_FICA

Considered earnings and FICA summary information

Solution Series form(s)	602SCR, 60FSCR
Catalog(s)	Benefits

Column	Data Type	Length
COUNTRY_ID	CHAR	1
SSN_OR_SIN	CHAR	12
ACCUM_NAME_FH	CHAR	3
ACCUM_DATE_FH	DATETIME	
CE_H_RECORD_TYPE_H	CHAR	1
CE_H_RECORD_DESC_H	VARCHAR	20
FICA_TYPE	VARCHAR	20
YTD_FICA	NUMERIC	10,2

DM2_CONSIDER_FICA (continued)

Column	Data Type	Length
FIRST_QTR_FICA	NUMERIC	10,2
SECOND_QTR_FICA	NUMERIC	10,2
THIRD_QTR_FICA	NUMERIC	10,2
FOURTH_QTR_FICA	NUMERIC	10,2

DM2_CONTACT

Employee contact information.

Solution Series form(s)	EM-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
CONTACT_TYPE_CD	CHAR	002
CONTACT_TYPE	VARCHAR	020
CONTACT_EFFECTIVE	DATETIME	
CONTACT_EXPIRED	DATETIME	
CONTACT_SEQUENCE	NUMERIC	02,0
CONTACT_CONFID_CD	CHAR	001
CONTACT_CONFIDENT	VARCHAR	020
CONTACT_UNLIST_CD	CHAR	001
CONTACT_UNLISTED	VARCHAR	020
CONTACT_INFO	VARCHAR	050

DM2_COORDINATOR

Details of class coordinator.

Solution Series form(s)	13RSCR, 14RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CO_ORDINATOR	CHAR	5
CO_ORDINATOR_DESC	VARCHAR	20
CO_KEY_SEPARATOR	CHAR	1
CO_ORD_ADDR1	VARCHAR	27
CO_ORD_ADDR2	VARCHAR	27
CO_ORD_ADDR3	VARCHAR	27
CO_ORD_POST_ZIP	VARCHAR	12
CO_ORD_TYPE	CHAR	2
CO_ORD_TYPE_DESC	VARCHAR	20
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
CO_ORD_PHONE_EXT	CHAR	4
CO_ORD_NAME	VARCHAR	25
CO_ORD_PHONE	VARCHAR	15
CO_ORD_FAX_NUMBER	CHAR	15

DM2_COORDITOR_CRS

Cross reference between the coordinator and the courses.

Solution Series form(s)	14RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CO_ORDINATOR	CHAR	5
CO_KEY_SEPARATOR	CHAR	1
CO_ORD_COURSE_1	CHAR	6
CO_ORD_COURSE_1_DE	VARCHAR	20
CO_STOP_DATE_1	DATETIME	

DM2_COURS_OFFERING

Details of a course.

Solution Series form(s)	10RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_DESC	VARCHAR	20
CD_COURSE_DATE	DATETIME	
CD_COURSE_UNTIL	DATETIME	
COURSE_DESCRIPTION	VARCHAR	54
COURSE_SUBJECT	CHAR	3
COURSE_SUBJECT_DSC	VARCHAR	20
CD_MIN_STUDENTS	NUMERIC	3,0
CD_MAX_STUDENTS	NUMERIC	3,0
CD_TRAINING_AREA	CHAR	2
CD_TRAINING_AREA_D	VARCHAR	20
COURSE_LEVEL	CHAR	1

DM2_COURS_OFFERING (continued)

COURSE_LEVEL_DESC	VARCHAR	20
CD_COURSE_DURATION	NUMERIC	4,1
TRAINING_UNITS	NUMERIC	3,0
PROVIDER_CODE	CHAR	10
PROVIDER_CODE_DESC	VARCHAR	20
COURSE_TYPE	CHAR	2
COURSE_TYPE_DESC	VARCHAR	20
COURSE_COMMENTS	VARCHAR	54

DM2_COURS_PROVIDER

Details of providers of courses.

Solution Series form(s)	13RSCR, 19RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
PI_PROVIDER	CHAR	10
PI_PROVIDER_DESC	VARCHAR	20
PI_KEY_SEPARATOR	CHAR	1
PI_PROV_ADDR1	VARCHAR	27
PI_PROV_ADDR2	VARCHAR	27
PI_PROV_ADDR3	VARCHAR	27
PI_PROV_POST_ZIP	VARCHAR	12
PI_PROV_TYPE	CHAR	2
PI_PROV_TYPE_DESC	VARCHAR	20
PI_COURSE_CAT	CHAR	2
PI_COURSE_CAT_DESC	VARCHAR	20
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
PI_PROV_CONTACT	VARCHAR	27
PI_PROV_PHONE	VARCHAR	15

DM2_COURSE_BOOKING

Enrollment information specific to a particular class.

Solution Series form(s)	20RSCR, 30RSCR, 50RSCR, 57RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_CODE_DSC	VARCHAR	20
CB_COURSE_START	DATETIME	
CB_TRAIN_LOCATION	CHAR	2
CB_TRAIN_LOC_DESC	VARCHAR	20
CB_CLASS	CHAR	1
CB_BOOKING_NBR	NUMERIC	6,0
CB_PROG_SCHEDULE	CHAR	5
CB_DATE_BOOKED	DATETIME	
CB_DATE_CONFIRMED	DATETIME	
CB_MAJOR_MARK	CHAR	3
CB_MINOR_MARK	CHAR	3
CB_OUTCOME	CHAR	1
CB_OUTCOME_DESC	VARCHAR	20
CB_REQ_ELECT	CHAR	1
CB_REQ_ELECT_DSC	VARCHAR	20
CB_COURSE_ATTENDED	CHAR	1
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
CB_REGISTER_OPT	CHAR	1
CB_REGISTER_OPT_D	VARCHAR	20
CB_WAIT_LIST_IND	CHAR	1
CB_WAIT_LIST_DSC	VARCHAR	20

DM2_COVERAGE_COST

Defines coverage and contribution rules specific to a Benefit plan.

Solution Series form(s)	TM-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TM_OPTION_ELECTED	CHAR	2
TM_OPTION	VARCHAR	20
CONTRIB_TYPE_CD	CHAR	1
CONTRIBUTION_TYPE	VARCHAR	20
TM_SEARCH_ARGUMENT	CHAR	6
TM_TABLE_DATE	DATETIME	
TM_TABLE_UNTIL	DATETIME	
COVERAGE_RULE	CHAR	2
COVERAGE_FACTOR_1	NUMERIC	10,2
COVERAGE_FACTOR_2	NUMERIC	10,2
COVERAGE_FACTOR_3	NUMERIC	10,2
CONTRIBUTION_RULE	CHAR	2
CONTRIB_RULE_DESC	VARCHAR	20
CONTRIB_FACTOR_1	NUMERIC	10,2
CONTRIB_FACTOR_2	NUMERIC	10,2
CONTRIB_RSLT_FREQ	CHAR	1
RESULTING_FREQUENC	VARCHAR	20
NONDISCRIM_VALUE	NUMERIC	10,2
FLEX_BEN_CR_COST	NUMERIC	10,2
COST_CALC	CHAR	1
COST_CALCULATION	VARCHAR	20

DM2_CRS_DEVP_COST

The costs associated with the development of the course.

Solution Series form(s)	11RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_CODE_DSC	VARCHAR	20
DC_DATE	DATETIME	
DC_VALUE	NUMERIC	7,0
DC_COMMENT	VARCHAR	45

DM2_CRS_OFFER_COST

Costs associated with a course.

Solution Series form(s)	10RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_DATE	DATETIME	
CD_COURSE_UNTIL	DATETIME	
CD_COST_CATEGORY1	CHAR	1
CD_COST_CATEGORY1D	VARCHAR	20
CD_COST_TYPE_1	CHAR	2
CD_COST_TYPE_1_DSC	VARCHAR	20
CD_COST_1	NUMERIC	7,2

DM2_CRS_OFFER_OBJ

Objectives that a course is designed to meet.

Solution Series form(s)	10RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_DATE	DATETIME	
CD_COURSE_UNTIL	DATETIME	
OBJECTIVE_1	CHAR	3
OBJECTIVE_1_DESC	VARCHAR	20

DM2_CRS_OFFER_PREQ

Prerequisites that need to be met prior to enrollment in the course.

Solution Series form(s)	10RSCR
Catalog(s)	none

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_DATE	DATETIME	
CD_COURSE_UNTIL	DATETIME	
PRE_REQUISITE_1	CHAR	6
PRE_REQUISITE_1_D	VARCHAR	20

DM2_CRS_OFFER_SKIL

Skills and competencies associated with a course.

Solution Series form(s)	10RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
CD_COURSE_CODE	CHAR	6
CD_COURSE_DATE	DATETIME	
CD_COURSE_UNTIL	DATETIME	
CD_SKILL_1	CHAR	6
CD_SKILL_1_DESC	VARCHAR	20
CD_PROFICIENCY_1	CHAR	2
CD_PROFICIENCY_1_D	VARCHAR	20

DM2_CRS_PROVDR_CRS

The course a particular provider provides.

Solution Series form(s)	19RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
PI_PROVIDER	CHAR	10
PI_KEY_SEPARATOR	CHA	
PI_PROV_COURSE_1	CHAR	6
PI_PROV_COURSE_1_D	VARCHAR	20
PI_STOP_DATE_1	DATETIME	

DM2_DC_CONTRIBUT

Contribution designations for a particular welfare plan.

Solution Series form(s)	64CSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
CONTRIB_TYPE	CHAR	1
CONTRIBUTION	VARCHAR	20
CONTRIB_ACTION_1	CHAR	001
CONTRIB_ACTION_1_D	VARCHAR	020
CONTRIB_AMOUNT_1	NUMERIC	07,2

DM2_DEPENDENT

Information specific to a person who is a dependent of an employee.

Solution Series form(s)	10-SCR, 10CSCR
Catalog(s)	Benefits, General, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
OTHER_KEY	CHAR	003
RELATIONSHIP_CODE	CHAR	002
RELATIONSHIP	VARCHAR	020
OTHER_NAME	VARCHAR	030
OTHER_SOC_INSUR	VARCHAR	012
OTHER_SEX_CODE	CHAR	001
OTHER_SEX	VARCHAR	020

DM2_DEPENDENT (continued)

Column	Data Type	Length
OTHER_BIRTH_DATE	DATETIME	
OTHER_AREA_CODE	CHAR	003
OTHER_PHONE_NUMBER	CHAR	008
FULL_TIME_STUDENT	CHAR	001
STUDENT_STATUS	VARCHAR	020
EMPLOYER_NAME	VARCHAR	030
OTHER_ADDRESS_1	VARCHAR	030
OTHER_ADDRESS_2	VARCHAR	030
OTHER_ZIP_POST	VARCHAR	12
INSURANCE_CARRIER	VARCHAR	012
DEP_DATA_TO_COBRA	DATETIME	
REASON_TO_COBRA_CD	CHAR	2
REASON_TO_COBRA	VARCHAR	20

DM2_DIRECT_DEPOSIT

The employee's direct deposit information.

Solution Series form(s)	H9-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
HED_NUMBER	NUMERIC	03,0
DIRECT_DEPOSIT_CD	CHAR	001
DIRECT_DEPOSIT_EDI	VARCHAR	020
EMPLOYEE_BANK_NBR	CHAR	009
EMPLOYEE_BANK_NAME	VARCHAR	020
BANK_ACCOUNT	CHAR	001
BANK_ACCOUNT_TYPE	VARCHAR	020
BANK_ACCOUNT_NBR	VARCHAR	017

DM2_DISCIPLINE

A record of a disciplinary action documented by the organization specific to an employee.

Solution Series form(s)	DA-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
DIS_OCCUR_DATE	DATETIME	
DIS_REASON_CODE	CHAR	002
DIS_REASON	VARCHAR	020
DIS_RECORD_DATE	DATETIME	
DIS_ACTION_CODE	CHAR	002
DIS_ACTION	VARCHAR	020
DIS_ACTION_DATE	DATETIME	
DIS_REV_REQ_CD	CHAR	002
DIS_REVIEW_REQUIRE	VARCHAR	020
DIS_REVIEW_DATE	DATETIME	

DM2_DISCRIMINAT_PLN

Defines the components to be used in a benefit plan discrimination test.

Solution Series form(s)	TV-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TEST_AS_OF_DATE	DATETIME	
TEST_AS_OF_UNTIL	DATETIME	
TEST_PLAN_ID	CHAR	3

DM2_DISCRIMINAT_TST

The discrimination test plan for a particular benefit plan.

Solution Series form(s)	TV-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TEST_AS_OF_DATE	DATETIME	
TEST_AS_OF_UNTIL	DATETIME	
TOTAL_TEST_GROUP	NUMERIC	6,0
TOTAL_HIGHLY_COMPD	NUMERIC	6,0
TOTAL_NON_HIGHLY	NUMERIC	6,0
TOTAL_TEST_HIGHLY	NUMERIC	6,0
TOT_TEST_NONHIGHLY	NUMERIC	6,0

DM2_EDUCATION

Educational information for an employee.

Solution Series form(s)	30-SCR
Catalog(s)	Benefits, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
EDUCATION_LEVEL	CHAR	003
EDUCATION	VARCHAR	020
SCHOOL_CODE	CHAR	006
SCHOOL_NAME	VARCHAR	020
YEARS_ATTENDED	NUMERIC	02,0
YEAR_GRADUATED	NUMERIC	02,0
MAJOR_CODE	CHAR	003
MAJOR	VARCHAR	020
MINOR_CODE	CHAR	003
MINOR	VARCHAR	020

DM2_EDUCATION (continued)

Column	Data Type	Length
GRADE_PT_AVG_CUR	NUMERIC	03,2
GRADE_PT_AVG_CUML	NUMERIC	03,2
CREDIT_HRS_REQ	NUMERIC	03,0
CREDIT_HRS_COMP	NUMERIC	03,0

DM2_EEO_ESTABLISH

Identifies a portion of the organization for EEO reporting purposes.

Solution Series form(s)	TX-SCR
Catalog(s)	General

Column	Data Type	Length
EEO_ESTABLISHMENTS	CHAR	4
TX_EEO_ESTBLSHMNT	CHAR	4
TX_EEO_ESTABLISH_D	VARCHAR	20
TX_TABLE_DATE	DATETIME	
TX_TABLE_UNTIL	DATETIME	
TX_KEY_SEP_1	CHAR	1
ELM_ST_OR_PROV	CHAR	2
ELM_ST_PROV_DESC	VARCHAR	20
ELM_COUNTY	CHAR	5
ELM_COUNTY_DESC	VARCHAR	20
ELM_CITY	CHAR	6
ELM_CITY_DESC	VARCHAR	20
ELM_SMSA	CHAR	6
ELM_SMSA_DESC	VARCHAR	20
TX_COMPANY_NO	CHAR	8
TX_UNIT_NO	CHAR	8
TX_SIC	CHAR	4
TX_SIC_DESC	VARCHAR	20
TX_DUNS_NO	VARCHAR	11
TX_EST_NAME	VARCHAR	30
TX_EST_CITY	VARCHAR	17
TX_EST_ST_PROV	CHAR	2
TX_ADDRESS	VARCHAR	30

DM2_EEO_ESTABLISH (continued)

Column	Data Type	Length
TX_COUNTY	VARCHAR	13
TX_ZIP_POST	VARCHAR	12
TX_EIN_NUMBER	CHAR	9
TX_VETS_COMPANY_NO	CHAR	8
TX_VETS_UNIT_NO	CHAR	8
TX_HEADQUARTERS	CHAR	1
TX_HEADQTR_DESC	VARCHAR	20
TX_SEC_C_1	CHAR	1
TX_SEC_C_1_DESC	VARCHAR	20
TX_SEC_C_2	CHAR	1
TX_SEC_C_2_DESC	VARCHAR	20
TX_SEC_C_3	CHAR	1
TX_SEC_C_3_DESC	VARCHAR	20
TX_APPRENT_EMPLD	CHAR	1
TX_APPR_EMPLD_DESC	VARCHAR	20
TX_NAIC_CODE	CHAR	6
TX_NAIC_DESC	VARCHAR	20

DM2_EEO_STATIS_PCT

External Labor Market (ELM) race and gender percents used for EEO reporting.

Solution Series form(s)	TY-SCR
Catalog(s)	General

Column	Data Type	Length
EEO_ESTABLISHMENTS	CHAR	4
DEMOGRAPHIC_LVL_CD	CHAR	1
DEMOGRAPHIC_ST_CD	CHAR	2
DEMOGRAPHIC_CCS_CD	CHAR	4
OCCUP_GROUP_LVL_CD	CHAR	1
OCCUP_GROUP_CODE	CHAR	3
GENDER	VARCHAR	20
ELM_TOTAL_PCT	NUMERIC	5,4
ELM_BLACK_PCT	NUMERIC	5,4
ELM_ASIAN_PCT	NUMERIC	5,4

DM2_EEO_STATIS_PCT (continued)

Column	Data Type	Length
ELM_AMIND_PCT	NUMERIC	5,4
ELM_HISPN_PCT	NUMERIC	5,4
ELM_WHITE_PCT	NUMERIC	5,4

DM2_EEO_STATISTICS

Demographic information used for statistical comparison of the organization with the external population for EEO reporting.

Solution Series form(s)	TY-SCR, TXCSCR,TWCSCR
Catalog(s)	General

Column	Data Type	Length
EEO_ESTABLISHMENTS	CHAR	4
DEMOGRAPHIC_LVL_CD	CHAR	1
DEMOGRAPHIC_LEVEL	VARCHAR	20
DEMOGRAPHIC_ST_CD	CHAR	2
DEMOGRAPHIC_STATE	VARCHAR	20
DEMOGRAPHIC_CCS_CD	CHAR	4
DEMOGRAPHIC_CCS_DS	VARCHAR	20
OCCUP_GROUP_LVL_CD	CHAR	1
OCCUP_GROUP_LEVEL	VARCHAR	20
OCCUP_GROUP_CODE	CHAR	3
OCCUP_GROUP	VARCHAR	20
ELM_TOTAL_WK_FORCE	NUMERIC	8,0

DM2_EMERGENCY

Personal and medical contact information specific to an employee.

Solution Series form(s)	16-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
EMERGENCY_KEY_O4	CHAR	003
EMERGENCY_CONTACT	VARCHAR	030
EMERGENCY_AREA_CD	CHAR	003
EMERGENCY_PHONE	CHAR	008
CONTACT_ADDRESS_1	VARCHAR	030
CONT_CITY_ST_PROV	VARCHAR	025
CONTACT_ZIP_POST	VARCHAR	12
EMERGENCY_PHYSIAN	VARCHAR	030
PHYSICIAN_AREA_CD	CHAR	003
PHYSICIAN_PHONE	CHAR	008
PHYSICIAN_ADDR_1	VARCHAR	030
PHYS_CITY_ST_PROV	VARCHAR	20
PHYSICIAN_ZIP_POST	VARCHAR	12

DM2_EMP_ACTIVITY

An employment activity, for example, leaves, termination, transfer, which may change an employee's status, service dates and/or location.

Solution Series form(s)	04-SCR, 08-SCR, 95-SCR, 96-SCR, EF-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
ACTIVITY_DATE	DATETIME	
ACTIVITY_UNTIL	DATETIME	
ACTIVITY_CODE	CHAR	003
ACTIVITY	VARCHAR	020
RESULTING_EMP_STAT	CHAR	002
EMPLOYEE_STATUS	VARCHAR	020
EXPECTED_RETURN	DATETIME	
LAST_DAY_WORKED	DATETIME	
LAST_DAY_PAID	DATETIME	
HISTORY_C1	CHAR	2
HISTORY_C2	CHAR	4
ADJUSTED_SENIORITY	DATETIME	
SEPARATION_DATE	DATETIME	
HR_PARITY_REQ_DATE	DATETIME	
ORIGINAL_HIRE_DATE	DATETIME	

DM2_EMP_CLAS_RESUT

A record of an employee's attendance at a specific class.

Solution Series form(s)	30RSCR, 34RSCR
Catalog(s)	Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
TH_COURSE_START	DATETIME	
TH_COURSE_CODE	CHAR	6
TH_COURSE_CODE_DSC	VARCHAR	20
TH_TRAIN_LOCATION	CHAR	2
TH_TRAIN_LOCA_DSC	VARCHAR	20
TH_CLASS	CHAR	1
MAJOR_MARK	CHAR	3
MINOR_MARK	CHAR	3
COURSE_RESULT	CHAR	1
COURSE_RESULT_DESC	VARCHAR	20
COURSE_ATTENDED	CHAR	1
COURSE_ATTENDED_D	VARCHAR	20
TH_COURSE_CANCEL	CHAR	1
TH_COURSE_CANCEL_D	VARCHAR	20
TH_DAYS_ABSENT	NUMERIC	3,1
TH_ABSENCE_RSN	CHAR	3
TH_ABSENCE_RSN_DSC	VARCHAR	20
TRAIN_REQ_ELECT	CHAR	1
TRAIN_REQ_ELECT_D	VARCHAR	20
TH_SCHOOL_CODE	CHAR	6
TH_SCHOOL_CODE_DSC	VARCHAR	20
TH_TRAIN_UNITS	NUMERIC	3,0

DM2_EMP_CLAS_RESUT (continued)

Column	Data Type	Length
ALL_OBJECTIVES_MET	CHAR	1
ALL_OBJECTIVES_DSC	VARCHAR	20
TH_SALARY	NUMERIC	7,2
TH_METHOD_CODE	CHAR	1
TH_METHOD_DESC	VARCHAR	20

DM2_EMP_CLASS_COST

The class costs for an attending employee.

Solution Series form(s)	34RSCR
Catalog(s)	Training

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
TH_COURSE_START	DATETIME	
TH_COURSE_CODE	CHAR	6
TH_COST_CAT_1	CHAR	1
TH_COST_CAT_1_DESC	VARCHAR	20
TH_COST_TYPE_1	CHAR	2
TH_COST_TYPE_1_DSC	VARCHAR	20
TH_COST_1	NUMERIC	7,2

DM2_EMP_CLASS_OBJ

The course objectives that were met by an employee.

Solution Series form(s)	30RSCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
TH_COURSE_START	DATETIME	
TH_OBJECTIVE_1_DSC	VARCHAR	20
TH_OBJECTIVE_1_MET	CHAR	1
TH_OBJECT_1_MET_D	VARCHAR	20

DM2_EMP_ELIGIBILIT

Employee's eligibility for a particular benefit plan.

Solution Series form(s)	90-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
SUSPENSE_DATE	DATETIME	
CALC_ACTION_DATE	DATETIME	
CALC_ACTION_CODE	CHAR	001
CALC_ACTION_CODE_D	VARCHAR	020

DM2_EMP_FLEX_CREDT

Details of an employee's flexible credits in a flex benefits plan.

Solution Series form(s)	55CSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
FLEX_PLAN_YEAR	DATETIME	
FLEX_PLAN_UNTIL	DATETIME	
FLEX_TOTAL_CREDITS	NUMERIC	07,2
FLEX_CR_APPLIED	NUMERIC	07,2
FLEX_CR_REMAIN	NUMERIC	07,2
FLEX_CR_TO_CASH	NUMERIC	07,2
FLEX_CR_DEFER	NUMERIC	07,2
FLEX_CR_DEDUCTION	NUMERIC	07,2
FLEX_CREDIT_POSTED	CHAR	001
FLEX_CREDITS_PSTED	VARCHAR	020
FLEX_CR_POSTED_DT	DATETIME	
FLEX_FORM_RETURNED	CHAR	001
FLEX_FORM_STATUS	VARCHAR	020
FLEX_CR_TO_SPEND	NUMERIC	07,2
SELECTION_IND_ENR	CHAR	001
SELECTION_IND_CON	CHAR	001

DM2_EMP_HED_QTR

Solution Series form(s)	HT-SCR
Catalog(s)	none

Column	Data Type	Length
HED_YEAR	NUMERIC	04,0
HED_QTR	NUMERIC	02,0
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
HED_NUMBER	NUMERIC	03,0
EMP_HED_NAME	VARCHAR	015
FREQUENCY_CODE	NUMERIC	02,0
FREQUENCY_DESC	VARCHAR	020
TYPE_CODE	CHAR	002
TYPE_DESC	VARCHAR	020
METHOD_CODE	CHAR	002
METHOD_DESC	VARCHAR	020
AMOUNT	NUMERIC	09,4
START_CODE	CHAR	001
START_DESCRIPTION	VARCHAR	020
START_FIELD	NUMERIC	06,0
STOP_CODE	CHAR	001
STOP_DESCRIPTION	VARCHAR	020
STOP_FIELD	NUMERIC	06,0
ONE_TIME_CODE	CHAR	001
ONE_TIME_DESCRIPT	VARCHAR	020
ONE_TIME_AMOUNT	NUMERIC	07,2
AMOUNT_ONE	NUMERIC	07,2
AMOUNT_TWO	NUMERIC	08,2
USER_CODE	CHAR	002
USER_NUMBER	VARCHAR	011
H_CHANGE	CHAR	001

DM2_EMP_HED_QTR (continued)

Column	Data Type	Length
HED_HOURS_CUR	NUMERIC	11,2
HED_HOURS_MTD	NUMERIC	11,2
HED_HOURS_QTD	NUMERIC	11,2
HED_HOURS_YTD	NUMERIC	11,2
HED_AMOUNT_CUR	NUMERIC	11,2
HED_AMOUNT_MTD	NUMERIC	11,2
HED_AMOUNT_QTD	NUMERIC	11,2
HED_AMOUNT_YTD	NUMERIC	11,2
MCC_HED_HFCDR_FLAG	CHAR	1
MCC_HED_HFCDR_DESC	VARCHAR	20

DM2_EMP_INCUMBENCY

Information relating to a particular incumbency of an employee.

Solution Series form(s)	M40CR
Catalog(s)	General, Pyroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
EI_ROLE_FROM_DATE	DATETIME	
EI_ROLE_DATE_UNTIL	DATETIME	
EI_ROLE_FROM_TIME	NUMERIC	4,0
EI_ROLE_REASON	CHAR	2
EI_ROLE_REASON_DES	VARCHAR	20
EI_ROLE_SEQ_NBR	NUMERIC	3,0
EI_ROLE_SEQ_NBR_DE	VARCHAR	20
EI_ROLE	VARCHAR	6
EI_ROLE_UNTIL_DATE	DATETIME	
EI_ROLE_UNTIL_RSN	CHAR	2

DM2_EMP_INCUMBENCY (continued)

Column	Data Type	Length
EI_ROLE_UNTIL_RSND	VARCHAR	20
EI_ROLE_STATUS	CHAR	1
EI_ROLE_STATUS_DES	VARCHAR	20
EI_GEO_RANGE_CODE	CHAR	1
EI_GEO_RANGE_DESC	VARCHAR	20
EI_GRADE	VARCHAR	6
EI_LOCATION_CODE	VARCHAR	4
EI_LOCATION_DESC	VARCHAR	20
EI_UNION_CODE	VARCHAR	6
EI_UNION_DESC	VARCHAR	20
EI_FTE_UNITS	NUMERIC	3,2
EI_FTE_HOURS	NUMERIC	6,2
EI_PRIME_INC_FLAG	CHAR	1
EI_PRIME_INC_DESC	VARCHAR	20
JOB_CODE	VARCHAR	6
POS_MANAGMENT	CHAR	4

DM2_EMP_LOCATION

Employee's location within the organization used for labor record allocation.

Solution Series form(s)	GGISCR, HL-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
LOCATION_NUMBER	NUMERIC	02,0
LOCATION_PERCENT	NUMERIC	06,2
CONTROL_3_CODE	CHAR	004
CONTROL_3	VARCHAR	020

DM2_EMP_LOCATION (continued)

Column	Data Type	Length
CONTROL_4_CODE	CHAR	004
CONTROL_4	VARCHAR	020
CONTROL_5_CODE	CHAR	004
CONTROL_5	VARCHAR	020
CONTROL_6_CODE	CHAR	004
CONTROL_6	VARCHAR	020
FUNCTION_CODE	CHAR	010
FUNCTION	VARCHAR	020

DM2_EMP_NAME_ADDR

Names and addresses for an employee.

Solution Series form(s)	AA-NEW, FF-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
NAME_CODE	NUMERIC	03,0
EMPLOYEE_NAME	VARCHAR	030
LAST_NAME	VARCHAR	20
MID_NAME	VARCHAR	20
FIRST_NAME	VARCHAR	20
ADDRESS_LINE_ONE	VARCHAR	030
ADDRESS_LINE_TWO	VARCHAR	030
CITY_STATE_PROV	VARCHAR	025
CITY	VARCHAR	020
STATE_OR_PROVIN	VARCHAR	20
ZIP_POST	VARCHAR	12

DM2_EMP_PLAN

Basic plan information specific to an employee.

Solution Series form(s)	55-SCR, 64-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
EFFECTIVE_DATE	DATETIME	
EFFECTIVE_UNTIL	DATETIME	
RESULT_PLAN_STATUS	CHAR	1
PLAN_STATUS	VARCHAR	20
OPTION_ELECTED	CHAR	2
OPTION_ELEC_DESC	VARCHAR	20
PLAN_ENTRY_DATE	DATETIME	
SUSPEND_END_DATE	DATETIME	
SERVICE_CALC_DATE	DATETIME	
VARIABLE_FACTOR	NUMERIC	8,2
OPT_CHG_REASON_CD	CHAR	2
OPTION_CHG_REASON	VARCHAR	20
ELIGIBILITY_DATE	DATETIME	

DM2_EMP_PLAN_CNTRI

HED cross reference for employee contribution to a particular benefit plan.

Solution Series form(s)	54-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
HED_XREF_NUMBER	NUMERIC	03,0
HED_XREF_EFF_DATE	DATETIME	
HED_XREF_EFF_UNTIL	DATETIME	
HED_XREF_FREQ_CODE	CHAR	002
HED_XREF_FREQUENCY	VARCHAR	020
HED_XREF_TYPE_CODE	CHAR	002
HED_XREF_TYPE	VARCHAR	020
HED_XREF_METHOD_CD	CHAR	002
HED_XREF_METHOD	VARCHAR	020
HED_XREF_AMT_PCT	NUMERIC	07,0
HED_XREF_START_CD	CHAR	001
HED_XREF_START	VARCHAR	020
HED_XREF_START_FLD	NUMERIC	06,0
HED_XREF_STOP_CODE	CHAR	001
HED_XREF_STOP	VARCHAR	020
HED_XREF_STOP_FLD	NUMERIC	06,0
HED_XREF_AMOUNT_1	NUMERIC	07,2
HED_XREF_AMOUNT_2	NUMERIC	08,2
PLAN_ID	CHAR	003
HED_XREF_CONTRB_CD	CHAR	001
HED_XREF_CONTRIBUT	VARCHAR	020
HED_XREF_ACTION_CD	CHAR	001
HED_XREF_ACTION	VARCHAR	020

DM2_EMP_PLAN_CNTRI (continued)

Column	Data Type	Length
HED_XREF_TM_RULE	CHAR	002
HED_XREF_TM_RULE_D	VARCHAR	020
HED_POSTED_IND	CHAR	001
HED_POSTED_IND_DES	VARCHAR	020

DM2_EMP_PLAN_COVER

Employee contribution and coverage details specific to a welfare plan.

Solution Series form(s)	53-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
COVERAGE_DATE	DATETIME	
COVERAGE_UNTIL	DATETIME	
CONTRIB_TYPE	CHAR	001
CONTRIBUTION	VARCHAR	020
CONTRIB_HED_XREF	NUMERIC	03,0
CONTRIB_HED_NAME	VARCHAR	015
CONTRIB_ACTION	CHAR	001
CONTRIB_ACTION_DES	VARCHAR	020
COVERAGE_AMOUNT_1	NUMERIC	07,0
COVERAGE_AMOUNT_2	NUMERIC	07,0
DEDUCTION_EFF	DATETIME	

DM2_EMP_PLAN_VEST

Vesting dates for an employee in a specific benefit plan.

Solution Series form(s)	63-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
VESTING_CALC_DATE	DATETIME	
VESTING_CALC_UNTIL	DATETIME	
CURRENT_VEST_PCT	NUMERIC	03,2
FIRST_VESTED	DATETIME	
FULLY_VESTED	DATETIME	
CURRENT_VESTED	DATETIME	

DM2_EMP_RETIREMENT

Employee retirement dates and retirement counseling information.

Solution Series form(s)	65-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
BENEFITS_REC_DATE	DATETIME	
BENEFITS_REC_UNTIL	DATETIME	
EARLY_RETIRE_DATE	DATETIME	
NORMAL_RETIRE	DATETIME	
MANDATORY_RETIRE	DATETIME	

DM2_EMP_RETIREMENT (continued)

Column	Data Type	Length
DISABILITY_RETIRE	DATETIME	
NEXT_COUNSELING_TP	CHAR	001
NEXT_RETIRE_COUNSE	VARCHAR	020
NEXT_COUNSELING_DT	DATETIME	
NEXT_NOTICE_TYPE	CHAR	001
NEXT_NOTICE	VARCHAR	020
NEXT_NOTICE_DATE	DATETIME	

DM2_EMP_TO_POS_XRE

A cross reference relating Positions to Employees.

Solution Series form(s)	cross-reference tables
Catalog(s)	none

Column	Data Type	Length
PI_CONTROL_NBR	CHAR	2
PI_POS_CODE	CHAR	6
PI_SEQ_NUMBER	NUMERIC	7,0
PI_TABLE_DATE	DATETIME	
PI_HRMS_ID_NO	VARCHAR	10
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
PI_EE_NO	VARCHAR	10
PI_FLAG	CHAR	1
PI_INC_NO	CHAR	2
PI_FTE	NUMERIC	3,2
PI_HOURS	NUMERIC	6,2
PI_ENDING_DATE	DATETIME	

DM2_EMPLOYEE

Basic information specific to a person who is employed or is seeking employment with a specific organization.

Solution Series form(s)	02-SCR, EE2SCR, EF-SCR, SB-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
SSN_OR_SIN	VARCHAR	012
PAY_FREQUENCY_CODE	CHAR	001
PAY_FREQUENCY	VARCHAR	020
PAYMENT_CODE	CHAR	001
PAYMENT_TYPE	VARCHAR	020
STATUS_CODE	CHAR	002
STATUS	VARCHAR	020
SEX_CODE	CHAR	001
SEX	VARCHAR	020
RACE_CODE	CHAR	002
EEO_RACE	VARCHAR	020
LANGUAGE_CODE	CHAR	2
LANGUAGE	VARCHAR	20
UNION_CODE	CHAR	005
UNION_NAME	VARCHAR	020
WORKERS_COMP_CODE	CHAR	005
BIRTH_DATE	DATETIME	
EMPLOYMENT_CODE	CHAR	002
EMPLOYMENT_SOURCE	VARCHAR	020
EMPLOYMENT_DATE	DATETIME	
TERMINATION_CODE	CHAR	002
TERM_CAUSE	VARCHAR	020

DM2_EMPLOYEE (continued)

Column	Data Type	Length
DATE_OF_TERM	DATETIME	
SHIFT_CODE	CHAR	001
SHIFT_CODE_DESC	VARCHAR	020
SPLIT_CODE	CHAR	001
SPLIT_CODE_DESC	VARCHAR	020
JOB_CATEGORY_CODE	CHAR	004
JOB_CATEGORY	VARCHAR	020
USER_FIELD_E	CHAR	001
FAIR_LABOR_CODE	CHAR	001
FAIR_LABOR_CD_DESC	VARCHAR	020
COMMISION_FLAG	CHAR	1
COMMISION_DESC	VARCHAR	20
PERIOD_OVERRIDE	NUMERIC	02,0
EMPLOYEE_SECURITY	CHAR	002
KEY_FIELD_1	CHAR	001
KEY_FIELD_2	CHAR	001
KEY_FIELD_3	CHAR	001
KEY_FIELD_4	CHAR	001
CLEAR_ANNIV	CHAR	001
EMPLOYEE_NAME	VARCHAR	30
PREFIX_NAME	VARCHAR	20
FIRST_NAME	VARCHAR	20
MID_NAME	VARCHAR	20
LAST_NAME	VARCHAR	20
SUFFIX_NAME	VARCHAR	20

DM2_EMPLOYEE_1

Additional information specific to a person who is employed or is seeking employment with a specific organization.

Solution Series form(s)	03-SCR
Catalog(s)	General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
BASIC_DATA_DATE	DATETIME	
BASIC_DATA_UNTIL	DATETIME	
PREV_APPL_ID_NBR	CHAR	010
HIRE_SOURCE	CHAR	002
SOURCE	VARCHAR	020
AGENCY_FEE	NUMERIC	05,0
RELOCATION_EXPENSE	NUMERIC	05,0
HOME_AREA_CODE	CHAR	003
HOME_PHONE	CHAR	007
WORK_AREA_CODE	CHAR	003
WORK_PHONE	CHAR	007
WORK_EXTENSION	CHAR	004
RELIGION_CODE	CHAR	002
RELIGION	VARCHAR	020
NATIVE_TONGUE	CHAR	002
LANGUAGE	VARCHAR	020
CA_BENEFIT_NUMBER	VARCHAR	011

DM2_EMPLOYEE_HED

Details of the employee's HEDs.

Solution Series form(s)	H9-SCR, HH-SCR, HL-SCR, JT-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
HED_NUMBER	NUMERIC	03,0
HED_NAME	VARCHAR	015
FREQUENCY_CODE	NUMERIC	02,0
FREQUENCY_DESC	VARCHAR	020
TYPE_CODE	CHAR	002
TYPE_DESC	VARCHAR	020
METHOD_CODE	CHAR	002
METHOD_DESC	VARCHAR	020
AMOUNT	NUMERIC	09,4
START_CODE	CHAR	001
START_DESCRIPTION	VARCHAR	020
START_FIELD	NUMERIC	06,0
STOP_CODE	CHAR	001
STOP_DESCRIPTION	VARCHAR	020
STOP_FIELD	NUMERIC	06,0
ONE_TIME_CODE	CHAR	001
ONE_TIME_DESCRIPT	VARCHAR	020
ONE_TIME_AMOUNT	NUMERIC	07,2
AMOUNT_ONE	NUMERIC	07,2
USER_CODE	CHAR	002
USER_NUMBER	VARCHAR	011
HED_HOURS_CUR	NUMERIC	11,2
HED_HOURS_QTD	NUMERIC	11,2
HED_HOURS_YTD	NUMERIC	11,2

DM2_EMPLOYEE_HED (continued)

Column	Data Type	Length
HED_AMOUNT_CUR	NUMERIC	11,2
HED_AMOUNT_MTD	NUMERIC	11,2
HED_AMOUNT_QTD	NUMERIC	11,2
HED_AMOUNT_YTD	NUMERIC	11,2
MCC_HED_HFCDR_FLAG	CHAR	1
MCC_HED_HFCDR_DESC	VARCHAR	20

DM2_FLEX_CRED_CALC

The credit calculation method used for a specific flex benefits plan.

Solution Series form(s)	FCCSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TFPC_EFFECTIVE_DT	DATETIME	
TFPC_EFFEC_UNTIL	DATETIME	
CRED_CALC_CODE_1	CHAR	2
CRED_CC_DESC1	VARCHAR	20

DM2_FLEX_PLAN_HED

Defines the HED to be used for deductions for a flex benefit plan.

Solution Series form(s)	TKFSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TKF_TABLE_DATE	DATETIME	
TKF_TABLE_UNTIL	DATETIME	
TKF_DEF_PLAN_1	CHAR	3
TKF_DEF_HED_1	CHAR	3

DM2_FLEX_PLAN_OPTS

Defines the options available to an employee in a flex benefit plan.

Solution Series form(s)	TKFSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TKF_TABLE_DATE	DATETIME	
TKF_TABLE_UNTIL	DATETIME	
TKF_DED_METHOD_ID	CHAR	1
TKF_TOTAL_CRED_HED	CHAR	3
TKF_NET_EARN_HED	CHAR	3
TKF_NET_DED_HED	CHAR	3
TKF_CR_CALC_RULE	CHAR	1
TKF_YR_END_SHUTOFF	CHAR	1
TKF_FLEX_WAVD_RULE	CHAR	1
TKF_DEF_OPT_RULE	CHAR	1
TKF_ENROL_COST_DSP	CHAR	1

DM2_FSA_BALANCE

Details of employee contributions to and disbursals from a Flexible Spending Account.

Solution Series form(s)	57-SCR
Catalog(s)	Bnefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
FSA_FLEX_YEAR	NUMERIC	04,0

DM2_FSA_BALANCE (continued)

Column	Data Type	Length
FSA_BALANCE_DATE	DATETIME	
FSA_BALANCE_UNTIL	DATETIME	
FSA_BEGIN_BALANCE	NUMERIC	08,2
FSA_ADDITIONS_TOT	NUMERIC	08,2
FSA_EXPENSES_TOTAL	NUMERIC	08,2
FSA_NET_CHANGE	NUMERIC	08,2
FSA_BALANCE	NUMERIC	08,2
FSA_TOTAL_CREDITS	NUMERIC	08,2
FSA_CLAIM	CHAR	003
FSA_POSTED_IND	CHAR	001

DM2_FSA_CLAIM

Flexible Spending Account claim details.

Solution Series form(s)	56-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
FOR_FLEX_YEAR	NUMERIC	04,0
FSA_CLAIM_NUMBER	NUMERIC	03,0
FSA_PENDING_ID	NUMERIC	02,0
FSA_CLAIM_DATE	DATETIME	
FSA_CLAIM_ID	VARCHAR	012
FSA_CLAIM_AMOUNT	NUMERIC	08,2
FSA_PAYMENT_DATE	DATETIME	
FSA_CHECK_TYPE	CHAR	001

DM2_FSA_CLAIM (continued)

Column	Data Type	Length
FSA_TYPE_OF_CHECK	VARCHAR	020
FSA_POSTED	DATETIME	
FSA_PENDING_AMOUNT	NUMERIC	08,2
FSA_PENDING_AMT_PD	NUMERIC	08,2

DM2_GRIEVANCE

An internal grievance or complaint filed by an employee against the company.

Solution Series form(s)	GT-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
GRIEVANCE_OCCUR_DT	DATETIME	
GRIEVANCE_CODE	CHAR	002
GRIEVANCE	VARCHAR	020
GRIEVANCE_STAT_CD	CHAR	002
GRIEVANCE_STATUS	VARCHAR	020
GRIEVANCE_STAT_DT	DATETIME	
GRIEVANCE_LOCATION	CHAR	010
GRIEVANCE_OCCUR_TM	CHAR	005
GRIEVANCE_CONTRACT	CHAR	010
GRIEVANCE_FILE_REF	CHAR	010
SUPERVISOR_CODE	CHAR	004
SUPERVISOR	VARCHAR	020
GRIEVANCE_REC_DT	DATETIME	

DM2_HIGHLY_PAID_DE

Factors used in developing a profile for highly paid employees to be used for discrimination testing in respect to certain types of benefit plans.

Solution Series form(s)	51-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
HIGHLY_PD_YEAR_END	DATETIME	
HIGHLY_PD_UNTIL	DATETIME	
PRIOR_YR_EARNINGS	NUMERIC	10,2
PRIOR_YR_DEF_EARN	NUMERIC	10,2
PRI_YR_5PCT_OWN	CHAR	001
PRIOR_YEAR_5_OWN	VARCHAR	020
PRIOR_YEAR_OFFICER	CHAR	001
PRIOR_YR_OFFICER_D	VARCHAR	020
PRI_YR_TOP_20PCT	CHAR	001
PRIOR_YEAR_TOP_20	VARCHAR	020
CURRENT_YEAR_EARN	NUMERIC	10,2
CURR_YEAR_DEF_EARN	NUMERIC	10,2
CURR_YR_5PCT_OWN	CHAR	001
CURR_YEAR_5_OWNER	VARCHAR	020
CURRENT_YR_OFFICER	CHAR	001
CURRENT_YEAR_OFF_D	VARCHAR	020
CURRENT_YR_TOP_100	CHAR	001
CURR_YEAR_TOP_100	VARCHAR	020
CUR_YR_TOP_20PCT	CHAR	001
CURR_YEAR_TOP_20	VARCHAR	020
OWNER_FAMILY	CHAR	001
OWNER_FAMILY_MEMBE	VARCHAR	020
OWNER_EMPLOYEE_NBR	CHAR	010

DM2_HIGHLY_PAID_DE (continued)

Column	Data Type	Length
EXCLUDE_20PCT_TST	CHAR	001
EXCLUDED_20_TEST	VARCHAR	020
HIGHLY_PAID	CHAR	001
HIGHLY_PAID_D	VARCHAR	020
OWNER_C1_2	CHAR	006
HIGH_PD_CURRENT	CHAR	001
HIGH_PD_CURRENT_D	VARCHAR	020
HIGH_PD_PRIOR	CHAR	001
HIGH_PD_PRIOR_D	VARCHAR	020
PRIOR_YEAR_50000	CHAR	001
PRIOR_YEAR_50000_D	VARCHAR	020
PRIOR_YEAR_75000	CHAR	001
PRIOR_YEAR_75000_D	VARCHAR	020
CURR_YEAR_50000	CHAR	001
CURR_YEAR_50000_D	VARCHAR	020
CURR_YEAR_75000	CHAR	001
CURR_YEAR_75000_D	VARCHAR	020

DM2_HIPAA

Dates and details required by the Health Insurance Portability and Accountability Act (HIPAA).

Solution Series form(s)	59KSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
PLAN_ID	CHAR	3
DEPENDENT_1	CHAR	3
COVR_START_DATE_PI	DATETIME	
COVR_AREA_IND_PI	CHAR	1
COVR_STOP_DATE_PI	DATETIME	
COVR_CERTISSUED_PI	CHAR	1

DM2_HIS_EMPLOYEE

The non-payroll portion of the employee record that is retained as a part of a payroll history record.

Solution Series form(s)	EE2SCR, GGISCR, HL-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHAR	004
SSN_OR_SIN	VARCHAR	012
PAY_FREQUENCY_CODE	CHAR	001
PAYMENT_CODE	CHAR	001
SEX_CODE	CHAR	001
RACE_CODE	CHAR	002
LANGUAGE_CODE	CHAR	002
UNION_CODE	CHAR	005
WORKERS_COMP_CODE	CHAR	005
BIRTH_DATE	DATETIME	
EMPLOYMENT_CODE	CHAR	002
EMPLOYMENT_DATE	DATETIME	
TERMINATION_CODE	CHAR	002
DATE_OF_TERM	DATETIME	
SHIFT_CODE	CHAR	001
SPLIT_CODE	CHAR	001
JOB_CATEGORY_CODE	CHAR	004
USER_FIELD_E	CHAR	001
FAIR_LABOR_CODE	CHAR	001
COMMISION_FLAG	CHAR	001
PERIOD_OVERRIDE	NUMERIC	02,0
EMPLOYEE_SECURITY	CHAR	002
KEY_FIELD_1	CHAR	001
KEY_FIELD_2	CHAR	001

DM2_HIS_EMPLOYEE (continued)

Column	Data Type	Length
KEY_FIELD_3	CHAR	001
KEY_FIELD_4	CHAR	001
CLEAR_ANNIV	CHAR	001
EMPLOYEE_NAME	VARCHAR	030
LOCATION_NUMBER	NUMERIC	02,0
LOCATION_PERCENT	NUMERIC	06,2
CONTROL_3_CODE	CHAR	004
CONTROL_4_CODE	CHAR	004
CONTROL_5_CODE	CHAR	004
CONTROL_6_CODE	CHAR	004
FUNCTION_CODE	CHAR	010
PAY_FREQUENCY	VARCHAR	020
PAYMENT_TYPE	VARCHAR	020
STATUS	VARCHAR	020
SEX	VARCHAR	020
EEO_RACE	VARCHAR	020
LANGUAGE	VARCHAR	020
UNION_NAME	VARCHAR	020
EMPLOYMENT_SOURCE	VARCHAR	020
TERM_CAUSE	VARCHAR	020
SHIFT_CODE_DESC	VARCHAR	020
SPLIT_CODE_DESC	VARCHAR	020
CONTROL_3	VARCHAR	020
CONTROL_4	VARCHAR	020
CONTROL_5	VARCHAR	020
CONTROL_6	VARCHAR	020
FUNCTION	VARCHAR	020

DM2_HIS_HED

The HED portion of an employee's history record.

Solution Series form(s)	HL-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHAR	004
HED_NUMBER	NUMERIC	03,0
HED_HOURS_L_H	NUMERIC	07,2
HED_AMOUNT_L_H	NUMERIC	11,2
PERIOD_END_DATE	DATETIME	
PAYMNT_DATE	DATETIME	

DM2_HIS_PAY

The payment portion of an employee history record.

Solution Series form(s)	AF-SCR, HL-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
HISTORY_HOURS	NUMERIC	08,2
HISTORY_RATE	NUMERIC	8,4
HISTORY_SALARY	NUMERIC	9,2
ROUTING_NBR	NUMERIC	09,0
CHANGE_DATE	DATETIME	
RECORD_GROUP	CHAR	002

DM2_HIS_PAY (continued)

Column	Data Type	Length
TO_DATE_CODE	CHAR	001
ADJ_BATCH	CHAR	001
MASTER_NUMBER	CHAR	004
BANK_CD	CHAR	002
RECON_NUMBER	NUMERIC	08,0
RECON_CLEAR_CODE	CHAR	001
PERIOD_END_DATE	DATETIME	

DM2_HR_TABLE_CTRL

The Human Resource table association to a company.

Solution Series form(s)	AX-SCR
Catalog(s)	General

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
CROSS_REF_DATE	DATETIME	
CROSS_REF_UNTIL	DATETIME	
JOB_CODES	CHAR	4
SALARY_GRADES	CHAR	4
JOB_POINTS	CHAR	4
SALARY_CHANGES	CHAR	4
OCCUPATION_GROUPS	CHAR	4
ACTIVITIES	CHAR	4
SYSTEM_OPTIONS	CHAR	4
SALARY_PLANS	CHAR	4
BENCHMARK_JOBS	CHAR	4
EEO_ESTABLISHMENTS	CHAR	4
POS_MANAGEMENT	CHAR	2
TRAINING_ADMIN	CHAR	2

DM2_INJURY

On-the-Job injury information including OSHA and Workers Compensation reporting data.

Solution Series form(s)	PR-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
INJURY_DATE	DATETIME	
INJURY_CODE	CHAR	004
INJURY	VARCHAR	025
DISABILITY_CLAIM	CHAR	001
DISABILITY_CLAIM_D	VARCHAR	020
WORKER_COMP_CODE	CHAR	001
WORKER_COMP	VARCHAR	020
LITIGATION_CODE	CHAR	001
LITIGATION	VARCHAR	020
OSHA_CODE	CHAR	001
OSHA	VARCHAR	020
CLAIM_NUMBER	VARCHAR	012
DAYS_LOST	NUMERIC	03,0
DAYS_RESTRICTED	NUMERIC	03,0
OPEN_CODE	CHAR	001
OPEN_CODE_DESC	VARCHAR	020
HOME_DEPARTMENT	CHAR	004

DM2_JOB_ASSIGNMENT

The job assigned to an employee on a specified date.

Solution Series form(s)	05-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
JOB_EFFECTIVE	DATETIME	
JOB_UNTIL	DATETIME	
KEY_SEPARATOR	CHAR	1
KEY_SEPARATOR_DESC	VARCHAR	20
CHANGE_TYPE	VARCHAR	3
CHANGE	VARCHAR	20
CONTROL_NUMBER	CHAR	4
JOB_CODE	VARCHAR	6
JOB_CODE_EXTENT	VARCHAR	4
JOB_UNION_CODE	CHAR	5
JOB_UNION	VARCHAR	20

DM2_JOB_BASIC

The basic details for a job.

Solution Series form(s)	05-SCR, M10SCR, M18SCR, M20SCR
Catalog(s)	General, Payroll

Column	Data Type	Length
JB_CONTROL_NBR	CHAR	2
JB_JOB_CODE	VARCHAR	6
JB_SEQ_NUMBER_01	NUMERIC	3,0
JB_TABLE_DATE_01	DATETIME	
JB_TABLE_DT_UNTIL	DATETIME	
JB_JOB_DESCRIPTION	VARCHAR	30
JB_REASON_CODE	CHAR	2
JB_REASON_DESC	VARCHAR	20

DM2_JOB_BASIC (continued)

Column	Data Type	Length
JB_GRADE	CHAR	6
JB_OCC_CAT_CODE	VARCHAR	6
JB_OCC_CAT_DESC	VARCHAR	20
JB_FAMILY_CODE	VARCHAR	4
JB_FAMILY_DESC	VARCHAR	20
JB_USER_FIELD_1	VARCHAR	8
JB_USER_FIELD_2	CHAR	2
JB_USER_DESC	VARCHAR	20

DM2_JOB_EVAL_DETAI

Evaluation points that define a particular job.

Solution Series form(s)	TC-SCR
Catalog(s)	General

Column	Data Type	Length
JOB_CODES	CHAR	4
TC_JOB_CODE	CHAR	6
TC_JOB_CODE_EXTENT	CHAR	4
TC_TABLE_DATE	DATETIME	
TC_TABLE_UNTIL	DATETIME	
TC_SEQUENCE_NUMBER	CHAR	1
TC_KEY_SEPARATOR	CHAR	1
EVALUATION_TYPE	VARCHAR	20
JOB_PROFILE_1	NUMERIC	3,2
PROFILE_SEPARATE_1	CHAR	1
TC_CODE	CHAR	6
TC_POINTS	NUMERIC	4,0

DM2_JOB_EVAL_PROFI

Summary of points and evaluation that provide the profile for a particular job.

Solution Series form(s)	TC-SCR
Catalog(s)	General

Column	Data Type	Length
JOB_CODES	CHAR	4
TC_JOB_CODE	CHAR	6
TC_JOB_CODE_EXTENT	CHAR	4
TC_TABLE_DATE	DATETIME	
TC_TABLE_UNTIL	DATETIME	
TC_SEQUENCE_NUMBER	CHAR	1
TC_KEY_SEPARATOR	CHAR	1
TOTAL_JOB_POINTS	NUMERIC	5,0
DATE_LAST_EVALUATE	DATETIME	

DM2_JOB_TABLE

The basic details of a job (non-Position Administration).

Solution Series form(s)	05-SCR, TA-SCR, TC-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_NUMBER	CHAR	004
TA_JOB_CODE	CHAR	006
TA_JOB_CODE_EXTENT	CHAR	4
TA_TABLE_DATE	DATETIME	
TA_TABLE_UNTIL	DATETIME	
JOB_TITLE	VARCHAR	030
WKERS_COMPENSATION	CHAR	005
SALARY_GRADE	CHAR	006
OCCUPATION_GROUP	CHAR	003
OCCUPATION	VARCHAR	020
SURVEY_IND_01	CHAR	002
SURVEY_IND_02	CHAR	002
SURVEY_IND_03	CHAR	002

DM2_JOB_TABLE (continued)

Column	Data Type	Length
SURVEY_IND_04	CHAR	002
SURVEY_INDS_05	CHAR	002
JOB_TYPE	CHAR	002
JOB	VARCHAR	020
FLSA_CLASS	CHAR	001
FLSA	VARCHAR	020
UNION_JOB_CODE	CHAR	006
UNION_JOB	VARCHAR	020
ASSIGNED_SHIFT	CHAR	001
ASSIGNED_SHIFT_DES	VARCHAR	020
TRAINEE_JOB_IND	CHAR	001
TRAINEE_JOB	VARCHAR	020
TA_PREV_JOB_CODE	CHAR	006
TA_PREV_JOB_CD_EXT	NUMERIC	04,0
TA_NOC_CODE	CHAR	5
TA_NOC_DESC	VARCHAR	20

DM2_JOB_TO_POS_XRE

A cross reference relating Jobs to Positions.

Solution Series form(s)	cross-reference tables
Catalog(s)	none

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
JP_JOB_CODE	VARCHAR	6
JP_SEQ_NUMBER	NUMERIC	4,0
JB_TABLE_DATE	DATETIME	
RL_POS_CODE	VARCHAR	6
JP_FLAG	CHAR	1

DM2_LBR_EMPLOYEE

The non-payroll portion of the employee record that is retained as a part of a payroll labor record.

Solution Series form(s)	EE2SCR, HL-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHAR	004
SSN_OR_SIN	VARCHAR	012
PAY_FREQUENCY_CODE	CHAR	001
PAYMENT_CODE	CHAR	001
STATUS_CODE	CHAR	002
SEX_CODE	CHAR	001
RACE_CODE	CHAR	002
LANGUAGE_CODE	CHAR	002
UNION_CODE	CHAR	005
WORKERS_COMP_CODE	CHAR	005
BIRTH_DATE	DATETIME	
EMPLOYMENT_CODE	CHAR	002
EMPLOYMENT_DATE	DATETIME	
TERMINATION_CODE	CHAR	002
DATE_OF_TERM	DATETIME	
SHIFT_CODE	CHAR	001
SPLIT_CODE	CHAR	001
JOB_CATEGORY_CODE	CHAR	004
USER_FIELD_E	CHAR	001
FAIR_LABOR_CODE	CHAR	001
COMMISION_FLAG	CHAR	001
PERIOD_OVERRIDE	NUMERIC	02,0
EMPLOYEE_SECURITY	CHAR	002
KEY_FIELD_1	CHAR	001

DM2_LBR_EMPLOYEE (continued)

Column	Data Type	Length
KEY_FIELD_2	CHAR	001
KEY_FIELD_3	CHAR	001
KEY_FIELD_4	CHAR	001
CLEAR_ANNIV	CHAR	001
EMPLOYEE_NAME	VARCHAR	030
PAY_FREQUENCY	VARCHAR	020
PAYMENT_TYPE	VARCHAR	020
STATUS	VARCHAR	020
SEX	VARCHAR	020
EEO_RACE	VARCHAR	020
LANGUAGE	VARCHAR	020
UNION_NAME	VARCHAR	020
EMPLOYMENT_SOURCE	VARCHAR	020
TERM_CAUSE	VARCHAR	020
SHIFT_CODE_DESC	VARCHAR	020
SPLIT_CODE_DESC	VARCHAR	020
CONTROL_3	VARCHAR	020
CONTROL_4	VARCHAR	020
CONTROL_5	VARCHAR	020
CONTROL_6	VARCHAR	020
FUNCTION	VARCHAR	020

DM2_LBR_G1

User defined information.

Solution Series form(s)	user-defined fields
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHA	004
G1_DATA	VARCHAR	068

DM2_LBR_G2

User defined information.

Solution Series form(s)	user-defined fields
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHAR	004
G2_DATA	VARCHAR	068

DM2_LBR_G3

User defined information.

Solution Series form(s)	user-defined fields
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHAR	004
G3_DATA	VARCHAR	068

DM2_LBR_PAY

The payment portion of an employee labor record.

Solution Series form(s)	HL-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
HISTORY_HOURS	NUMERIC	08,2
HISTORY_RATE	NUMERIC	8,4
HISTORY_SALARY	NUMERIC	9,2
ROUTING_NBR	NUMERIC	09,0
CHANGE_DATE	DATETIME	
RECORD_GROUP	CHAR	002
TO_DATE_CODE	CHAR	001
ADJ_BATCH	CHAR	001
MASTER_NUMBER	CHAR	004
BANK_CD	CHAR	002
RECON_NUMBER	NUMERIC	08,0
RECON_CLEAR_CODE	CHAR	001
PERIOD_END_DATE	DATETIME	
PAYMNT_DATE	DATETIME	
LOCATION_NUMBER	NUMERIC	02,0
LOCATION_PERCENT	NUMERIC	06,2
CONTROL_3_CODE	CHAR	004
CONTROL_4_CODE	CHAR	004
CONTROL_5_CODE	CHAR	004
CONTROL_6_CODE	CHAR	004
FUNCTION_CODE	CHAR	010
HED_NBR_L_H	NUMERIC	03,0
HED_HOURS_L_H	NUMERIC	7,2
HED_AMOUNT_L_H	NUMERIC	11,2
CONTROL_3	VARCHAR	020
CONTROL_4	VARCHAR	020

DM2_LBR_PAY (continued)

Column	Data Type	Length
CONTROL_5	VARCHAR	020
CONTROL_6	VARCHAR	020
FUNCTION	VARCHAR	020
HED_NAME	VARCHAR	020

DM2_LOCATION

Information that describes the location of an employee within the organization.

Solution Series form(s)	05CSCR, GG-SCR
Catalog(s)	Benefits, General, Payroll, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
LOCATION_EFFECTIVE	DATETIME	
LOCATION_UNTIL	DATETIME	
ZR_KEY_SEPARATOR	CHAR	001
ZR_KEY_SEP_DESC	VARCHAR	020
LOCATION_CHANGE_TP	CHAR	003
LOCATION_CHANGE	VARCHAR	020
EEO_ESTABLISHMENT	CHAR	004
EEO_ESTABLISH	VARCHAR	020
CTRL_THREE	CHAR	004
CONTROL_THREE	VARCHAR	020
CTRL_FOUR	CHAR	004
CONTROL_FOUR	VARCHAR	020
CTRL_FIVE	CHAR	004
CONTROL_FIVE	VARCHAR	020
CTRL_SIX	CHAR	004
CONTROL_SIX	VARCHAR	020
GEO_RANGE_IND	CHAR	001
GEOGRAPHIC_RANGE	VARCHAR	020
MAIL_DIST_DATA	CHAR	010

DM2_MASTER_PLAN

The ‘umbrella’ plan for the benefits plans in a flex benefits plan.

Solution Series form(s)	TP-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
MASTER_PLAN_DATE	DATETIME	
MASTER_PLAN_UNTIL	DATETIME	
TP_PLAN_1	CHAR	3

DM2_MEDICAL

Miscellaneous information relating the physical condition of the employee.

Solution Series form(s)	15-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
EMERGENCY_DATE	DATETIME	
EMERGENCY_UNTIL	DATETIME	
HANDICAP_CODE	CHAR	003
HANDICAP	VARCHAR	020
RESTRICTED_WORK_CD	CHAR	3
RESTRICTION	VARCHAR	20
DISABILITY_CODE	CHAR	3
DISABILITY	VARCHAR	20
DISABILITY_DATE	DATETIME	
BLOOD_TYPE_CODE	CHAR	003
BLOOD_TYPE	VARCHAR	020

DM2_MEDICAL (continued)

Column	Data Type	Length
WILL_GIVE_CODE	CHAR	001
WILL_GIVE	VARCHAR	020
DATE_LAST_GAVE	DATETIME	
SMOKER_ID	CHAR	001
SMOKER	VARCHAR	020

DM2_MONETARY_PERQ

Monetary perquisite paid to an employee.

Solution Series form(s)	27-SCR
Catalog(s)	General, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
PERQ_HED_XREF	CHAR	003
PERQ_HED_NAME	VARCHAR	20
PERQ_DATE_AWARDED	DATETIME	
PERQ_AMT_AWARDED	NUMERIC	08,2
PERQ_START_FIELD	NUMERIC	06,0
PERQ_STOP_CODE	CHAR	001
PERQ_STOP_CODE_DES	VARCHAR	020
PERQ_STOP_FIELD	NUMERIC	06,0
ACTIVE_PERQ_SWITCH	CHAR	001
ACTIVE_PERQ_DESC	VARCHAR	020

DM2_OCCUPATION_GRP

Job groupings into job families and categories used for EEO reporting.

Solution Series form(s)	TE-SCR
Catalog(s)	General

Column	Data Type	Length
OCCUPATION_GROUPS	CHAR	4
TE_OCCUPATION_GRP	CHAR	3
TE_OCCUPATION	VARCHAR	20
TE_TABLE_DATE	DATETIME	
TE_TABLE_UNTIL	DATETIME	
JOB_FAMILY	CHAR	2
JOB_FAMILY_DESC	VARCHAR	20
EEO_1_JOB_CATEGORY	CHAR	2
EEO_1_CATEGORY	VARCHAR	20
EEO_4_JOB_CATEGORY	CHAR	2
EEO_4_CATEGORY	VARCHAR	20
EEO_5_JOB_CATEGORY	CHAR	2
EEO_5_CATEGORY	VARCHAR	20
EEO_6_JOB_CATEGORY	CHAR	2
EEO_6_CATEGORY	VARCHAR	20

DM2_ORG_UNIT_BASIC

The basic details for an Organization Unit.

Solution Series form(s)	M44SCR, M46SCR, M47SCR, M48SCR, M49SCR
Catalog(s)	General, Payroll, Training

Column	Data Type	Length
OU_CONTROL_NBR	CHAR	2
OU_ORG_UNIT	CHAR	6
OU_SEQ_NUMBER	NUMERIC	3,0
OU_TABLE_DATE_01	DATETIME	
OU_TABLE_DT_UNTIL	DATETIME	
OU_REASON_CODE	CHAR	2
OU_REASON_DESC	VARCHAR	20
OU_BELONGS_TO_CODE	CHAR	6
OU_UNIT_NAME	VARCHAR	30
OU_GEO_RANGE_CODE	CHAR	1
OU_GEO_RANGE_DESC	VARCHAR	20
OU_LOCATION_CODE	VARCHAR	4
OU_LOCATION_DESC	VARCHAR	20
OU_TEMP_FLAG	CHAR	1
SOSN	VARCHAR	5

DM2_ORG_UNIT_DOC

Information about documents relating to Organization Units.

Solution Series form(s)	M49SCR
Catalog(s)	General

Column	Data Type	Length
OU_CONTROL_NBR	CHAR	2
OU_ORG_UNIT	VARCHAR	6
OU_SEQ_NUMBER	NUMERIC	3,0
OU_TABLE_DATE_10	DATETIME	
OU_TABLE_DT_UNTIL	DATETIME	
OU_TYPE_OF_FILE	VARCHAR	3
OU_TYPE_DESC	VARCHAR	20
OU_FILE_FORMAT	VARCHAR	3
OU_FILE_DESC	VARCHAR	20
OU_FILE_PATH	VARCHAR	45

DM2_ORG_UNIT_FTE

Headcount, FTE, Hours, and Salary data for an Organization Unit.

Solution Series form(s)	M47SCR
Catalog(s)	General

Column	Data Type	Length
OU_CONTROL_NBR	CHAR	2
OU_ORG_UNIT	VARCHAR	6
OU_SEQ_NUMBER	NUMERIC	3,0
OU_TABLE_DATE_03	DATETIME	
OU_TABLE_DT_UNTIL	DATETIME	
OU_BUDGET_HC	NUMERIC	6,0
OU_BUDGET_FTE_UNIT	NUMERIC	8,2
OU_BUDGET_FTE_HOUR	NUMERIC	10,2
OU_BUDGET_SALARY	NUMERIC	12,0
ACTUAL_VACANCIES	NUMERIC	9,0

DM2_ORG_UNT_LVL_NM

The level of an organization unit.

Solution Series form(s)	M44SCR
Catalog(s)	General

Column	Data Type	Length
OU_CONTROL_NBR	CHAR	2
OU_ORG_UNIT	VARCHAR	6
OU_SEQ_NUMBER	NUMERIC	3,0
OU_TABLE_DATE_02	DATETIME	
OU_TABLE_DT_UNTIL	DATETIME	
LEVEL_NUMBER	NUMERIC	3,0
LEVEL_NAME	VARCHAR	30
OU_ALT_LEVEL_NAME	VARCHAR	30

DM2_PARTICIP_TYPE

Defines various types of criteria that allow for participation in a particular benefit plan.

Solution Series form(s)	TN-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TN_SEARCH_ARGUMENT	CHAR	6
TN_TABLE_DATE	DATETIME	
TN_TABLE_UNTIL	DATETIME	
PARTICIPATE_NAME	VARCHAR	20
TYPE_CODE	CHAR	1
TYPE_DESC	VARCHAR	20
MIN_AGE	CHAR	8
MAX_AGE	CHAR	8

DM2_PARTICIP_TYPE (continued)

Column	Data Type	Length
SERVICE	CHAR	8
HOURS	NUMERIC	4,0
DATE_CALC	CHAR	1
DATE_DESC	VARCHAR	20
SERVICE_METHOD	CHAR	1
SERVICE_METHOD_DES	VARCHAR	20

DM2_PAY_FREQUENCY

Pay frequency information for a specific company (ORG LEVEL 1-2).

Solution Series form(s)	AJ-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
AJ_FREQ	CHAR	1
FREQUENCY	VARCHAR	12
ANNUAL_FACTOR	NUMERIC	4,0
ANNUALIZ_FACTOR_ED	VARCHAR	20
NBR_OF_WEEKS	NUMERIC	4,0
NUMBER_OF_WEEKS_ED	VARCHAR	20
PERIODS_PAID	NUMERIC	1,0
NEW_PERIOD	CHAR	1
NEW_PERIOD_DESC	VARCHAR	20
PAYMENT_DATE	DATETIME	
ANNIVERSARY_DATE	DATETIME	
PERIOD_DATE	DATETIME	
PERIOD_NUMBER	NUMERIC	2,0
PAY_CYCLE	NUMERIC	1,0
DEDUCTION_CYCLE	NUMERIC	1,0

DM2_PAY_FREQUENCY (continued)

Column	Data Type	Length
SAVE_PERIOD	DATETIME	
SAVE_NUMBER	NUMERIC	2,0
SAVE_PAY	NUMERIC	1,0
SAVE_DEDUCTION	NUMERIC	1,0
ACTUAL_HOURS	NUMERIC	5,0
LABOR_PERCENTAGE	NUMERIC	4,0
LAST_PERIOD	DATETIME	

DM2_PAY_OPTIONS

Defines the company set-up options for payroll processing.

Solution Series form(s)	AF-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
BANK_CODE	CHAR	002
FLSA_METHOD_CODE	CHAR	001
FLSA_METHOD	VARCHAR	020
PAY_RECONCILIATION	CHAR	001
PAY_RECON_DESC	VARCHAR	020
DEF_UNEMPLOY_CODE	CHAR	001
DEFAULT_UNEMPLOYME	VARCHAR	020
RETAIN_HISTORY_CD	CHAR	001
RETAIN_HISTORY	VARCHAR	020
PRINT_TAX_CODE	CHAR	001
PRINT_TAX	VARCHAR	020
OVERTIME_SHIFT_CD	CHAR	001
OVERTIME_SHIFT	VARCHAR	020
CO_CATEGORY_CD	CHAR	002

DM2_PAY_OPTIONS (continued)

Column	Data Type	Length
COMPANY_CATEGORY	VARCHAR	020
PAY_RAISE_SPLIT_CD	CHAR	001
PAY_RAISE_SPLIT_DE	VARCHAR	020
DEF_PAY_FREQ_CODE	CHAR	001
DEFAULT_PAY_FREQ	VARCHAR	020
CLEAR_ALL_FREQ_CD	CHAR	001
CLEAR_ALL_FREQ_DES	VARCHAR	020
REPORT_FREQ_CODE	CHAR	001
REPORT_FREQUENCY	VARCHAR	020
DROP_LABOR	NUMERIC	02,0
DROP_HISTORY	NUMERIC	02,0
COUNTRY_CODE	CHAR	001
PAYROLL_COUNTRY	VARCHAR	020
NO_PAY_WARNING_CD	CHAR	001
NO_PAY_WARNING	VARCHAR	020
CLEAR_THEN_ADJUST	CHAR	001
CLEAR_THEN_ADJ_DES	VARCHAR	020
ROUTING_NUMBER	CHAR	009
BANK_NAME	VARCHAR	020
CHECK_OPT01	CHAR	001
CHECK_OPT02	CHAR	001
CHECK_OPT03	CHAR	001
CHECK_OPT04	CHAR	001
CHECK_OPT05	CHAR	001
CHECK_OPT06	CHAR	001
CHECK_OPT07	CHAR	001
CHECK_OPT08	CHAR	001
CHECK_OPT08_DESC	VARCHAR	020
CHECK_OPT09	CHAR	001
CHECK_OPT10	CHAR	001
CHECK_OPT11	CHAR	001

DM2_PAY_OPTIONS (continued)

Column	Data Type	Length
FRICK_TAPE	CHAR	001
FRICK_TAPE_DESC	VARCHAR	020
TAX_MC_OVERRIDE	CHAR	001
TAX_MC_OVERRIDE_DE	VARCHAR	020
TAX_C12	CHAR	006
RECIP_RULES_SWITCH	CHAR	001
RECIP_RULES_SW_DES	VARCHAR	020
BUILD_QPE	CHAR	001
BUILD_QPE_DESC	VARCHAR	020
BUILD_QID	CHAR	001
BUILD_QID_DESC	VARCHAR	020
MAG_BAR_IND	CHAR	001
MAG_BAR_DESCRIP	VARCHAR	020
DEDUCTIONS_COSTED	CHAR	001
DED_COSTED_DESC	VARCHAR	020
AF_LOC_CURR_CDE	CHAR	003
AF_LOC_CURRENCY	VARCHAR	020

DM2_PENSION_BENEFI

Pension amount and payment details for a specific employee.

Solution Series form(s)	66-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
HISTORY_RECORD_DT	DATETIME	
HISTORY_REC_UNTIL	DATETIME	

DM2_PENSION_BENEFI (continued)

Column	Data Type	Length
RETIREMENT_OPTION	CHAR	002
RETIREMENT	VARCHAR	020
MONTHLY_PENSION	NUMERIC	07,2
PENSION_CHANGE_TP	CHAR	002
PENSION_CHANGE	VARCHAR	020
PENSION_INCREMENT	NUMERIC	07,2
STOP_PAYMENT_DATE	DATETIME	
RETIREMENT_DATE	DATETIME	
FORM_OF_PAYMENT	CHAR	002
PAYMENT	VARCHAR	020
ELECTION_DATE	DATETIME	
REVOCATION_DATE	DATETIME	
DATE_OF_DEATH	DATETIME	
ELECTED_PAYMENT_DT	DATETIME	

DM2_PERIOD_END

Defines the payroll period end for a particular employee.

Solution Series form(s)	PE-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
PERIOD_TABLE	DATETIME	
PERIOD_WEEKS	NUMERIC	05,2
PERIOD_HOURS	NUMERIC	7,2
PERIOD_AMOUNT	NUMERIC	11,2

DM2_PERQS

Non-monetary perquisite given to an employee.

Solution Series form(s)	20-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PERQUISITE_TYPE	CHAR	003
PERQUISITE	VARCHAR	020
PERQUISITE_DATE	DATETIME	
MEMBER_NUMBER	VARCHAR	020
DOLLAR_VALUE	NUMERIC	06,0
DATE_OF_EXPIRATION	DATETIME	
RETURN_DATE	DATETIME	

DM2_PEXAM_SCHD

Information relating to the specifics of a medical examination scheduled for an employee including the cost and results of the examination.

Solution Series form(s)	18-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PHYSICAL_RECORDED	DATETIME	
PHYSICAL_TYPE_CODE	CHAR	001
PHYSICAL_TYPE	VARCHAR	020
PHYSICAL_SCHEDULED	DATETIME	
PHYSICAL_REASON_CD	CHAR	002

DM2_PEXAM_SCHD (continued)

Column	Data Type	Length
PHYSICAL_REASON	VARCHAR	020
PHYSICAL_LOC_CD	CHAR	001
PHYSICAL_LOCATION	VARCHAR	020
PHYSICIAN_CODE	CHAR	002
PHYSICIAN	VARCHAR	020
PERQUISITE_XREF_CD	CHAR	002
PERQUISITE_XREF	VARCHAR	020
PHYSICAL_COST	NUMERIC	08,2
PHYSICAL_TAKEN	DATETIME	
PHYSICAL_RESULT_CD	CHAR	002
PHYSICAL_RESULT_DS	VARCHAR	020
PERQ_EXAM_PROVIDED	CHAR	001

DM2_PEXAM_TEST

Various tests that are part of a physical examination administered to an employee.

Solution Series form(s)	19-SCR
Catalog(s)	none

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PHYSICAL_DATE	DATETIME	
PHYSICAL_TEST_SEQ	CHAR	001
TEST_1CODE	CHAR	005
PHYSICAL_TEST_1	VARCHAR	020
PHYSICAL_RESULT_1	CHAR	008

DM2_PLAN_DEPEND

Cross-reference indicating the plans in which an employee's dependents are enrolled.

Solution Series form(s)	59DSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
DEPENDENT_DATE	DATETIME	
DEPENDENT_UNTIL	DATETIME	
DEPENDENT_1	CHAR	003

DM2_PLAN_EARN_DED

Defines the deduction and coverage rules for a particular benefit plan.

Solution Series form(s)	TS-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TS_CONTRIBUTION_CD	CHAR	1
TS_CONTRIBUTION	VARCHAR	20
TS_SEARCH_ARGUMENT	CHAR	6
TS_TABLE_DATE	DATETIME	
TS_TABLE_UNTIL	DATETIME	
TS_HED_FREQ_CD	CHAR	2
TS_HED_FREQUENCY	VARCHAR	20
TS_HED_TYPE_CODE	CHAR	2
TS_HED_TYPE	VARCHAR	20
TS_HED_METHOD_CODE	CHAR	2

DM2_PLAN_EARN_DED (continued)

Column	Data Type	Length
TS_HED_METHOD	VARCHAR	20
TS_HED_AMT_PCT	NUMERIC	7,0
TS_AUTO_DEDUCTION	CHAR	2
AUTO_DEDUCTION	VARCHAR	20
TS_START_CODE	CHAR	1
TS_START_DESCRIPT	VARCHAR	20
TS_START_FIELD	NUMERIC	6,0
TS_STOP_CODE	CHAR	1
TS_STOP_DESCRIPT	VARCHAR	20
TS_STOP_FIELD	NUMERIC	6,0
TS_AMOUNT_ONE	NUMERIC	9,2
TS_AMOUNT_TWO	NUMERIC	10,2

DM2_PLAN_ELIG_STAT

Defines the status required to be eligible for a particular benefit plan.

Solution Series form(s)	TL-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TL_SEARCH_ARGUMENT	CHAR	6
TL_TABLE_DATE	DATETIME	
TL_TABLE_UNTIL	DATETIME	
ELIGIBLE_STATUS	CHAR	2

DM2_PLAN_ELIGIBILI

Defines the eligibility rules for a particular benefit plan.

Solution Series form(s)	TL-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TL_SEARCH_ARGUMENT	CHAR	6
TL_TABLE_DATE	DATETIME	
TL_TABLE_UNTIL	DATETIME	
ELIGIBILITY_TP_CD	CHAR	1
ELIGIBILITY_TYPE	VARCHAR	20
ELIG_MINIMUM_AGE	CHAR	8
ELIG_MAXIMUM_AGE	CHAR	8
ELIGIBLE_SERVICE	CHAR	8
ELIGIBLE_HOURS	NUMERIC	4
ELIGIBLE_DATE_MTHD	CHAR	1
ELIGIBLE_DATE_CALC	CHAR	20
ELIG_SERVICE_MTHD	CHAR	1
ELIG_SERVICE_METH	VARCHAR	20

DM2_PLAN_OPT_ACTIV

The option or activity that creates the employee's status in a particular benefit plan.

Solution Series form(s)	TTASCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
OPTION_ACTIVITY	CHAR	3
TT_MAJOR_ACTIVITY	VARCHAR	20

DM2_PLAN_OPT_ACTIV (continued)

Column	Data Type	Length
TT_SEARCH_ARGUMENT	CHAR	6
TT_TABLE_DATE	DATETIME	
TT_TABLE_UNTIL	DATETIME	
TT_DATE_CALC_MTHD	CHAR	1
TT_DATE_CALC_METH	VARCHAR	20

DM2_PLAN_OPT_STATU

The employee's status in a particular benefit plan that is created by various options or activities.

Solution Series form(s)	TTASCR, TTOSCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
OPTION_ACTIVITY	CHAR	3
TT_SEARCH_ARGUMENT	CHAR	6
TT_TABLE_DATE	DATETIME	
TT_TABLE_UNTIL	DATETIME	
PLAN_STATUS_NBR	VARCHAR	20
STATUS_1L	CHAR	1
TT_STATUS_1L	VARCHAR	20
STATUS_1H	CHAR	1
TT_STATUS_1H	VARCHAR	20
RESULT_STATUS_1	CHAR	1
TT_RESULT_STATUS_1	VARCHAR	20
TT_DELAY_TIME_1	CHAR	8

DM2_PLAN_PARTICIP

Defines the participation rules for a particular benefit plan.

Solution Series form(s)	TN-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TN_SEARCH_ARGUMENT	CHAR	6
TN_TABLE_DATE	DATETIME	
TN_TABLE_UNTIL	DATETIME	
TN_KEY_SEPARATOR	CHAR	1
SCHEDULE_NAME	CHAR	2
SCHEDULE_NAME_DESC	VARCHAR	20

DM2_PLAN_RETIREMNT

Defines the rules for retirement eligibility dates.

Solution Series form(s)	TJ-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_NBR	CHAR	4
PLAN_ID	CHAR	3
TJ_SEARCH_ARGUMENT	CHAR	6
TJ_TABLE_DATE	DATETIME	
TJ_TABLE_UNTIL	DATETIME	
RETIRE_TYPE	VARCHAR	20
TJ_RULE	CHAR	1
TJ_RULE_DESC	VARCHAR	20
RETIRE_AGE	CHAR	8
RETIRE_SERVICE	CHAR	8

DM2_PLAN_RETIREMNT (continued)

Column	Data Type	Length
NOTICE_1	CHAR	8
NOTICE_2	CHAR	8
ADJUSTMENT	CHAR	1
ADJUSTMENT_DESC	VARCHAR	20

DM2_PLAN_SERVICE

Deferred Plan service and vesting information specific to an employee.

Solution Series form(s)	61-SCR, 62-SCR, 65-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
SERVICE_RECORD_DT	DATETIME	
SERVICE_REC_UNTIL	DATETIME	
SERVICE_TYPE	VARCHAR	20
SERVICE_DATE	DATETIME	
CREDIT	CHAR	008
GRANTED	CHAR	001
GRANTED_DESC	VARCHAR	020

DM2_PLANNED_SALARY

Future planned salary information specific to an employee.

Solution Series form(s)	45-SCR
Catalog(s)	General

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_YEAR_START_DT	DATETIME	
PLAN_YEAR_UNTIL	DATETIME	
PLAN_ACTUAL_SWTCH	CHAR	001
PLAN_ACTUAL_SWTCHD	VARCHAR	020
INCREASE_NUMBER	CHAR	001
INCREASE_NUMBER_DE	VARCHAR	020
INCREASE_TYPE	CHAR	001
INCREASE_TYPE_DESC	VARCHAR	020
SALARY_INCREASE_DT	DATETIME	
PLAN_PCT_CHANGE	NUMERIC	5,2
PLAN_PAY_PRD_AMT	NUMERIC	08,2
PLAN_ANNL_AMT_CHG	NUMERIC	08,2
PLAN_BUD_EFF_DOLL	NUMERIC	08,2
PLAN_ANNUAL_SALARY	NUMERIC	09,2
PLAN_BUD_EFF_PCT	NUMERIC	04,2
FUTURE_CHANGE_TYPE	CHAR	003
FUTURE_CHANGE_TP_D	VARCHAR	020
PLAN_CALC_METHOD	CHAR	001
PLAN_RECORDED_DATE	DATETIME	

DM2_PP_ACTIVITY_CD

The codes and descriptions of the first 2-digit activity code.

Solution Series form(s)	PowerPlay models
Catalog(s)	none

Column	Data Type	Length
ACTIVITY2_CODE	CHAR	2
ACTIVITY2_DESC	VARCHAR	20

DM2_PP_ DATE

The month-end dates for 100 years, from 1949 through 2050.

Solution Series form(s)	PowerPlay models
Catalog(s)	none

Column	Data Type	Length
AS_OF_DATE	DATETIME	

DM2_PP_ ORG_LEVEL

The organizational levels within and organization when using the Position Administration module. (This is a PowerPlay table)

Solution Series form(s)	PowerPlay models
Catalog(s)	none

Column	Data Type	Length
ORG_CODE	CHAR	6
ORG_CODE1	CHAR	6
ORG_CODE2	CHAR	6
ORG_CODE3	CHAR	6
ORG_CODE4	CHAR	6
ORG_CODE5	CHAR	6
ORG_CODE6	CHAR	6

DM2_PP_ ORG_LEVEL (continued)

Column	Data Type	Length
ORG_CODE7	CHAR	6
ORG_CODE8	CHAR	6
ORG_NAME	VARCHAR	30
ORG_NAME1	VARCHAR	30
ORG_NAME2	VARCHAR	30
ORG_NAME3	VARCHAR	30
ORG_NAME4	VARCHAR	30
ORG_NAME5	VARCHAR	30
ORG_NAME6	VARCHAR	30
ORG_NAME7	VARCHAR	30
ORG_NAME8	VARCHAR	30

DM2_PP_ORG_POS_XRE

The organizational levels/units and positions within and organization when using the Position Administration module. (This is a PowerPlay table)

Solution Series form(s)	cross-reference tables
Catalog(s)	none

Column	Data Type	Length
ORG_CODE	CHAR	6
POS_CODE	CHAR	6
POS_NAM	VARCHAR	30

DM2_PRIOR_YEAR_2

The organization's prior year's employee population categorized by gender and race.

Solution Series form(s)	TW-SCR
Catalog(s)	General

Column	Data Type	Length
EEO_ESTABLISHMENTS	CHAR	4
TW_EEO_EST	CHAR	4
TW_TABLE_DATE	DATETIME	
TW_TABLE_UNTIL	DATETIME	
GENDER	VARCHAR	20
WHITE	NUMERIC	6,0
HISPANIC	NUMERIC	6,0
ASIAN_PI	NUMERIC	6,0
INDIAN_ALASKAN	NUMERIC	6,0
BLACK	NUMERIC	6,0

DM2_PRIOR_YEAR_TOT

The organization's prior year's employee population categorized by race.

Solution Series form(s)	TW-SCR
Catalog(s)	General

Column	Data Type	Length
EEO_ESTABLISHMENTS	CHAR	4
TW_EEO_EST	CHAR	4
TW_TABLE_DATE	DATETIME	
TW_TABLE_UNTIL	DATETIME	
TW_TOT_B_K	NUMERIC	8,0
TW_EEO_EST_DESC	VARCHAR	20

DM2_PROG_SCHED_CRS

The courses that together make up a particular program.

Solution Series form(s)	15RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
PS_PROGRAM_SCHED	CHAR	5
PS_PROGRAM_START	DATETIME	
PS_PROGRAM_UNTIL	DATETIME	
CD_COURSE1	CHAR	6
CD_COURSE1_DESC	VARCHAR	20
PS_COURSE1_START	DATETIME	
PS_TRAIN_LOC_1	CHAR	2
PS_TRAIN_LOC_1_D	VARCHAR	20
PS_CLASS1	CHAR	1

DM2_PROG_SCHEDULED

The schedule of a particular program.

Solution Series form(s)	15RSCR
Catalog(s)	Training

Column	Data Type	Length
TRAINING_ADMIN	CHAR	2
PS_PROGRAM_SCHED	CHAR	5
PS_PROGRAM_SCHED_D	VARCHAR	20
PS_PROGRAM_START	DATETIME	
PS_PROGRAM_UNTIL	DATETIME	
PS_PROGRAM_DESC	VARCHAR	50

DM2_RATING

The performance rating, promotability information for an employee.

Solution Series form(s)	49-SCR
Catalog(s)	General

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
RATING_DATE	DATETIME	
RATING_UNTIL	DATETIME	
RATING_TYPE	CHAR	002
TYPE_OF_RATING	VARCHAR	020
RATING_VALUE	CHAR	001
RATING	VARCHAR	020
PROMOTION_ASSMNT	CHAR	001
PROMOTABILITY	VARCHAR	020
PROMOTABILITY_DATE	DATETIME	
WILLING_TO_TRAVEL	CHAR	001
TRAVEL_PERCENT	NUMERIC	03,0
WILLING_RELOCATE	CHAR	001
RELO_WILLINGNESS	VARCHAR	020
RELOCATION_AREA	CHAR	002
AREA_FOR_RELOCATN	VARCHAR	020
RATER_IDENTIFIER	CHAR	010
APPRAISAL_TABLE	CHAR	004
AVERAGE_RATING	NUMERIC	04,2

DM2_REQUIS_BASIC

The basic details for a Requisition.

Solution Series form(s)	R10SCR, R11SCR
Catalog(s)	General

Column	Data Type	Length
JOB_CODES	CHAR	2
RQ_NUMBER	CHAR	6
RQ_SEQUENCE_NBR	CHAR	4
RQ_EFFECTIVE_DATE	DATETIME	
RQ_EFFECTIVE_UNTIL	DATETIME	
RQ_KEY_SEPARATOR	CHAR	1
RQ_KEY_SEPARATOR_D	VARCHAR	20
RQ_STATUS	CHAR	2
RQ_STATUS_DESC	VARCHAR	20
RQ_POSITION_NBR	VARCHAR	6
RQ_POSITION_DATE	DATETIME	
RQ_CAMPAIGN_ID	CHAR	3
RQ_APPROVED_BY	CHAR	3
RQ_APPROVED_DESC	VARCHAR	20
RQ_REASON_CLOSED	CHAR	2
RQ_REASON_DESC	VARCHAR	20
RQ_UNITS_CODE	CHAR	2
RQ_UNITS_CODE_DESC	VARCHAR	20
RQ_LIMIT_AMOUNT	NUMERIC	9,0
RQ_THRESHOLD_AMT	NUMERIC	9,0

DM2_REQUIS_CANDID

The basic details for a Requisition Candidate.

Solution Series form(s)	R11SCR
Catalog(s)	General

Column	Data Type	Length
JOB_CODES	CHAR	2
RQ_NUMBER	CHAR	6
RQ_SEQUENCE_NBR	CHAR	4
RQ_EFFECTIVE_DATE	DATETIME	
RQ_EFFECTIVE_UNTIL	DATETIME	
RQ_KEY_SEPARATOR	CHAR	1
RQ_KEY_SEPARATOR_D	VARCHAR	20
RQ_CAND_POS_NBR	CHAR	6
EMPLOYEE_NUMBER	CHAR	10
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
RQ_CAND_STATUS	CHAR	2
RQ_CAND_STATUS_D	VARCHAR	20
RQ_CAND_UNIT	CHAR	2
RQ_CAND_UNIT_D	VARCHAR	20
RQ_CAND_AMOUNT	NUMERIC	9,0
RQ_CAND_NAME	VARCHAR	50

DM2_ROLE_BASIC

The basic details for a Position.

Solution Series form(s)	M20SCR, M28SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_SEQ_NUMBER	NUMERIC	3,0
RL_TABLE_DATE_01	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_JOB_DESCRIPTION	VARCHAR	30
RL_REASON_CODE	CHAR	2
RL_REASON_DESC	VARCHAR	20
RL_OCC_CAT_CODE	VARCHAR	6
RL_OCC_CAT_DESC	VARCHAR	20
RL_FAMILY_CODE	VARCHAR	4
RL_FAMILY_DESC	VARCHAR	20
RL_USER_FIELD_1	VARCHAR	8
RL_USER_FIELD_2	VARCHAR	2
RL_USER_DESC	VARCHAR	20
PO_EXCLUDE_FROM_RT	CHAR	1
PO_EXCLUDE_FROM_D	VARCHAR	20

DM2_ROLE_BASIC_2

The basic details for a Position, further to DM2_ROLE_BASIC.

Solution Series form(s)	M20SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_SEQ_NUMBER	NUMERIC	3,0
RL_TABLE_DATE_02	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_AWARD	VARCHAR	10
RL_GRADE	VARCHAR	6
RL_WP_REF	VARCHAR	30

DM2_ROLE_COMPLEMNT

The complement for a position.

Solution Series form(s)	M81SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_56	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_BUDGET_HC	NUMERIC	6,0
RL_BGT_FTE_UNITS	NUMERIC	6,1
RL_BGT_FTE_HOURS	NUMERIC	10,2

DM2_ROLE_DOC_REF

Information about documents relating to Positions.

Solution Series form(s)	M29SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_10	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_TYPE_OF_FILE	VARCHAR	3
RL_TYPE_FILE_DESC	VARCHAR	20
RL_FILE_FORMAT	VARCHAR	3
RL_FILE_FRMT_DESC	VARCHAR	20
RL_FILE_PATH	VARCHAR	45

DM2_ROLE_EDUCATION

Level of Education and Subject for a Position.

Solution Series form(s)	M24SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_08	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_EDUC_TYPE_CODE	VARCHAR	4
RL_EDUC_TYPE_DESC	VARCHAR	20
RL_EDUC_STRM_CODE	VARCHAR	4
RL_EDUC_STRM_DESC	VARCHAR	20
RL_EDUC_COMMENT	VARCHAR	30

DM2_ROLE_EVAL

Position evaluation data.

Solution Series form(s)	M22SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_03	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_EVAL_TYPE_CODE	CHAR	2
RL_EVAL_TYPE_DESC	VARCHAR	20
RL_EVAL_TOTAL_PTS	NUMERIC	4,0
RL_EVAL_COMMENT	VARCHAR	30

DM2_ROLE_EVAL_CRIT

Position evaluation criteria.

Solution Series form(s)	M22SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_04	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_EVAL_CRIT_TYPE	CHAR	3
RL_EVAL_CRIT_TY_DS	VARCHAR	20
RL_EVAL_CRIT_PTS	NUMERIC	3,0
RL_EVAL_CRIT_RATE	VARCHAR	6
RL_EVAL_CRIT_DESC	VARCHAR	20
RL_EVAL_CR_CMNT	VARCHAR	30

DM2_ROLE_FTE

Headcount, FTE, Hours, and Salary data for a Position.

Solution Series form(s)	M34SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_55	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_BUDGET_HC	NUMERIC	6,0
RL_BGT_FTE_UNITS	NUMERIC	6,2
RL_BGT_FTE_HOURS	NUMERIC	10,2
RL_BUDGET_SALARY	NUMERIC	12,0

DM2_ROLE_FUNDING

Funding information for a particular position.

Solution Series form(s)	M31SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_52	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_FUND_BY_HRMS_ID	VARCHAR	10
RL_FUND_SOURCE_CD	VARCHAR	6
RL_FUND_SRC_DESC	VARCHAR	20
RL_FUND_PROG_CODE	VARCHAR	6
RL_FUND_PROG_DESC	VARCHAR	20

DM2_ROLE_FUNDING (continued)

Column	Data Type	Length
RL_FUND_PERCENT	NUMERIC	4,1
RL_FUND_END_DATE	DATETIME	
RL_FUND_COMMENT	VARCHAR	30

DM2_ROLE_LICENSES

Licenses required for a particular Position.

Solution Series form(s)	M25SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_07	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_LICENSE_CODE	CHAR	4
RL_LICENSE_DESC	VARCHAR	20
RL_LICENSE_COMMENT	VARCHAR	30

DM2_ROLE_LOCATION

Organization Unit to which a Position reports, Positions to which a Position directly and indirectly reports, physical location.

Solution Series form(s)	M30SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_51	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_ORG_UNIT_CODE	VARCHAR	6
RL_LOCATION_CODE	VARCHAR	4

DM2_ROLE_LOCATION (continued)

Column	Data Type	Length
RL_LOCATION_DESC	VARCHAR	20
RL_DIRECT_RPTS_TO	VARCHAR	6
RL_INDIR_RPTS_TO	VARCHAR	6

DM2_ROLE_MEMBERSHP

Membership required for a particular Position.

Solution Series form(s)	M25SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_06	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_MEMBERSHIP_CODE	VARCHAR	4
RL_MEMBERSHIP_DESC	VARCHAR	20
RL_MEMBER_COMMENT	VARCHAR	30

DM2_ROLE_MISC_DATA

Used to hold information currently held on the HR Jobcode table (TA-SCR).

Solution Series form(s)	M2MSCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	CHAR	6
RL_SEQ_NUMBER	NUMERIC	3,0
RL_TABLE_DATE_12	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
PO_SURVEY_INDICATR	CHAR	10
PO_ASSIGNED_SHIFT	CHAR	1
PO_ASSIGN_SHIFT_DE	VARCHAR	20
PO_JOB_TYPE	CHAR	2

DM2_ROLE_MISC_DATA (continued)

Column	Data Type	Length
PO_JOB_TYPE_DESC	VARCHAR	20
PO_WORK_COMP_CODE	VARCHAR	5
PO_UNION_JOB	VARCHAR	6
PO_UNION_JOB_DESC	VARCHAR	20
PO_TRAINEE_JOB	CHAR	1
PO_TRAINEE_JOB_DES	VARCHAR	20
PO_FLSA_CLASS	CHAR	1
PO_FLSA_CLASS_DESC	VARCHAR	20

DM2_ROLE_NEXT_JOB

Possible next succeeding Jobs.

Solution Series form(s)	M27SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_09	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_NXT_JOB_ID	VARCHAR	6
RL_NXT_JOB_COMMENT	VARCHAR	30

DM2_ROLE_NXT_REVW

Information relating to a position's next review.

Solution Series form(s)	M33SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_SEQ_NUMBER	NUMERIC	3,0
RL_TABLE_DATE_54	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_NXT_REVIEW_DATE	DATETIME	
RL_REVIEW_REASON	CHAR	2
RL_REVIEW_DESC	VARCHAR	20
RL_REVIEW_COMMENT	VARCHAR	30

DM2_ROLE_REQ_EXP

Any specific experience required for a Position.

Solution Series form(s)	M2ESCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_11	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_EXPERIENCE_TYPE	VARCHAR	3
RL_EXPERIENCE_DESC	VARCHAR	20
RL_EXP_DURATION	CHAR	2
RL_EXP_DURATN_DESC	VARCHAR	20
RL_EXP_COMMENT	VARCHAR	30

DM2_ROLE_REQ_TRAIN

Training courses that must be completed for a Position.

Solution Series form(s)	M2TSCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_13	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_TRAINING_COURSE	VARCHAR	6
RL_TRAINING_DESC	VARCHAR	20
RL_TRAIN_COMMENT	VARCHAR	30

DM2_ROLE_SKILLS

Skill/competency and proficiency for a Position.

Solution Series form(s)	M23SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_05	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_SKILL_COMP_CODE	VARCHAR	10
RL_SKILL_COMP_DESC	VARCHAR	20
RL_SKILL_LEVEL_CD	VARCHAR	3
RL_SKILL_LEVEL_DSC	VARCHAR	20
RL_SKILL_COMMENT	VARCHAR	30

DM2_ROLE_STATUS

A Position status.

Solution Series form(s)	M20SCR
Catalog(s)	General

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_50	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_POS_JOB_ID	VARCHAR	6
RL_STATUS_CODE	VARCHAR	4
RL_STATUS_DESC	VARCHAR	20
RL_EMP_STATUS_CODE	CHAR	1
RL_EMP_STATUS_DESC	VARCHAR	20

DM2_ROLE_VEHICLE

A vehicle attached to a Position.

Solution Series form(s)	
Catalog(s)	

Column	Data Type	Length
RL_CONTROL_NBR	CHAR	2
RL_POS_CODE	VARCHAR	6
RL_TABLE_DATE_53	DATETIME	
RL_TABLE_DT_UNTIL	DATETIME	
RL_SEQ_NUMBER	NUMERIC	3,0
RL_VEHICLE_TYPE_CD	CHAR	2
RL_VHCLE_TYPE_DESC	VARCHAR	20
RL_VEHICLE_REG_NBR	VARCHAR	10
RL_VEHICLE_REG_EXP	DATETIME	
RL_VEHICLE_RETURN	DATETIME	
RL_VEHICLE_COMMENT	VARCHAR	30

DM2_SALARY

Salary information for an employee.

Solution Series form(s)	05-SCR, 40-SCR, 41-SCR
Catalog(s)	Benefits, General, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
INCUMBENCY_NBR	CHAR	002
INCUMBENCY_NBR_DES	VARCHAR	020
SALARY_EFFECTIVE	DATETIME	
SALARY_UNTIL	DATETIME	
SALARY_SEQUENCE	CHAR	1
SALARY_SEQ_DESC	VARCHAR	20
SALARY_CHANGE_TYPE	CHAR	003
SALARY_CHANGE	VARCHAR	020
HOURLY_RATE	NUMERIC	07,4
HOURS_PER_PERIOD	NUMERIC	05,2
PAYMENT_FREQUENCY	CHAR	001
FREQUENCY_TYPE	VARCHAR	020
SALARY_PER_PERIOD	NUMERIC	08,2
ANNUAL_SALARY	NUMERIC	09,2
ANNUAL_AMT_CHANGE	NUMERIC	08,2
PERCENT_CHANGE	NUMERIC	05,2
MONTHS_SINCE	NUMERIC	03,0
COMPA_RATIO	NUMERIC	03,2
POSITION_IN_RANGE	NUMERIC	05,2
SALARY_CALC_METHOD	CHAR	001
RED_GREEN_IND	CHAR	1
RANGE_INDICATOR	VARCHAR	20
MIN_ANNUAL_SAL	NUMERIC	9,0
MID_ANNUAL_SAL	NUMERIC	9,0
MAX_ANNUAL_SAL	NUMERIC	9,0

DM2_SALARY (continued)

Column	Data Type	Length
MIN_PERPAY_SAL	NUMERIC	9,2
MID_PERPAY_SAL	NUMERIC	9,2
MAX_PERPAY_SAL	NUMERIC	9,2
MIN_HOURLY_SAL	NUMERIC	9,4
MID_HOURLY_SAL	NUMERIC	9,4
MAX_HOURLY_SAL	NUMERIC	9,4
RANGE_PENETRATION	NUMERIC	5,0

DM2_SALARY_REVIEW

Scheduled employee salary review by a specific reviewer.

Solution Series form(s)	43-SCR
Catalog(s)	General

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
NEXT_REVIEW_DATE	DATETIME	
NEXT_REVIEW_TYPE	CHAR	002
NEXT_REVIEW	VARCHAR	020
REVIEWER_NAME	VARCHAR	030
DISTRIBUTION_DATA	CHAR	010
DISTRIBUTION_DATE	DATETIME	
DATE_RTN_EXPECTED	DATETIME	
ACTUAL_RETURN_DATE	DATETIME	

DM2_SALARY_TABLE

Salary definition and parameters for a particular salary grade.

Solution Series form(s)	TBASCR, TBBSCR, TBCSCR
Catalog(s)	General

Column	Data Type	Length
SALARY_PLANS	CHAR	004
TB_SALARY_GRADE	CHAR	006
TB_GEOGRAPHIC_IDX	CHAR	001
TB_GEOGRAPHIC_RANG	VARCHAR	020
TB_TABLE_DATE	DATETIME	
TB_TABLE_UNTIL	DATETIME	
TB_SEQUENCE_NUMBER	CHAR	1
TB_SALARY_TYPE	CHAR	001
FREQUENCY_IND	CHAR	001
TB_TABLE_FREQUENCY	VARCHAR	020
VARIANCE_PERCENT	NUMERIC	05,3
MINIMUM_SALARY	NUMERIC	13,4
FIRST_QUARTILE	NUMERIC	13,4
LEVEL_THREE_TYPE_B	NUMERIC	13,4
MIDPOINT_SALARY	NUMERIC	13,4
THIRD_QUARTILE	NUMERIC	13,4
LEVEL_6_3RD_QTR_B	NUMERIC	13,4
MAXIMUM_SALARY	NUMERIC	13,4

DM2_SAVINGS_BOND

US Savings Bond information specific to an employee.

Solution Series form(s)	SB-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
BOND_HED	NUMERIC	03,0
BOND_HED_NAME	VARCHAR	015
BOND_DENOMINATION	CHAR	001
BOND_DENOM_DESC	VARCHAR	020
BOND_OWNER_ID	CHAR	003
BOND_CO_OWNER_ID	CHAR	003
BOND_BENEFIC_ID	CHAR	003
BOND_MAIL_TO_ID	CHAR	003
BOND_SERIES	CHAR	002
BOND_SERIES_DESC	VARCHAR	020

DM2_SERVICE_BRKS

Details about an employee's break in service that effects a benefit plan.

Solution Series form(s)	61-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
LEAVE_START_DATE	DATETIME	
LEAVE_END_DATE	DATETIME	
LEAVE_SPAN	CHAR	8
PARITY_REQUALIF_DT	DATETIME	

DM2_SERVICE_BRKS (continued)

Column	Data Type	Length
LEAVE_REASON	CHAR	003
LEAVE_ACTIVITY	VARCHAR	020
B_I_S_INDICATOR	CHAR	002
BREAK_REASON	VARCHAR	020

DM2_SKILLS

Skill/competency and proficiency of an employee.

Solution Series form(s)	33-SCR
Catalog(s)	General, Trainng

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
SKILLS_CODE	CHAR	006
SKILLS	VARCHAR	020
DATE_SKILL_OBTAIN	DATETIME	
SKILLS_SOURCE_CODE	CHAR	001
SKILLS_SOURCE	VARCHAR	020
SKL_PROFICIENCY_CD	CHAR	002
SKILL_PROFICIENCY	VARCHAR	020
TRAIN_COURSE_CODE	CHAR	006
TRAIN_COURSE_CD_D	VARCHAR	020
SKILL_SCHOOL_CODE	CHAR	006
SKILL_SCHOOL	VARCHAR	020
SKILL_VERIFY_CODE	CHAR	002
SKILL_VERIFICATION	VARCHAR	020
SKILL_FIELD_1	CHAR	006
SKILL_FIELD_2	CHAR	006
SKILL_FIELD_3	CHAR	006
SKILL_FIELD_4	CHAR	006
SKILL_COURSE_CODE	CHAR	003
SKILL_COURSE	VARCHAR	020

DM2_SYSTEM_OPTIONS

The system options in effect on a specific date.

Solution Series form(s)	TG-SCR
Catalog(s)	General

Column	Data Type	Length
TG_CONTROL_NBR	VARCHAR	4
SYSTEM_OPTION_DATE	DATETIME	
SYSTEM_OPT_UNTIL	DATETIME	
DISPLAY_NAME	CHAR	1
DISPLAY_NAME_DESC	VARCHAR	20
CONTROL_3_SWITCH	CHAR	1
CONTROL_THREE_SWIT	VARCHAR	20
CONTROL_4_SWITCH	CHAR	1
CONTROL_4_SWITCH_D	VARCHAR	20
CONTROL_5_SWITCH	CHAR	1
CONTROL_5_SWITCH_D	VARCHAR	20
CONTROL_6_SWITCH	CHAR	1
CONTROL_SIX_SWITCH	VARCHAR	20
PRD_ROUNDING_RULE	CHAR	2
ANNUAL_ROUND_RULE	VARCHAR	2
PAY_FREQUENCY_SW	CHAR	1
PAY_FREQ_SWITCH_DE	VARCHAR	20
HOURLY_RATE_SWITCH	CHAR	1
HOURLY_RATE_SWITCD	VARCHAR	20
NORMAL_HOURS_SWITC	CHAR	1
NORMAL_HOURS_SWITD	VARCHAR	20
SALARY_PER_SWITCH	CHAR	1
SALARY_PER_SWITCHD	VARCHAR	20
UNION_SWITCH	CHAR	1
UNION_SWITCH_DESC	VARCHAR	20
POS_MGMT_SWITCH	CHAR	1

DM2_SYSTEM_OPTIONS (continued)

Column	Data Type	Length
POS_MGMT_SWITCH_DE	VARCHAR	20
REQ_TRACK_SWITCH	CHAR	1
REQ_TRACK_SWITCH_D	VARCHAR	20
COMP_CONTROL_SWITC	CHAR	1
COMP_CONT_SWITCH_D	VARCHAR	20
BUDGET_COMP_SWITCH	CHAR	1
BUDGET_COMP_SWI_DE	VARCHAR	20
CMP_UNIT_ID_SWITCH	CHAR	1
CMP_UNIT_ID_SWI_DE	VARCHAR	20

DM2_TIME_USED

Describes unauthorized time away from work.

Solution Series form(s)	93ASCR, 93USCR
Catalog(s)	General, Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
TIME_USED_YEAR_END	DATETIME	
TIME_USED_AS_OF_DT	DATETIME	
TIME_USED_UNTIL	DATETIME	
TIME_USED_TYPE	VARCHAR	20
TIME_USED_AMOUNT	NUMERIC	05,2

DM2_TRAINING

Training information specific to an employee.

Solution Series form(s)	31-SCR
Catalog(s)	General, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
TRAIN_COURSE_CD	CHAR	003
TRAINING_COURSE	VARCHAR	020
TRAINING_YEAR	NUMERIC	04,0
TRAINING_COURSE_NO	CHAR	001
TRAIN_COMP_CD	CHAR	001
TRAIN_COMPLETION	VARCHAR	020
TRAINING_TYPE_CODE	CHAR	003
TRAINING_TYPE	VARCHAR	020
COURSE_LOCATION_CD	CHAR	004
COURSE_LOCATION	VARCHAR	020
COURSE_INSTRCTR_CD	CHAR	002
COURSE_INSTRUCTOR	VARCHAR	020
COURSE_START_DATE	DATETIME	
COURSE_COMP_DT	DATETIME	
TRAINING_RATING	NUMERIC	04,3
TRAINING_CREDIT	NUMERIC	02,0
TRAINING_COSTS	NUMERIC	06,2
TRAIN_COMPANY_PD	NUMERIC	06,2
TRAINING_CONTROL_3	CHAR	004
TRAINING_CTRL_3_D	VARCHAR	020
TRAINING_CONTROL_4	CHAR	004
TRAINING_CTRL_4_D	VARCHAR	020

DM2_TRAINING (continued)

Column	Data Type	Length
TRAINING_CONTROL_5	CHAR	004
TRAINING_CTRL_5_D	VARCHAR	020
TRAINING_CONTROL_6	CHAR	004
TRAINING_CTRL_6_D	VARCHAR	020
COURSE_EVALUATE_CD	CHAR	001
COURSE_EVALUATION	VARCHAR	020

DM2_TRAINING_REQUI

Training required for an employee.

Solution Series form(s)	31RSCR
Catalog(s)	General, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	10
TR_COURSE_CODE	CHAR	6
TR_COURSE_CODE_DSC	VARCHAR	20
TR_REQUIRED_BY	DATETIME	
TRAIN_REQ_ELECT2	CHAR	1
TRAIN_REQ_ELECT_D2	VARCHAR	20
TRAIN_REQ_REASON	CHAR	1
TRAIN_REQ_REASON_D	VARCHAR	20
TRAIN_REQ_STATUS	CHAR	1
TRAIN_REQ_STATUS_D	VARCHAR	20

DM2_TS_FUND_ACTIVI

Details of Thrift Savings Fund contributions, withdrawals, service changes, and suspension of contributions.

Solution Series form(s)	80-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
CONTRIB_TYPE_QC	CHAR	001
CONTRIBUTION_QC	VARCHAR	020
FUND_CODE_QC	CHAR	001
FUND_QC	VARCHAR	020
DATE_OF_ACTION	DATETIME	
DATE_ACTION_UNTIL	DATETIME	
T_S_WITHDRAWAL_TP	CHAR	001
T_S_WITHDRAWAL	VARCHAR	020
T_S_WITHDRAWAL_AMT	NUMERIC	08,2
T_S_WITHDRAW_MTHD	CHAR	001
T_S_WITHDRAW_PAYME	VARCHAR	020
T_S_ANNUITY_TYPE	CHAR	001
T_S_ANNUITY	VARCHAR	020
T_S_PYMT_DURATION	NUMERIC	04,0
T_S_SUSPEND_END_DT	DATETIME	
T_S_WITHDRAW_POST	DATETIME	
T_S_SERVICE_CHARGE	NUMERIC	08,2

DM2_TS_FUND_ALLOCA

An employee's contribution amount and deduction information for a thrift savings plan.

Solution Series form(s)	79-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
CONTRIB_TYPE_QA	CHAR	001
CONTRIBUTION_QA	VARCHAR	020
ELECTION_EFFECTIVE	DATETIME	
ELECTION_UNTIL	DATETIME	
T_S_CONTRB_AMT_PCT	NUMERIC	07,0
T_S_HED_XREF	NUMERIC	03,0
T_S_HED_NAME	VARCHAR	15
T_S_CONTRIB_ACTION	CHAR	001
T_S_DEDUCT_EFFECT	DATETIME	

DM2_TS_FUND_PCT

The percent of the thrift savings plan contribution that the employee designates for each fund in the plan.

Solution Series form(s)	79-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003

DM2_TS_FUND_PCT (continued)

Column	Data Type	Length
CONTRIB_TYPE_QA	CHAR	001
CONTRIBUTION_QA	VARCHAR	020
ELECTION_EFFECTIVE	DATETIME	
ELECTION_UNTIL	DATETIME	
FUND_NUMBER	VARCHAR	20
T_S_FUND_A_PCT	NUMERIC	03,0

DM2_TS_FUND_TRANSF

Details of Thrift Savings Fund transfers for a specific employee.

Solution Series form(s)	81-SCR
Catalog(s)	Benefits

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
PLAN_ID	CHAR	003
CONTRIB_TYPE_QD	CHAR	001
CONTRIBUTION_QD	VARCHAR	020
FUND_CODE_QD	CHAR	001
FUND_QD	VARCHAR	020
DATE_OF_ACTION_QD	DATETIME	
TYPE_OF_XFER_CD	CHAR	001
TYPE_OF_TRANSFER	VARCHAR	020
T_S_TRANSFER_AMT	NUMERIC	08,2
T_S_TRANSFER_POST	DATETIME	

DM2_TUITION

Tuition reimbursement information specific to an employee.

Solution Series form(s)	32-SCR
Catalog(s)	General, Training

Column	Data Type	Length
CONTROL_1	CHAR	2
CONTROL_2	CHAR	4
EMPLOYEE_NUMBER	CHAR	010
EDUCATION_LEVEL_Z2	CHAR	003
EDUCATION_Z2	VARCHAR	020
SCHOOL_CODE_Z2	CHAR	006
SCHOOL_NAME_Z2	VARCHAR	020
TUITION_YEAR	NUMERIC	04,0
COURSE_NUMBER_CODE	CHAR	001
SEMESTER_QUARTER	NUMERIC	01,0
COURSE_TITLE	VARCHAR	015
COURSE_GRADE	NUMERIC	03,2
HED_CROSS_REF	NUMERIC	03,0
HED_CROSS_REF_NAME	VARCHAR	015
TUITION_PERCENT	NUMERIC	03,0
TUITION_AMOUNT	NUMERIC	06,2
BOOKS_PERCENT	NUMERIC	03,0
BOOKS_AMOUNT	NUMERIC	06,2
FEES_OTHER_PERCENT	NUMERIC	03,0
FEES_OTHER_AMOUNT	NUMERIC	06,2
TUITION_PAID_DATE	DATETIME	

DM2_US_EMP_TAX_QTR

US tax quarter summary information for an employee.

Solution Series form(s)	JJ-SCR
Catalog(s)	Payroll

Column	Data Type	Length
TAX_YEAR	NUMERIC	04,0
TAX_QTR	NUMERIC	02,0
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
TAX_TYPE	CHAR	001
TAX_TYPE_EDIT	VARCHAR	020
TAX_CODE	CHAR	006
TAX_METHOD_CODE	CHAR	001
TAX_METHOD	VARCHAR	020
RESIDENT_CODE	CHAR	001
RESIDENT_STATUS	VARCHAR	020
TAX_DEPENDENTS	NUMERIC	02,0
TAX_MARITAL_CODE	CHAR	001
TAX_MARITAL_STATUS	VARCHAR	020
TAX_AMOUNT_PERCENT	NUMERIC	07,0
UNEMPLOYMENT_CODE	CHAR	001
PLEDGE_PERCENT	NUMERIC	05,2
RECIPROCAL_CODE	CHAR	001
TAX_RECIPROCAL	VARCHAR	020
RECIPROCAL_STATE	CHAR	002
TAX_TABLE	NUMERIC	01,0
WORK_FLAG_CODE	CHAR	01
WORK_FLAG	VARCHAR	020
J_USER_CODE	CHAR	001
J_CHANGE	CHAR	001

DM2_US_EMP_TAX_QTR (continued)

Column	Data Type	Length
TOTAL_WAGES_CUR	NUMERIC	11,2
TOTAL_WAGES_MTD	NUMERIC	11,2
TOTAL_WAGES_QTD	NUMERIC	11,2
TOTAL_WAGES_YTD	NUMERIC	11,2
EMPLOYER_WAGES_CUR	NUMERIC	11,2
EMPLOYER_WAGES_MTD	NUMERIC	11,2
EMPLOYER_WAGES_QTD	NUMERIC	11,2
EMPLOYER_WAGES_YTD	NUMERIC	11,2
EMPLOYEE_WAGES_CUR	NUMERIC	11,2
EMPLOYEE_WAGES_MTD	NUMERIC	11,2
EMPLOYEE_WAGES_QTD	NUMERIC	11,2
EMPLOYEE_WAGES_YTD	NUMERIC	11,2
UI_WAGES_CUR	NUMERIC	11,2
UI_WAGES_MTD	NUMERIC	11,2
UI_WAGES_QTD	NUMERIC	11,2
UI_WAGES_YTD	NUMERIC	11,2
OT_PREM_WAGES_CUR	NUMERIC	11,2
OT_PREM_WAGES_MTD	NUMERIC	11,2
OT_PREM_WAGES_QTD	NUMERIC	11,2
OT_PREM_WAGES_YTD	NUMERIC	11,2
WORK_IN_WAGES_CUR	NUMERIC	11,2
WORK_IN_WAGES_MTD	NUMERIC	11,2
WORK_IN_WAGES_QTD	NUMERIC	11,2
WORK_IN_WAGES_YTD	NUMERIC	11,2
RESIDE_WAGES_CUR	NUMERIC	11,2
RESIDE_WAGES_MTD	NUMERIC	11,2
RESIDE_WAGES_QTD	NUMERIC	11,2
RESIDE_WAGES_YTD	NUMERIC	11,2
PRIOR_WAGES_CUR	NUMERIC	11,2
PRIOR_WAGES_MTD	NUMERIC	1,2
PRIOR_WAGES_QTD	NUMERIC	11,2

DM2_US_EMP_TAX_QTR (continued)

Column	Data Type	Length
PRIOR_WAGES_YTD	NUMERIC	11,2
EMPLOYER_TAX_CUR	NUMERIC	11,2
EMPLOYER_TAX_MTD	NUMERIC	11,2
EMPLOYER_TAX_QTD	NUMERIC	11,2
EMPLOYER_TAX_YTD	NUMERIC	11,2
EMPLOYEE_TAX_CUR	NUMERIC	11,2
EMPLOYEE_TAX_MTD	NUMERIC	11,2
EMPLOYEE_TAX_QTD	NUMERIC	11,2
EMPLOYEE_TAX_YTD	NUMERIC	11,2
UI_TAX_CUR	NUMERIC	11,2
UI_TAX_MTD	NUMERIC	11,2
UI_TAX_QTD	NUMERIC	11,2
UI_TAX_YTD	NUMERIC	11,2
PRIOR_TAX_CUR	NUMERIC	11,2
PRIOR_TAX_MTD	NUMERIC	11,2
PRIOR_TAX_QTD	NUMERIC	11,2
PRIOR_TAX_YTD	NUMERIC	11,2
EIC_CUR	NUMERIC	11,2
EIC_MTD	NUMERIC	11,2
EIC_QTD	NUMERIC11,2	
EIC_YTD	NUMERIC11,2	
WEEKS_WORKED_CUR	NUMERIC	06,2
WEEKS_WORKED_MTD	NUMERIC	06,2
WEEKS_WORKED_QTD	NUMERIC	06,2
WEEKS_WORKED_YTD	NUMERIC	06,2

DM2_US_EMPLOYEE_TAX

The US taxes that apply to a particular employee.

Solution Series form(s)	JJISCR, T1-SCR
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
TAX_TYPE	CHAR	001
TAX_TYPE_EDIT	VARCHAR	020
TAX_CODE	CHAR	006
TAX_METHOD_CODE	CHAR	001
TAX_METHOD	VARCHAR	020
RESIDENT_CODE	CHAR	001
RESIDENT_STATUS	VARCHAR	020
TAX_DEPENDENTS	NUMERIC	02,0
TAX_MARITAL_CODE	CHAR	001
TAX_MARITAL_STATUS	VARCHAR	020
TAX_AMOUNT_PERCENT	NUMERIC	07,0
UNEMPLOYMENT_CODE	CHAR	001
UNEMPLOYMENT	VARCHAR	020
PLEDGE_PERCENT	NUMERIC	05,2
RECIPROCAL_CODE	CHAR	001
TAX_RECIPROCAL	VARCHAR	020
RECIPROCAL_STATE	CHAR	002
TAX_TABLE	NUMERIC	01,0
WORK_FLAG_CODE	CHAR	001
WORK_FLAG	VARCHAR	020
J_USER_CODE	CHAR	001
J_CHANGE	CHAR	001
TOTAL_WAGES_CUR	NUMERIC	11,2

DM2_US_EMPLOYEE_TAX (continued)

Column	Data Type	Length
TOTAL_WAGES_MTD	NUMERIC	11,2
TOTAL_WAGES_QTD	NUMERIC	11,2
TOTAL_WAGES_YTD	NUMERIC	11,2
EMPLOYER_WAGES_CUR	NUMERIC	11,2
EMPLOYER_WAGES_MTD	NUMERIC	11,2
EMPLOYER_WAGES_QTD	NUMERIC	11,2
EMPLOYER_WAGES_YTD	NUMERIC	11,2
EMPLOYEE_WAGES_CUR	NUMERIC	11,2
EMPLOYEE_WAGES_MTD	NUMERIC	11,2
EMPLOYEE_WAGES_QTD	NUMERIC	11,2
EMPLOYEE_WAGES_YTD	NUMERIC	11,2
UI_WAGES_CUR	NUMERIC	11,2
UI_WAGES_MTD	NUMERIC	11,2
UI_WAGES_QTD	NUMERIC	11,2
UI_WAGES_YTD	NUMERIC	11,2
OT_PREM_WAGES_CUR	NUMERIC	11,2
OT_PREM_WAGES_MTD	NUMERIC	11,2
OT_PREM_WAGES_QTD	NUMERIC	11,2
OT_PREM_WAGES_YTD	NUMERIC	11,2
WORK_IN_WAGES_CUR	NUMERIC	11,2
WORK_IN_WAGES_MTD	NUMERIC	11,2
WORK_IN_WAGES_QTD	NUMERIC	11,2
WORK_IN_WAGES_YTD	NUMERIC	11,2
RESIDE_WAGES_CUR	NUMERIC	11,2
RESIDE_WAGES_MTD	NUMERIC	11,2
RESIDE_WAGES_QTD	NUMERIC	11,2
RESIDE_WAGES_YTD	NUMERIC	11,2
PRIOR_WAGES_CUR	NUMERIC	11,2
PRIOR_WAGES_MTD	NUMERIC	11,2
PRIOR_WAGES_QTD	NUMERIC	11,2
PRIOR_WAGES_YTD	NUMERIC	11,2

DM2_US_EMPLOYEE_TAX (continued)

Column	Data Type	Length
EMPLOYER_TAX_CUR	NUMERIC	11,2
EMPLOYER_TAX_MTD	NUMERIC	11,2
EMPLOYER_TAX_QTD	NUMERIC	11,2
EMPLOYER_TAX_YTD	NUMERIC	11,2
EMPLOYEE_TAX_CUR	NUMERIC	11,2
EMPLOYEE_TAX_MTD	NUMERIC	11,2
EMPLOYEE_TAX_QTD	NUMERIC	11,2
EMPLOYEE_TAX_YTD	NUMERIC	11,2
UI_TAX_CUR	NUMERIC	11,2
UI_TAX_MTD	NUMERIC	11,2
UI_TAX_QTD	NUMERIC	11,2
UI_TAX_YTD	NUMERIC	11,2
PRIOR_TAX_CUR	NUMERIC	11,2
PRIOR_TAX_QTD	NUMERIC	11,2
PRIOR_TAX_YTD	NUMERIC	11,2
EIC_CUR	NUMERIC	11,2
EIC_MTD	NUMERIC	11,2
EIC_QTD	NUMERIC	11,2
EIC_YTD	NUMERIC	11,2
WEEKS_WORKED_CUR	NUMERIC	06,2
WEEKS_WORKED_MTD	NUMERIC	06,2
WEEKS_WORKED_QTD	NUMERIC	06,2
WEEKS_WORKED_YTD	NUMERIC	06,2

DM2_US_HIS_TAX

The US tax portion of an employee's history record.

Solution Series form(s)	Varies depending on the tax
Catalog(s)	Payroll

Column	Data Type	Length
CONTROL_1	CHAR	002
CONTROL_2	CHAR	004
EMPLOYEE_NUMBER	CHAR	010
CHANGE_DATE	DATETIME	
MASTER_NUMBER	CHAR	004
PERIOD_END_DATE	DATETIME	
PAYMNT_DATE	DATETIME	
TAX_TYPE	CHAR	001
TAX_CODE	CHAR	006
TOTAL_WAGES	NUMERIC	11,2
EMPLOYER_WAGES	NUMERIC	11,2
EMPLOYEE_WAGES	NUMERIC	11,2
UI_WAGES	NUMERIC	11,2
OT_PREM_WAGES	NUMERIC	11,2
WORK_IN_WAGES	NUMERIC	11,2
RESIDE_WAGES	NUMERIC	11,2
PRIOR_WAGES	NUMERIC	11,2
EMPLOYER_TAX	NUMERIC	11,2
EMPLOYEE_TAX	NUMERIC	11,2
UI_TAX	NUMERIC	11,2
PRIOR_TAX	NUMERIC	11,2
EIC	NUMERIC	11,2
WEEKS_WORKED	NUMERIC	06,2

CHAPTER 4

Data Elements

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Introduction to Data Elements

This chapter contains a complete list of the data elements within the data mart data model and their descriptions.

A

ABS_KEY

CHAR, 001

The ABS-KEY field is used to ensure that multiple entries of a segment, on the same date, with the same Reason Absent, are sequenced properly on the employee's Master Record. This field uses the Key Separator Value option list (HR70).

Each key combination may have a maximum of ten entries for the same ABSENT-DATE and ABSENT-TYPE- CODE. Enter the segments beginning with ABS-KEY value of 9, then 8, and so forth.

Blank out the ABS-KEY to let the system automatically populate the ABS-KEY field. The first record for a specified ABSENT-DATE and ABSENT-TYPE-CODE will default to a '9', the second to an '8' and so on as long as the ABS-KEY is blanked out.

Key Separator Value Option List (HR70)

This option defines the separation of multiple occurrences of the same transaction key.

ABS_KEY_DESC

VARCHAR, 020

This field uses the Key Separator Value option list (HR70).

Key Separator Value Option List (HR70)

This option defines the separation of multiple occurrences of the same transaction key.

ABSENCE_TYPE

VARCHAR, 020

This field displays the description from the option list translation of the ABSENT-TYPE-CODE. This field uses the Control 5 option list (PR039).

FOR TIME ENTRY: This field is used to enter an override Control-5 number. Enter this field if the employee worked any hours at a Control-5 other than his normal location.

Control 5 Option List (PR039)

This is a user-defined Option List. You must enter these options and descriptions as necessary for your organization. CONTROL-5 is the fifth level of location identification for your organization.

ABSENCE_TYPE_CODE

CHAR, 002

This is the type of absence day taken whether excused or unexcused. This field uses the Control 5 option list (PR039).

FOR TIME ENTRY: This field is used to enter an override Control-5 number. Enter this field if the employee worked any hours at a Control-5 other than his normal location.

Control 5 Option List (PR039)

This is a user-defined Option List. You must enter these options and descriptions as necessary for your organization. CONTROL-5 is the fifth level of location identification for your organization.

ABSENT_APPR_USER_D

VARCHAR, 020

This field displays the description from the option list translation of the ABSENT-APPROV-USER. This field uses the Decision Maker Option List (TA049).

Decision Maker Option List (TA049)

This is the name of the person who determined the type of absence and whether it was approved for payment.

ABSENT_APPROV_USER

CHAR, 004

This is the name of the person who determined the type of absence and whether it was approved for payment. This field uses the Decision Maker Option List (TA049).

Decision Maker Option List (TA049)

This option identifies the name of the person who determined the type of absence and whether it was approved for payment.

ABSENT_APPROVAL

VARCHAR, 020

This field displays the description from the option list translation of the ABSENT-APPROVAL-CD Code. This field uses the Absence Approval option list (TA03).

Absence Approval Option List (TA03)

This option list identifies whether or not the employee's absence was approved and by whom.

ABSENT_APPROVAL_CD

CHAR, 002

This is the designation of whether the employee's absence was approved (paid) or denied (not paid) and the determining authority. This field uses the Absence Approval option list (TA03).

TIME AND ATTENDANCE USERS ONLY: This field must be populated for a time card to be created for the record.

Codes of 'Ax' allow for time card creation.

If a code of 'Ax' is entered, an Absence Table record (TAASCR form) must be present for the Absence Type Code entered.

Codes of 'Dx' do not allow for time card creation.

Absence Approval Option List (TA03)

This option list identifies whether or not the employee's absence was approved and by whom.

ABSENT_DATE

DATETIME

This is the date on which the employee was absent from his/her scheduled work.

ABSENT_DAY

CHAR, 009

This is the day of the week on which an absence fell. This field is generated by the system to be displayed on the Absence Inquiry form (93ISCR).

ABSENT_DAY_CODE

CHAR, 003

This is the day of the week and its relationship to a holiday or the day of the employee's scheduled shift on which the absence occurred. This field uses the Day of Absence option list (TA02).

Day of Absence Option List (TA02)

Two sets of codes are presented for recording the day of the employee's absence. One set of codes will be used if it is important to record the day of the employee's shift, the other is used to record the day of the week and its relationship to a holiday.

ABSENT_DAY_DESC

VARCHAR, 020

This field displays the description from the option list translation of the Absent Day Code. This field uses the Day of Absence option list (TA02).

Day of Absence Option List (TA02)

Two sets of codes are presented for recording the day of the employee's absence. One set of codes will be used if it is important to record the day of the employee's shift, the other is used to record the day of the week and its relationship to a holiday.

ABSENT_ENTERED_BY

CHAR, 004

This is the user that entered the absence.

ABSENT_HOURS

NUMERIC, 04,2

This is the number of hours the employee was absent from scheduled work.

ABSENT_POINTS

NUMERIC, 4,1

This is the accumulation of point values for specific absence types. To see a total of this field refer to the Absence Points form (93PSCR).

ABSENT_REASON

VARCHAR, 015

This is an optional field to enter the reasons for an absence.

ABSENT_TC_IND

CHAR, 001

This is an indicator for TIME AND ATTENDANCE ADMINISTRATION module users for whether a time card has been generated for this absence. This field uses the Yes/No Edit option list (PP00).

If you do not have the TIME AND ATTENDANCE ADMINISTRATION module, this indicator will always be 'N'

Yes/No Edit Option List (PP00)

This option list is used for fields that require only a yes or no entry.

ABSENT_TC_IND_DESC

VARCHAR, 020

This field displays the description from the option list translation of the ABSENT-TC-IND. This field uses the Yes/No Edit option list (PP00).

Yes/No Edit Option List (PP00)

This option list is used for fields that require only a yes or no entry.

ABSENCE_TYPE

VARCHAR, 020

This field displays the description from the Absence Type option list translation of the ABSENCE-TYPE-CODE. This field uses the Absence Type option list (TA01).

Absence Type Option List (TA01)

The option identifies the type of absence recorded for the employee.

ABSENCE_TYPE_CODE

CHAR, 002

This is the type of absence day taken whether excused or unexcused. This field uses the Absence Type option list (TA01).

TIME AND ATTENDANCE USERS ONLY: This is used in the process to create Time Entries from absence data. For a Time Entry to be generated from an Absences form (93-SCR) entry, a corresponding Absence Table record (TAASCR form) must be established for the entry to this field.

Absence Type Option List (TA01)

The option identifies the type of absence recorded for the employee.

ACCEPTED_COVERAGE

CHAR, 001

This is the indicator of whether or not the employee or dependent accepted extended coverage. This field uses the Accepted Coverage option list (BA50).

Accepted Coverage Option List (BA50)

This option identifies whether or not the Qualified Beneficiary has accepted COBRA coverage.

ACCRUAL_OPTION

VARCHAR, 020

The ACCRUAL-OPTION field contains the description of the ACCRUAL-OPTION-CODE specified for accrual situations. This field uses the HED Accrual Option List (PP21).

HED Accrual Option List (PP21)

These codes are used to indicate how accrued hours are paid.

ACCRUAL_OPTION_CD

CHAR, 001

This field determines the action to be taken if accrual is specified (for vacation, sick days, and so forth) and the hours entered exceed the hours allowed. This field uses the HED Accrual Option List (PP21).

HED Accrual Option List (PP21)

These codes are used to indicate how accrued hours are paid.

ACCUM_DATE_FH

DATETIME

This is the date of the period end through which hours and earnings are recorded on the FICA-HI Accumulator.

ACCUM_FREQUENCY

VARCHAR, 20

This field displays the description from the option list translation of the Accum Frequency Code. This field uses the Considered Earnings option list (BA25).

Considered Earnings Option List (BA25)

This code defines on what frequency the Considered Earnings/Hours Accumulators are to be retained.

ACCUM_FREQUENCY_CD

CHAR, 1

This is the indicator that represents the number of detail CE/H Accumulators which will be created for the CE/H Accumulator named. This field uses the Considered Earnings option list (BA25).

If the frequency is monthly, there will be twelve detail records. If the frequency is quarterly, there are four, and if annual, there is one detail record.

Considered Earnings Option List (BA25)

This code defines on what frequency the Considered Earnings/Hours Accumulators are to be retained.

ACCUM_NAME_FH

CHAR, 3

This is the unique name of the FICA-HI Considered Earnings/Hours Accumulator.

ACCUMULATOR_DATE

DATETIME

This is the date of the period end through which hours and earnings are recorded on the Accumulator.

For example, if the Accumulator is scheduled to accumulate earnings X hours on a quarterly basis, the ACCUMULATOR_DATE field contains a date that is a quarter end.

ACCUMULATOR_NAME

CHAR, 3

This is the name of the Considered Earnings/Hours Accumulator being referenced. This is a unique 3-position name which with a few exceptions is user-defined.

Predefined Accumulator names are 000 for the From Date of Hire Accumulator and FIC for the FICA Accumulator.

ACT_RETURNED_DATE

DATETIME

This field contains the date the performance appraisal was actually received back in the originating department.

ACTIVE_PERQ_DESC

VARCHAR, 020

This field contains the code to indicate that a perquisite is active and still being paid. This field uses the Yes/No Edit option list (HR00).

Yes/No Edit Option List (HR00)

This option list is used for fields that require only a yes or no entry.

ACTIVE_PERQ_SWITCH

CHAR, 001

This code indicates that a perquisite is active and still being paid. This field uses the Yes/No Edit option list (HR00).

Yes/No Edit Option List (HR00)

This option list is used for fields that require only a yes or no entry.

ACTIVITIES

CHAR, 4

This is the Control Number of the Human Resource Base Module Activities Validation (TF-SCR) table to be used for the Organization (Control 1-2).

ACTIVITIES_OPTIONS

CHAR, 4

This is the Control Number of the Activity and Option Validation (TTISCR) table to be used for this Organization (Control 1-2).

ACTIVITY

VARCHAR, 020

This field displays the description from the option list translation of the ACTIVITY-CODE. This field uses the Activity Codes option list (HR09).

Activity Codes Option List (HR09)

The three positions of the ACTIVITY-CODE option list are defined as follows:

Position One—major activity

Position Two—type of major activity

Position Three—qualifier of major activity type

When adding options to this option list DO NOT change the values of the first and second positions. The third position (the 'x' value) is the only position that can contain an alphanumeric value, allowing you to develop up to thirty-five different employee types.

ACTIVITY_1H

CHAR, 2

The Minor Activity Code/Range_1 (High) is used in conjunction with the MAJOR_ACTIVITY and ACTIVITY_1L fields to describe a group of separation activities to which the Plan Breaks-in-Service Rules (TUISCR) table record pertains.

This 2-digit code is actually the second and third characters of the employee ACTIVITY_CODE (option list HR09). It contains the high end of a range of ACTIVITY_CODEs to which the associated Rule 1 applies.

For example, if Rule 1 were applied to all employees returning from LOA w/pay (ACTIVITY_CODEs 501-505), you must enter the following:

5 in the TU Major Activity field

01 in the TU Act field

05 in the TU Act 1H field

ACTIVITY_1L

CHAR, 2

The Minor Activity Code/Range_1 (Low) is used in conjunction with the MAJOR_ACTIVITY and ACTIVITY_1L 1H fields to describe a group of separation activities to which the TU Table record pertains. This 2-digit code is actually the second and third character (option list HR09).

It contains the high end of a range of ACTIVITY CODEs to which the associated Rule 1 applies.

For example, if Rule 1 were applied to all employees returning from LOA w/Pay (Activity Codes 501 - 505), you would make the following entries:

5 in the TU Major Activity field

01 in the TU Act 1L field

05 in the TU Act 1H field

You must make an entry in this field.

ACTIVITY_CODE

CHAR, 003

This code identifies which major activity is occurring. This field uses the Activity option list (HR09).

Activity Option List (HR09)

The three positions of the ACTIVITY-CODE option list are defined as follows:

Position One—major activity

Position Two—type of major activity

Position Three—qualifier of major activity type

When adding options to this option list, DO NOT change the values of the first and second positions. The third position (the ‘x’ value) is the only position that can contain an alphanumeric value, allowing you to develop up to thirty-five different employee types.

ACTIVITY_DATE

DATETIME

This is the date an employee’s major activity is effective.

ACTIVITY_UNTIL

DATETIME

This is the date an employee’s major activity is effective until. It is actually the begin date of the next activity.

ACTIVITY2_CODE

CHAR, 2

This field identifies the first two positions of the employee's Activity Code.

The first position represents the major activity:

0 = Becoming an active employee

1 = Termination

2 = Disability

3 = Retirement

4 = Death

5 = Leave of Absence

6 = Lay Off

7 = Transfer

8 = Labor Walk Out

9 = File conversion to CSSS Employee Type Changes

The second position represents the type of major activity.

ACTIVITY2_DESC

CHAR, 20

This field displays the description from the ACTIVITY2_CODE option list.

ACTUAL_HOURS

NUMERIC, 5,0

This is used to enter the actual number of hours in the pay period. This number must be expressed to two decimal places.

This figure can then be used by a report generator or user-coding to compute a factor required for labor distribution purposes for pay with variable durations (semi-monthly payrolls, for example).

The Actual Hours field is set to zero (0) on the run following a pay run for this frequency.

ACTUAL_RETURN_DATE

DATETIME

This is the date the salary review form was actually received back in the originating department.

ACTUAL_VACANCIES

NUMERIC, 9,0

This is a derived field of position vacancies used with the Position Administration module.

ADD_FED_TAX

NUMERIC, 07,0

This is used with a Tax Method Code of four through eight, or B.

For Tax Method Codes four and six, enter the amount with two decimals; for codes five, seven, and eight, enter four decimals (for example, enter five percent as 0500); and for code B, enter a whole dollar amount.

For Tax Method Code A, the week-to-date taxable wages are stored here.

ADD_TOTAL_HOURS

VARCHAR, 020

This field displays the description from the option list translation of the ADD-TOTAL-HOURS-CD. This field uses the Add to Total Hours option list (PP18).

Add to Total Hours Option List (PP18)

The options in this option list determine whether the HED totals are added to the total hours appearing on the check stub. This code is entered on the Company Earnings HED Definition Options form (A82SCR).

ADD_TOTAL_HOURS_CD

CHAR, 001

Enter a code to specify whether or not the recorded hours are to be added to total hours. This field uses the Add to Total Hours option list (PP18).

THESE CODES ARE USED FOR EARNINGS ONLY.

Codes ‘1’ and ‘3’ also cause the entered hours to be subtracted from the Amount One field on the HH-SCR screen for accrual pay.

Add to Total Hours Option List (PP18)

The options in this option list determine whether the HED totals are added to the total hours appearing on the check stub. This code is entered on the Company Earnings HED Definition Options form (A82SCR).

ADDRESS_LINE_ONE

VARCHAR, 030

This is used to enter the street number and street name portion of the employee’s address.

ADDRESS_LINE_TWO

VARCHAR, 030

An entry is necessary in this field only when additional address information exists. For example, you might include a route or apartment number.

ADJ_BATCH

CHAR, 001

This is a one digit code used in processing payment reversals and clearings.

ADJUSTED_SENIORITY

DATETIME

This is the Adjusted Seniority date for an employee. This date is initially entered by the New Hire form (01-SCR) when the New Hire activity is entered and is equal to the ACTIVITY date.

The date may be adjusted on any ACTIVITY form, but generally the Status Changes form (08-SCR) form is most appropriate.

ADJUSTMENT

CHAR, 1

This code defines the method by which the Early Retirement Service date is rounded after it has been calculated (for example, first of the following month).

ADJUSTMENT_DESC

VARCHAR, 20

This code defines the method by which the Early Retirement Service date is rounded after it has been calculated (for example, first of the following month).

ADP_CO_CONTRIB

NUMERIC, 08,2

This is the amount of Company contributions made for this plan in the Average Deferral Percentage (ADP) year.

ADP_COMPANY_RATIO

NUMERIC, 06,5

This is the Average Deferral Percentage (ADP) Company Ratio that was calculated by dividing the Company contribution amount by the ADP Earnings.

ADP_DATE_CREATED

DATETIME

This is the date the QR segment was initially created for this Average Deferral Percentage (ADP) year ,or when it was last updated if data has been modified.

ADP_EARNINGS

NUMERIC, 10,2

This is the Federal Earnings reported on the employee's US form W-2, used in the calculation of Pre-Tax Post-Tax and employer ADP Average Deferral Percentage to be used in anti-discrimination testing.

ADP_POST_TAX_RATIO

NUMERIC, 06,5

This is the Average Deferral Percentage (ADP) Post-Tax Ratio which was calculated by dividing the Post-Tax Contributions amount by the ADP Earnings.

ADP_PRE_TAX_RATIO

NUMERIC, 06,5

This is the Average Deferral Percentage (ADP) Pre-Tax Ratio that was calculated by dividing the Pre-Tax Contribution amount by the ADP Earnings.

ADP_PRE_TX_CONTRIB

NUMERIC, 08,2

This is the amount of Pre-Tax Contributions made for this plan in the Average Deferral Percentage (ADP) year.

ADP_PST_TX_CONTRIB

NUMERIC, 08,2

This is the amount of Post-Tax Contributions made for this plan in the Average Deferral Percentage (ADP) year.

ADP_YEAR

NUMERIC, 04,0

This is the year for which the Average Deferral Percentage (ADP) data pertains.

AF_LOC_CURR_CDE

CHAR, 003

The Local Currency field is selected from the Currency Option List (PR69). The following are supplied by Cyborg and may be supplemented with any additional ones required by your organization:

ASD	Australian Dollars
CAD	Canadian Dollars
DM	German Marks
FFR	French Francs
HKD	Hong Kong Dollars
IDR	Indonesian Rupiah
INR	Indian Rupees
ITL	Italian Lira
MAR	Malaysian Ringits
SGD	Singapore Dollars
STD	UK Sterling
THB	Thai Bahts
TUL	Turkish Lira
USD	US Dollars
YEN	Japanese Yen

AF_LOC_CURRENCY

VARCHAR 020

The Local Currency field description is obtained from the Currency Option List (PR69)

AGENCY_FEE
NUMERIC, 05,0

This is the finding fee paid to an outside employment agency or an employee for referring a new employee to your organization. This figure is rounded up to the nearest dollar, and is automatically right justified.

ALL_OBJECTIVES_DSC
VARCHAR, 20

This field displays the description from the option list translation of the ALL-OBJECTIVES-MET.

ALL_OBJECTIVES_MET
CHAR, 1

This field indicates if all of the stated objectives of the course have been met.

ALLERGY_1
VARCHAR, 020

This field displays the description from the option list translation of the ALLERGY-CODE-1.

ALLERGY_CODE_1
CHAR, 002

This code identifies the employee's allergic condition.

ALLOCATION_DATE
DATETIME

This is the effective date of a beneficiary or contingent annuitant election for a benefits plan.

ALLOCATION_UNTIL
DATETIME

This is the effective end date of a beneficiary or contingent annuitant election for a benefits plan.

ALTERNATE_COMP_DES
CHAR, 20

This field displays the description from the option list translation of the ALTERNATE-COMP-IND code.

ALTERNATE_COMP_IND
CHAR, 1

This is a field that indicates an alternate compensation has been given to the employee.

AMOUNT

NUMERIC, 09,4

This field may be used when the Method Code on the H segment specifies an amount or percent and you are moving a two-decimal value to the Hours Earnings or Deduction.

AMOUNT_ONE

NUMERIC, 07,2

EARNINGS: This field contains the Normal Hours associated with employee Normal Earnings. The AMOUNT-1 field is used only for HED 001 (Normal Pay) and HED 002 (Future Raise). The format is hours and hundredths of hours.

DEDUCTIONS: This field contains the purchase price for Guidelines bonds or other rolling purchase items (such as stocks: Category 52 Deductions).

NOTE: for Method Codes ‘03’ through ‘07’, ‘13’, and ‘19’, this field can be used to enter an amount of pay that is protected from the Deduction.

AMOUNT_TWO

NUMERIC, 08,2

EARNINGS: This field contains the Normal Salary for the pay period. The AMOUNT-2 field is used only with HED 001 (Normal Pay) and HED 002 (Future Raise).

DEDUCTIONS: This field is normally Undefined for deductions. However, for bonds (Category 52 Guidelines deductions), the AMOUNT-2 field is maintained by the system and contains the ending balance.

This field is updated by ALL system-generated payments and adjustments that affect year-to-date figures. An entry can be made in this field to provide the ending balance when an employee is added to the system.

ANNIVERSARY_DATE

DATETIME

This is the period end date for the next pay period. It is automatically computed by the system whenever the date is less than or equal to the current period end date.

ANNUAL_AMT_CHANGE

NUMERIC, 08,2

This is the annual amount of change for a salary from the most recent change to the next. This amount may be entered directly or indirectly as the result of a system calculation.

The system enters zeros in the Annual Amount Change field when the first salary occurrence is entered.

ANNUAL_FACTOR
NUMERIC, 4,0

This field specifies the number of pay periods in the year according to the pay frequency used.

ANNUAL_ROUND_RULE
VARCHAR, 2

This value determines which rounding rule to follow when the system performs the annual salary calculation.

ANNUAL_SALARY
NUMERIC, 09,2

This is the employee's annual salary. The amount may be entered directly or indirectly as the result of a system calculation.

ANNUALIZ_FACTOR_ED
VARCHAR, 20

This field displays the description from the option list translation of the ANNUAL-FACTOR code.

ANNUITANT_FACTORS
CHAR, 4

This is the Control Number of the TQ table to be used for this organization (Control 1-2).

AP_DISTRIB_DATA
CHAR, 010

This is the mail/distribution data regarding where the performance appraisal form was sent. It may be the reviewer's, or—in the case of mass distribution—the central, mailing location.

AP_DISTRIB_DATE
DATETIME

This contains the date the performance appraisal form was sent.

APP_REVIEWER_NAME
VARCHAR, 030

This is the name of the person responsible for collecting completed performance appraisal forms (in the case of mass distribution) or completing and returning the form.

APPL_HOME_AREA_CD
NUMERIC, 03,0

This field contains the area code of the applicant's home telephone number.

APPL_HOME_PHONE_NO
CHAR, 008

This is the home telephone number of the applicant.

APPL_MAIL_CONTACT
CHAR, 001

This code indicates whether or not the applicant wants to be contacted by mail.

APPL_PHONE_CONTACT
CHAR, 001

This code indicates whether or not the applicant wants to be contacted by telephone.

APPL_WORK_AREA_CD
NUMERIC, 03,0

This is the area code of the applicant's work telephone number.

APPL_WORK_EXT
CHAR, 004

This is the extension number to be used with the applicant's work telephone number.

APPL_WORK_PHONE_NO
CHAR, 008

This is the applicant's work telephone number.

APPRAISAL_TABLE
CHAR, 004

This is the TD Table number to be used when a TD Table is read.

AREA_FOR_RELOCATN
VARCHAR, 020

This field displays the description from the option list translation of the RELOCATION-AREA-CODE.

AS_OF_DATE
DATETIME

This date represents the date the table was built for this data mart extract.

ASIAN_PI
NUMERIC, 6,0

All individuals who belong to this category have origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands.

Included in this classification are China, India, Japan, Korea, the Philippines, and the Samoan Islands.

ASSIGNED_SHIFT
CHAR, 001

This code identifies the work shift associated to a particular JOB-CODE.

ASSIGNED_SHIFT_DES
VARCHAR, 020

This field displays the description from the option list translation of the ASSIGNED-SHIFT code.

ASSOCIATION
VARCHAR, 020

This field displays the description from the option list translation of the ASSOCIATION-CODE.

ASSOCIATION_CODE
CHAR, 004

This code identifies the association.

ASSOCIATION_DATE
DATETIME

This is the date the employee became affiliated or renewed membership with the association.

ASSOCIATION_EXPIRE
DATETIME

This is the association membership expiration date.

ASSOCIATION_NUMBER
CHAR, 010

This is the membership identification number.

AUTHORIZE_LOCATION
CHAR, 004

This is the location of the plant or facility where the bonus was authorized.

AUTHORIZED_BY
VARCHAR, 030

This is the name of the authorizing function department or other agency.

AUTHORIZING_LOC_DE
VARCHAR, 020

This field contains the location of the plant or facility where the bonus was authorized.

AUTO_DEDUCTION
VARCHAR, 20

This field displays the description from the option list translation of the TS-AUTO-DEDUCTION code.

AUTOMATIC_SET_UP
VARCHAR, 020

This field displays the description from the option list translation of the AUTOMATIC-SETUP-CODE.

AUTOMATIC_SETUP_CD
CHAR, 001

This field allows you to specify that these Hours Earnings or Deductions are to be set up automatically for employees added to the Employee Database via batch run through P20 file only.

For earnings, you can select an option that causes the system to use the default information to calculate earnings for a time document coded to this Hours, Earnings or Deduction; the result is stored in HED 001 (Normal Pay).

Frequency from the A8 form to set up an HED; another option allows you to use the Default Earnings or Deduction for an employee, regardless of the Frequency entered in the H form.

AVERAGE_RATING
NUMERIC, 04,2

This value represents the average of the employee's weighted scores in numerous performance appraisal rating categories.

AY_CROSS_REF_DATE
DATETIME

This is a century/key date, retained on the file in complement form.

It is edited as: MM-DD-CCYY.

Example: the 6th of June, 1997 would be entered as 19990606 or 06-06-1999.

AY_CROSS_REF_UNTIL
DATETIME

This is the ending effective date of the table information stored on the AY-SCR.

B

B_I_S_INDICATOR
CHAR, 002

This indicates the result of determining if a break-in-service has occurred due to a service interruption. Upon receipt of a transaction returning an employee to active service from a prior separation, the system checks the plan rules concerning that type of separation (TU Table).

If, according to the rules on the table record, no break has been incurred, the system returns a value of zeroes (00), indicating no break. However, if the system determines that a break has occurred, the value returned in this field is the rule code used to determine the break.

BANK_ACCOUNT
CHAR, 001

This code indicates whether this direct deposit is going into a checking or a savings account.

BANK_ACCOUNT_NBR
VARCHAR, 017

The employee's bank account number is entered left justified in this field.

BANK_ACCOUNT_TYPE
VARCHAR, 020

This field displays the description from the option list translation of the BANK-ACCOUNT code.

BANK_CD
CHAR, 02,0

This records the identifier code of the bank used to reconcile payment documents. If only one bank is used, leave this field blank.

BANK_CODE
CHAR, 002

The BANK-CODE field records the identifier code of the bank used to reconcile payment documents. If only one bank is used, leave this field blank.

BANK_NAME
VARCHAR, 020

This field contains the description from the option list translation of the ROUTING-NUMBER code.

BASIC_DATA_DATE
DATETIME

This date is the effective date of the form's information.

BASIC_DATA_UNTIL
DATETIME

This date is the effective date of the form's information.

BENCHMARK_JOBS
CHAR, 4

This is the Control Number of the Salary Administration TI Table to be used for the organization (Control 1-2).

BENEF_ADDRESS
VARCHAR, 030

This is the named beneficiary or contingent annuitant's street address as used for correspondence. If the full address requires more than the 30 characters provided by this field, enter the supplemental data in BENEF_ADDRESS_2.

BENEF_ADDRESS_2
VARCHAR, 030

This is the named beneficiary or contingent annuitant's supplemental street address as used for correspondence. It is used only when the full address requires additional space to record apartment numbers, post office box numbers, and so forth. (The main street address should always be entered in BENEF_ADDRESS.)

Supplemental address information can be entered only when the street address is entered.

BENEF_AREA_CODE
CHAR, 003

This is the area code portion of the telephone number for the named beneficiary or contingent annuitant.

BENEF_BIRTH_DATE
DATETIME

This is the date of birth of the named beneficiary or contingent annuitant. For retirement plans with survivor benefits, the contingent annuitant age (calculated from the date of birth) is required to locate the correct set of factors to be used in calculating benefits.

BENEF_CITY
VARCHAR, 20

This is the city where the named beneficiary or contingent annuitant live.

BENEF_CITY_ST_PROV
VARCHAR, 030

This is the city and state/province where the named beneficiary or contingent annuitant lives.

BENEF_KEY
CHAR, 003

Enter a unique three-character code that distinguishes the type of individual whose information is on this form.

BENEF_PHONE_NUMBER
CHAR, 008

This is the telephone number of the named beneficiary or contingent annuitant. The dash is required between the exchange and the number. Entry of this field is usually optional, but becomes required if the area code is entered.

BENEF_RELATION_CD
CHAR, 002

This code identifies how the beneficiary named in this form is related to the employee.

BENEF_RELATIONSHIP
VARCHAR, 020

This field displays the description from the option list translation of the BENEF-RELATION-CODE.

BENEF_SEX_CODE
CHAR, 001

This field identifies the sex of the named beneficiary or contingent annuitant. For retirement plans with survivor provisions, the contingent annuitant sex option is required to locate the correct set of factors to be used in calculating the survivor benefit.

BENEF_SEX
VARCHAR, 020

This field displays the description from the option list translation of the Benef Sex Code.

BENEF_SSN_OR_SIN
VARCHAR, 012

This is the Social Security Number or Social Insurance Number of the named beneficiary or contingent annuitant. Dashes must be entered along with the digits.

The US Internal Revenue Service requires the Social Security Number when payments are made and the survivor income has to be reported.

BENEF_ST_OR_PROV
VARCHAR, 20

This is the state/province where the named beneficiary or contingent annuitant lives .

BENEF_ZIP_POST
VARCHAR, 12

This is the zip code as used for correspondence for the named beneficiary or contingent annuitant. It is required whenever the city and state are entered in BENEF-CITY/STATE.

BENEFICIARY_NAME
VARCHAR, 030

This is the beneficiary's name, entered in the format: LAST FIRST MIDDLE.

BENEFICIARY_XREF_1
CHAR, 003

This is the identifier of the beneficiary for Benefit Plans requiring a beneficiary election. The beneficiary identifier refers to the detailed information already recorded in the OA, OB, and OC employee segments, as entered on a beneficiary/contingent annuitant form.

Therefore, you must complete the detailed name, address, and so forth on the 58-SCR before using the cross-reference identifier, since it is validated by searching the OA through OC segments for a matching key.

BENEFITS_REC_DATE
DATETIME

This field is the effective date of an employee Q0 segment containing calculated retirement dates, associated retirement notice dates, and pre- retirement counseling dates.

BENEFITS_REC_UNTIL
DATETIME

This is the ending effective date of an employee Q0 segment containing calculated retirement dates, associated retirement notice dates, and pre- retirement counseling dates.

BIRTH_DATE
DATETIME

This is the employee's date of birth.

BLACK
NUMERIC, 6,0

All individuals having origins in any of the black racial groups of Africa are included in this category. Not of Hispanic origin.

BLOOD_TYPE
VARCHAR, 020

This field displays the description from the option list translation of the BLOOD-TYPE-CODE.

BLOOD_TYPE_CODE
CHAR, 003

This code identifies an employee's blood type.

BOND_BENEFIC_ID
CHAR, 003

The beneficiary identification code from the 58-SCR of the beneficiary for the bond.

BOND_CO_OWNER_ID
CHAR, 003

The identification code of the person who is the co-owner of the bond.

BOND_DENOM_DESC
VARCHAR, 020

This field displays the description from the option list translation of the BOND-DENOMINATION code.

BOND_DENOMINATION
CHAR, 001

The dollar amount of the bond.

BOND_HED
NUMERIC, 03,0

This is the Hours, Earning, or Deduction (HED) that is used for the savings bond deduction.

BOND_HED_NAME
VARCHAR, 015

This is the savings bond Hours, Earning, or Deduction (HED) name.

BOND_MAIL_TO_ID
CHAR, 003

The non-foreign address to which the bond is to be mailed.

BOND_OWNER_ID
CHAR, 003

The identification code of the person who is the owner of the bond—either the employee or another person.

BOND_SERIES
CHAR, 002

This is the unique code from the BA67 option list assigned to the bond series the employee is purchasing.

BOND_SERIES_DESC

VARCHAR 020

This field displays the description of the code in the BA67 option list.

BONUS_AMT_AWARDED

NUMERIC, 08,2

This is the amount of the bonus or commission for the time period specified on the segment.

BONUS_DATE

DATETIME

This is the date the bonus/commission was granted.

BONUS_HED_NAME

VARCHAR, 020

This field displays the description from the option list translation of the BONUS-HED-XREF code.

BONUS_HED_XREF

CHAR, 003

This is the Payroll Hours, Earnings, or Deduction (HED) by which the bonus is paid to the employee. An A8-SCR must be entered before an Hours, Earnings, or Deduction Number may be used.

BONUS_MONTH

CHAR, 002

This is the month for which the bonus/commission pertains. Generally, you will have either a BONUS-MONTH or QUARTER recorded to further define the BONUS-YEAR.

BONUS_QUARTER

CHAR, 001

This is the quarter for which the bonus/commission pertains. Generally, you will have either a BONUS-QUARTER or MONTH recorded to further define the BONUS-YEAR.

BONUS_YEAR

CHAR, 002

This is the year for which the bonus was awarded or the commission calculated.

BOOKS_AMOUNT

NUMERIC, 06,2

This is the amount of reimbursement for book charges.

BOOKS_PERCENT
NUMERIC, 03,0

This is the percentage of reimbursement for book charges.

BREAK_REASON
VARCHAR, 020

This field displays the description from the option list translation of the B-I-S-INDICATOR code.

BUCKET_ID
CHAR, 1

This field denotes which bucket an earning is to be added to for CE/H processing.

BUDGET_COMP_SWI_DE
VARCHAR, 20

This switch determines whether the Budget Complement switch is turned on within the Position Administration module.

BUDGET_COMP_SWITCH
CHAR, 1

This switch determines whether the Budget Complement switch is turned on within the Position Administration module.

BUILD_ONLINE (*/ST* 3.0 and 4.0 only)
CHAR, 001

This indicates to the system whether or not this organization (Control 1-2) is to be copied to the on-line Employee Database.

N = Do not copy this organization to on-line file

Y or blank = Copy this organization to the on-line file

BUILD_QID
CHAR, 001

This field indicates whether ID alternate key records are to be built.

BUILD_QID_DESC
VARCHAR, 020

This field displays the description from the option list translation of the BUILD-QID code.

BUILD_QPE
CHAR, 001

This field indicates whether phonetic alternate key records are to be built.

BUILD_QPE_DESC

VARCHAR, 020

This field displays the description from the option list translation of the BUILD-QPE code.

C

CA_BENEFIT_NUMBER
VARCHAR, 011

This is used by companies with employees living in Canada to record the number pertaining to an employee's participation in any provincial (Medicare) health insurance plan. This number is entered left justified if less than 11 positions.

CALC_ACTION_CODE
CHAR, 001

This code identifies whether the employee is eligible for Enrollment or is to be De-enrolled from the Plan.

CALC_ACTION_CODE_D
VARCHAR, 020

This field displays the description from the option list translation of the CALC-ACTION-CODE.

CALC_ACTION_DATE
DATETIME

This is the date that was used during the calculation process. For example, if an employee is rehired on September 1 1999 and you enter the REHIRE command, then any RA segments produced will contain a CALC-ACTION-DATE of 09-01-99.

CATEGORY_CODE
CHAR, 002

This is the Category Code assigned to an earning or deduction. This may be used when making inquiries of the file in a batch report or with a QUERY. It CANNOT be used in a form or report that will update the file, as it is not associated with an option list.

CATEGORY_DESC
VARCHAR, 020

This field displays the description from the option list translation of the CATEGORY-CODE.

CATEGORY_HOLD
CHAR, 002

This field designates whether there is a category hold on the Hours, Earnings, or Deduction (HED).

CB_BOOKING_NBR
NUMERIC, 6,0

This is the booking number allocated by the system when employees are booked into a course. For each scheduled course, the booking number begins at 001 and will

increment by one for each employee booked onto the course. Booking numbers are not re-used within a course, even if employees are canceled from the course.

CB_CLASS

CHAR, 1

This is the class number of this course. This number must correspond to the class number of the course schedule.

CB_COURSE_ATTENDED

CHAR, 1

This indicates whether an employee has attended a course in which he or she was booked. This will automatically be set to 'Y' if course results and so forth are entered.

CB_COURSE_START

DATETIME

This is the start date of the course. This date must correspond to the start date from the course schedule.

CB_DATE_BOOKED

DATETIME

This is the current date when an employee is booked in a course. It is automatically updated.

CB_DATE_CONFIRMED

DATETIME

This is an optional field to enter the date a course booking is confirmed.

CB_MAJOR_MARK

CHAR, 3

This is the primary grade or mark the student received in this class.

CB_MINOR_MARK

CHAR, 3

This is the secondary grade the student received in this class if the instructor gives one.

CB_OUTCOME

CHAR, 1

This identifies whether or not the student successfully completed the class.

CB_OUTCOME_DESC

VARCHAR, 20

This field displays the description from the option list translation of the CB-OUTCOME code.

CB_PROG_SCHEDULE
CHAR, 5

This is the program number if the course booking was made via the program schedule.

CB_REGISTER_OPT
CHAR, 1

This field indicates if the student is registered or was canceled from this class.

CB_REGISTER_OPT_D
VARCHAR, 20

This field displays the description from the option list translation of the CB-REGISTER-OPT code.

CB_REQ_ELECT
CHAR, 1

This field identifies if the student is taking this class as a requirement or they have elected to take this class.

CB_REQ_ELECT_DSC
VARCHAR, 20

This field displays the description from the option list translation of the CB-REQ-ELECT code.

CB_TRAIN_LOC_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CB-TRAIN-LOCATION code.

CB_TRAIN_LOCATION
CHAR, 2

This location differentiates between the same courses being offered at different training centers within an organization.

CB_WAIT_LIST_DSC
VARCHAR, 20

This field displays the description from the option list translation of the CB-WAIT-LIST-IND code.

CB_WAIT_LIST_IND
CHAR, 1

This identifies if the student is on the wait list for this class.

CD_COST_1
NUMERIC, 7,2

This is the amount this item typically costs for this course.

CD_COST_CATEGORY1
CHAR, 1

This is a category of costs typically associated with this course.

CD_COST_CATEGORY1D
VARCHAR, 20

This field displays the description from the option list translation of the CD-COST-CATEGORY1 code.

CD_COST_TYPE_1
CHAR, 2

This identifies the specific type of cost usually incurred when running this course.

CD_COST_TYPE_1_DSC
VARCHAR, 20

This field displays the description from the option list translation of the CD-COST-TYPE-1 code.

CD_COURSE_CODE
CHAR, 6

This is the unique identifier for the course on the course directory.

CD_COURSE_CODE_DSC
VARCHAR, 20

This field displays the description from the option list translation of the CD-COURSE-CODE.

CD_COURSE_DATE
DATETIME

This is the effective date of a course definition.

CD_COURSE_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CD-COURSE-CODE.

CD_COURSE_DURATION
NUMERIC, 4,1

Course duration in days. Example: 2.5 days entered as ‘25’.

CD_COURSE_UNTIL
DATETIME

This is the ending date of the selected course.

CD_COURSE1
CHAR, 6

This is the first course in a program.

CD_COURSE1_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CD-COURSE1 code.

CD_MAX_STUDENTS
NUMERIC, 3,0

This is the maximum number of students who may attend this course. This is a mandatory field.

CD_MIN_STUDENTS
NUMERIC, 3,0

This is the minimum number of students required for the course to be conducted.

CD_PROFICIENCY_1
CHAR, 2

This is the competency at skill 1.

CD_PROFICIENCY_1_D
VARCHAR, 20

This field displays the description from the option list translation of the CD-PROFICIENCY-1 code.

CD_SKILL_1
CHAR, 6

This is one of the skills or competencies the student will learn by taking this course.

CD_SKILL_1_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CD-SKILL-1 code.

CD_TRAINING_AREA
CHAR, 2

This is the training area responsible for this course.

CD_TRAINING_AREA_D
VARCHAR, 20

This field displays the description from the option list translation of the CD-TRAINING-AREA code.

CE_COURSE_START
DATETIME

This is the start date of a scheduled class.

CE_EVAL_1_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_10_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_2_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_3_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_4_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_5_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_6_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_7_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_8_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_9_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CE-EVALUATION (1-10) code.

CE_EVAL_NUMBER
CHAR, 3

The sequential number assigned to this class evaluation.

CE_EVALUATION_1
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_10
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_2
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_3
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_4
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_5
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_6
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_7
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_8
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_EVALUATION_9
CHAR, 1

This field holds the results of how the student rated the class in this evaluation category.

CE_H_1000_HOUR_DT
DATETIME

This is the date on which the current 'plan year' Considered Hours Worked field reached 1000 hours.

This is system filled by the CONSID generator or may be manually entered. The E/H-1000-HOUR-DATE can be found only on the Plan Year End record (RECORD-TYPE = 0).

CE_H_EARN_BUCKET
CHAR, 001

This determines which of 36 buckets in earning is to be added to for CE/H processing. Bucket zero is not available for definition because it contains the overtime premium. Earnings with 01 Category Code must be coded to a bucket for proper accumulation.

CE_H_HOURS_CODE
VARCHAR, 020

This field contains the description of the option list translation of the CE/H-HOURS-ACCUMULAT code.

CE_H_HRS_ACCUMULAT
CHAR, 001

This relates to the earnings or deduction hours added to the CONSIDERED-HOURS-ACCUMULATOR. This field is used to define the eligible dollars and hours that are used for various benefit plan accumulations. The hours accumulator is a code that indicates whether the accumulation is for hours-worked, hours-paid, or both.

If you are using The Human Resource Management System, the Hours Accum field will reflect values selected by your benefits administrator.

CE_H_RECORD_DESC_H

VARCHAR, 20

This field displays the description from the option list translation of the CE-H-RECORD-TYPE-H code.

CE_H_RECORD_TYPE

CHAR, 1

This code identifies whether the CE/H record is a Year to Date, Detail FICA, or From Date of Hire record.

CE_H_RECORD_TYPE_D

VARCHAR, 20

This field displays the description from the option list translation of the CE-H-RECORD-TYPE code.

CE_H_RECORD_TYPE_H

CHAR, 1

This code defines the FICA-HI Considered Earnings/ Hours Accumulator type, such as year-to-date.

CERT_LICENSE_PERM

VARCHAR, 020

This field displays the description from the option list translation of the CLP-TYPE code.

CHANGE

VARCHAR, 20

This field displays the description from the option list translation of the CHANGE-TYPE code.

CHANGE_DATE

DATETIME

This is the effective date of the history and/or labor transaction.

CHANGE_TYPE

VARCHAR, 3

This code identifies the reason the Job Assignment change is taking place.

CHECK_OPT01

CHAR, 001

This is used to authorize the printing of CONTROL-1 as part of the Distribution-Line detail, which prints above the Name/Address lines on the face of the Pay Document.

Y = Print

N = Do Not Print

CHECK_OPT02

CHAR, 001

This is used to authorize the printing of CONTROL-2 as part of the Distribution-Line detail, which prints above the Name/Address lines on the face of the Pay Document.

Y = Print

N = Do Not Print

CHECK_OPT03

CHAR, 001

This is used to authorize the printing of CONTROL-3-CODE as part of the Distribution-Line detail, which prints above the Name/Address lines on the face of the Pay Document.

Y = Print

N = Do Not Print

CHECK_OPT04

CHAR, 001

This is used to authorize the printing of CONTROL-4-CODE as part of the Distribution-Line detail, which prints above the Name/Address lines on the face of the Pay Document.

Y = Print

N = Do Not Print

CHECK_OPT05

CHAR, 001

This is used to authorize the printing of CONTROL-5-CODE as part of the Distribution-Line detail, which prints above the Name/Address lines on the face of the Pay Document.

Y = Print

N = Do Not Print

CHECK_OPT06

CHAR, 001

This is used to authorize the printing of CONTROL-6-CODE as part of the Distribution-Line detail, which prints above the Name/Address lines on the face of the Pay Document.

Y = Print

N = Do Not Print

CHECK_OPT07

CHAR, 001

This is used to authorize the printing of FUNCTION-CODE as part of the Distribution-Line detail, which prints above the Name/Address lines on the face of the Pay Document.

Y = Print

N = Do Not Print

CHECK_OPT08

CHAR, 001

This is used to identify which Control value to print on the stub of the Pay Document in the 'Dept' box.

CHECK_OPT08_DESC

VARCHAR, 020

This field displays the description from the option list translation of the CHECK_OPT08.

CHECK_OPT09

CHAR, 001

This is used to identify if the detail of earnings with year-to-date balances and no current amounts should be printed or summarized as 'OTHER'.

Y = Print Detail

N = Summarize as 'OTHER'

CHECK_OPT10

CHAR, 001

This is used to identify if the detail of Deductions with year-to-date balances and no current amounts should be printed or summarized as 'OTHER'.

Y = Print Detail

N = Summarize as 'OTHER'

CHECK_OPT11

CHAR, 001

This authorizes the printing of the Pay Period Beginning Date.

Y = Print

N = Do Not Print

CITIZEN_COUNTRY

VARCHAR, 020

This field displays the description from the option list translation of the CITIZENSHIP-CODE.

CITIZENSHIP_CODE
CHAR, 002

This is the code of the country where the employee holds citizenship.

CITY
VARCHAR, 020

This is the city in which the employee resides.

CITY_STATE_PROV
VARCHAR, 025

This field contains the city and state portion of the address where the employee or applicant lives.

CLAIM_NUMBER
VARCHAR, 012

This is the CLAIM-NUMBER associated with the injury.

This number can contain letters and dashes, if appropriate. An example of this entry: ‘BA3344-00266’.

CLEAR_ALL_FREQ_CD
CHAR, 001

This tells the system which employees are to be cleared when the CLEAR-TO-DATE option is selected on the AE-SCR.

Y = Clear All Frequencies on Pay Run (Default)

N = Clear Paid Frequencies Only

CLEAR_ALL_FREQ_DES
VARCHAR, 020

This field displays the description from the option list translation of the CLEAR-ALL-FREQ-CODE.

CLEAR_ANNIV
CHAR, 001

This is the clear employee anniversary switch used in Payroll processing.

CLEAR_THEN_ADJ_DES
VARCHAR, 020

This is the clear employee anniversary switch used in Payroll processing.

CLEAR_THEN_ADJUST
CHAR, 001

This is the clear employee anniversary switch used in Payroll processing.

CLEARANCE
VARCHAR, 020

This is the clear employee anniversary switch used in Payroll processing.

CLEARING_AGENCY
VARCHAR, 020

This is the clear employee anniversary switch used in Payroll processing.

CLP_DATE_EXPIRED
DATETIME

This is the clear employee anniversary switch used in Payroll processing.

CLP_DATE_RECORDED
DATETIME

This is the clear employee anniversary switch used in Payroll processing.

CLP_NUMBER
CHAR, 010

This is the clear employee anniversary switch used in Payroll processing.

CLP_STATE_PROV
VARCHAR, 020

This is the clear employee anniversary switch used in Payroll processing.

CLP_STATE_PROV_CD
CHAR, 002

This is the clear employee anniversary switch used in Payroll processing.

CLP_STATUS
VARCHAR, 020

This is the clear employee anniversary switch used in Payroll processing.

CLP_STATUS_CODE
CHAR, 001

This is the clear employee anniversary switch used in Payroll processing.

CLP_TYPE
CHAR, 004

This is the clear employee anniversary switch used in Payroll processing.

CMP_UNIT_ID_SWI_DE
VARCHAR, 20

This is the clear employee anniversary switch used in Payroll processing.

CMP_UNIT_ID_SWITCH
CHAR, 1

This determines what type of complement unit is being used (FTE, HC or Hours) for complement control. This is used with the Position Administration module.

CNTRY_LOCATION_DES (*/ST* 3.0 and 4.0 only)
VARCHAR, 020

This field displays the description from the option list translation of the COUNTRY_LOCATION code.

CO_CATEGORY_CD
CHAR, 002

This option indicates the organization (Control 1-2) category. This option is used in relationship with the Country Option during a payrun to determine whether or not pay should be calculated.

Category Options are used to further define a Country Option for an organization (Control 1-2) and determine if payroll checks can be produced for its Master records.

Options 01-50 produce pay checks.

Options 51 99 do NOT produce pay checks.

CO_KEY_SEPARATOR
CHAR, 1

This is a unique identifier that allows up to nine occurrences per coordinator.

CO_ORD_ADDR1
VARCHAR, 27

This is the coordinator address line 1.

CO_ORD_ADDR2
VARCHAR, 27

This is the coordinator address line 2.

CO_ORD_ADDR3
VARCHAR, 27

This is the coordinator address line 3.

CO_ORD_COURSE_1
CHAR, 6

This is the unique identifier for the course on the course directory.

CO_ORD_COURSE_1_DE
VARCHAR, 20

This field displays the description from the option list translation of the CO-ORD-COURSE-1 code.

CO_ORD_FAX_NUMBER

CHAR, 15

This is the fax number of the coordinator.

CO_ORD_NAME

VARCHAR, 25

This is the name of the coordinator.

CO_ORD_PHONE

VARCHAR, 15

This is the telephone number of the coordinator.

CO_ORD_PHONE_EXT

CHAR, 4

This is the telephone extension of the coordinator.

CO_ORD_POST_ZIP

VARCHAR, 12

The postal code of the coordinator.

CO_ORD_TYPE

CHAR, 2

This is the coordinator type.

CO_ORD_TYPE_DESC

VARCHAR, 20

This field displays the description from the option list translation of the CO-ORD-TYPE code.

CO_ORDINATOR

CHAR, 5

This is the unique identifier of the coordinator, which can be a name or an organization.

CO_ORDINATOR_DESC

VARCHAR, 20

The description of the coordinator.

CO_STOP_DATE_1

DATETIME

This is the date on which the coordinator stopped coordinating activities for this course.

COMMISION_DESC
VARCHAR, 20

This field displays the description from the option list translation of the Commission Flag. It represents the commission at the time of the selected History and/or Labor record.

COMMISION_FLAG
CHAR, 001

This specifies whether overtime calculation for the employee comes under the US Fair Labor Standards Act.

If FLSA does apply, enter the calculation method code used for this employee. This code can be set up at the company level through the FLSA Method Code field (AF-SCR).

Use the FAIR-LABOR-CODE field in a situation in which the overtime calculation method for a particular employee differs from the method established at the company level.

COMP_CONT_SWITCH_D
VARCHAR, 20

This field displays the description from the option list translation of the COMP-CONTROL-SWITC code.

COMP_CONTROL_SWITC
CHAR, 1

This field determines whether the Complement Control switch is turned on or off. Used with the Position Administration module.

COMPA_RATIO
NUMERIC, 03,2

This is the ratio of the employee's salary compared to the midpoint of the salary range. This ratio is automatically calculated by the system and cannot be overridden.

COMPANY_ADDRESS
VARCHAR, 30

This specifies the first line of the address of the corporation or company.

COMPANY_ADDRESS_2
VARCHAR, 30

This specifies the second line of the address of the corporation or company.

COMPANY_CATEGORY
VARCHAR, 020

This field displays the description from the option list translation of the COMPANY-CATEGORY-CD.

COMPANY_CITY
VARCHAR, 25

This is the city in which the corporation or company is located.

COMPANY_NAME
VARCHAR, 60

This is used to specify the corporation title as it is to appear on line one of all reports (including government reports). This entry is required when setting up an organization or changing an organization's name.

COMPANY_NAME_2
VARCHAR, 30

This is used to specify the division plant or company name as it is to appear on line two of all payroll reports.

COMPANY_TAX_ID
CHAR, 007

This field is a combination of the TAX-TYPE and TAX- CODE.

COMPANY_VERSION
CHAR, 2

This field is used to specify the company file version.

CONSIDERED_EARNING
NUMERIC, 13,2

This is the total earnings accumulated for the period according to the definition of considered Earnings on the Accumulator's TO Table.

If the CE/H-RECORD-TYPE = 0 (year to Date record), this field contains the Total Year to Date considered earnings.

CONSIDERED_HRS_PD
NUMERIC, 8,2

This is the total hours paid for the period, according to the definition of considered hours paid on the Accumulator's TO Table.

If the CE/H-RECORD-TYPE = 0 (Year to Date record), this field contains the total Year to Date considered hours paid.

CONSIDERED_HRS_WKD
NUMERIC, 8,2

This is the total hours worked for the period according to the definition of considered hours worked on the Accumulator's TO Table.

If the CE/H-RECORD-TYPE = 0 (Year to Date record), this field contains the total Year to Date considered Hours worked.

CONT_CITY_ST_PROV
VARCHAR, 025

This is the city and state portion of the emergency contact's address.

CONTACT_ADDRESS_1
VARCHAR, 030

This is the street address portion of the emergency contact's address.

CONTACT_CONFID_CD
CHAR, 001

This one-character field indicates if the contact address can be used to send confidential information to the employee.

CONTACT_CONFIDENT
VARCHAR, 020

This field displays the description from the option list translation of the CONTACT-CONFIDENT code.

CONTACT_EFFECTIVE
DATETIME

This six-character field contains the date the employee contact information becomes effective.

CONTACT_EXPIRED
DATETIME

This six-character field contains the date the employee contact information expires. This field can be entered later after this date is known.

CONTACT_INFO
VARCHAR, 050

This field contains employee contact information.

CONTACT_SEQUENCE
NUMERIC, 02,0

This two-character field indicates the contact sequence for an employee. For example, which address should be used first, second, and so forth.

If you are not using the Workflow Solution, this field is user-defined.

CONTACT_TYPE
VARCHAR, 020

This 20-character field contains the description associated with the Contact Type Code (CONTACT- TYPE-CODE) from Option List HR71.

CONTACT_TYPE_CD
CHAR, 002

This two-character field contains the type of contact such as email, FAX, cellular phone, and so forth.

CONTACT_UNLIST_CD
CHAR, 001

This field displays the description from the option list translation of the CONTACT-UNLISTED code.

CONTACT_UNLISTED
VARCHAR, 020

This one-character field indicates if the contact information should be made available to others without the employee's permission.

CONTACT_ZIP_POST
VARCHAR, 12

This is the postal code portion of the emergency contact's address.

CONTRIB_ACTION
CHAR, 001

This value identifies whether contributions/coverages available under a Plan have been Accepted, Overridden, or Rejected. A value must be entered in this field or the form entry will be rejected.

CONTRIB_ACTION_1
CHAR, 001

This value identifies whether contributions/coverages available under a Plan have been Accepted, Overridden, or Rejected.

CONTRIB_ACTION_1_D
VARCHAR, 020

This field displays the description from the option list translation of the CONTRIB-ACTION-1 code.

CONTRIB_ACTION_DES
VARCHAR, 020

This field displays the description from the option list translation of the CONTRIB-ACTION code.

CONTRIB_AMOUNT_1
NUMERIC, 07,2

This is the annualized employee deduction for Basic Post-Tax Contributions for a Benefit Plan. This value is system calculated and retained on this segment.

CONTRIB_FACTOR_1

NUMERIC, 10,2

This is a NUMERIC value used in an arithmetic formula (as described by the Contrib Rule) to calculate the contribution paid towards a Benefit Plan.

CONTRIB_FACTOR_2

NUMERIC, 10,2

This is a NUMERIC value used in an arithmetic formula (as described by the Contrib Rule) to calculate the contribution paid towards a Benefit Plan.

CONTRIB_HED_NAME

VARCHAR, 015

This is the name of the Contribution HED.

CONTRIB_HED_XREF

NUMERIC, 03,0

This is derived by system processing and contains the Hours, Earnings, or Deduction Number that is to be used to take the contribution as a payroll deduction. The specific Hours, Earnings, or Deduction Number is determined by the source of funds used as contributions for the plan (see CONTRIB_TYPE). The Hours, Earnings, or Deduction must have been defined at the company level (A8 segment), and must be indicated on the TK table record for the Plan.

CONTRIB_RSLT_FREQ

CHAR, 1

This code represents the frequency of the contribution amount, as defined by the Plan documents. The system translates the results to the appropriate deduction frequency.

CONTRIB_RULE_DESC

VARCHAR, 20

This field displays the description from the option list translation of the CONTRIBUTION_RULE.

CONTRIB_TYPE

CHAR, 1

This indicates the source of funds used as contributions in a Q8 segment containing Welfare benefits plan coverage and contribution information.

CONTRIB_TYPE_CD

CHAR, 1

This code is used to establish multiple TS Table entries for different types of Hours Earnings or Deduction (HEDs).

CONTRIBUTION-TYPE HED TYPE:

1 - Basic Post HED

2 - Suppl Post HED

3 - Company HED

4 - Basic Pre HED

5 - Suppl Pre

CONTRIB_TYPE_QA

CHAR, 001

This indicates the source of funds maintained in a QA segment that contains thrift/savings plan investment fund allocations and combined contribution percentage for a specific source of funds.

CONTRIB_TYPE_QC

CHAR, 001

This indicates the source of funds maintained in a QC segment that contains thrift/savings plan withdrawal activity details.

CONTRIB_TYPE_QD

CHAR, 001

This indicates the source of funds maintained in a QD segment that contains thrift/savings plan fund transfer activity details.

CONTRIBUTION

VARCHAR, 20

This field displays the description from the option list translation of the CONTRIB-TYPE code.

CONTRIBUTION_AMT

NUMERIC, 07,2

This is the annualized employee deduction or company contribution for a Welfare Benefit Plan. This value is system calculated based upon rules entered on the TM Table (PLAN_ID, OPTION_ELECTED and CONTRIB_RESULT_FREQ) and possibly other employee level data.

This CONTRIBUTION_AMOUNT is then de-annualized to the employee's frequency to determine the amount of the employee's actual deduction and company accrual. This value can be overridden by entering a '0' in the CONTRIB_ACTION field.

CONTRIBUTION_QA

VARCHAR, 020

This field displays the description from the option list translation of the CONTRIB-TYPE-QA code.

CONTRIBUTION_QC

VARCHAR, 020

This field displays the description from the option list translation of the CONTRIB-TYPE-QC code.

CONTRIBUTION_QD

VARCHAR, 020

This field displays the description from the option list translation of the CONTRIB-TYPE-QD code.

CONTRIBUTION_RULE

CHAR, 2

This is a user-defined code which identifies a particular calculation formula used to determine the employee contribution amount towards a Benefit Plan.

CONTROL_1

CHAR, 2

This represents the highest level of control in your organization hierarchy. For example, CONTROL-1 usually refers to the corporate or legal entity level.

The CONTROL-1 is paired with the CONTROL-2 value to form the compound field called CONTROL-1-2. This compound field (CONTROL-1-2) is used as the company number throughout the system, and appears on the heading of all Cyborg reports.

CONTROL_1_NAME

VARCHAR, 12

This provides the system with a description of the highest organizational level within a company or legal entity. This field entry appears on reports as the descriptive name of the level (for example, CORPORATION).

CONTROL_2

CHAR, 4

This represents the second level of control in your organization's hierarchy. For example, CONTROL-2 usually refers to the organization or division level within a corporation or legal entity.

The CONTROL-2 is paired with the CONTROL-1 value to form the compound field called CONTROL-1-2.

This compound field (CONTROL-1-2)is used as the organization number throughout the system, and appears on the heading of all Cyborg reports.

CONTROL_2

CHAR, 004

This represents the second level of control in your organization's hierarchy. For example, CONTROL-2 usually refers to the organization or division level within a corporation or legal entity.

The CONTROL-2 is paired with the CONTROL-1 value to form the compound field called CONTROL-1-2.

This compound field (CONTROL-1-2)is used as the organization number throughout the system, and appears on the heading of all Cyborg reports.

CONTROL_2_NAME

VARCHAR, 12

This provides the system with a description of the second organizational level within a company or legal entity. This field entry appears on reports as the descriptive name of the level (for example, DIVISION).

CONTROL_3

VARCHAR, 020

This field displays the description from the option list translation of the CONTROL-3-CODE. It represents the employee's Control 3 name at the time of the selected History and/or Labor record.

CONTROL_3_CODE

CHAR, 004

This option is used along with Payroll Level 4 through Payroll Level 6 options to describe the location to which the employee's labor is to be charged.

These fields supply the detail information for the generic control levels set up with the AA-SCR.

For example, if the control levels 3 through 6 are defined on the Company Name and Address form as Division, Department, Section, and Group, respectively, the Payroll Level 3 Option specifies the particular division in which the employee works.

Finally, the entry of four asterisks (****) in this field prevents the creation of labor records for this location.

CONTROL_3_NAME

VARCHAR, 12

This is the name of the third Payroll level of your enterprise. The first four characters of this field entry appear on reports as the descriptive name for this Payroll level.

This field entry appears on reports as the descriptive name of the level (for example, an entry of REGION would appear as REGI).

CONTROL_3_SWITCH

CHAR, 1

This value indicates how information entered in the CONTROL-THREE field on employee-level forms should be handled.

CONTROL_4

VARCHAR, 020

This field displays the description from the option list translation of the CONTROL-4-CODE. It represents the employee's Control 4 name at the time of the selected History and/or Labor record.

CONTROL_4_CODE

CHAR, 004

This option is used along with Payroll Level 3, Payroll Level 5 and Payroll Level 6 to describe the location to which the employee's labor is to be charged.

These fields supply detail information for the generic Control levels set up with the Company Name and Address form.

For example, if CONTROLs-3 through -6 are defined on the AA-SCR as Division, Department, Section, and Group, respectively, CONTROL-4-CODE specifies the particular department in which the employee works.

CONTROL_4_NAME

VARCHAR, 12

This is the name of the fourth Payroll level of your enterprise. The first four characters of this field entry appear on reports as the descriptive name for this Payroll level.

This field entry appears on reports as the descriptive name of the level (for example, an entry DEPARTMENT would appear as DEPA).

CONTROL_4_SWITCH

CHAR, 1

This value indicates how information entered in the Control Four field on employee-level forms should be handled.

CONTROL_4_SWITCH_D

VARCHAR, 20

This field displays the description from the option list translation of the CONTROL-4-SWITCH Code.

CONTROL_5

VARCHAR, 020

This field displays the description from the option list translation of the CONTROL-5-CODE. It represents the employee's Control 5 name at the time of the selected History and/or Labor record.

CONTROL_5_CODE

CHAR, 004

This option is used along with Payroll Level 3, Payroll Level 4 and Payroll Level 6 to describe the location to which the employee's labor is to be charged.

These fields supply detail information for the generic Control levels set up on the Company Name and Address form.

For example, if Payroll Level 3 through 6 are defined on the Company Name and Address form as Division, Department, Section, and Group, respectively, Payroll Level 5 specifies the particular section in which the employee works.

CONTROL_5_NAME

VARCHAR, 12

This is the name of the fifth Payroll level of your enterprise. The first four characters of this field entry appear on reports as the descriptive name for this Pay level.

This field entry appears on reports as the descriptive name of the level (for example, an entry of SECTION would appear as SECT).

CONTROL_5_SWITCH

CHAR, 1

This value indicates how information entered in the Control Five field on employee-level forms should be handled.

CONTROL_5_SWITCH_D

VARCHAR, 20

This field displays the description from the option list translation of the CONTROL-5-SWITCH Code.

CONTROL_6

VARCHAR, 020

This field displays the description from the option list translation of the CONTROL-6-CODE. It represents the employee's Control 6 name at the time of the selected History and/or Labor record.

CONTROL_6_CODE

CHAR, 004

This option is used along with the Payroll Level 3, Payroll Level 4, and Payroll Level 5 to describe the location to which the employee's labor is to be charged.

These fields supply detail information for the generic Control levels set up with the Company Name and Address form.

For example, if Payroll Level 3 through 6 are defined on the Company Name and Address form as Division, Department, Section, and Group, respectively, Payroll Level 6 specifies the particular group in which the employee works.

CONTROL_6_NAME

VARCHAR, 12

This is the name of the sixth Payroll level of your enterprise. The first four characters of this field entry appear on reports as the descriptive name for this Payroll level.

This field entry appears on reports as the descriptive name of the level (for example, an entry of BUILDING would appear as BUIL).

CONTROL_6_SWITCH

CHAR, 1

This value indicates how information entered in the CONTROL-SIX field on employee-level forms should be handled.

CONTROL_FIVE
VARCHAR, 020

This field displays the description from the option list translation of the CTRL-FIVE code.

CONTROL_FOUR
VARCHAR, 020

This field displays the description from the option list translation of the CTRL-FOUR code.

CONTROL_NBR
CHAR, 4

This is a control number used to individualize sets of benefit plans. The entry is validated against the AY Company-level record using the information in THIS-C1 C2. The purpose of this field is to allow the sharing of common benefit plans among multiple companies.

CONTROL_NUMBER
CHAR, 4

This is a required field. Type the accrual control number that represents the organization or company to which you want to assign the accrual routine. This number must have been entered previously on the Company-To-Rules Cross-Ref For Accrual Selection form.

The accrual control number is initially assigned to an organization or organizations on the cross-reference form. When the accrual control number is later listed with an accrual routine on this form, it tells the ACCRUE program which organization or organizations will use this routine. In other words, the accrual routine control number links the organization or organizations to which it was previously assigned on the Company-To-Rules Cross-Ref For Accrual Selection form with the detailed information being established on the Accrual Routine Selection Criteria form.

CONTROL_SIX
VARCHAR, 020

This field displays the description from the option list translation of the CTRL-SIX code.

CONTROL_SIX_SWITCH
VARCHAR, 20

This value indicates how information entered in the CONTROL-SIX field on employee-level forms should be handled.

CONTROL_THREE
VARCHAR, 020

This field displays the description from the option list translation of the CTRL-THREE code.

CONTROL_THREE_SWIT
VARCHAR, 20

This value indicates how information entered in the CONTROL-THREE field on employee-level forms should be handled.

CONTROL-1 PI_EE_NO
VARCHAR, 10

This is a 10 digit space for employee number. This is used with the Position Administration module.

COST_CALC
CHAR, 1

This code identifies the method of calculating the cost or credits for the Plan option defined on the TM Table.

COST_CALCULATION
VARCHAR, 20

This field displays the description from the option list translation of the COST-CALC code.

COUNTRY_CODE
CHAR, 001

This code indicates the country in which the organization (Control 1-2) is based. This code is used in conjunction with the COMPANY-CATEGORY-CD which can specify pay categories within a Country Code.

COUNTRY_ID
CHAR, 1

This code indicates the country in which the employee's organization (Control 1-2) is based when the Considered Earnings/Hours Accumulator was created.

COUNTRY_ID
CHAR, 1

This code indicates the country in which the employee's organization (Control 1-2) is based when the Considered Earnings/Hours Accumulator was created.

COUNTRY_LOCATION (*/ST* 3.0 and 4.0 only)
CHAR, 003

The value in this drop down box specifies the country in which the organization is located.

COURSE_ATTENDED
CHAR, 1

This indicates whether the employee attended the course or not.

COURSE_ATTENDED_D
VARCHAR, 20

This field displays the description from the option list translation of the COURSE-ATTENDED code.

COURSE_COMMENTS
VARCHAR, 54

These are any comments the employee would like to record against the course.

COURSE_COMP_DT
DATETIME

This is the date on which the training course was completed and attendees dismissed. It will be blank for a course that is scheduled but not yet taken, or if the employee did not attend.

COURSE_COORD
CHAR, 5

This is the coordinator of the course. If the COURSE- COORD-C1-2 field is entered, this field will either reference the provider index to validate the coordinator or check if the coordinator is an employee.

COURSE_COORD_DESC
VARCHAR, 20

This field displays the description from the option list translation of the COURSE-COORD code.

COURSE_DESCRIPTION
VARCHAR, 54

This is a brief description of the course.

COURSE_END_DATE
DATETIME

This is the date on which the course ends.

COURSE_EVALUATE_CD
CHAR, 001

This code represents the employee's evaluation of the course. It is used to determine if a course should be continued or if a course would be beneficial for other employees.

COURSE_EVALUATION
VARCHAR, 020

This field displays the description from the Option list translation of the COURSE-EVALUATION-CD.

COURSE_GRADE
NUMERIC, 03,2

This is the grade the employee earned for the course.

COURSE_INSTRCTR_CD
CHAR, 002

This code identifies the instructor of the course.

COURSE_INSTRUCTOR
VARCHAR, 020

This field displays the description from the option list translation of the COURSE-INSTRUCTOR-CD code.

COURSE_LEVEL
CHAR, 1

This is the level required before a course can be attempted.

COURSE_LEVEL_DESC
VARCHAR, 20

This field displays the description from the option list translation of the COURSE-LEVEL code.

COURSE_LOCATION
VARCHAR, 020

This field displays the description from the option list translation of the COURSE-LOCATION-CODE.

COURSE_LOCATION_CD
CHAR, 004

This code identifies the physical location of where the training course was held. This option list may be defined as a holding code equal to school codes or Control 3 or 4, or it may be a combination.

COURSE_NBR_BOOKED
NUMERIC, 3,0

This is the number of people booked to attend a course.

COURSE_NO_ATTEND
NUMERIC, 3,0

The number of people who have attended the course.

This is calculated when results are entered, or if the course attended indicator is set to ‘Y’ on the employee’s training history.

COURSE_NUMBER_CODE

CHAR, 001

This is a unique value for each course taken in a semester/quarter allowing for separate reimbursement records when more than one course is attended within the same term.

COURSE_RESULT

CHAR, 1

This is the result of the employee's participation in the course.

COURSE_RESULT_DESC

VARCHAR, 20

This field displays the description from the option list translation of the COURSE-RESULT code.

COURSE_START_DATE

DATETIME

This is the date the training course is/was scheduled to begin. This is the future date if the course status is scheduled instead of taken.

COURSE_STATUS

CHAR, 1

This is the status of a scheduled course.

COURSE_STATUS_DESC

VARCHAR, 20

This field displays the description from the option list translation of the COURSE-STATUS code.

COURSE_SUBJECT

CHAR, 3

This is the general subject area addressed in this course.

COURSE_SUBJECT_DSC

VARCHAR, 20

This field displays the description from the option list translation of the COURSE-SUBJECT code.

COURSE_TITLE

VARCHAR, 015

This is the title of the course taken by the employee this semester/quarter. However, the COURSE-NUMBER- CODE assigned by the school may be entered here when it is necessary to track multiple attempts at the same course.

COURSE_TYPE

CHAR, 2

This is the type of course instruction—for example, CBT or lecture.

COURSE_TYPE_DESC

VARCHAR, 20

This field displays the description from the option list translation of the COURSE-TYPE code.

COVERAGE

VARCHAR, 20

The translation of the COVERAGE-RULE code that identifies a particular calculation formula used to determine the coverage amount of a benefit plan for an individual employee.

COVERAGE_AMOUNT_1

NUMERIC, 07,0

This is the level of benefit indicated by the plan rules, using employee data and table data to perform the calculation. It can be directly entered instead of calculated if proper authorization exists to do so. For example, the plan rules for a Group Term Insurance plan might provide for coverage equal to two and one half times the employee's annual salary equivalency. If an employee earns $12,000 per year, the Coverage Amount would be calculated as $30,000 under the plan.

COVERAGE_AMOUNT_2

NUMERIC, 07,0

This is an extension of COVERAGE-AMOUNT-1.

No system calculated values are stored in this field. Therefore, you can use this field to store additional coverage amounts in the case where a Plan has more than one coverage amount. For example, in a Dependent Life Insurance plan, a spouse might be entitled to 50% of the employee's life insurance benefit.

For that plan, the COVERAGE-AMOUNT-1 field would store the employee's coverage amount and the COVERAGE-AMOUNT-2 field could be used to store the spouse's coverage amount.

COVERAGE_DATE

DATETIME

This is the effective date of a Q8 segment containing Welfare benefits plan coverage and contribution information.

COVERAGE_FACTOR_1

NUMERIC, 10,2

This NUMERIC value is used in an arithmetic formula (as described by the COVERAGE-RULE) to calculate the coverage amount of a benefit plan for an individual employee.

COVERAGE_FACTOR_2

NUMERIC, 10,2

This NUMERIC value is used in an arithmetic formula (as described by the COVERAGE-RULE) to calculate the coverage amount of a benefit plan for an individual employee.

COVERAGE_FACTOR_3

NUMERIC, 10,2

This NUMERIC value is used in an arithmetic formula (as described by the COVERAGE-RULE) to calculate the coverage amount of a benefit plan for an individual employee.

COVERAGE_RULE

CHAR, 2

This code identifies the calculation formula used to determine the coverage amount of a benefit plan for an individual employee. This field is required only if the plan is defined as a life insurance or disability plan where the coverage amount is to be recorded or used to calculate a contribution amount due to participation in a plan. For example, coverage H1 can be defined as COVERAGE_FACTOR_1 times the ANNUAL_SALARY.

The maximum would be COVERAGE_FACTOR_2 and minimum COVERAGE_FACTOR_3.

COVERAGE_UNTIL

DATETIME

This is the ending effective date of the selected employee benefit plan.

COVR_AREA_IND_PI

CHAR, 1

This field indicates whether and employee or covered dependent is out of area as it relates to HIPAA.

COVR_CERTISSUED_PI

CHAR, 1

This fields designates whether a HIPAA certificate has been issued to the employee.

COVR_START_DATE_PI

DATETIME

This field is the date (stored in the century/complement date format) for which an employee's HIPAA coverage starts.

COVR_STOP_DATE_PI
DATETIME

This field is the date (stored in the century/complement date format) for which an employee's HIPAA coverage ends.

CPP_QPP_DEDUCT
NUMERIC, 11,2

This field stores the deduction amount if the employee is subject to Quebec or Canada Pension Plan contributions.(Canadian field.)

CPP_QPP_DEDUCT_CUR
NUMERIC, 11,2

This field stores the current deduction amount if the employee is subject to Quebec or Canada Pension Plan contributions.(Canadian field.)

CPP_QPP_DEDUCT_MTD
NUMERIC, 11,2

This field stores the Month to Date deduction amount if the employee is subject to Quebec or Canada Pension Plan contributions.(Canadian field.)

CPP_QPP_DEDUCT_QTD
NUMERIC, 11,2

This field stores the Quarter to Date deduction amount if the employee is subject to Quebec or Canada Pension Plan contributions.(Canadian field.)

CPP_QPP_DEDUCT_YTD
NUMERIC, 11,2

This field stores the Year to Date deduction amount if the employee is subject to Quebec or Canada Pension Plan contributions.(Canadian field.)

CPP_QPP_IND
VARCHAR, 020

This field displays the description from the option list translation of the Unemployment Code.

CPP_QPP_IND_CODE
CHAR, 001

This code indicates whether unemployment/disability should be accumulated for this employee in this tax body. Whenever the RESIDENT-CODE is set up, this field is automatically set to '0' or '1', based on the contents of the DEFAULT-UNEMPLOYMENT-CODE field on the AF-SCR form.

CPP_QPP_WAGES
NUMERIC, 11,2

This field stores the employee's pensionable wages. (Canadian field.)

CPP_QPP_WAGES_CUR
NUMERIC, 11,2

This field stores the employee's current pensionable wages.(Canadian field.)

CPP_QPP_WAGES_MTD
NUMERIC, 11,2

This field stores the employee's Month to Date pensionable wages.(Canadian field.)

CPP_QPP_WAGES_QTD
NUMERIC, 11,2

This field stores the employee's Quarter to Date pensionable wages.(Canadian field.)

CPP_QPP_WAGES_YTD
NUMERIC, 11,2

This field stores the employee's Year to Date pensionable wages.(Canadian field.)

CRED_CALC_CODE_1
CHAR, 2

This code identifies the first of a series of calculated amounts which make up an employee's total flex credits.

CRED_CC_DESC1
VARCHAR, 20

This field displays the description from the option list translation of the CREDIT-CALC-CODE.

CREDIT
CHAR, 008

This is the value of the employee's years months and days of credited Benefit Service in a deferred benefits plan.

CREDIT_HRS_COMP
NUMERIC, 03,0

This is the number of credit hours completed by the employee at the school defined by the SCHOOL-CODE.

CREDIT_HRS_REQ
NUMERIC, 03,0

This is the number of required credit hours completed before the degree defined by the EDUCATION-LEVEL code is granted.

CROSS_REF_DATE
DATETIME

This is the effective date of the Table entry.

CROSS_REF_UNTIL
DATETIME

The is the ending effective date of the table entry.

CS_CLASS
CHAR, 1

Class is used to uniquely identify multiple occurrences of the same course on the same day.

CS_COST_1
NUMERIC, 7,2

This is the amount this item cost for this class.

CS_COST_CATEGORY1
CHAR, 1

This is a category of costs typically associated with this class.

CS_COST_CATEGORY1D
VARCHAR, 20

This field displays the description from the option list translation of the CS-COST-CATEGORY1 code.

CS_COST_TYPE_1
CHAR, 2

This field displays the cost type associated with the class.

CS_COST_TYPE_1_DSC
VARCHAR, 20

This field displays the description from the option list translation of the CS-COST-TYPE-1 code.

CS_COURSE_DURATION
NUMERIC, 4,1

This is the course duration in hours. Example: 2.5 hours entered as ‘25’. If not entered, CD-COURSE-DURATN from the course directory will be defaulted into the field.

CS_COURSE_START
DATETIME

This is the start date of a scheduled course.

CS_DAY_DETAILS_1
CHAR, 10

This is the day or days of the class on which the other time schedule-1 details apply.

CS_END_TIME_1
CHAR, 5

This is the ending time of the class. This must be entered as HH:MM.

CS_LOCATION_1
CHAR, 3

This is the facility where the class will be held.

CS_LOCATION_1_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CS-LOCATION-1 code.

CS_MAX_STUDENTS
NUMERIC, 3,0

This is the maximum number of students who may attend this course. If not entered, the CD-MAX- STUDENTS from the course directory is defaulted into the field.

CS_MIN_STUDENTS
NUMERIC, 3,0

This is the minimum number of students required for a course to be run. If not entered, the CD-MIN- STUDENTS from the course directory is defaulted into the field.

CS_ROOM_1
CHAR, 4

The room where the class is held.

CS_SESSION
CHAR, 2

This is used to uniquely identify multiple occurrences of the same course on the same day.

CS_START_TIME_1
CHAR, 5

This is the starting time of the class. This is must be entered as HH:MM.

CS_TRAIN_LOC_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CS-TRAIN-LOCATION code.

CS_TRAIN_LOCATION
CHAR, 2

This location differentiates between the same courses being offered at different training centers within an organization.

CS_TRAINER
CHAR, 10

This is the trainer for the course. If the TRAINER-C1-2 field is entered, this field will either reference the provider index to validate the trainer or check if the trainer is an employee.

CS_TRAINER_DESC
VARCHAR, 20

This field displays the description from the option list translation of the CS-TRAINER code.

CS_TRAINING_AREA
CHAR, 2

This is the training area of the course. If not entered, the CD-TRAINING-AREA from the course directory will be defaulted into the field.

CS_TRAINING_AREA_D
VARCHAR, 20

This field displays the description from the option list translation of the CS-TRAINING-AREA code.

CTRL_FIVE
CHAR, 004

This is the Human Resource Control Five value assigned this employee. This organization level may be translated to a division, plant site, section, and so forth, as defined by this employee.

This value may be populated directly, or fed from the Payroll G(01) record. The means is determined by the TG Table entry that has been set-up for the employee's organization (Control 1-2). The option list description can be accessed using field name CONTROL_FIVE.

CTRL_FOUR
CHAR, 004

This is the Human Resource Control Four value assigned this employee. This organization level may be translated to a division, plant site, section, and so forth, as defined by this employee.

This value may be populated directly, or fed from the Payroll G(01) record. The means is determined by the TG Table entry that has been set- up for the employee's organization (Control 1-2). The option list description can be accessed using field name CONTROL_FOUR. There is also a 15-position definition of the description called CONTROL_FOUR_15.

CTRL_SIX

CHAR, 004

This is the Human Resource Control Six value assigned this employee. This organization level may be translated to a division, plant site, section, and so forth, as defined by you.

The value in this field may be populated directly or fed from the Payroll G(01) record. The means is determined by the TG Table entry that has been set-up for the employee's organization (Control 1-2). The option list description can be accessed using field name CONTROL_SIX.

CTRL_THREE

CHAR, 004

This is the Human Resource Control Three value assigned this employee. This organization level may be translated to a division, plant site, section, and so forth., as defined by you.

The value in this field may be populated directly or fed from the Payroll G(01) record. The means is determined by the TG Table entry that has been set-up for the employee's organization (Control 1-2). The option list description can be accessed using field name CONTROL_THREE. There is also a 15 position definition of the description called CONTROL_THREE_15.

CUR_YR_TOP_20PCT

CHAR, 001

This code indicates whether or not the employee was in the top 20% of paid employees in the current year.

CURR_YEAR_5_OWNER

VARCHAR, 020

This code indicates whether or not the employee was a 5% owner of stock in the company in the current year.

CURR_YEAR_50000

CHAR, 001

This is the Y/N indicator of whether or not the employee has earned $50000 or more in the current year.

CURR_YEAR_50000_D

VARCHAR, 020

This field contains the Y/N indicator of whether or not the employee has earned $50000 or more in the current year.

CURR_YEAR_75000

CHAR, 001

This is the Y/N indicator of whether or not the employee has earned $75000 or more in the current year.

CURR_YEAR_75000_D

VARCHAR, 020

This field contains the Y/N indicator of whether or not the employee has earned $75000 or more in the current year.

CURR_YEAR_DEF_EARN

NUMERIC, 10,2

This is the amount of deferred earnings that will be reported on the employee's US form W-2 for the current year.

CURR_YEAR_TOP_100

VARCHAR, 020

This field contains the code to indicate whether or not the employee was in the top 100 paid employees in the current year.

CURR_YEAR_TOP_20

VARCHAR, 020

This field contains the code to indicate whether or not the employee was in the top 20% of paid employees in the current year.

CURR_YR_5PCT_OWN

CHAR, 001

This code indicates whether or not the employee was a 5% owner of stock in the company in the current year.

CURRENT_VEST_PCT

NUMERIC, 03,2

This is the vesting percentage calculated as of the last vesting calculation date (CURRENT_VESTED). For example, if a plan calls for vesting in the accrued benefit using a 'ten year cliff vesting' schedule, after the 10th service anniversary (using the employee's VESTING_SERVICE date), the value in this field would be 100.

The value entered in this field must be greater than zero, but not greater than 100.

NOTE: Vesting applies to company contributions. Employee contributions are always 100% vested.

CURRENT_VESTED

DATETIME

This is the date the current vesting percentage was calculated.

CURRENT_YEAR_EARN

NUMERIC, 10,2

This is the federal earnings that will be reported on the employee's US form W-2 for the current year. Field from Tax record 102.

CURRENT_YEAR_OFF_D

VARCHAR, 020

This field contains the code to indicate whether or not the employee is an officer in the current year.

CURRENT_YR_OFFICER

CHAR, 001

This code indicates whether or not the employee is an officer in the current year.

CURRENT_YR_TOP_100

CHAR, 001

This code indicates whether or not the employee was in the top 100 paid employees in the current year.

D

DATE_ACTION_UNTIL
DATETIME

This is the ending date for the Fund activity.

DATE_BONUS_PAID
DATETIME

This is the check/pay run date of the bonus payment is recorded in this field.

DATE_CALC
CHAR, 1

This code defines the method by which the Participation Service Date is rounded—for example, first of the following month.

DATE_CALC_1
CHAR, 1

This describes the method used to adjust the date formed by adding the Delay Time to the Leave Date for purposes of determining if a break-in-service has been incurred when an employee returns from a service interruption.

DATE_CALC_METHOD_1
VARCHAR, 20

This field displays the description from the option list translation of the DATE-CALC-1 code.

DATE_DESC
VARCHAR, 20

This field displays the description from the option list translation of the DATE_CALC.

DATE_LAST_EVALUATE
DATETIME

This is the date this particular job was last assessed by the company's job evaluation committee.

DATE_LAST_GAVE
DATETIME

This date identifies when the employee last donated blood.

DATE_OF_ACTION
DATETIME

This specifies the effective date of a QC segment that contains thrift/savings plan withdrawal activity details.

DATE_OF_ACTION_QD
DATETIME

This specifies the effective date of a QD segment that contains thrift/savings plan transfer activity details.

DATE_OF_DEATH
DATETIME

This is the date the employee, beneficiary, or contingent annuitant (whomever is receiving the Monthly Pension) died. It is usually saved by the system upon entry of a Death activity in the Human Resource Base module, but can be manually entered.

DATE_OF_EXPIRATION
DATETIME

This is the date the perquisite is due to expire and must be renewed.

DATE_OF_TERM
DATETIME

This is the date on which an employee was terminated from his/her employment or was transferred to another organization (Control-1-2). An entry in this field prohibits calculation of auto pay for the employee when the termination date is prior to the period-end date on the AJ-SCR for the employee's pay frequency.

DATE_RTN_EXPECTED
DATETIME

This is the date the salary review form is due back in the originating department.

DATE_SKILL_OBTAIN
DATETIME

This is the date on which the employee or applicant obtained the skill or the training course was complete.

DAYS_LOST
NUMERIC, 03,0

This is the number of days an employee was absent from work due to illness or injury.

DAYS_RESTRICTED
NUMERIC, 03,0

This is the number of work days on which (because of injury or illness) the:

1) Employee was assigned to another job on a temporary basis

2) Employee worked at a permanent job less than full time

3) Employee could not perform normal duties

DC_COMMENT
VARCHAR, 45

These are comments for course development costs.

DC_DATE
DATETIME

This is the date the development cost of the course was incurred.

DC_VALUE
NUMERIC, 7,0

This is the development cost of the course.

DEDUCTIONS_COSTED
CHAR 001

If this field is checked then any Deductions that are calculated using the Multicurrency functionality will have Labor records produced complete with the LG8 segment.

DED_COSTED_DESC
VARCHAR 020

The Deductions costed description is selected from the PP00 option list and indicates whether Deductions will be costed.

DED_COSTED_DESC
VARCHAR, 20

This field displays the description from the option list translation of the DEDUCTIONS_COSTED.

DEDUCTION_CYCLE
NUMERIC, 1,0

This tells the system to process the appropriate deduction on this pay run. This specifies which pay period this payment reflects. Any of the following entries can appear in the Deduction Cycle field:

1 = First period of the month

2 = Second period of the month

3 = Third period of the month

4 = Fourth period of the month

5 = Fifth period of the month

6 = Do not process HEDs with a frequency of 02 through 11 or 19

9 = Frequency 18 deduction only.

This functions together with the Frequency Identifier, Payment Date, New Period and Pay Cycle fields to pay a pay frequency.

DEDUCTION_EFF
DATETIME

This is the date on which a deduction becomes effective. It is initially calculated by the system according to plan rules and adjusted according to the value in the

TS_AUTO_DEDUCTION field. It can be changed anytime a newly elected option or condition causes the contribution level to change.

DEF_PAY_FREQ_CODE

CHAR, 001

This identifies the company-level pay frequency that is used if the Pay Frequency field of the employee's record is left blank.

DEF_UNEMPLOY_CODE

CHAR, 001

The Default Unemployment Code determines the state in which unemployment wages are accumulated for those employees working in one state and living in another. You can override this setting for any employee with the UNEMPLOYMENT-CODE field on the JJ-SCR.

DEFAULT_AMOUNT_PCT

NUMERIC, 07,0

This is the amount or percent used to calculate the earnings.

DEFAULT_FREQ_DESC

VARCHAR, 020

This field displays the description from the option list translation of the DEFAULT-FREQUENCY code.

DEFAULT_FREQUENCY

NUMERIC, 02,0

This is the Frequency Code assigned to an earnings or deduction. This may be used when making inquiries of the file in a batch report or with a QUERY. It CANNOT be used in a form or report that will update the file, as it is not associated with an option list.

DEFAULT_METHOD

CHAR, 002

This is the Method Code assigned to an earnings or deduction. This may be used when making inquiries of the file in a batch report or with a QUERY. It CANNOT be used in a form or report which will update the file, as it is not associated with an option list.

DEFAULT_METHOD_DES

VARCHAR, 020

This field displays the description from the option list translation of the DEFAULT-METHOD.

DEFAULT_PAY_FREQ

VARCHAR, 020

This field displays the description from the option list translation of the DEF-PAY-FREQ-CODE.

DEFAULT_PERCENT

NUMERIC, 05,4

This is the employer FICA percentage for US tax body 101 (FICA). For all other tax bodies (when applicable), this field contains a default withholding percentage that is used to compute the tax amount for any earnings with a CATEGORY-CODE (A8 screen) that calls for a default tax.

DEFAULT_TYPE

CHAR, 002

This is the Type Code assigned to an earnings or deduction. This may be used when making inquiries of the file in a batch report or with a QUERY. It CANNOT be used in a screen or report which will update the file as it is not associated with a option list.

DEFAULT_TYPE_DESC

VARCHAR, 020

This field displays the description from the option list translation of the DEFAULT-TYPE.

DEFAULT_UNEMPLOYME

VARCHAR, 020

This field displays the description from the option list translation of the DEF-UNEMPLOY-CODE.

DELAY_TIME_1

CHAR, 8

This specifies an amount of time to be added to the employee's Leave Date to form a date by which time an employee must return to active service to avoid incurring a break-in-service under plan rules. Values are entered as time in years, months, and days (YYMMDD).

These are not dates. The actual delay span can be adjusted by the associated date calculation field, if present. This is required when needed for the calculation indicated by the associated rule code. For example, if the plan allows an employee to interrupt service for up to six months before a break-in-service is incurred, you would enter '000600'.

DEMOGRAPHIC_CCS_CD

CHAR, 4

This code defines the City County or SMSA represented in the percentage values on this TY Table record. This code is used in conjunction with the DEMOGRAPHIC_ STATE_CD to provide the full code for option list validation.

County Code: EO04

City Code: EO05

SMSA: EO03

DEMOGRAPHIC_CCS_DS
VARCHAR, 20

This field contains the description from the option list translation of the DEMOGRAPHIC-CCS-CODE code.

DEMOGRAPHIC_LEVEL
VARCHAR, 20

This field contains the description from the option list translation of the DEMOGRAPHIC-LVL-CD code.

DEMOGRAPHIC_LVL_CD
CHAR, 1

This code defines the level of demographic data which resides on this TY Table record.

DEMOGRAPHIC_ST_CD
CHAR, 2

This code defines the state which is represented by the percentages on this TY Table record. This will contain the value of SA if the data is for an SMSA.

DEMOGRAPHIC_STATE
VARCHAR, 20

This field contains the description from the option list translation of the DEMOGRAPHIC-STATE-CD code.

DEP_DATA_TO_COBRA
DATETIME

This is the date on which the Spouse and/or Dependents Master Record data was formatted and sent to the COBRA Solution PC program.

DEPENDENT_1
CHAR, 3

This 3 position unique KEY-ID identifies a Dependent entitled to coverage under this Plan. The system validates the entry in DEPENDENT-1 against the KEY-ID, which is originally recorded to identify the spouse or dependent on the 10-SCR. Therefore, 10-SCR detail data must be recorded for the KEY-ID used in the DEPENDENT-1 field prior to entering the KEY-ID in this field.

DEPENDENT_DATE
DATETIME

This is the effective date of a Spouse or dependent's coverage under a benefit plan. When completing the Covered Dependents form, you are required to make an entry in this field.

DEPENDENT_UNTIL
DATETIME

This is the ending effective date of a Spouse or dependent's coverage under a benefit plan.

DIRECT_DEPOSIT_CD
CHAR, 001

This option list is used for editing purposes only. The value 'D' must be entered in this field.

DIRECT_DEPOSIT_EDI
VARCHAR, 020

This field displays the description from the option list translation of the DIRECT-DEPOSIT-CD.

DIS_ACTION
VARCHAR, 020

This field displays the description from the option list translation of the DIS-ACTION-CODE.

DIS_ACTION_CODE
CHAR, 002

This code represents the disciplinary action which has taken place.

DIS_OCCUR_DATE
DATETIME

This is the date on which the action occurred which warranted the disciplinary action.

DIS_REASON
VARCHAR, 020

This field displays the description from the option list translation of the DIS-REASON-CODE.

DIS_REASON_CODE
CHAR, 002

This code represents the reason for disciplinary action.

DIS_RECORD_DATE
DATETIME

This is the date on which the disciplinary action is actually recorded.

DIS_REV_REQ_CD
CHAR, 002

This code represents the review required for the disciplinary action.

DIS_REVIEW_DATE

DATETIME

This is the date the disciplinary action review is scheduled for.

DIS_REVIEW_REQUIRE

VARCHAR, 020

This field displays the description from the option list translation of the DIS-REV-REQUIRED-CD code.

DISAB_RATE

NUMERIC, 07,4

The Disability Rate field can be used for any one of several purposes.

For applicable state tax bodies, this field contains the Disability Rate.

For US tax body 101 (FICA), this field contains the employee FICA percentage.

For Canadian tax body 2XX (CPP/QPP), this field contains the employee CPP/QPP percentage.

For Canadian tax body 3XX, this field contains the employee UIC percentage.

For cities with both resident and nonresident default tax rates, this field contains the nonresident default tax rate.

DISAB_RECIP

NUMERIC, 01,0

This specifies the disability reciprocal. Valid entries for the United States are as follows:

0 = Self-adjusting; honor other state wages

1 = Self-adjusting disability

2 = Calculate as % x (wage - 1 dependent) up to a maximum

3 = Calculate as % x (wage) up to a maximum

4 = Wage annualized x rate up to a maximum = deduction deannualized.

Valid entries for Canada are as follows:

0 = Other provincial disability taxes apply toward the maximum

1 = Only this province's disability taxes apply toward the maximum

2 = Use the Tax Miscellaneous entry as the exemption amount.

DISABILITY

VARCHAR, 20

This field displays the description from the option list translation of the Disability Code.

DISABILITY_CLAIM

CHAR, 001

This code designates whether or not a Disability Claim was filed. The valid codes are as follows:

1 = No disability

2 = Short term disability

3 = Long term disability

DISABILITY_CLAIM_D

VARCHAR, 020

This field displays the description from the option list translation of the DISABILITY-CLAIM.

DISABILITY_CODE

CHAR, 3

This code identifies the employee's disability condition.

DISABILITY_DATE

DATETIME

This is the date the employee's disability occurred. You are only required to make an entry when you have entered a Disability Code.

DISABILITY_RETIRE

DATETIME

This is the earliest date on which the employee can elect to take a disability retirement according to the rules of the selected plan. It can also be used to record the earliest date on which the employee can elect disability retirement according to company rules.

Since the date is projected, its format includes century notation in the first two digits. The actual stored value for April 1, 2010 would be 20100401.

Disability retirement dates are calculated by the system when an employee becomes a participant in a retirement plan. Manual entries usually are not required in this field. For more information concerning the rules under which the projected disability retirement date is calculated for a particular benefits plan, refer to the TJ table entries for the Plan ID.

The actual disability retirement (not this projected value) is entered at the time the disability retirement activity is recorded in the system. The activity is partially validated by comparing the actual date to the pre-calculated date.

DISPLAY_NAME

CHAR, 1

This is automatically set to ON, which means that the employee's name prints at the top of each employee- level form. This is an automatic option. If customizing is required, this field may be accessed by form programs.

DISPLAY_NAME_DESC

VARCHAR, 20

This field displays the description from the option list translation of the DISPLAY-NAME Code.

DISTRIBUTION_DATA

CHAR, 010

This is mail/distribution data regarding where the salary review was sent. It may be the reviewer's or in the case of mass distribution the central mailing location.

DISTRIBUTION_DATE

DATETIME

This is the date the salary review form was released and sent.

DOLLAR_VALUE

NUMERIC, 06,0

This is the dollar value of each perquisite awarded an employee. Before entering, the amount is rounded to the nearest dollar. The value is then automatically right justified.

DROP_HISTORY

NUMERIC, 02,0

History records are dropped from the Payroll Employee Database after the number of months specified in the DROP- HISTORY field have elapsed. Valid entries in this field are:

00 - 87 = The number of months history records are maintained on the payroll Employee Database

88 = Do not drop. The default for this field is 88

The dropping of history records can occur only on the run following a pay run. The Change Date field in the history record is compared to the Run Date field on the AE-SCR entered for the previous pay run.

The comparison is performed as follows:

The number of months specified is added to the year and month of the Change Date in the history record.

If the year and month of the Run Date from the previous pay run's AE-SCR is greater than the computed date, the record is dropped.

If the number of months specified is 88 or the Recon Clear field in the history record contains a 1 or 2 (uncleared payment), the record is not dropped.

DROP_LABOR

NUMERIC, 02,0

Labor records are dropped from the payroll Employee Database after the number of months specified in the Drop Labor field have elapsed. Valid entries are as follows:

00 - 87 = The number of months labor records are maintained on the Employee Database

88 = Do not drop. The default for this field is 88

The dropping of labor records can occur only on the run following a pay run (which could also be a pay run). The Change Date field in the labor record is compared to the Run Date field on the AE-SCR entered for the previous pay run.

The comparison is performed as follows:

The number of months specified is added to the year and month of the Change Date in the labor record.

If the year and month of the Run Date from the previous pay run's AE-SCR is greater than the computed date, the record is dropped.

E

EARLY_RETIRE_DATE

DATETIME

This is the month and year of the earliest date on which the employee can elect to retire according to the rules of the plan selected.

It can also be used to record the earliest date on which the employee can retire according to company rules. This is a redefinition of the field Early Retire, which additionally contains the century indicator and day of the month. Early retirement dates are calculated by the system when an employee becomes a participant in a retirement plan.

Manual entries usually are not required in this Field.

For more information concerning the rules under which the projected early retirement date is calculated for a particular benefits plan, please refer to the TJ table entries for the Plan ID.

The actual retirement date (not this projected value) is entered at the time the retirement activity is recorded in the system. The activity is partially validated by comparing the actual date to the pre-calculated date.

EARNINGS_FLSA_RATE

VARCHAR, 020

This field displays the description from the option list translation of the EARNINGS-RATE-FLSA code.

EARNINGS_RATE_FLSA

CHAR, 001

This code defines how this non-overtime earnings is to contribute to the calculation of the employee's overtime rate under the Fair Labor Standards Act.

EDUCATION

VARCHAR, 020

This field displays the description from the option list translation of the EDUCATION-LEVEL code.

EDUCATION_LEVEL

CHAR, 003

This identifies the type of education that an employee has completed or is in the process of completing.

EDUCATION_LEVEL_Z2

CHAR, 003

This identifies the type of education an employee has completed or is in the process of completing.

EDUCATION_Z2
VARCHAR, 020

This field displays the description from the option list translation of the EDUCATION-LEVEL-Z2 code.

EEO_1_CATEGORY
VARCHAR, 20

This field displays the description from the option list translation of the EEO-1-JOB-CATEGORY code.

EEO_1_JOB_CATEGORY
CHAR, 2

This records the EEOC JOB-CLASS assigned to the Occupation Group code. As delivered, forms that use the field JOB-CLASS will return the EEO-1 Job Category value from the TE Table.

Form modifications are required to substitute the EEO-4, 5, or 6 Job Category fields. Use fields Job Clas4, Job Clas5, or Job Clas6 respectively and RELOAD the applicable program.

EEO_4_CATEGORY
VARCHAR, 20

This field displays the description from the option list translation of the EEO-4-JOB-CATEGORY code.

EEO_4_JOB_CATEGORY
CHAR, 2

This records the EEOC Job Class assigned to the Occupation Group code. The code is the EEO-4 Job Category field from the TE Table.

EEO_5_CATEGORY
VARCHAR, 20

This field displays the description from the option list translation of the EEO-5-JOB-CATEGORY code.

EEO_5_JOB_CATEGORY
CHAR, 2

This records the EEOC Job Class assigned to the Occupation Group code. The code is the EEO-5 Job Category field from the TE Table.

EEO_6_CATEGORY
VARCHAR, 20

This field displays the description from the option list translation of the EEO-6-JOB-CATEGORY code.

EEO_6_JOB_CATEGORY
CHAR, 2

This records the EEOC Job Class assigned to the Occupation Group code. The code is the EEO-6 Job Category field from the TE Table.

EEO_ESTABLISH
VARCHAR, 020

This field displays the description from the option list translation of the EEO-ESTABLISHMENT code.

EEO_ESTABLISHMENT
CHAR, 004

This is the EEO-ESTABLISHMENT number assigned to the location where the employee works.

EEO_ESTABLISHMENTS
CHAR, 4

This is the Control Number of the EEO/AAP TX Tables to be used for the organization (Control 1-2).

EEO_RACE
VARCHAR, 020

This field displays the description from the option list translation of the RACE-CODE. It represents the race of the employee at the time of the selected History and/or Labor record.

EFFECTIVE_DATE
DATETIME

This is the date the schedule becomes effective for an employee.

EFFECTIVE_UNTIL
DATETIME

This is the ending date the schedule becomes effective for an employee.

EI_DEDUCTION
NUMERIC, 11,2

This field stores the employee deduction for Employment Insurance. (Canadian field.)

EI_DEDUCTION_CUR
NUMERIC, 11,2

This field stores the current employee deduction for Employment Insurance. (Canadian field.)

EI_DEDUCTION_MTD
NUMERIC, 11,2

This field stores the Month to Date employee deduction for Employment Insurance. (Canadian field.)

EI_DEDUCTION_QTD
NUMERIC, 11,2

This field stores the Quarter to Date employee deduction for Employment Insurance. (Canadian field.)

EI_DEDUCTION_YTD
NUMERIC, 11,2

This field stores the Year to Date employee deduction for Employment Insurance. (Canadian field.)

EI_FTE_HOURS
NUMERIC, 6,2

This is the number of hours that the Incumbent will be assigned for this incumbency.

EI_FTE_UNITS
NUMERIC, 3,2

This is the Full Time Equivalency value that the Incumbent will be assigned for this Incumbency.

EI_GEO_RANGE_CODE
CHAR, 1

This code is used to identify the geographic area the Incumbent is located.

EI_GEO_RANGE_DESC
VARCHAR, 20

This is the description of the code that is used to identify the geographic area the Incumbent is located.

EI_GRADE
VARCHAR, 6

This is the salary grade for the Incumbency entry.

EI_LOCATION_CODE
VARCHAR, 4

This code is used to identify the physical location of the Position incumbency (for example,. Building A).

EI_LOCATION_DESC
VARCHAR, 20

This is the description of the code used to identify the physical location of the Position incumbency (for example, Building A).

EI_PRIME_INC_DESC
VARCHAR, 20

This code is used to identify the type of incumbency: Primary, Primary History, or Other.

EI_PRIME_INC_FLAG
CHAR, 1

This code is used to identify the type of incumbency: Primary, Primary History, or Other.

EI_ROLE
VARCHAR, 6

This is the Position the employee to which the employee is linked to make up the incumbency.

EI_ROLE_FROM_TIME
NUMERIC, 4,0

This is the time of the day the employee Position incumbency becomes effective.

EI_ROLE_REASON
CHAR, 2

This code is used to identify the reason the Position incumbency is being established.

EI_ROLE_REASON_DES
VARCHAR, 20

This is the description of the code that is used to identify the reason the Position incumbency is being established.

EI_ROLE_SEQ_NBR
NUMERIC, 3,0

This code is used to identify the employee Position incumbency (for example, 1st, 2nd, 3rd, and so forth).

EI_ROLE_SEQ_NBR_DE
VARCHAR, 20

This code is used to identify the employee Position incumbency (for example, 1st, 2nd, 3rd, and so forth).

EI_ROLE_STATUS
CHAR, 1

This code is used to identify the status of the Position incumbency (for example, Permanent, Acting).

EI_ROLE_STATUS_DES
VARCHAR, 20

This is the description of the code that is used to identify the Position incumbency (for example, Permanent, Acting).

EI_ROLE_UNTIL_DATE
DATETIME

This is the date to which the Position incumbency will be active.

EI_ROLE_UNTIL_RSN
CHAR, 2

This code is used to identify the reason the Position incumbency will end.

EI_ROLE_UNTIL_RSND
VARCHAR, 20

This is the description of the code used to identify the reason the Position incumbency will end.

EI_UNION_CODE
VARCHAR, 6

This code is used to identify the union for the Position incumbency.

EI_UNION_DESC
VARCHAR, 20

This is the description of the code used to identify the union for the Position incumbency.

EI_WAGES
NUMERIC, 11,2

This field stores the employee wages subject to Employment Insurance. (Canadian field)

EI_WAGES_CUR
NUMERIC, 11,2

This field stores the current employee wages subject to Employment Insurance. (Canadian field)

EI_WAGES_MTD
NUMERIC, 11,2

This field stores the Month to Date employee wages subject to Employment Insurance. (Canadian field)

EI_WAGES_QTD
NUMERIC, 11,2

This field stores the Quarter to Date employee wages subject to Employment Insurance. (Canadian field)

EI_WAGES_YTD
NUMERIC, 11,2

This field stores the Year to Date employee wages subject to Employment Insurance. (Canadian field)

EIC
NUMERIC, 11,2

This field (Earned Income Credit) stores a refundable amount that reduces the tax owed by certain low-income individuals who meet adjusted gross income levels. An eligible employee can claim the credit on an individual tax return at the end of the year or may elect to receive advance payments with their normal pay.

EIC_CUR
NUMERIC, 11,2

This field stores the current Earned Income Credit amount.

EIC_MTD
NUMERIC, 11,2

This field stores the Month to Date Earned Income Credit amount.

EIC_QTD
NUMERIC, 11,2

This field stores the Quarter to Date Earned Income Credit amount.

EIC_YTD
NUMERIC, 11,2

This field stores the Year to Date Earned Income Credit amount.

ELECTED_PAYMENT_DT
DATETIME

This is the date when the Monthly Pension benefit first becomes payable. Once entered there is no need to update this field unless the ELECTED-PAYMENT-DATE changes.

ELECTION_DATE
DATETIME

This is the date the FORM-OF-PAYMENT election occurs. It is often necessary to record the specific date when the employee elects a specific FORM-OF- PAYMENT since waiting periods may be associated with certain Optional forms of payment.

ELECTION_EFFECTIVE
DATETIME

This specifies the effective date of a QA segment that contains thrift/savings plan investment fund allocations and combined contribution percentage for a specific source of funds.

ELECTION_UNTIL

DATETIME

This specifies the ending effective date of a QA segment that contains thrift/savings plan investment fund allocations and combined contribution percentage for a specific source of funds.

ELIG_MAXIMUM_AGE

CHAR, 8

This defines the maximum age limitation for participation in the plan described by the TL Table.

ELIG_MINIMUM_AGE

CHAR, 8

This defines the minimum age requirement to be eligible to participate in the plan.

ELIG_SERVICE_METH

VARCHAR, 20

This is the calculation method that defines how service is calculated.

ELIG_SERVICE_MTHD

CHAR, 1

This is the calculation method that defines how service is calculated.

ELIGIBILITY_DATE

DATETIME

This is the date when the employee is first eligible to participate in the deferred benefits plan. This is initially calculated according to plan rules the first time an attempt is made to enroll the employee in the plan.

ELIGIBILITY_ DATE is propagated to future Q4 segments. It is only necessary to make an entry in this field if you are entering an enrollment for an employee who is not eligible according to plan rules and you are entering the ELIGIBILITY_DATE in an attempt to override the systems automatic calculations or the system calculated date needs adjustment.

In either of these cases, enter the date in YYMMDD or MM_DD_YY format.

For more information concerning the calculation of eligibility dates, refer to the TN table entries for the plan.

ELIGIBILITY_RULES

CHAR, 4

This is the Control Number of the TL table to be used for this organization (Control 1-2).

ELIGIBILITY_TP_CD

CHAR, 1

This code identifies the formula used to calculate when an employee becomes eligible to participate in the plan.

ELIGIBILITY_TYPE

VARCHAR, 20

The translation of the Eligibility Type Code that identifies the formula used to calculate when an employee becomes eligible to participate in the plan described on the TL table.

ELIGIBLE_DATE_CALC

CHAR, 20

The translation of the Eligibility Date Method code which identifies the formula to calculate the Eligibility date for the plan described on the TL table.

ELIGIBLE_DATE_MTHD

CHAR, 1

This identifies the formula to calculate the Eligibility Date for the plan described by the TL table.

ELIGIBLE_HOURS

NUMERIC, 4

This defines the amount of time (in hours) an employee must work before becoming eligible to participate in the plan described by the TL table.

ELIGIBLE_SERVICE

CHAR, 8

This defines the amount of service an employee must accumulate before participating in the plan being described by the TL table.

NOTE: Effective with Employer Tax Years beginning in 1989, the US Tax Reform Act of 1986 requires that there be a maximum of one eligibility purposes for a 401K Plan.

ELIGIBLE_STATUS

CHAR, 2

This is the resulting employee status that defines the type of employee who may be eligible for this plan.

ELM_AMIND_PCT

NUMERIC, 5,4

This is the percentage of American Indian males contained in the ELM-TOTAL-WORK-FORCE field for the TY Table's demographic level.

ELM_ASIAN_PCT
NUMERIC, 5,4

This is the percentage of Asian males contained in the ELM-TOTAL-WORK-FORCE field for the TY Table's demographic level.

ELM_BLACK_PCT
NUMERIC, 5,4

This is the percentage of black males contained in the ELM-TOTAL-WORK-FORCE field for the TY Table's demographic level.

ELM_CITY
CHAR, 6

This is the EXTERNAL-LABOR-MARKET-CITY code assigned to the EEO-ESTABLISHMENT.

ELM_CITY_DESC
VARCHAR, 20

This field displays the description from the option list translation of the ELM-CITY Code.

ELM_COUNTY
CHAR, 5

This is the EXTERNAL-LABOR-MARKET-COUNTY code assigned to the EEO-ESTABLISHMENT.

ELM_COUNTY_DESC
VARCHAR, 20

This field displays the description from the option list translation of the ELM-COUNTY Code.

ELM_HISPN_PCT
NUMERIC, 5,4

This is the percentage of Hispanic males contained in the ELM-TOTAL-WORK-FORCE field for the TY Table's demographic level.

ELM_SMSA
CHAR, 6

This is the EXTERNAL-LABOR-MARKET-STANDARD-METROPOLITAN-STATISTICAL-AREA code assigned to the EEO-ESTABLISHMENT.

ELM_SMSA_DESC
VARCHAR, 20

This field displays the description from the option list translation of the ELM-SMSA Code.

ELM_ST_OR_PROV
CHAR, 2

This field contains the EXTERNAL-LABOR-MARKET-STATE code assigned to the TX-EEO-ESTABLISHMENT.

ELM_ST_PROV_DESC
VARCHAR, 20

This field displays the description from the option list translation of the ELM-STATE Code.

ELM_TOTAL_PCT
NUMERIC, 5,4

This is the total percent of males contained in the ELM- TOTAL-WORK-FORCE field for the TY Table's demographic level.

ELM_TOTAL_WK_FORCE
NUMERIC, 8,0

This is the total number of persons in the work force for the TY Table's demographic level. This total is used with the individual ELM percentages to determine the numbers of male and females by race for EEO/AAP analysis purposes.

ELM_WHITE_PCT
NUMERIC, 5,4

This is the percent of white males contained in the ELM-TOTAL-WORK-FORCE field for the TY Table's demographic level.

EMERGENCY_AREA_CD
CHAR, 003

This is the area code of the emergency contact's telephone number.

EMERGENCY_CONTACT
VARCHAR, 030

This is the individual's name the employee has authorized to contact in an emergency. Enter it in the following format: Last Name, (comma/blank) First Name Middle Initial.

EMERGENCY_DATE
DATETIME

This is the effective date of the emergency information.

EMERGENCY_KEY_O4
CHAR, 003

This is a three-character identification code to separate multiple emergency records. Segment: contact name/addr1.

EMERGENCY_PHONE

CHAR, 008

This is the phone number portion of the emergency contact's telephone number.

EMERGENCY_PHYSIAN

VARCHAR, 030

This is the name of the physician the employee requests you contact in case of an emergency. Enter it in the following format: Last Name, (comma/blank) First Name Middle Initial.

EMERGENCY_UNTIL

DATETIME

This is the ending effective date of the emergency information.

EMP_HED_NAME

VARCHAR, 015

This is the name of the HED.

EMPLOYEE_BANK_NAME

VARCHAR, 020

This field displays the description from the option list translation of the EMPLOYEE-BANK-NUMBER code.

EMPLOYEE_BANK_NBR

CHAR, 009

Enter the TO routing number in this field.

Before you can use this field, you must have previously set up a complete list of all routing numbers corresponding descriptions used by your company in option list PR07. (See also the Routing Number field option list PR07 on the AF2-SCR.)

EMPLOYEE_NAME

VARCHAR, 030

This is an employee name.

It may also contain other name information depending on the usage of the field on the FF-SCR. Employee name MUST be entered in the following format: Last, First Middle. (There must be a comma and a space between last and first name.) The default entry created by LMODEL 00 is VOID, VOID VOID VOID VOID. In the Position Control Module, EMPLOYEE-NAME is system-generated.

EMPLOYEE_NUMBER

CHAR, 010

This value is the Key to the employee record on the Employee Database.

When you add a new employee using an employee template, you must complete this text box with a valid employee number for the new hire. Thereafter, this field becomes inquiry-only; you may view the employee number but not change it.

The employee number is 10 characters or less in length, and MUST NOT begin with the letter 'L'.

Budget Labor Information:

An 'L' in the first position of an employee number prevents that employee from being paid. Such an employee can be set up and used to enter budget labor information that is then printed on the Labor Report (1L1L).

EMPLOYEE_SECURITY

CHAR, 002

This is a two position, alpha NUMERIC field which is user defined.

This form is often used when locations need access to their information only and they are part of the same Organization.

Or, it could be used to secure a small group of employees like the Senior Management of a company.

Codes used in this field will be added to the security profile for the users that need to have access to the employee record.

Users that do not have the designated code built into their security profile will not be able to access the employee record.

Any attempt to access a secured record will result in a security violation, which will be logged in the security records of the system. This level of security can be simple or very complex.

EMPLOYEE_STATUS

VARCHAR, 020

This field displays the description from the option list translation of the RESULTING-EMP-STATUS code.

EMPLOYEE_TAX

NUMERIC, 11,2

This is the figure for the employee’s portion of US FICA.

This figure is taken from the employee’s history record.

EMPLOYEE_TAX_CUR

NUMERIC, 11,2

The EMPLOYEE-TAX-CUR field contains the current figure for the employee’s portion of FICA.

EMPLOYEE_TAX_MTD

NUMERIC, 11,2

The EMPLOYEE-TAX-MTD field contains the month to date figure for the employee’s portion of FICA.

EMPLOYEE_TAX_QTD

NUMERIC, 11,2

This is the quarter to date figure for the employee's portion of US FICA.

EMPLOYEE_TAX_YTD

NUMERIC, 11,2

This is the year to date figure for the employee's portion of US FICA.

EMPLOYEE_WAGES

NUMERIC, 11,2

This is the figure for employee US FICA wages.

This figure is taken from the employee's history record.

EMPLOYEE_WAGES_CUR

NUMERIC, 11,2

This is the current figure for employee US FICA wages.

EMPLOYEE_WAGES_MTD

NUMERIC, 11,2

The EMPLOYEE-WAGES-MTD field contains the month to date figure for employee FICA wages.

EMPLOYEE_WAGES_QTD

NUMERIC, 11,2

This is the quarter to date figure for employee US FICA wages.

EMPLOYEE_WAGES_YTD

NUMERIC, 11,2

The EMPLOYEE-WAGES-YTD field contains the year to date figure for employee US FICA wages.

EMPLOYER_NAME

VARCHAR, 030

This is the name of the spouse's or dependent's employer. Leave this field blank if the spouse or dependent is not employed.

EMPLOYER_TAX

NUMERIC, 11,2

This is the figure for the employer's portion of US FICA.

EMPLOYER_TAX_CUR

NUMERIC, 11,2

The EMPLOYER-TAX-CUR field contains the current figure for the employer's portion of US FICA.

EMPLOYER_TAX_MTD
NUMERIC, 11,2

This is the month to date figure for the employer's portion of US FICA.

EMPLOYER_TAX_QTD
NUMERIC, 11,2

This is the quarter to date figure for the employer's portion of US FICA. You are not permitted to make an entry here.

EMPLOYER_TAX_YTD
NUMERIC, 11,2

The EMPLOYER-TAX-YTD field contains the year to date figure for the employer's portion of US FICA.

EMPLOYER_WAGES
NUMERIC, 11,2

This is the figure for employer US FICA wages.

This amount is taken from the employee's history record.

EMPLOYER_WAGES_CUR
NUMERIC, 11,2

This is the current figure for employer US FICA wages.

You are not permitted to make an entry here.

EMPLOYER_WAGES_MTD
NUMERIC, 11,2

The EMPLOYER-WAGES-MTD field contains the month-to-date figure for employer US FICA wages.

EMPLOYER_WAGES_QTD
NUMERIC, 11,2

This is the quarter to date figure for employer US FICA wages.

EMPLOYER_WAGES_YTD
NUMERIC, 11,2

This is the year to date figure for employer US FICA wages.

EMPLOYMENT_CODE
CHAR, 002

This identifies the employment status of the employee for Vers80 reports.

EMPLOYMENT_DATE
DATETIME

This is the date of employment.

EMPLOYMENT_INS
VARCHAR, 020

This field displays the description from the option list translation of the EMPLOYMENT_INS.

EMPLOYMENT_INS_CD
CHAR, 001

This code indicates whether unemployment/ disability should be accumulated for this employee in this tax body. Whenever the RESIDENT-CODE is set up this field is automatically set to ‘0’ or ‘1’ based on the contents of the DEFAULT-UNEMPLOYMENT-CODE field on the AF-SCR.

EMPLOYMENT_SOURCE
VARCHAR, 020

The Employment Source field contains the description of the Employment Code specified for this employee. It represents the source of the employee's employment at the time of the selected History and/or Labor record.

When an Employment Code has been entered, the system searches option list PE06 for the code’s corresponding description. You must set up option list PE06 before it can be used.

EST_ANNUAL_INCOME
NUMERIC, 11,2

The use of this field depends on the tax record being accessed.

For tax record 101, this is the amount to be used as a base annual income in the calculation of tax for a commission-paid employee.

For the type 2 tax record, this field contains pensionable earnings.

For the type 3 tax record, for Quebec only, this is other authorized non-refundable tax credits (K1) such as medical expenses and charitable donations.

EST_ANNUAL_INCOME
NUMERIC, 11,2

The use of this field depends on the tax record being accessed.

For tax record 101, this is the amount to be used as a base annual income in the calculation of tax for a commission-paid employee.

For the type 2 tax record, this field contains pensionable earnings.

For the type 3 tax record, for Quebec only, this is other authorized non-refundable tax credits (K1) such as medical expenses and charitable donations.

EVALUATION_REQD
CHAR, 1

This specifies whether evaluation is required for this course.

EVALUATION_REQD_D
VARCHAR, 20

This field displays the description from the option list translation of the EVALUATION-REQD code.

EVALUATION_TYPE
VARCHAR, 20

This is the description of the Evaluation Type.

EVENT_DATE
DATETIME

This is the date on which the Qualifying Event occurred or was effective.

EVENT_NUMBER
NUMERIC, 02,0

This is the number of the Qualifying Event. This is used to determine if this is the primary or a secondary event.

EXCLUDE_20PCT_TST
CHAR, 001

This code indicates whether or not the employer is excluded from the top 20% based on the IRS-defined exclusion criteria.

EXCLUDED_20_TEST
VARCHAR, 020

This field contains the code to indicate whether or not this employee is to be excluded from the determination of the top 20% paid employees.

EXPECTED_RETURN
DATETIME

This is the date the employee is expected to return.

F

FAIR_LABOR_CD_DESC
VARCHAR, 020

This field displays the description from the option list translation of the FAIR-LABOR-CODE. It represents the employee's FLSA status at the time of the selected History and/or Labor record.

FAIR_LABOR_CODE
CHAR, 001

This specifies whether overtime calculation for the employee comes under the Fair Labor Standards Act. If FLSA does apply, enter the calculation method code used for this employee. This code can be set up at the company level through the FLSA Method Code field (AF-SCR). Use the FAIR-LABOR-CODE field in a situation in which the overtime calculation method for a particular employee differs from the method established at the company level.

FED_ANN_DEDUCTIONS
NUMERIC, 5,2

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

FED_HD_PRESC_AREA
NUMERIC, 05,0

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

FED_LCF_TAX_CREDIT
NUMERIC, 11,2

This field is used to store the annual labor-sponsored funds federal tax credit. (Canadian field.)

FEDERAL_NET_CLAIM
NUMERIC, 07,0

This is used with a Tax Method Code of four through eight or B.

For Tax Method Codes four and six, enter the amount with two decimals.

For codes five, seven, and eight, enter four decimals (for example, enter five percent as 0500).

For code B, enter a whole dollar amount.

For Tax Method Code A, the week-to-date taxable wages is stored here.

FEES_OTHER_AMOUNT

NUMERIC, 06,2

This is the amount of reimbursement for fees and other charges.

FEES_OTHER_PERCENT

NUMERIC, 03,0

This is the percentage of fees and other expenses to be paid.

FICA_TYPE

VARCHAR, 20

This is a description of the US FICA type.

FIRST_NAME

VARCHAR, 20

This field is used as the output field that contains the First Name after the execution of the subroutine 'EDTFML' that splits a Name field into three separate fields.

FIRST_QTR_FICA

NUMERIC, 10,2

This is the total FICA-HI considered earnings for the first quarter of the calendar year.

FIRST_QUARTILE

NUMERIC, 13,4

This represents the 25th percentile amount of the annual salary range.

This amount is the midway point between the minimum and midpoint amounts in the salary range.

FIRST_VESTED

DATETIME

This is the first date on which vesting percentage calculations determine the vesting percentage to be greater than zero for a deferred benefits plan. Once entered, there is no need to update this field.

FLAT_RATE

CHAR, 005

This term refers to a tax that is calculated as a standard percentage rate and that is calculated in the same way for all employees (that is, factors such as marital status do not enter into the calculation).

FLEX_BEN_CR_COST
NUMERIC, 10,2

This is the value of the option for the purposes of costing a Flexible Benefit Plan if an employee selects this plan and this option.

FLEX_CR_APPLIED
NUMERIC, 07,2

This is the number of credits which were used by the employee as defined on the Flexible Benefit enrollment form.

FLEX_CR_DEDUCTION
NUMERIC, 07,2

This is the amount of the remaining credit balance that is to be deducted from the employee's pay either as a lump sum amount or as an amount per pay for the duration of the Flexible Benefit Plan year.

FLEX_CR_DEFER
NUMERIC, 07,2

This is the amount of the remaining credit balance which is to be applied to a deferred plan balance.

FLEX_CR_POSTED_DT
DATETIME

This is the date on which the flexible benefit remaining balance distribution was performed.

FLEX_CR_REMAIN
NUMERIC, 07,2

This is the number of credits remaining after the employee's Flexible Benefit enrollment has been processed and the cost of each plan has been subtracted from the total credits available.

This value will be distributed to a deduction or other credit distribution vehicle.

FLEX_CR_TO_CASH
NUMERIC, 07,2

This is the amount of the remaining credit balance that is to be paid to the employee in cash either as a lump sum or over the duration of the Plan year.

FLEX_CR_TO_SPEND
NUMERIC, 07,2

This is the amount of the remaining credit balance that is to be applied to a flexible spending account.

FLEX_CREDIT_CALC
CHAR, 4

This is the Control Number of the T table to be used for this organization (Control 1-2).

FLEX_CREDIT_POSTED
CHAR, 001

This is the indicator of whether or not the credit distribution has been posted to the appropriate Hours Earnings or Deduction or account balance.

FLEX_CREDITS_PSTED
VARCHAR, 020

This field displays the description from the option list translation of the FLEX-CREDIT-POSTED code.

FLEX_FORM_RETURNED
CHAR, 001

This is the indicator of whether or not the employee has returned a completed form and the enrollment form status.

FLEX_FORM_STATUS
VARCHAR, 020

This field displays the description from the option list translation of the FLEX-FORM-RETURNED code.

FLEX_PLAN_MASTER
CHAR, 003

This is the Plan ID of the Flexible Master Plan if the Plan ID is a number of a Flexible Benefit Plan.

FLEX_PLAN_UNTIL
DATETIME

This is the ending effective of the selected flex plan.

FLEX_PLAN_YEAR
DATETIME

This is either the beginning date of the Flexible Benefit Plan or in the case of an employee who is eligible for a mid-year enrollment the date on which the employee was eligible for enrollment.

FLEX_TOTAL_CREDITS
NUMERIC, 07,2

This is the total number of credits awarded to the employee for the purpose of purchasing benefits under a Flexible Benefit Plan.

FLSA
VARCHAR, 020

This field displays the description from the option list translation of the FLSA-CLASS code.

FLSA_CLASS
CHAR, 001

These codes are used to identify exempt vs. non- exempt Fair Labor Standards Act classifications of each JOB-CODE/JOB-CODE-EXTENT entry.

FLSA_METHOD
VARCHAR, 020

This field contains the description from the option list translation of the FLSA-METHOD-CODE.

FLSA_METHOD_CODE
CHAR, 001

This is the code for the desired Fair Labor Standards Act calculation method. This code can be overridden at the employee level (EE-SCR).

FOR_FLEX_YEAR
NUMERIC, 04,0

This is the Flex Spending Account Year against which this claim is to be assigned.

FORM_OF_PAYMENT
CHAR, 002

This is the FORM-OF-PAYMENT as elected by the employee. The retiree is often permitted to choose how retirement benefits are to be paid to the beneficiaries and contingent annuitants. Once entered there is no need to update this field unless the FORM-OF- PAYMENT changes.

FOURTH_QTR_FICA
NUMERIC, 10,2

This is the total FICA-HI considered earnings for the fourth quarter of the calendar year.

FREQUENCY
VARCHAR, 12

This is the description of the Frequency (for example, weekly semi-monthly, and so forth).

FREQUENCY_CODE
NUMERIC, 02,0

This is the Frequency Code assigned to an Earnings or Deduction HED on the H segment. The field may be used when making inquiries of the file in a batch report or

with a QUERY. It CANNOT be used in a screen or report which will update the file as it is no option list.

FREQUENCY_DESC

VARCHAR, 020

This field displays the description from the option list translation of the FREQUENCY-CODE.

FREQUENCY_FOR_TAX

VARCHAR, 020

This field contains frequency to be used for taxation when the earnings is paid as a separate check.

FREQUENCY_IND

CHAR, 001

This specifies the FREQUENCY used to calculate per pay period range amounts.

This frequency does not necessarily match the PAY-FREQUENCY on the employee's record. The system converts the employee's current pay to Table frequency amounts so that Compa-Ratio, Position in Range, or Red/Green Indicator calculations can be performed.

FREQUENCY_TYPE

VARCHAR, 020

This field displays the description from the option list translation of the PAYMENT-FREQUENCY code.

FRICK_TAPE

CHAR, 001

This is used to control the generation of an output file for FRICK.

Y = Create the file Blank

N = Do not create the file

FRICK_TAPE_DESC

VARCHAR, 020

This field displays the description from the option list translation of the FRICK-TAPE-CODE.

FROZEN_SALARY

NUMERIC, 9,2

The frozen salary for an employee can be entered here if keeping this data is important to your organization. An employee's frozen salary could be a salary before a raise or bonus.

FSA_ADDITIONS_TOT

NUMERIC, 08,2

This is additions made by or on the employee's behalf since the last account balancing date (that is, the sum of all credits applied during the accounting period in dollars and cents).

Flexible spending account balances are maintained by category to comply with IRS regulations prohibiting the comingling or cross-use of funds set aside for flexible benefits plan claims.

FSA_BALANCE

NUMERIC, 08,2

This is the employee's ending balance (that is, the net total of all funds in the account) at the end of the accounting period.

It is equal to the beginning balance minus (or plus) the net change (in dollars and cents). Flexible spending account balances are by category to comply with IRS regulations prohibiting the comingling or cross- use of funds set aside for flexible benefits plan claims.

FSA_BALANCE_DATE

DATETIME

This is the effective date of a QT segment containing flexible benefits plan spending account periodic balancing information. Enter dates in CCYYMMDD or MM-DD-CCYY format.

FSA_BALANCE_UNTIL

DATETIME

This is the ending effective date of a QT segment containing flexible benefits plan spending account periodic balancing information. Enter dates in CCYYMMDD or MM-DD-CCYY format.

FSA_BEGIN_BALANCE

NUMERIC, 08,2

This is the employee's beginning balance (that is, the net total of all funds in the account) at the start of an accounting period (in dollars and cents). Flexible spending account balances are maintained by category to comply with IRS regulations prohibiting the comingling or cross-use of funds set aside for flexible benefits plan claims.

FSA_CHECK_TYPE

CHAR, 001

This is the type of check used to make reimbursement for expenses incurred against a specific claim category. IRS regulations require that account balances in flexible benefits plans be maintained separately for each category of claim that can be made.

FSA_CLAIM

CHAR, 003

This is the three-position Claim Number of the Claim for which the new FSA Balance is recorded.

FSA_CLAIM_AMOUNT

NUMERIC, 08,2

This is the amount to be debited against the employee's flexible spending account balance for the type of expense claim being made (Dollars and cents). IRS regulations require that account balances in flexible benefits plans be maintained separately for each category of claim that can be made.

FSA_CLAIM_DATE

DATETIME

This is the effective date of a claim made against an employee's flexible spending account. Dates may be entered in either CCYYMMDD or MM-DD-CCYY format.

IRS regulations require that account balances in flexible benefits plans be maintained separately for each category of claim that can be made.

FSA_CLAIM_ID

VARCHAR, 012

This identifies a specific claim made in a valid claim category. The 12 characters in this field have no pre- defined meaning and are intended to provide a means to record the actual service identification number/code used by the provider for billing purposes. IRS regulations require that account balances in flexible benefits plans be maintained separately for each category of claim that can be made.

FSA_CLAIM_NUMBER

NUMERIC, 03,0

This is a three-position number which is assigned sequentially to claims as they are entered for a Flex Spending Account Year.

Begin these numbers with 001 and increment the value each time a new claim is recorded, or begin with 999 and decrement the number for each new claim.

FSA_EXPENSES_TOTAL

NUMERIC, 08,2

This is claims made by the employee since the last account balancing date (that is, the sum of all debits applied during the accounting period in dollars and cents).

Flexible spending account balances are maintained by category to comply with IRS regulations prohibiting the comingling or cross-use of funds set aside for flexible benefits plan claims.

FSA_FLEX_YEAR
NUMERIC, 04,0

This is the Year of the date which represents the first day of the Flex Plan Year. This year field allows multiple Flex Plan Year's balances on file at the same time.

FSA_NET_CHANGE
NUMERIC, 08,2

This is the algebraically signed sum of all applied credits and debits to the account since the last account balancing date (in dollars and cents). Flexible spending account balances are maintained by category to comply with IRS regulations prohibiting the comingling or cross- use of funds set aside for flexible benefits plan claims.

FSA_PAYMENT_DATE
DATETIME

This identifies the date on which reimbursement was made for expenses incurred against a specific claim category. IRS regulations require that account balances in flexible benefits plans be maintained separately for each category of claim that can be made

FSA_PENDING_AMOUNT
NUMERIC, 08,2

This is the amount of the FSA Claim which could not be paid at this time. This field is referenced when the contributions are added to the Flexible Spending Account balance.

FSA_PENDING_AMT_PD
NUMERIC, 08,2

This is the pending amount which was paid on the check recorded.

FSA_PENDING_ID
NUMERIC, 02,0

This is used as a key separator to allow multiple segments for the same Flexible Spending Account Claim. This is required when there is a portion of the claim which cannot be paid because there is not enough in the FSA Balance and you have decided that partial payments may be made against the balance amount.

FSA_POSTED
DATETIME

This is the date on which the Flexible Spending Account activity was posted.

FSA_POSTED_IND
CHAR, 001

This value is entered via the 57-SCR program when data is entered via CBSVB. It is erased when the balance update has been reported via the 83-RPT. This field does not appear on the 57-SCR for audit purposes.

FSA_TOTAL_CREDITS
NUMERIC, 08,2

This holds the total Flexible Benefit Credits applied to the Flexible Spending Account. This value is used when checking Medical Claims for possible payment.

FSA_TYPE_OF_CHECK
VARCHAR, 020

This field displays the description from the option list translation of the FSA Check Type code.

FULL_TIME_STUDENT
CHAR, 001

This code indicates whether or not the spouse or dependent named in this screen is a student and what level of school participation is involved.

FULLY_VESTED
DATETIME

This is the first date on which vesting calculations determine the vesting percentage to be equal to 100 for a deferred benefits plan. Once entered, there is no need to update this field.

FUNCTION
VARCHAR, 020

The FUNCTION field contains the description of the FUNCTION-CODE specified for this particular charge-to location. It represents the function of the employee at the time of the selected History and/or Labor record.

When a FUNCTION-CODE has been entered, the system searches option list PR059 for the code's corresponding description.

FUNCTION_CODE
CHAR, 010

This code can be supplied in addition to the Control 3 through 6 Codes to describe a particular

Charge-to location. For example, the Function Control field can describe a project, job type, machine type, work level, or a product produced.

FUND_CODE_QC
CHAR, 001

The Fund Code shows where contributions are invested.

Contribution Type identifies the source of those contributions. This identifies the investment vehicle for a QC segment containing Thrift/Savings plan withdrawal activity details.

FUND_CODE_QD

CHAR, 001

This field identifies the investment vehicle for a QD segment containing Thrift/Savings plan transfer activity details. The Fund Code shows where contributions are invested. Contribution Type identifies the source of those contributions.

FUND_NUMBER

VARCHAR, 20

This is the number associated with the company funds offered.

FUND_QC

VARCHAR, 020

This field displays the description from the option list description of the Fund Code QC.

FUND_QD

VARCHAR, 020

This displays the description from the option list description of the Fund Code QD.

FUTURE_CHANGE_TP_D

VARCHAR, 020

This field displays the description from the option list translation of the FUTURE-CHANGE-TYPE code.

FUTURE_CHANGE_TYPE

CHAR, 003

This code identifies why this salary change is being made. This is a required field only if the user is creating an actual increase (ZF) record from Salary Plan/Budget data.

G

G1_DATA
VARCHAR, 068

This field contains the value for extended labor distribution from the LG1 segment.

G2_DATA
VARCHAR, 068

This field contains the value for extended labor distribution from the LG2 segment.

G3_DATA
VARCHAR, 068

This field contains the value for extended labor distribution from the LG3 segment.

GENDER
VARCHAR, 20

This is the sex of the employee.

GEO_RANGE_IND
CHAR, 001

This identifies in which area of the country the employee is considered. This indicator is mandatory at the employee level, even if you use the same value in all your Salary Grade Table Geographic Indicators. The value entered here is used in building the to read the Salary Grade Table for calculations such as Compa-Ratio.

GEOGRAPHIC_RANGE
VARCHAR, 020

This field displays the description from the option list translation of the Geographic Range Ind code.

GL_ACCOUNT
VARCHAR, 012

This is the account number portion of the general ledger account number. The distribution portion is derived from labor distribution data.

GRADE_PT_AVG_CUML
NUMERIC, 03,2

This is the grade point average of all courses completed by the employee at the indicated school.

GRADE_PT_AVG_CUR
NUMERIC, 03,2

This is the grade point average for the current term completed by the employee.

GRANTED
CHAR, 001

This is the indicator of whether a participant was granted an additional year of Benefit Service when this segment was created.

GRANTED_DESC
VARCHAR, 020

This field contains the indicator of whether a participant was granted an additional year of Benefit Service when this segment was created.

GRIEVANCE
VARCHAR, 020

This field displays the description from the option list translation of the GRIEVANCE-CODE.

GRIEVANCE_CODE
CHAR, 002

This code further defines the Grievance that is being recorded.

GRIEVANCE_CONTRACT
CHAR, 010

This is a reference number to where in a contract (union or otherwise) there may be legal and/or contractual reference to the occurrence of an incidence like the one which prompted the Grievance.

GRIEVANCE_FILE_REF
CHAR, 010

This number or notation identifies where additional information concerning the Grievance may be obtained.

GRIEVANCE_LOCATION
CHAR, 010

This is the Location or Location Code where the incident that prompted the Grievance occurred.

GRIEVANCE_OCCUR_DT
DATETIME

This is the date on which the incident that prompted the Grievance occurred.

GRIEVANCE_OCCUR_TM
CHAR, 005

This is the time (military) at which the incident that prompted the grievance occurred.

GRIEVANCE_REC_DT
DATETIME

This is the date on which the Grievance was recorded.

GRIEVANCE_STAT_CD

CHAR, 002

This code describes the status of the Grievance as of the status date.

GRIEVANCE_STAT_DT

DATETIME

This is the date on which the status of the Grievance was evaluated.

GRIEVANCE_STATUS

VARCHAR, 020

This field displays the description from the option list translation of the GRIEVANCE-STAT-CODE.

GROUP_AVERAGE

NUMERIC, 4,1

This is the grade average of the selected class.

GROUP_PLAN_MASTER

CHAR, 003

This is the PLAN ID of a Benefit Plan which is defined as a Group Master Plan Type to which this plan belongs.

H

H_CHANGE
CHAR, 001

This field is a system flag to indicate a change has occurred on this segment.

H_CHANGE
CHAR, 001

This field is a system flag to indicate a change has occurred on this segment.

HANDICAP
VARCHAR, 020

This field displays the description from the option list translation of the Handicap Code.

HANDICAP_CODE
CHAR, 003

This code identifies an employee's handicap.

HED CONTRIBUTION_TYPE
VARCHAR, 20

This field displays the description from the option list translation of the CONTRIBUTION-TYPE-Code.

HED_AMOUNT_CUR
NUMERIC, 11,2

This is the current amount of the earnings or deduction.

HED_AMOUNT_L_H
NUMERIC, 11,2

The HED Amount Labor/History field shows the earnings or deduction amount.

This amount is taken from the employee's labor or history record.

HED_AMOUNT_MTD
NUMERIC, 11,2

This is the month-to-date amount of the earnings or deduction.

HED_AMOUNT_QTD
NUMERIC, 11,2

This is the quarter-to-date amount of the earnings or deduction.

HED_AMOUNT_YTD
NUMERIC, 11,2

This is the year-to-date amount of the earnings or deduction.

HED_CROSS_REF
NUMERIC, 03,0

This is the HED number used to pay the reimbursement.

HED_CROSS_REF_NAME
VARCHAR, 015

This is the name of the HED used to pay the reimbursement.

HED_HOURS_CUR
NUMERIC, 11,2

This is the current hours for an earnings or the current amount for deduction arrears.

HED_HOURS_L_H
NUMERIC, 7,2

This shows the hours for an earnings or the amount for deduction arrears. This figure is taken from the employee's history or labor record.

HED_HOURS_MTD
NUMERIC, 11,2

This is the month-to-date hours for an earnings or the month-to-date amount for deduction arrears.

HED_HOURS_QTD
NUMERIC, 11,2

This is the quarter-to-date hours for an earnings or the quarter-to-date amount for deduction arrears.

HED_HOURS_YTD
NUMERIC, 11,2

This is the year-to-date hours for an earnings or the year to-date amount for deduction arrears.

HED_NAME
VARCHAR, 015

This is the description of the earnings or deduction as it is to appear on pay stubs and reports.

The 15th character of the name does not appear on the pay stub.

This position can be used for a miscellaneous code, if needed.

HED_NBR_L_H
NUMERIC, 03,0

This field displays an earning number that was included in the payment.

HED_NUMBER

NUMERIC, 03,0

This is the unique number assigned to the particular Hours Earnings or Deduction being set up through this A8-SCR. Although most Hours Earnings or Deduction numbers are user-defined, there are four preassigned numbers:

001 for Normal Pay

002 for Future Raises

003 for Overtime

999 for Net Pay

Hours Earnings or Deduction numbers 004-500 can be assigned to other earnings at your discretion and 501-998 are available for assignment to deductions.

HED_POSTED_IND

CHAR, 001

This is a value entered from the 8R-RPT program when the Q5 data has been written over to the Payroll H segment. For audit purposes this field intentionally does not appear on the 54-SCR.

HED_POSTED_IND_DES

VARCHAR, 020

This field displays the description from the option list translation of the HED-POSTED-IND code.

HED_QTR

NUMERIC, 02,0

This field contains the quarter to date figure for the selected tax body.

HED_REGISTER

CHAR, 001

This code indicates whether or not the earnings or deduction is to be printed on the HED Register.

Y = This HED is printed on the HED Register (Default)

N = This HED is not printed on the HED Register

HED_TAX_FLAG

VARCHAR, 020

This field displays the description from the option list translation of the HED Tax Flag Code.

HED_TAX_FLAG_CODE

CHAR, 001

This is an indicator to control a tax withholding override.

HED_TIMING
VARCHAR, 020

This field displays the description from the option list translation of the HED Timing Code.

HED_TIMING_CODE
CHAR, 001

This allows you to set up a table of job-related rates without using up multiple HEDs. In addition, the appropriate entry in this field causes a time document to automatically trigger other earnings or deduction.

HED_TYPE
VARCHAR, 20

This is the type of HED.

HED_XREF_ACTION
VARCHAR, 020

This field displays the description from the option list translation of the HED-XREF-ACTION code.

HED_XREF_ACTION_CD
CHAR, 001

This code identifies whether types of contributions available under a plan have been accepted overridden or rejected. A value must be entered in this field.

HED_XREF_AMOUNT_1
NUMERIC, 07,2

This contains a purchase price for bonds or other rolling purchase items such as stocks (category 53 deduction).

In addition , used with the proper Method Code, this field can be used to enter an amount of pay protected from the deduction referenced by the HED-XREF-NUMBER.

The value in this field is passed to the Payroll HED's AMOUNT-ONE field.

HED_XREF_AMOUNT_2
NUMERIC, 08,2

This is normally undefined for deduction. However, for Category 52 deduction (bonds), the Amount Two field is maintained by the system and contains the ending balance. All computer-issued payments and adjustments affecting year-to-date figures update this field. The value in this field is passed to the Payroll HED's AMOUNT-TWO field.

HED_XREF_AMT_PCT
NUMERIC, 07,0

This specifies a deduction value for a particular benefit.

This may be expressed as a fixed dollar amount or a percentage of earnings. It is the HED-XREF-METHOD-CODE that tells the system whether the value is an amount or percent.

Enter amounts with two decimals (for example 5 dollars would be expressed as 500).

Use four decimals for percentages (for example, five percent would be expressed as 0500).

The HED-XREF-AMT-PCT value is written to the Payroll HED's AMOUNT-PERCENT field.

HED_XREF_CONTRB_CD

CHAR, 001

This code indicates the source of funds used as contributions in a Q5 segment containing plan deduction and Payroll H record update data.

HED_XREF_CONTRIBUT

VARCHAR, 020

This field displays the description from the option list translation of the HED-XREF-CONTRIB-CD.

HED_XREF_EFF_DATE

DATETIME

This is the date on which the deduction is to take effect.

The system determines when to update the Payroll HED record with this record's deduction information based upon the HED-XREF-EFFECT-DATE.

HED_XREF_EFF_UNTIL

DATETIME

This is the date on which the deduction is to end.

HED_XREF_FREQ_CODE

CHAR, 002

This is the pay period in which deductions are to be taken for the benefit described by the HED-XREF-NUMBER.

HED_XREF_FREQUENCY

VARCHAR, 020

This field displays the description from the option list translation of the HED-XREF-FREQ-CODE.

HED_XREF_METHOD

VARCHAR, 020

This field displays the description from the option list translation of the HED-XREF-METHOD-CODE.

HED_XREF_METHOD_CD
CHAR, 002

This code describes the calculation method used to determine the amount of the deduction for the benefit described by the HED-XREF-NUMBER.

HED_XREF_NAME
VARCHAR, 015

This field displays the description from the option list translation of the HED_XREF_NUMBER code.

HED_XREF_NUMBER
NUMERIC, 03,0

This is the unique number assigned to this deduction at the company level through the A8-SCR. Any number entered in this field must match to the HED number associated with the HED-XREF-CONTRIB-CODE on the TK Table for the HED-XREF-PLAN-ID entered on the form.

HED_XREF_START
VARCHAR, 020

This field displays the description from the option list translation of the HED_XREF_START_CD.

HED_XREF_START_CD
CHAR, 001

This code describes the contents of the HED-XREF- START-FIELD.

It can be used to start a deduction or an automatic earnings when an event occurs. The HED-XREF-START-CODE is written to the Payroll HED's START-CODE field.

HED_XREF_START_FLD
NUMERIC, 06,0

This value identifies a date or amount which when reached starts the deduction for this HED-XREF-NUMBER. If a dollar amount is being entered, enter it as a whole dollar amount. The value in this field is passed to the Payroll HED's START-FIELD.

HED_XREF_STOP
VARCHAR, 020

This field displays the description from the option list translation of the HED_XREF_STOP_CD.

HED_XREF_STOP_CODE
CHAR, 001

This code identifies the contents of the Stop field for the HED-XREF-NUMBER.

It can be used to stop a deduction or automatic earnings when an event occurs.

The value in this field is passed to the Payroll HED's STOP-CODE field.

HED_XREF_STOP_FLD
NUMERIC, 06,0

This is a date or amount which when reached, stops the deduction or automatic earnings of this HED-XREF- NUMBER. If a dollar amount is being entered, enter it as a whole dollar amount. The value in this field is passed to the Payroll HED's STOP-FIELD.

HED_XREF_TM_RULE
CHAR, 002

This is the CONTRIB-RULE from the Plan's TM Table which was used to calculate the deduction amount or percent contained on the Q5 segment. This field is automatically updated by the system if the Q5 segments are being generated as a byproduct of an entry screens.

You can make a manual entry in this field if you choose to do so.

HED_XREF_TM_RULE_D
VARCHAR, 020

This field displays the description from the option list translation of the HED-XREF-TM-RULE code.

HED_XREF_TYPE
VARCHAR, 020

This field displays the description from the option list translation of the HED-XREF-TYPE-CODE.

HED_XREF_TYPE_CODE
CHAR, 002

This code determines the action to be taken when there is not enough money left in the employee's paycheck for the deduction to be taken (arrears). This value is written to the Payroll HED-DEDUCT-ARREAR-CD field.

HED_YEAR
NUMERIC, 04,0

This field contains the year to date figure for the selected tax body.

HIGH_PD_CURRENT
CHAR, 001

This code defines whether or not the employee is deemed a highly-paid employee based on current year criteria rather than data from the prior year.

HIGH_PD_CURRENT_D
VARCHAR, 020

This field contains the code defining whether or not the employee is deemed a highly-paid employee based on current year criteria rather than data from the prior year.

HIGH_PD_PRIOR
CHAR, 001

This code defines whether or not the employee is deemed a highly-paid employee based on data in effect the prior year.

HIGH_PD_PRIOR_D
VARCHAR, 020

This field contains the code defining whether or not the employee is deemed a highly-paid employee based on data in effect the prior year.

HIGHLY_PAID
CHAR, 001

This code defines whether or not the employee is deemed a highly-paid employee for this years testing.

HIGHLY_PAID_D
VARCHAR, 020

This field contains the code defining whether or not the employee is deemed a highly-paid employee for this years testing.

HIGHLY_PD_UNTIL
DATETIME

This is the ending effective date of the employee's highly paid compensation.

HIGHLY_PD_YEAR_END
DATETIME

This is the Plan Year-End, which corresponds with the year-end of the Plans that are included in the nondiscrimination test defined on a TODSCR Table.

HIRE_SOURCE
CHAR, 002

This code defines the source of hire for this employee.

Using this field analysis may be performed to determine the most successful form of hire source.

HISPANIC
NUMERIC, 6,0

All individuals of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race, are included in this category.

Individuals whose last names are recognized as Spanish surnames typically belong in this category.

HISTORY_C1
CHAR, 2

This field contains the value of the Control 1 in which the employee's Master Record resided when the Major Activity was recorded.

HISTORY_C2
CHAR, 4

This field contains the value of the Control 2 in which the employee's Master Record resided when the Major Activity was recorded.

HISTORY_HOURS
NUMERIC, 08,2

This field contains the normal hours in the employee's pay cycle.

HISTORY_RATE
NUMERIC, 8,4

This field contains the hourly rate the employee is being paid on the selected pay cycle.

May be blank if HISTORY_SALARY is input instead.

HISTORY_REC_UNTIL
DATETIME

This is the ending date for the Pension activity.

HISTORY_RECORD_DT
DATETIME

This is the effective date of the Q6 segment containing Pension Plan election and payment information.

HISTORY_SALARY
NUMERIC, 9,2

This field contains the period salary the employee is being paid on the selected pay cycle.

May be blank if HISTORY_RATE is input instead.

HOME_AREA_CODE
CHAR, 003

This is the area code of the employee's home telephone number. If you change the HOME-PHONE value, you must re-enter the HOME-AREA-CODE.

HOME_CONTACT_HOURS
VARCHAR, 015

This is the time frame in which the applicant will be available to be contacted at the applicant's home telephone number.

HOME_DEPARTMENT
CHAR, 004

This is the department the employee was regularly assigned to even though he/she may be temporarily assigned to another department at the time of illness.

HOME_PHONE
CHAR, 007

This is the employee's home telephone number. If you change the HOME-AREA-CODE, you must re-enter the HOME-PHONE value.

HOURLY_RATE
NUMERIC, 07,4

This is the employee's hourly rate of pay. The value in this field may be directly entered, or the result of a system calculation. In addition, the value in this field may update the HOURLY-RATE field on HED 001, if the TG Table for the employee's Control function.

HOURLY_RATE_SWITCD
VARCHAR, 20

This field displays the description from the option list translation of the HOURLY-RATE-SWITCH Code.

HOURLY_RATE_SWITCH
CHAR, 1

This value indicates how information entered in the HOURLY-RATE field on employee-level screens should be handled.

HOURS
NUMERIC, 4,0

This defines the amount of time (in hours) an employee must work before participating in the plan described by the TN table. Hours are entered as integers only (fractional portions are not allowed).

HOURS_PER_PERIOD
NUMERIC, 05,2

This is the normal hours in the employee's pay period. If this field is not entered on a salary calculation form, the system will default to the HOURS-PER-PAY- PERIOD on HED 001. If HED 001 does not have a value for HOURS-PER-PAY-PERIOD, the applicable form will be rejected.

HR_LEAVE_SPAN
CHAR, 8

This is the amount of time between the separation ACTIVITY-DATE and the return ACTIVITY-DATE. HR- LEAVE-SPAN is always displayed in YYMMDD format.

HR_PARITY_REQ_DATE

DATETIME

The Parity Requalification Date is defined by ERISA as the date by which a separated employee or an employee on leave must return to prevent incurring a break in service.

In other words, if the employee returns by this the employer cannot deny the employee any prebreak service.

REA 1984 regulations are reflected in the CSSS parity requalification date calculation. Employees who terminate with LESS than five years of service will have five years added to their leave date to calculate parity requalification. Terminated employees with MORE than five years of service will have their full service added to the leave date.

Service is calculated by subtracting the ADJUSTED-SENIORITY date from the LEAVE-DATE. It is very important that adjusted seniority be maintained.

Since REA ‘84 regulations apply only to employees terminated after August 23, 1984, you must review all terminated employees added to the Employee Database during a conversion run. It will be necessary for you to adjust the HR-PARITY-REQ-DATE of employees terminated before August 23, 1984. Employees terminated after this date, and entered after conversion on the 95-SCR or 96-SCR, will have a correct date calculated.

I

ID_EMPLOYMENT
CHAR, 001

This is the identification of the type of document produced proving the applicant or employee has employment authorization in the US.

ID_EMPLOYMENTS
VARCHAR, 020

This field displays the description from the option list translation of the ID-EMPLOYMENT code.

ID_IDENTITY
CHAR, 001

This is the identification of the type of document produced proving identity of the applicant or employee.

ID_IDENTITYS
VARCHAR, 020

This field displays the description from the option list translation of the ID-IDENTITY code.

ID_PROVIDED
CHAR, 001

This is the code for the type of identification document produced. It may contain a value that translates to two documents having been submitted, in which case a value is required in the ID-EMPLOYMENT and ID- IDENTITY fields to identify the two separate documents.

ID_PROVIDEDS
VARCHAR, 020

This field displays the description from the option list translation of the ID-PROVIDED code.

ID_VERIFIED
CHAR, 001

This is the identification procedure status. The status denotes whether or not the procedure has started and if identification could be produced.

ID_VERIFIEDS
VARCHAR, 020

This field displays the description from the option list translation of the ID-VERIFIED code.

INCREASE_NUMBER

CHAR, 001

This is a user-entered number assigned to an increase representing the sequence in which the increase is to be applied during the Salary Plan Year. This is a required field. In the case of a single increase in a Plan Year, enter the value '1'.

INCREASE_NUMBER_DE

VARCHAR, 020

This field displays the description from the option list translation of the INCREASE-NUMBER code.

INCREASE_TYPE

CHAR, 001

This code indicates whether this increase was generated (or entered) as a normal by-product of the Salary Planning/Budget Policy (INCREASE- TYPE A) or was entered on-line as an exception to the policy because the employee is a high or low performer.

If a high or low performer record exists for an INCREASE-NUMBER, the system uses the H or L record for all budgeting, reporting, and calculation purposes.

This is a required field.

INCREASE_TYPE_DESC

VARCHAR, 020

This field displays the description from the option list translation of the INCREASE-TYPE code.

INCUMBENCY_NBR

CHAR, 002

This is the incumbency number when Position Administration is in use.

INCUMBENCY_NBR_DES

VARCHAR, 020

This field displays the description from the option list translation of the INCUMBENCY-NBR code.

INDIAN_ALASKAN

NUMERIC, 6,0

All individuals having origins in any of the original peoples of North America and who maintain cultural identification through tribal affiliation or community recognition belong in this category.

INJURY

VARCHAR, 025

This is the description of the injury or illness. An example of this entry: BROKEN INDEX FINGER.

INJURY_CODE

CHAR, 004

This code describes the type of illness or injury that the employee has sustained.

You must develop its coding scheme using one of the characters listed in this table as the first character of each code. The remaining characters of this code are user-defined.

ILLNESS:

1 = Skin disease
2 = Lung dust
3 = Respiratory
4 = Poisoning
5 = Disorder - agents
6 = Disorder - trauma
7 = Other illness

INJURY:

8 = User-defined
9 = User-defined

INJURY_DATE

DATETIME

This is the date of the injury or illness.

INSURANCE_CARRIER

VARCHAR, 012

This is the name of the spouse or dependent's insurance carrier if applicable.

INSURANCE_CARRIER

VARCHAR, 020

This is the name of the spouse or dependent's insurance carrier if applicable.

INSURE_CARRIER

CHAR, 002

This code identifies the Insurance Company which handles the insurance for this Benefit Plan.

J

J_CHANGE
CHAR, 001

This is a user defined field.

J_USER_CODE
CHAR, 001

The User Code field is normally an undefined field; its use is left to the discretion of the user.

However, for California U/I reporting enter the appropriate Wage Plan Code.

JB_CONTROL_NBR
CHAR, 2

This is the Control Number of the Position Administration module for the organization (Control 1-2) entered. It is also the first two positions of the Base HR modules TA table control number. This dual role is necessary in order to allow the TA table functionality to be fed from Position Administration.

JB_FAMILY_CODE
VARCHAR, 4

This code is used to identify the Job Family for the Job entry.

JB_FAMILY_DESC
VARCHAR, 20

This is the description of the code that is used to identify the Job Family for the Job entry.

JB_GRADE
CHAR, 6

This is the salary grade for the Job Entry.

JB_JOB_CODE
VARCHAR, 6

This is a unique, six-character code that identifies the Job.

JB_JOB_DESCRIPTION
VARCHAR, 30

This is a free-form description of the Job entry.

JB_OCC_CAT_CODE
VARCHAR, 6

This code is used to identify the Occupation Group for the Job entry.

JB_OCC_CAT_DESC
VARCHAR, 20

This is a description of the code used to identify the Occupation Group for a Job entry.

JB_REASON_CODE
CHAR, 2

This code is used to identify a Job as being created, changed, or abolished.

JB_REASON_DESC
VARCHAR, 20

This is a description of the code that is used to identify a Job as being created, changed, or abolished.

JB_SEQ_NUMBER_01
NUMERIC, 3,0

This is the sequence number of the job record.

JB_TABLE_DATE
DATETIME

This is the effective date of the Job entry.

JB_TABLE_DATE_01
DATETIME

This is the effective date of the Job table entry.

JB_TABLE_DT_UNTIL
DATETIME

This is the ending effective date of the Job table entry.

JB_USER_DESC
VARCHAR, 20

This is the description of a code that can be used however you want. The label on the form should be changed to reflect the usage of this field.

JB_USER_FIELD_1
VARCHAR, 8

This is a free-form field that can be used however you want. The label on the form should be changed to reflect the usage of this field.

JB_USER_FIELD_2
CHAR, 2

This code can be used however you want. The label on the form should be changed to reflect usage of this field.

JOB
VARCHAR, 020

This field contains the description of the JOB-TYPE code entered on the TA Table.

JOB_CATEGORY
VARCHAR, 020

This field displays the description from the option list translation of the ACTIVITY Code. It represents the job category at the time of the selected History and/or Labor record.

JOB_CATEGORY_CODE
CHAR, 004

This records the EEOC Job Category assigned to the employee for Basic HR EEO reporting.

JOB_CODE
VARCHAR, 6

This is the JOB-CODE assigned on the TA Table for the job the employee currently holds or at the time of the entry held.

The JOB-CODE is used with the JOB-CODE- EXTENT in all but a few reporting instances. If a TA Table record has not been entered for the JOB- CODE/JOB-CODE-EXTENT for the employee on forms where both fields are present, the form will be rejected. You must establish the TA Table entry then return to the employee-level screen to enter the employee segment.

The JOB-CODE may be used alone when multiple JOB-CODE-EXTENTS have been used for the same JOB-CODE in order to do analysis or totaling, regardless of the JOB-CODE-EXTENT.

JOB_CODE_EXTENT
VARCHAR, 4

This is the JOB-CODE-EXTENT of the JOB-CODE currently held by the employee or held when the segment was entered.

When using employee-level forms that contain both the JOB-CODE and JOB- CODE-EXTENT fields, you must enter both values. The two values MUST match an existing JOB-CODE/JOB-CODE EXTENT TA Table record. If the system does not find a match, the form is rejected.

You must make the applicable TA Table entry before attempting to re-enter the form. The JOB-CODE-EXTENT value must be something other than spaces or all zeroes.

JOB_CODES
CHAR, 2

This is the Control Number of the Human Resource Base Module's TA Table to be used for the organization (Control 1-2) entered.

JOB_EFFECTIVE
DATETIME

This is the effective date of the JOB-CODE/JOB-CODE-EXTENT.

JOB_FAMILY
CHAR, 2

This is the JOB-FAMILY code assigned to the OCCUPATION-GROUP code.

JOB_FAMILY_DESC
VARCHAR, 20

This field displays the description from the option list translation of the JOB-FAMILY code.

JOB_POINTS
CHAR, 4

This is the Control Number of the Salary Administration TC Table to be used for the organization (Control 1-2).

JOB_PROFILE_1
NUMERIC, 3,2

This is the Profile Percentage rating for the KNOWLEDGE Job Points.

JOB_TITLE
VARCHAR, 030

This is the title assigned to the JOB-CODE/JOB-CODE-EXTENT on the TA Table.

JOB_TYPE
CHAR, 002

These codes are generic categories that further define a particular JOB-CODE/JOB-CODE-EXTENT on the TA Table.

JOB_UNION
VARCHAR, 20

This field displays the description from the option list translation of the JOB-UNION-CODE.

JOB_UNION_CODE
CHAR, 5

This is the employee's JOB-UNION-CODE. A code may be entered, whether or not the system deducts union dues.

It should equal the UNION-CODE entered on the EE-SCR but may be overridden.

JOB_UNTIL
DATETIME

This is the ending date of the job.

JP_FLAG

CHAR, 1

This is a one digit job flag used in the Position Administration module.

JP_JOB_CODE

VARCHAR, 6

This is a six digit code used to represent the job.

This is used with the Position Administration module.

JP_SEQ_NUMBER

NUMERIC, 4,0

This is the job sequence number.

This is used with the Position Administration module.

K

KEY_FIELD_1
CHAR, 001

This is a one-position user-defined field used within the Labor and/or History records.

KEY_FIELD_2
CHAR, 001

This is a one-position user-defined field used within the Labor and/or History records.

KEY_FIELD_3
CHAR, 001

This is a one-position user-defined field used within the Labor and/or History records.

KEY_FIELD_4
CHAR, 001

This is a one-position user-defined field used within the Labor and/or History records.

KEY_SEPARATOR
CHAR, 1

This is used to ensure multiple entries of a segment on the same date will be sequenced properly on the Employee's Master Record. Each key combination may have a maximum of ten entries for the same JOB- EFFECTIVE date.

Enter the segments beginning with KE of 9, then 8, and so forth. It is important that segments with a KEY-SEPARATOR be entered in the order of their occurrence because the last segment entered for the date will be considered the most current for reporting and future calculation purposes.

KEY_SEPARATOR_DESC
VARCHAR, 20

This field displays the description from the option list translation of the KEY-SEPARATOR code.

L

LABOR_PERCENTAGE
NUMERIC, 4,0

This is the percentage of the pay period's earnings which apply to this accounting period. This value can be used by a general ledger interface report generator. The Labor Percentage field is set to zero on the run following a pay run for this frequency.

LANGUAGE
VARCHAR, 020

This field displays the description from the option list translation of the NATIVE-TONGUE code. It represents the employee's language at the time of the selected History and/or Labor record.

LANGUAGE
VARCHAR, 20

This field displays the description from the option list translation of the NATIVE-TONGUE code.

LANGUAGE_CODE
CHAR, 002

This is the employee's RACE-CODE used in EEO reporting.

You are not allowed to modify the option list.

This code is only applicable if Basic HR is purchased (that is, if only Payroll is purchased, this field will not validate).

LAST_DAY_PAID
DATETIME

This is the last date the employee was paid or will be paid for the ACTIVITY. If the employee is to be paid for an indefinite period of time regardless of whether the ACTIVITY has been processed (for example, LOA with pay), this field should be left blank.

LAST_DAY_WORKED
DATETIME

This is the last date the employee worked before leaving the company.

LAST_NAME
VARCHAR, 20

This field is used as the output field that contains the Last Name after the execution of the subroutine 'EDTFML' that splits a Name field into three separate fields.

LAST_PERIOD
DATETIME

This is the date of the previously run pay period run for a selected frequency.

LATEST_BOOKING_NO
NUMERIC, 3,0

Holds the latest booking number for a scheduled course to be used when allocating the next booking number to an employee being booked on a course.

It is automatically incremented.

LEAVE_ACTIVITY
VARCHAR, 020

This field contains the description of the activity identified by the LEAVE-REASON code. You are not permitted to make an entry here.

LEAVE_END_DATE
DATETIME

This records the effective date of the return from a service interruption.

When an employee returns to active service from a previous separation, the service interruption must be reviewed to determine if a break-in-service has occurred according to plan rules.

Returns to active service are automatically recorded by the system when the return/rehire/ recall/reinstatement/and so forth activity is recorded in the Human Resource Base Component and a TU Table record is found that defines BREAK-IN-SERVICE rules for the Leave Activity.

You can enter a LEAVE-END-DATE if necessary.

LEAVE_REASON
CHAR, 003

When an employee separates from active service a service interruption occurs.

The LEAVE-REASON records the Major Activity code from the Human Resource Base Module that originated the leave for the separation.

LEAVE_SPAN
CHAR, 8

This is the period of time between the employee's LEAVE-START-DATE and LEAVE-END-DATE. The LEAVE-SPAN is calculated by subtracting the LEAVE-START-DATE from the LEAVE-END-DATE, and is displayed in YYMMDD format.

LEAVE_START_DATE
DATETIME

When an employee separates from active service a service interruption occurs. This records the effective date of the start of a service interruption; it is not necessarily the beginning of a break-in-service.

A service interruption is automatically recorded by the system when the employee returns to Active Service and then, only if a TU Table record is found that defines BREAK-IN-SERVICE rules for the Activity (from the Human Resource Base Component) which caused the service interruption.

You can enter the LEAVE- START-DATE if you want to record a service interruption or modify existing data.

LEVEL_6_3RD_QTR_B

NUMERIC, 13,4

This is the value of the sixth span for the TBB Per Period Salary Grade Table. It is one-third the amount between the Midpoint and Maximum of the salary range; or the Third Quartile value if the Salary Grade was generated entering a 'Q' in the Code 2 field

LEVEL_NAME

VARCHAR, 30

This is the Organizational Unit Level Name.

This is used with the Position Administration module.

LEVEL_NUMBER

NUMERIC, 3,0

This is the Organizational Unit Level Number.

This is used with the Position Administration module.

LEVEL_THREE_TYPE_B

NUMERIC, 13,4

This is the value of the third span for the TBB Per Period Salary Grade Table. It is two-thirds the amount between the minimum and midpoint of the salary range.

This field will not be generated if the Salary Grade was created using the Quartile option.

LITIGATION

VARCHAR, 020

This field displays the description from the option list translation of the LITIGATION-CODE.

LITIGATION_CODE

CHAR, 001

This code designates whether or not litigation is pending as a result of the injury or illness. The valid codes are as follows:

0 = No litigation

1 = Litigation in progress

2 = Litigation successful

3 = Litigation unsuccessful

LOCATION_CHANGE

VARCHAR, 020

This field displays the description from the option list translation of the LOCATION-CHANGE Code.

LOCATION_CHANGE_TP

CHAR, 003

This code identifies the location field(s) changed on this segment.

LOCATION_EFFECTIVE

DATETIME

This is the effective date of the location data changed on the segment.

LOCATION_NUMBER

NUMERIC, 02,0

This indicates the location to which a percentage of the employee's pay is to be charged. Valid entries are as follows:

01 = Home location

02 - 98 = Additional distribution locations

When an employee is added to the Employee Database, a G-SCR must be entered with the LOCATION-NUMBER 01 for the home location.

LOCATION_PERCENT

NUMERIC, 06,2

This specifies the percentage of the employee's pay that is to be charged to the location indicated in the Location Number field. If an employee has a single G record and less than 100 percent is entered in the Location Percent field, the percentage of the earnings that is unaccounted for is not charged to any location. Unless you do not wish to account for 100 percent of an employee's earnings, leave this field blank for the home location (Location Number 01).

LOCATION_UNTIL

DATETIME

This is the ending effective date of the selected location.

It is actually the beginning date of the next location.

M

MAG_BAR_DESCRIP
VARCHAR, 020

A default description of the type of badge reader data collection device is given.

MAG_BAR_IND
CHAR, 001

This field applies only if you are using The Time and Attendance Administration.

The available Option List values in the list box are: Bar Code (B) and Magnetic Stripe (M).

MAIL_CONTACT
VARCHAR, 020

This field displays the description from the option list translation of the APPL-MAIL-CONTACT code.

MAIL_DIST_DATA
CHAR, 010

This is the internal mail station or distribution data which is used in producing Internal Mailing Labels. The field may be modified to a option list by establishing a User option list, entering its name in F-NAME for the MAIL-DISTRUBUTE-DATA field, and populating the option list with your valid mail numbers.

MAJOR
VARCHAR, 020

This field displays the description from the option list translation of the MAJOR-CODE.

MAJOR_ACTIVITY
CHAR, 1

This code describes the group of separation activities to which the TU table record pertains. It is actually the first character of the ACTIVITY-CODE (see option list HR09).

MAJOR_CODE
CHAR, 003

This code identifies the employee's primary course of study.

MAJOR_MARK
CHAR, 3

This is the primary grade or mark the student received in this class.

MANDATORY_RETIRE

DATETIME

This is the latest date on which a plan participant can retire according to plan rules (It may also be used to record the latest date on which the employee is expected to retire according to company rules).Usually, earnings and service accrued after this date may not be used in the calculation of benefit levels. Since the date is projected, its format includes century notation in the first two digits; the actual stored value for April 1, 2010 would be 20100401.

Mandatory retirement dates are calculated by the system when an employee becomes a participant in a retirement plan.

Manual entries usually will not be required in this field unless the system calculated date is to be manually overridden.

For more information concerning the rules under which the projected mandatory retirement date is calculated for a particular benefits plan, please refer to the TJ Table entries for the Plan ID.

The actual retirement date (not this projected value) is entered at the time the retirement activity is recorded in the system.

MARITAL_CODE

CHAR, 001

This code identifies the employee's current marital status.

MARITAL_STATUS

VARCHAR, 020

This field displays the description from the option list translation of the MARITAL-CODE.

MASTER_NUMBER

CHAR, 004

This field contains a four-digit master number. A valid entry is required in this text box and in the Payment Date field before a specific record will display on the Payment Reversal form. You may leave this field blank if you wish to view all records.

MASTER_PLAN

CHAR, 4

This is the Control Number of the TP table to be used for this organization (Control 1-2).

MASTER_PLAN_DATE

DATETIME

This is the effective date of the TP Table Record.

MASTER_PLAN_RULES
CHAR, 4

This is the Control Number of the TKF table to be used for this organization (Control 1-2).

MASTER_PLAN_UNTIL
DATETIME

This is the ending effective date of the TP Table record.

MAX_AGE
CHAR, 8

This defines the maximum age limitation for participation in the plan described by the TN table. Enter the date in YYMMDD format. For example, if employees are not allowed in the plan after age 65, you would enter ‘650000’.

MAX_ANNUAL_SAL
NUMERIC, 9,0

This field is the highest annual salary amount associated with the salary grade for a particular job.

MAX_DISAB_TAX
NUMERIC, 11,2

For applicable states this field contains the maximum disability tax an employee can pay.

For U.S. tax body 101 (FICA), this field contains the maximum FICA tax an employee can pay.

For Canadian tax body 2XX (CPP/QPP) and 3XX (UIC), this field contains the maximum annual amount an employee can pay for CPP/QPP or UIC.

MAX_DISAB_WAGE
NUMERIC, 11,2

For applicable states this field contains the maximum wages subject to an employee-paid disability tax.

For U.S. tax body 101 (FICA), this field contains the maximum wages on which the employee must pay FICA.

For Canadian tax body 2XX (CPP/QPP), this field contains the annual CPP/QPP wage limit.

For Canadian tax body 3XX (UIC), this field contains the minimum annual UIC tax amount.

MAX_HOURLY_SAL
NUMERIC, 9,4

This field is the highest hourly salary amount associated with the salary grade for a particular job.

MAX_PERPAY_SAL
NUMERIC, 9,2

This is the value of the maximum of the TBB Per Period Salary Grade.

It represents the highest amount of the range and the point over which an employee would be considered as being in the Salary Grade's red circle.

MAX_UI_WAGE
NUMERIC, 11,2

For states and U.S. tax body 102 this field contains the unemployment wage limit.

For U.S. tax body 101 (FICA), this field contains the employer FICA wage maximum.

For Canadian tax body 3XX, this field contains the maximum annual UIC wage limit.

MAXIMUM_SALARY
NUMERIC, 13,4

This field is the maximum salary amount associated with the salary grade for a particular job.

MCC_HED_HFCDR_FLAG
CHAR 001

This field is set to 'F' by the MC-SCR screen to indicate that there is a multicurrency record associated with this HED

MCC_HED_HFCDR_DESC
VARCHAR 020

The description of the MCC_HED_HFCDR_FLAG field and is used to show that a HED as a multicurrency record associated with it.

MEMBER_NUMBER
VARCHAR, 020

This is used to log a membership or account number that relates to a particular perquisite.

METHOD_CODE
CHAR, 002

This is the Method Option assigned to an Earnings or Deduction HED on the H segment.

The field may be used when making inquiries of the file in a batch report or with a QUERY. It CANNOT be used in a form or report that will update the file as it is not associated with an Option List.

METHOD_DESC
VARCHAR, 020

This field displays the description from the option list translation of the METHOD-CODE.

MID_ANNUAL_SAL
NUMERIC, 9,0

This field is the mid-point annual salary amount associated with the salary grade for a particular job.

MID_HOURLY_SAL
NUMERIC, 9,4

This field is the mid-point hourly salary amount associated with the salary grade for a particular job.

MID_NAME
VARCHAR, 20

This field stores the Employee Middle Name.

MID_NAME
VARCHAR, 20

This field stores the Employee Middle Name.

MID_PERPAY_SAL
NUMERIC, 9,2

This value represents the 50th percentile amount of the TBA Per Period Salary Grade range.

If this field is calculated by the system, it is equidistant between the Salary Grade's Minimum and Maximum values.

MIDPOINT_SALARY
NUMERIC, 13,4

This field is the mid-point salary amount associated with the salary grade for a particular job.

MILITARY_STATUS
VARCHAR, 020

This field displays the description from the option list translation of the MILITARY-STATUS-CD.

MILITARY_STATUS_CD
CHAR, 001

This is the employee's military status.

MIN_AGE
CHAR, 8

This defines the minimum age required for employees to participate in the plan described by the TN table. Enter the date in YYMMDD format. For example, if employees must be twenty-five to participate in the plan, you would enter ‘250000’.

MIN_ANNUAL_SAL
NUMERIC, 9,0

This field is the minimum annual salary amount associated with the salary grade for a particular job.

MIN_HOURLY_SAL
NUMERIC, 9,4

This field is the minimum hourly salary amount associated with the salary grade for a particular job.

MIN_PERPAY_SAL
NUMERIC, 9,2

This is the value of the minimum of the TBB Per Period Salary Grade.

It represents the lowest amount of the range and the point under which an employee would be considered as being in the Salary Grade’s green circle.

MINIMUM_SALARY
NUMERIC, 13,4

This field is the minimum salary amount associated with the salary grade for a particular job.

MINOR
VARCHAR, 020

This field displays the description from the option list translation of the MINOR-CODE.

MINOR_CODE
CHAR, 003

This code identifies the employee’s secondary course of study.

MINOR_MARK
CHAR, 3

This is the secondary grade the student received in this class if the instructor gives one.

MONTHLY_PENSION
NUMERIC, 07,2

This field contains the monthly pension benefit being paid to the retiree, (in dollars and cents). Once entered there is no need to update this field unless the MONTHLY-PENSION changes.

If the amount does change after Retirement, the system also requires PENSION-CHANGE-TYPE and PENSION-INCREMENT fields.

MONTHS_SINCE

NUMERIC, 03,0

This is the number of months between occurrences of the employee's prior and current SALARY- EFFECTIVE- DATE on the Employee Database. The system zero fills this field when the first salary occurrence is entered.

MULTI_AVERAGE_RATE

NUMERIC, 7,4

This is a calculated field. When using the Position Administration module, the calculation performed to obtain this field is the multi-incumbency total salary divided by the multi-incumbency total hours. When not using Position Administration the calculation performed is annual salary divided by hours per period.

MULTI_INC_TOT_HRS

NUMERIC, 6,2

This value is calculated from the multi- incumbency hours on the 40-SCR and displayed in Inquiry mode.

MULTI_INC_TOT_SAL

NUMERIC, 9,2

This value is calculated from the multi- incumbency salaries on the 40-SCR and displayed in Inquiry mode.

N

NAME_CODE

NUMERIC, 03,0

This code identifies the function of the name and address information that immediately follows it on the screen. Valid entries are:

001 = Legal name and address

002 - 998 = User-defined names and addresses

999 = Payment mailing address (use only if different from legal address)

NATIVE_TONGUE

CHAR, 002

This code identifies the employee's native language.

NBR_OF_WEEKS

NUMERIC, 4,0

This field stores the number of weeks in a given time frame.

NEW_PERIOD

CHAR, 1

This works in conjunction with the FREQUENCY- IDENTIFIER, PAYMENT-DATE, PAY-CYCLE, and DEDUCTION-CYCLE fields in paying a PAY-FREQUENCY.

Use the NEW-PERIOD field to indicate whether or not this is a new period for the frequency. Valid entries are:

N = Not a New Period

Y = New period (Default)

If a new period is specified, this field updates the dates on the AJ-SCR.

If you enter a Y, the PAY-CYCLE and DEDUCTION-CYCLE fields are ignored. Before the five fields can be used to pay a frequency, that pay frequency must first be established with the AJ-SCR.

NEW_PERIOD_DESC

VARCHAR, 20

This field displays the description from the option list translation of the NEW-PERIOD code.

NEXT_APPRAISAL

VARCHAR, 020

This field displays the description from the option list translation of the Next Appraisal Type code.

NEXT_APPRAISAL_DT
DATETIME

This is the date the next appraisal review is to be performed.

NEXT_APPRAISAL_TP
CHAR, 002

This code defines the type of appraisal review which is to be performed.

NEXT_COUNSELING_DT
DATETIME

This is the projected date of the next counseling session to be given to a plan participant who is nearing a projected retirement date. This date is a Century format date and can be entered as CCYYMMDD or MM-DD- CCYY.

NEXT_COUNSELING_TP
CHAR, 001

This is the type of the next counseling session to be given to a plan participant who is nearing a projected retirement date.

For example, if a company counsels participants within one year of projected early retirement, counseling calculation programs will mark all participants whose EARLY-RETIRE date is approximately one year in the future from the program's run date as needing a one year pre-early retirement counseling session. (The one year marker date is simultaneously stored as NEXT-RET-COUNSEL-DTE.)

NEXT_NOTICE
VARCHAR, 020

This field displays the description from the option list translation of the NEXT-NOTICE-TYPE code.

NEXT_NOTICE_DATE
DATETIME

This is the date the retirement notification is due to be sent to the employee. The NEXT-NOTICE-DATE is initially system calculated based upon rules entered on the Plan's TJ Table. Thereafter it is automatically updated to the next date a notice is due by a batch generator.

You can, however, manually adjust this field.

NEXT_NOTICE_TYPE
CHAR, 001

This is the NEXT-NOTICE-TYPE option which identifies the type of retirement notification due to be sent to an employee approaching eligibility for retirement.

For example, if a company schedules first retirement notifications to be distributed one year prior to a possible retirement date, an employee who is first eligible for Early Retirement on August 1 1989 is scheduled for his first Early Retirement notification on August 1 1988.

This field is initially system generated as the first scheduled notice type at Plan Enrollment based upon rules entered on the Plan's TJ Table. The NEXT-NOTICE-TYPE is automatically updated to the next notice due chronologically by a batch generator. You can however manually adjust this field.

NEXT_RETIRE_COUNSE

VARCHAR, 020

Translation of the type of the next counseling session to be given to a plan participant who is nearing a projected retirement date.

NEXT_REVIEW

VARCHAR, 020

This field displays the description from the option list translation of the NEXT-REVIEW-TYPE code.

NEXT_REVIEW_DATE

DATETIME

This field contains the date the next salary review is to be performed.

NEXT_REVIEW_TYPE

CHAR, 002

This code defines the type of salary review to be performed.

NO_PAY_WARNING

VARCHAR, 020

This field displays the description from the option list translation of the NO-PAY-WARNING Code.

NO_PAY_WARNING_CD

CHAR, 001

When an employee's frequency is being paid but the employee isn't the NO-PAY-WARNING field can force a pass through that employee's HEDs. Also, a warning message can be printed on the Payroll Audit Trail to alert you to such an occurrence.

NON_INDEXED_AMOUNT

NUMERIC, 5,2

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

NONDISCRIM_VALUE

NUMERIC, 10,2

This is the value of the option for the purposes of nondiscrimination testing if the amount to be used in testing is different than the calculation contribution amount.

NONRES_HEAD

NUMERIC, 01,0

This specifies the tax table to be used for the non- resident head of household category. Valid entries are:

0 = No tax for non-resident head of household

1 - 6 = The table to be used for non-resident head of household

NONRES_MAR

NUMERIC, 01,0

This specifies the tax table to be used for the non- resident married category. Valid entries are:

0 = No tax for non-resident married (Default)

1 - 6 = The table to be used for non-resident married

NONRES_SINGLE

NUMERIC, 01,0

This specifies the tax table to be used for the non- resident single category. Valid entries are:

0 = No tax for non-resident single (Default)

1 - 6 = The table to be used for non-resident single

NORMAL_HOURS_SWITC

CHAR, 1

This value indicates how information entered in the NORMAL-HOURS field should be handled.

NORMAL_HOURS_SWITD

VARCHAR, 20

This field displays the description from the option list translation of the NORMAL-HOURS-SWITCH Code.

NORMAL_RETIRE

DATETIME

This is the date on which a plan participant can retire as a normal retiree according to plan rules.

It can also be used to record the date on which the employee is expected to retire according to company rules.

Since the date is projected, its format includes century notation in the first two digits; the actual stored value for April 1, 2010 would be 20100401.

Normal retirement dates are calculated by the system when an employee becomes a participant in a retirement plan.

Manual entries usually are not required in this field unless an employee's Plan Service dates change resulting in a different NORMAL- RETIREMENT-DATE than the date originally calculated by the system.

For more information concerning the rules under which the projected normal retirement date is calculated for a particular benefits plan, please refer to the TJ table entries for the Plan ID.

The actual retirement date (not this projected value) is entered at the time the retirement activity is recorded in the system.

The activity is partially validated by comparing the actual date to the pre-calculated date.

NOTICE_1

CHAR, 8

This is a time span field that defines the timeframe in which an employee must be notified of pending early retirement eligibility.

NOTICE_2

CHAR, 8

This is a time span field that defines the timeframe in which an employee must be notified of pending early retirement eligibility.

NOTIFIED_EE_RIGHTS

DATETIME

This is the date on which the employee or their dependent was notified of their right for extended coverage under COBRA.

NOTIFIED_HR

DATETIME

This is the date on which the employee notified HR of the Qualifying Event or the date HR identified the fact the event had occurred.

NOTIFIED_INS_CO

DATETIME

This is the date the insurance company was notified of an employee's or their dependent's right to extended coverage under COBRA.

NUMBER_OF_WEEKS_ED

VARCHAR, 20

This field contains 15 positions of the description of the option list translations of the NUMBER-OF-WEEKS.

O

OBJECTIVE_1
CHAR, 3

This is one of the objectives to be met by this course.

OBJECTIVE_1_DESC
VARCHAR, 20

This field displays the description from the option list translation of the OBJECTIVE_1.

OCCUP_GROUP
VARCHAR, 20

This field displays the description from the option list translation of the OCCUP-GROUP-CODE.

OCCUP_GROUP_CODE
CHAR, 3

This is the Occupation Group Code for which the External Labor Market percentages apply within the occupation group level county city or SMSA within the demographic level on the TY EEO/AAP Demographics Table. Occupation Group codes are government- assigned categories of generically titled job groupings.

OCCUPATION-GROUP codes are taken from the list published by the US Department of Commerce, Bureau of the Census. Census of Population, 1980: Equal Employment Opportunity Special File.

The delivered TE SCR Table contains all 514 codes.

OCCUP_GROUP_LEVEL
VARCHAR, 20

This field displays the description from the option list translation of the OCCUP-GROUP-LEVEL-CD code.

OCCUP_GROUP_LVL_CD
CHAR, 1

This code defines what level of demographic data is present on the TY Table record and whether the data is relevant to an EEO report Job Family roll-up or Occupation Group Code only.

OCCUP_GROUP_LVL_CD
CHAR, 1

This code defines what level of demographic data is present on the TY Table record and whether the data is relevant to an EEO report Job Family roll-up or Occupation Group Code only.

OCCUPATION

VARCHAR, 020

This field displays the description from the option list translation of the OCCUPATION-GROUP code.

OCCUPATION_GROUP

CHAR, 003

These codes are government assigned categories of generically titled job groupings that further classify the JOB-CODE. OCCUPATION-GROUP codes are taken from the list published by the US Department of Commerce, Bureau of the Census. Census of Population, Employment Opportunity Special File.

The delivered TE-SCR Table contains all 514 codes for use during the roll-up process in preparing demographic data. The OCCUPATION-GROUP codes and their JOB-FAMILY, EEO-1,4,5,6 JOB CLASS (Category) codes are Cyborg-delivered on the TE Table.

OCCUPATION_GROUPS

CHAR, 4

This is the Control Number of the EEO/AAP Module TE Table to be used for the organization (Control 1-2).

ONE_TIME_AMOUNT

NUMERIC, 07,2

This text box is used with the One-Time Rule field.

Type the amount to be calculated for the one-time occurrence. You can type the amount with two decimal places or with a decimal point.

The content of this field remains unchanged after the earning or deduction is processed.

If the TAX-FREQUENCY-CODE of the corresponding company deduction HED contains zero ONE-TIME- AMOUNT is processed even if this earning or deduction is not due to be calculated because of the FREQUENCY-CODE specified for this earnings or deduction.

ONE_TIME_CODE

CHAR, 001

This drop down box is used in conjunction with the One- time Amt text box to cause the system to perform a calculation for the current, or upcoming, payroll run only.

Ordinarily, you will select a value from this drop down box when a adjustment is needed for the next payroll cycle only. The value in the One-time Rule field is automatically changed to No One Time Amt (0) after this earning or deduction is processed during the payroll run.

One-time calculations override earnings or deductions with a Frequency of Inactive (0). That is, the one-time amount is taken or paid even though the earning or deduction is inactive.

This field is normally used for deductions; however, it can apply to automatically calculated earnings. Use of the One-time Rule for HED 001 is not recommended for an employee paid by time document because the employee's NORMAL-HOURS are associated with the One-time Amt.

The One-time Rule is set to zero after this earnings or deduction has been processed. However, the One-time Amt field is not zeroed out.

ONE_TIME_DESCRIPT

VARCHAR, 020

The One-Time Description field contains the description of the One-Time Code specified for the deduction or automatic earnings.

OPEN_CODE

CHAR, 001

This code designates whether or not the employee is still in a restricted status and still losing days off work.

Y = The employee is still losing days or is in restricted status

N = The employee is not losing days and is not in restricted status

OPEN_CODE_DESC

VARCHAR, 020

This field displays the description from the option list translation of the OPEN-CODE.

OPT_CHG_REASON_CD

CHAR, 2

This is used to track the reason for a change in benefit option.

OPTION_ACTIVITY

CHAR, 3

This is either the Option Elected code or the Major Activity Code to be valid for a Benefit Plan.

OPTION_CHG_REASON

VARCHAR, 20

This is used to track the reason for an option change.

OPTION_ELEC_DESC

VARCHAR, 20

This field displays the description from the option list translation of the Option Elected code.

OPTION_ELECTED

CHAR, 2

This indicates the employee's choice of benefit levels when multiple options are available. It can be as simple as a Yes/Enroll or No/Waive depending upon the plan.

For example, medical plans often offer multi-tier coverage for single employees, employee and spouse, employee and child or children, or employee and family.

Each of these four choices may be a value of the Option Elected for that plan along with a value to indicate waivers or other reasons for declinations.

The OPTION-ELECTED field may even be used to specify a level within an option in a plan. For example, in medical plans with Sponsored Dependent coverage, the OPTION-ELECTED may indicate not only the election of Sponsored Dependent coverage, but the number of dependents to be covered as well.

This field can be used in Flexible Benefit plans to elect a level of coverage. For example, if the plan rules allow employees to purchase additional vacation days, the actual option elected can include the number of additional vacation days to be added to the employee's total. This would require that additional codes be added to option list BA03.

ORG_CODE1

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE1

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE2

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE3

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE4

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE5

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE6

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE7

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_CODE8

CHAR 6

This is a unique, six-character code that identifies the Organization Unit.

ORG_NAME1

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORG_NAME2

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORG_NAME3

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORG_NAME4

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORG_NAME5

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORG_NAME6

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORG_NAME7

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORG_NAME8

VARCHAR 30

This is the name of the Organization Unit. This field is used with the Position Administration module.

ORIGINAL_HIRE_DATE
DATETIME

This field contains the employee's original date of hire.

The date is initially entered on the 01-SCR the New Hire activity is entered and equal to the ACTIVITY date.

The date may be adjusted on any ACTIVITY screen, but generally the 08-SCR is most appropriate.

OSHA
VARCHAR, 020

This field displays the description from the option list translation of the OSHA-CODE.

OSHA_CODE
CHAR, 001

This code designates whether or not the injury or illness is reportable to OSHA. Valid codes are:

0 = OSHA non- reportable

1 = OSHA reportable

OT_PREM_WAGES
NUMERIC, 11,2

This field holds the employee's Overtime Premium Wages.

OT_PREM_WAGES_CUR
NUMERIC, 11,2

This field holds the employee's current Overtime Premium Wages.

OT_PREM_WAGES_MTD
NUMERIC, 11,2

This field holds the employee's MTD Overtime Premium Wages.

OT_PREM_WAGES_QTD
NUMERIC, 11,2

This field holds the employee's QTD Overtime Premium Wages.

OT_PREM_WAGES_YTD
NUMERIC, 11,2

This field holds the employee's YTD Overtime Premium Wages.

OTH_FD_TX_CRED_K3
NUMERIC, 05,0

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

OTH_FD_TX_CRED_K3

NUMERIC, 05,0

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

OTHER_ADDRESS_1

VARCHAR, 030

This is the street address portion of the employer's address for the spouse or dependent.

OTHER_ADDRESS_2

VARCHAR, 030

This is the city and state portion of the employer's address for the spouse or dependent.

OTHER_AREA_CODE

CHAR, 003

This is the area code portion of the spouse or dependent's telephone number.

OTHER_BIRTH_DATE

DATETIME

This is the birth date of the spouse or dependent named in this form.

OTHER_KEY

CHAR, 003

This is a unique identification value for the spouse or dependent segment.

OTHER_NAME

VARCHAR, 030

This is the spouse's or dependent's name. Enter the name in the following format: Last Name, (comma/space) First Name.

OTHER_PHONE_NUMBER

CHAR, 008

This is the phone number portion of the spouse or dependent's telephone number.

OTHER_SEX
VARCHAR, 020

This field displays the description from the option list translation of the OTHER-SEX-CODE.

OTHER_SEX_CODE
CHAR, 001

This code identifies the sex of the spouse or dependent named in this form.

OTHER_SOC_INSUR
VARCHAR, 012

This is the social insurance number of the spouse or dependent named in this form. Dashes need to be entered along with the number.

OTHER_ZIP_POST
VARCHAR, 12

This is the postal code portion of the employer's address for the spouse or dependent.

OU_ALT_LEVEL_NAME
VARCHAR, 30

This is the level name for the Organization Unit. Leave this field blank if you want to use the default level name you entered on the Organization Unit - Default Level Names form (M44SCR).

OU_BELONGS_TO_CODE
CHAR, 6

This is the Organization Unit to which this Organization Unit belongs.

OU_BUDGET_FTE_HOUR
NUMERIC, 10,2

This is the number of hours for which the Organization Unit is budgeted.

OU_BUDGET_FTE_UNIT
NUMERIC, 8,2

This is the Full Time Equivalency value for which the Organization Unit is budgeted.

OU_BUDGET_HC
NUMERIC, 6,0

This is the number of persons that have been budgeted for this Organization Unit.

OU_BUDGET_SALARY
NUMERIC, 12,0

This is the total salary that has been budgeted for this Organization Unit.

OU_CONTROL_NBR

CHAR, 2

This is the Organizational Unit Control Number.

This is used with the Position Administration module.

OU_FILE_DESC

VARCHAR, 20

This is the description of the code used to identify the format of the document reference file (for example, Org Plus).

OU_FILE_FORMAT

VARCHAR, 3

This code is used to identify the format of the document reference file (for example, Org Plus).

OU_FILE_PATH

VARCHAR, 45

This is a free-form field used to enter the file path for the document reference (for example, C:\ORG\CHART2.ORG).

OU_GEO_RANGE_CODE

CHAR, 1

This code is used to identify the geographic area the Organization Unit is located.

OU_GEO_RANGE_DESC

VARCHAR, 20

This is the description of the code that is used to identify the geographic area the Organization Unit is located.

OU_LOCATION_CODE

VARCHAR, 4

This code is used to identify the physical location of the Organization Unit (for example, Building A).

OU_LOCATION_DESC

VARCHAR, 20

This is the description of the code that is used to identify the physical location of the Organization Unit (for example, Building A).

OU_ORG_UNIT

VARCHAR, 6

This is a unique, six-character code that identifies the Organization Unit.

OU_REASON_CODE

CHAR, 2

This code is used to identify an Organization Unit as created, changed, or abolished.

OU_REASON_DESC

VARCHAR, 20

This is the description of the code used to identify an Organization Unit as created, changed, or abolished.

OU_ORG_UNIT

CHAR, 6

This is a unique, six-character code that identifies the Organization Unit.

OU_SEQ_NUMBER

NUMERIC, 3,0

This is the level number for an Organization Unit's default level name. The level number is incremented automatically by one when you add a new default level name.

OU_TABLE_DATE_01

DATETIME

This is the table effective date for the basic details of the Org Unit data stored on the M46SCR.

OU_TABLE_DATE_02

DATETIME

This is the table effective date for Org Unit Level Names stored on the M44SCR. This is used with the Position Administration module.

OU_TABLE_DATE_03

DATETIME

This is the table effective date for the Org Unit Budget data stored on the M47SCR.

OU_TABLE_DATE_10

DATETIME

This is the table effective date for the Org Unit Document Reference data stored on the M49SCR.

OU_TABLE_DT_UNTIL

DATETIME

This is the ending date of the table record.

OU_TEMP_FLAG
CHAR, 1

OU_TYPE_DESC
VARCHAR, 20

This is the description of the code used to identify the type of document reference file (for example, Org Chart).

OU_TYPE_OF_FILE
VARCHAR, 3

This code is used to identify the type of document reference file (for example, Org Chart).

OU_UNIT_NAME
VARCHAR, 30

The is the name of the Organizational Unit.

This is used with the Position Administration module.

OVERTIME_SHIFT
VARCHAR, 020

This field displays the description from the option list translation of the OVERTIME-SHIFT-CODE.

OVERTIME_SHIFT_CD
CHAR, 001

This code is used to specify how your company pays shift differential on overtime hours.

OWNER_C1_2
CHAR, 006

This is the organization (Control 1-2) that contains the owner's master record defined in the OWNER-EMPLOYEE-NBR field.

OWNER_EMPLOYEE_NBR
CHAR, 010

This is the employee numbers of the 10 top-paid highly-paid employees or 5% Owners who will have this employee's earnings and contribution aggregated with theirs for discrimination testing.

OWNER_FAMILY
CHAR, 001

This code indicates whether or not the employee is a lineal ascendant or descendant of one of the 10 top-paid highly-paid or of a 5% Owner. Lineal ascendant or descendant include the employee's parents, spouse, children, and childrens' spouses.

OWNER_FAMILY_MEMBE

VARCHAR, 020

This field contains the description from the option list translation of the OWNER-FAMILY code.

P

PARITY_REQUALIF_DT

DATETIME

This is defined (by ERISA in the US) as the date by which a separated or on leave employee must return so as not to cause a break in prior service. In other words, if the employee returns by this date, the employer cannot deny the employee any prebreak service.

For plans which use the Rule of Parity to determine if a break-in-service has occurred as a result of a service interruption, the system calculates the Requalification Date and stores this date in the PARITY-REQUALIF- DATE.

The Parity Requalification Date is calculated by adding the employee's pre-interruption service in years, months, and days to a service date specified by the plan rules (Original Hire Date, etc.). If the pre-interruption service is less than five years, five years are added to the PLAN-SERVICE-DATE.

PARTICIP_RULES

CHAR, 4

This is the Control Number of the TN table to be used for this organization (Control 1-2).

PARTICIPATE_NAME

VARCHAR, 20

This field is the name of the benefits plan.

PAY_CYCLE

NUMERIC, 1,0

This field designates the pay cycle for the pay run—that is, weekly, monthly, and so forth.

PAY_FREQ_SWITCH_DE

VARCHAR, 20

This field displays the description from the option list translation of the PAY-FREQUENCY-SWITCH Code.

PAY_FREQUENCY

VARCHAR, 020

This field displays the option list translation of the PAY-FREQUENCY-CODE. It represents the employee's payment frequency at the time of the selected History and/or Labor record.

PAY_FREQUENCY_CODE

CHAR, 001

This code designates the employee's pay frequency. If you leave this field blank when adding a new employee to the Employee Database, the system uses the default from the DEF-PAY-FREQ-CODE field on the Company Options (AF-SCR) form.

PAY_FREQUENCY_SW

CHAR, 1

This value indicates how information entered in the PAY FREQUENCY field on employee-level forms should be handled.

PAY_RAISE_SPLIT_CD

CHAR, 001

This code tells the system whether or not to prorate a future raise based on the pay period's calendar days.

This only affects a future raise that has been entered using HED 002.

Y = Split Time Card or Automatic Pay based on the Date (Default)

N = Do Not Split - Pay Entire Pay at the New Rate

PAY_RAISE_SPLIT_DE

VARCHAR, 020

This field displays the description from the option list translation of the PAY-RAISE-SPLIT-CODE code.

PAY_RECON_DESC

VARCHAR, 020

This field displays the description from the option list translation of the PAY-RECONCILIATION code.

PAY_RECONCILIATION

CHAR, 001

This indicates to the system whether or not the company is going to use the system's check reconciliation feature.

Y = Use Check Reconciliation Option (Default)

N = Do Not Use Check Reconciliation Option

PAYMENT

VARCHAR, 020

This field displays the description from the option list translation of the FORM-OF-PAYMENT code.

PAYMENT_CODE

CHAR, 001

This code indicates whether an employee is paid automatically or through time document entry. This code indicates whether an employee is paid automatically or through time document entry. Within each of the given categories, the employee can be hourly or salaried.

PAYMENT_DATE

DATETIME

This is the date that appears on the pay check or automatic direct deposit slip. This works with the FREQUENCY-IDENTIFIER, NEW-PERIOD, PAY-CYCLE, and DEDUCTION-CYCLE fields to pay a pay frequency. The PAYMENT-FREQUENCY code must first be set up on the Company Pay Frequencies (AJ- SCR) form before any of the above five fields can be used to pay it. No entry should be made on the AJ-SCR screen. This field is automatically updated for the Process Control (AE-SCR) form.

PAYMENT_FREQUENCY

CHAR, 001

This is the PAYMENT-FREQUENCY code for the employee.

This code must be validated through the Company Pay Frequencies (AJ-SCR) screen for the employee. You may enter this value directly.

If left blank, this field is filled with the E segments (EE-SCR) PAY-FREQUENCY-CODE value. This field may also update the E segment if the TG Table so indicates.

PAYMENT_TYPE

VARCHAR, 020

This field displays the description from the option list translation of the PAYMENT-CODE. It represents the employee's payment type at the time of the selected History and/or Labor record.

PAYMNT_DATE

DATETIME

This is the effective date of the HED payment.

PAYROLL_COUNTRY

VARCHAR, 020

This field displays the description from the option list translation of the COUNTRY-CODE.

PCT_ALLOCATED_1

NUMERIC, 04,1

This is the percent of total benefit to be allocated to the beneficiary/contingent annuitant identified in the cross-reference field (BENEFICIARY-XREF-1).

If a BENEFICIARY-XREF-1 is recorded, then PERCENT-ALLOCATED-1 must be entered. The system assumes one decimal place. Therefore, when entering amounts,

allow for one decimal (for example, 25% would be entered as ‘250’). This allows for fractions such as 33 1/3 (entered as ‘333’). In this instance, the other two thirds would be ‘333’ and ‘334’.

NOTE: The sum of all entered multiple beneficiary percentage allocations must equal 1000 (100%).

PENS_ADJUSTMENT

NUMERIC, 11,2

This field is used for the employer calculated pension adjustment amount for employees who accrued benefits for the year under their registered pension plan (RPP) or deferred profit sharing plan (DPSP).

PENSION_CHANGE

VARCHAR, 020

The translation of the reason for changes to the previous monthly benefit amount.

PENSION_CHANGE_TP

CHAR, 002

This identifies the reason for changes to the previous monthly benefit amount. Many Retirement plans provide for periodic adjustments to a retiree’s pension, such as for cost-of-living, contractual increases, and so forth.

PENSION_INCREMENT

NUMERIC, 07,2

This is the amount of the increase/decrease to the monthly benefit (dollars and cents). Many Retirement plans provide for periodic adjustments to a retiree’s pension, such as for cost-of-living, contractual increases, and so forth.

PENSIONABLE_EARNS

NUMERIC, 11,2

This field can be used to store the amount of pensionable earnings (earnings subject to Q/CPP), if different from taxable earnings. (Canadian field.)

PERCENT_CHANGE

NUMERIC, 05,2

This is the percent change between the last salary change and this one. The percent may be entered directly or the result of a system calculation. The system enters zeros in this field when the first salary occurrence is entered.

PERIOD_AMOUNT
NUMERIC, 11,2

This is a NUMERIC field only. Enter the amount with two decimal places.

PERIOD_DATE
DATETIME

This is the period end date of the pay period for this pay frequency. It is automatically updated by the system each time a new period pay run is made. Enter the date in CCYYMMDD or MM-DD-CCYY format.

PERIOD_END_DATE
DATETIME

This field displays the period-end date for the payment.

PERIOD_END_TABLE
VARCHAR, 020

This field displays the description from the option list translation of the PERIOD-TABLE-CODE.

PERIOD_HOURS
NUMERIC, 7,2

This is a NUMERIC field only. Enter PERIOD-HOURS as hours and hundredths of hours.

PERIOD_NUMBER
NUMERIC, 2,0

This is the pay period's number for that year. The PERIOD-NUMBER field is automatically updated by the system.

PERIOD_OVERRIDE
NUMERIC, 02,0

This is used to stop payment to an automatically paid employee for a specified number of pay periods.

The system decrements the number entered here each time the employee's pay frequency is paid.

Valid entries are:

00 = Automatic pay is not prevented

01 - 54 = The employee is not to be automatically paid for XX number of pay periods. This number is decremented one each time the frequency is paid for a new pay period.

88 = The employee is not to be automatically paid for an indefinite number of pay periods.

A value greater than zero also prevents an automatic pass through the employee's HEDs (regardless of the value in the No Pay Warning field on the AF2-SCR).

PERIOD_TABLE
DATETIME

This field displays the description from the option list translation of the PERIOD-TABLE-CODE.

PERIOD_TABLE_CODE
CHAR, 001

The option selected in this field allows deduction hours, dollars, or both to be accumulated in a nonstandard accumulation period (not a pay period) in a period-end (PE) table record.

PERIOD_WEEKS
NUMERIC, 05,2

This is a NUMERIC field only. Enter PERIOD-WEEKS with two decimal places.

PERIODS_PAID
NUMERIC, 1,0

This is the numbers of periods paid.

PERMANENT_ORDER
NUMERIC, 03,0

This specifies the order in which earnings and deductions are to be calculated. The entries 001 through 999 can be used for this purpose.

If the PERMANENT- ORDER field is left blank, HEDs are processed according to HED Number, from lowest to highest.

The entry ‘000’ indicates that the HED is inactive.

PERQ_AMT_AWARDED
NUMERIC, 08,2

This is the amount of the monetary perquisite to be paid each period defined on the A8 or H transaction.

PERQ_DATE_AWARDED
DATETIME

This is the date on which the monetary perquisite was awarded to the employee.

PERQ_EXAM_PROVIDED
CHAR, 001

This displays the YES/NO indicator from the option list HR00.

PERQ_HED_NAME
VARCHAR, 20

This field displays the description from the option list translation of the PERQ-HED-XREF code.

PERQ_HED_XREF
CHAR, 003

This is the Payroll Hours, Earnings or Deduction by which the monetary perquisite is paid to the employee.

An A8 must be entered before an HED number may be used.

PERQ_START_FIELD
NUMERIC, 06,0

This is the date or amount which, when reached, starts a deduction or an automatic earnings. If a date is used, a start occurs if it is less than or equal to the Period Date on the AJ-SCR.

For Start Codes two through five, enter the whole dollar amount.

PERQ_STOP_CODE
CHAR, 001

This code defines the value in the PERQ-STOP- FIELD.

PERQ_STOP_CODE_DES
VARCHAR, 020

This code defines the value in the PERQ-STOP- FIELD.

PERQ_STOP_FIELD
NUMERIC, 06,0

This specifies a date or amount which, when reached, stops a deduction or an automatic earnings. If a date is used, a stop occurs if it is less than or equal to the Period Date on the AJ-SCR.

For STOP-CODEs 2 through 6, enter a whole dollar amount.

For STOP- CODEs 7 through 9 and A, enter an amount with two decimals.

PERQUISITE
VARCHAR, 020

This field displays the description from the option list translation of the PERQUISITE-TYPE code.

PERQUISITE_DATE
DATETIME

This is the date the non-monetary perquisite was awarded.

PERQUISITE_TYPE
CHAR, 003

This code identifies the perquisite type granted the employee.

PERQUISITE_XREF
VARCHAR, 020

This field displays the description from the option list translation of the PERQUISITE-XREF code.

PERQUISITE_XREF_CD
CHAR, 002

This is the perquisite code assigned to the physical examination for this employee. This code may be important when identifying and calculating an employee's total compensation.

PHONE_CONTACT
VARCHAR, 020

This field displays the description from the option list translation of the APPL-PHONE-CONTACT code.

PHYS_CITY_ST_PROV
VARCHAR, 20

This is the city and state portion of the physician's address.

PHYSICAL_COST
NUMERIC, 08,2

This is the cost of the physical examination. This information may be important to calculate and report an employee's total compensation.

PHYSICAL_DATE
DATETIME

This is the same date as either the PHYSICAL-SCHEDULED or PHYSICAL-TAKEN date. Which date depends on whether you enter the date before or after the physical examination is performed.

PHYSICAL_LOC_CD
CHAR, 001

This code identifies where the physical examination is to be performed.

PHYSICAL_LOCATION
VARCHAR, 020

This field displays the description from the option list translation of the PHYSICAL-LOCATION-CD.

PHYSICAL_REASON
VARCHAR, 020

This field displays the description from the option list translation of the PHYSICAL-REASON-CODE.

PHYSICAL_REASON_CD
CHAR, 002

This code defines why the physical examination is to be performed.

PHYSICAL_RECORDED
DATETIME

This is the date on which the physical examination data was recorded.

PHYSICAL_RESULT_1
CHAR, 008

This is provided to allow you to record the result of the corresponding physical examination test. It is a free-form field; you may define the field to a User option list if required.

PHYSICAL_RESULT_CD
CHAR, 002

This code describes the overall outcome of the physical examination.

This code may also indicate whether or not an additional examination is required.

PHYSICAL_RESULT_DS
VARCHAR, 020

This field displays the description from the option list translation of the PHYSICAL-RESULT-CODE.

PHYSICAL_SCHEDULED
DATETIME

This is the date on which the physical examination is scheduled to be performed. This date also appears on the examination test results form after the tests to be performed are recorded and before the examination is performed.

PHYSICAL_TAKEN
DATETIME

This is the date on which the physical examination was actually performed. This date also appears on the physical examination test results form when the tests and results are posted after the examination.

PHYSICAL_TEST_1
VARCHAR, 020

This field displays the description from the option list translation of the PHYSICAL-TEST-1CODE.

PHYSICAL_TEST_SEQ
CHAR, 001

This value allows multiple sets of physical examination tests to be entered for an employee or applicant.

PHYSICAL_TYPE
VARCHAR, 020

This field displays the description from the option list translation of the PHYSICAL-TYPE-CODE.

PHYSICAL_TYPE_CODE
CHAR, 001

This code identifies the type of physical examination scheduled for or taken by the employee or applicant.

PHYSICIAN
VARCHAR, 020

This field displays the description from the option list translation of the PHYSICIAN-CODE.

PHYSICIAN_ADDR_1
VARCHAR, 030

This is the street address portion of physician address.

PHYSICIAN_AREA_CD
CHAR, 003

This is the area code portion of the physician's telephone number.

PHYSICIAN_CODE
CHAR, 002

This code identifies the physician who is in charge of the employee's or applicant's physical examination.

PHYSICIAN_PHONE
CHAR, 008

This is the phone number portion of the physician's telephone number.

PHYSICIAN_ZIP_POST
VARCHAR, 12

This is the postal code portion of the physician's address.

PI_CONTROL_NBR
CHAR, 2

This is the CONTROL-NUMBER assigned to the table entry.

PI_COURSE_CAT
CHAR, 2

This is the Provider Index Course Category.

PI_COURSE_CAT_DESC
VARCHAR, 20

This field displays the description from the option list translation of the PI-COURSE-CAT code.

PI_ENDING_DATE
DATETIME

This is the ending date of the position.

This is used with the Position Administration module.

PI_FLAG
CHAR, 1

This is a one digit position flag used in the Position Administration module.

PI_FTE
NUMERIC, 3,2

This is the Full Time Equivalency value for which the Organization Unit is budgeted.

This is used with the Position Administration module.

PI_HOURS
NUMERIC, 6,2

This is the number of hours for which the Organization Unit is budgeted.

This is used with the Position Administration module.

PI_HRMS_ID_NO
VARCHAR, 10

This is a 10 digit character used to store the ID number.

This is used with the Position Administration module.

PI_INC_NO
CHAR, 2

This field is used to identify the employee position incumbency (for example, 1st, 2nd, 3rd, and so forth).

This is used with the Position Administration module.

PI_KEY_SEPARATOR
CHAR, 1

This field identifies multiple iterations of course provider data.

PI_POS_CODE
CHAR, 6

This is a six digit code used to represent the position.

This is used with the Position Administration module.

PI_PROV_ADDR1
VARCHAR, 27

This is the first line of the provider address.

PI_PROV_ADDR2
VARCHAR, 27

This is the second line of the provider address.

PI_PROV_ADDR3
VARCHAR, 27

This is the third line of the provider address.

PI_PROV_CONTACT
VARCHAR, 27

This is the contact name for the provider.

PI_PROV_COURSE_1
CHAR, 6

This is the unique identifier of the course for which the provider is qualified to provide instruction.

PI_PROV_COURSE_1_D
VARCHAR, 20

This field displays the description from the option list translation of the PI-PROV-COURSE-1 code.

PI_PROV_PHONE
VARCHAR, 15

This is the telephone number of the provider.

PI_PROV_POST_ZIP
VARCHAR, 12

The postal code of the Provider.

PI_PROV_TYPE
CHAR, 2

This is the provider type.

PI_PROV_TYPE_DESC
VARCHAR, 20

This field displays the description from the option list translation of the PI-PROV-TYPE code.

PI_PROVIDER
CHAR, 10

This is the unique identifier of the provider.

PI_PROVIDER_DESC
VARCHAR, 20

This field displays the description from the option list translation of the PI-PROVIDER code.

PI_SEQ_NUMBER
NUMERIC, 7,0

This is the position sequence number.

This is used with the Position Administration module.

PI_STOP_DATE_1
DATETIME

This is the date as of which this provider is no longer a qualified provider for the course.

PI_TABLE_DATE
DATETIME

This is the effective date of the table entry.

This is used with the Position Administration module.

PLAN_ACTUAL_SWTCH
CHAR, 001

This code identifies the Salary Plan to which this Record Plan/Budget applies.

PLAN_ACTUAL_SWTCHD
VARCHAR, 020

This field displays the description from the option list translation of the PLAN-ACTUAL-SWTCH code.

PLAN_ANNL_AMT_CHG
NUMERIC, 08,2

This is the annual difference between the old annual salary amount and the Salary Plan/Budget record salary on this Z record. This can be system calculated or manually entered.

PLAN_ANNUAL_SALARY
NUMERIC, 09,2

This is the annual salary amount based on the Salary Plan/Budget increase. The amount may be the result of a system calculation or may have been manually entered.

PLAN_BUD_EFF_DOLL
NUMERIC, 08,2

This is the dollar impact of the Salary Plan/ Budget increase on the budget prorated for the remainder of the budget year. This field contains the percent impact of this increase on the budget prorated for the remainder of the budget year.

PLAN_BUD_EFF_PCT
NUMERIC, 04,2

This is the percent impact of the Salary Plan/ Budget increase on the budget prorated for the remainder of the budget year. This field contains the percent impact of this increase on the budget prorated for the remainder of the budget year.

PLAN_CALC_METHOD
CHAR, 001

This code defines the calculation method used to create the Plan segment.

PLAN_CLASS
VARCHAR, 020

The translation of the TK PLAN-CLASS code which identifies the type of enrollment for a particular benefit plan.

PLAN_CLASS_CODE
CHAR, 001

This code defines the plan class whether or not it is active or optional.

PLAN_ENTRY_DATE
DATETIME

This is the employee's original participation date in a Welfare benefits plan.

The first time an employee meets the eligibility requirements for a plan and becomes enrolled, the effective date of that enrollment is recorded as the PLAN-ENTRY-DATE.

This date is not changed by later elections or actions unless indicated by plan rules.

PLAN_FACTORS
CHAR, 4

This is the Control Number of the TM table to be used for this organization (Control 1-2).

PLAN_ID
CHAR, 3

This is the unique identifier of a specific Benefit Plan in which the employee is currently enrolled or will be eligible. It must have a TK Table record established before it can be used at the Employee Database level.

PLAN_ID
CHAR, 003

This is the unique identifier of a specific Benefit Plan in which the employee is currently enrolled or will be eligible. It must have a TK Table record established before it can be used at the employee level in the Employee Database.

PLAN_NAME
VARCHAR, 020

This contains the name assigned by the user identifying the plan associated with the PLAN-ID field.

PLAN_PAY_PRD_AMT
NUMERIC, 08,2

This is the per-pay period amount of the Salary Plan/Budget increase.

The amount may be the result of a system calculation or a direct manual entry.

PLAN_PCT_CHANGE
NUMERIC, 5,2

This is the percent difference between the old salary amount and the new Salary Plan/Budget increase. This can be system calculated or manually entered.

PLAN_RECORDED_DATE
DATETIME

This is the date on which the Salary Plan was recorded on the ZP segment.

PLAN_RULES
CHAR, 4

This is the Control Number of the TK table to be used for this organization (Control 1-2).

PLAN_STATUS
VARCHAR, 20

This field displays the description from the option list translation of the Resulting Plan Stat code.

PLAN_STATUS_NBR
VARCHAR, 20

This is the plan status number.

PLAN_TYPE
VARCHAR, 020

This field is the description of the benefit plan type (category).

PLAN_TYPE_CODE
CHAR, 002

This code defines the Benefit Plan's type.

PLAN_YEAR_END
CHAR, 005

This date indicates the month and day the plan year ends.

PLAN_YEAR_START_DT
DATETIME

This date represents the first day of a Salary Plan Year.

This is a required field.

PLAN_YEAR_UNTIL
DATETIME

This date represents the last day of a Salary Plan Year.

This is a required field.

PLEDGE_PERCENT
NUMERIC, 05,2

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

PO_ASSIGN_SHIFT_DE
VARCHAR, 20

This is the description of the code used to identify the work shift.

PO_ASSIGNED_SHIFT
CHAR, 1

This code is used to identify the work shift.

PO_EXCLUDE_FROM_D
VARCHAR, 20

This checkbox is used to indicate that this Position should be excluded from Requisition Tracking.

PO_EXCLUDE_FROM_RT
CHAR, 1

This checkbox is used to indicate that this Position should be excluded from Requisition Tracking.

PO_FLSA_CLASS
CHAR, 1

These radio buttons are used to identify the Job as either Exempt or Non-exempt for US Fair Labor and Standards Act classification.

PO_FLSA_CLASS_DESC
VARCHAR, 20

These radio buttons are used to identify the Job as either Exempt or Non-exempt for US Fair Labor and Standards Act classification.

PO_JOB_TYPE
CHAR, 2

This code is used to define a generic category.

PO_JOB_TYPE_DESC
VARCHAR, 20

This is the description of the code used to define a Position's Job (for example, Salaried Exempt).

PO_SURVEY_INDICATR
CHAR, 10

This field is used to store a user-defined code indicating if this is a benchmark Position. It is intended to be used as five two-character fields.

PO_TRAINEE_JOB
CHAR, 1

This code is used to identify the Job as either White Collar Trainee or Production Trainee.

PO_TRAINEE_JOB_DES
VARCHAR, 20

This is the description of the code that is used to identify the Job as White Collar Trainee or Production Trainee.

PO_UNION_JOB
VARCHAR, 6

This code is used to identify the union for the job.

PO_UNION_JOB_DESC
VARCHAR, 20

This is the description of the code used to identify the union for the Job.

PO_WORK_COMP_CODE
VARCHAR, 5

This code is used to identify the worker's compensation code for the Job.

POS_MANAGEMENT
CHAR, 2

This is the Control Number of the Position Administration module for the organization (Control 1-2) entered. It is also the first two positions of the Base HR modules TA

table control number. This dual role is necessary in order to allow the TA table functionality to be fed from Position Administration.

POS_MANAGMENT
CHAR, 4

POS_MGMT_SWITCH
CHAR, 1

This field determines whether the Position Administration module is turned on or off.

POS_MGMT_SWITCH_DE
VARCHAR, 20

This field displays the description from the option list translation of the POS-MGMT-SWITCH code.

POSITION_IN_RANGE
NUMERIC, 05,2

This percent is automatically calculated as the difference between the employee salary and the minimum of the range divided by the difference between the maximum and the minimum of the range.

This field may not be overridden.

PQB
CHAR, 003

This is the Spouse/Dependent Key ID of the Principal Qualified Beneficiary who is the person causing or impacted by this Qualifying Event. If all of the Spouse and Dependents are involved and were sent down to the COBRA Solution, this field will contain the value ALL.

PRD_ROUNDING_RULE
CHAR, 2

This value determines which rounding rule to follow when the system performs the Pay Period Salary calculation.

PRE_REQUISITE_1
CHAR, 6

This is the unique identifier for a course that is a pre- requisite to taking this course.

PRE_REQUISITE_1_D
VARCHAR, 20

This field displays the description from the option list translation of the PRE-REQUISITE-1 code.

PREFIX_NAME
VARCHAR, 20

This field represents any prefix name or title attached to the employee's name (for example, Dr., Mr., Mrs., and so forth).

PREV_APPL_ID_NBR
CHAR, 010

This is the applicant ID number you previously assigned this employee as part of your applicant tracking program. This user-devised scheme can contain a maximum of ten positions. The entry can be either right or left justified. Whatever scheme you choose, follow it consistently

PREV_YEAR_EFFECT
DATETIME

This is the effective date of the multi-incumbency Total Annual Salary and Hours.

PREV_YEAR_UNTIL
DATETIME

This is the ending effective date of the multi- incumbency Total Annual Salary and Hours.

PREVIOUS_YR_SALARY
NUMERIC, 9,2

The previous years salary can be entered here if keeping this data is important to your organization.

PRI_YR_5PCT_OWN
CHAR, 001

This code indicates whether or not the employee was a 5% Owner of stock in the company in the prior year.

PRI_YR_TOP_20PCT
CHAR, 001

This code indicates whether or not the employee is considered in the top 20%, based on earnings from the prior year.

PRINT_TAX
VARCHAR, 020

This field displays the description of the option list translation of the Print Tax Code.

PRINT_TAX_CODE
CHAR, 001

This code indicates to the system whether or not the tax brackets should be printed on the Payroll Audit Trail report for this company.

PRIOR_NAME
VARCHAR, 020

This is a prior surname (due to marriage or other legal means) of an employee or applicant.

PRIOR_TAX
NUMERIC, 11,2

This field contains the employee's prior tax for the selected pay period.

PRIOR_TAX_CUR
NUMERIC, 11,2

This field contains the employee's current tax for the selected pay period.

PRIOR_TAX_MTD
NUMERIC, 11,2

This field contains the employee's Month to Date tax for the selected pay period.

PRIOR_TAX_QTD
NUMERIC, 11,2

This field contains the employee's Quarter to Date tax for the selected pay period.

PRIOR_TAX_YTD
NUMERIC, 11,2

This field contains the employee's Year to Date tax for the selected pay period.

PRIOR_WAGES
NUMERIC, 11,2

This field contains the employee's prior wages for the selected pay period.

PRIOR_WAGES_CUR
NUMERIC, 11,2

This field contains the employee's current wages for the selected pay period.

PRIOR_WAGES_MTD
NUMERIC, 11,2

This field contains the employee's Month to Date wages for the selected pay period.

PRIOR_WAGES_QTD
NUMERIC, 11,2

This field contains the employee's Quarter to Date wages for the selected pay period.

PRIOR_WAGES_YTD
NUMERIC, 11,2

This field contains the employee's Year to Date wages for the selected pay period.

PRIOR_YEAR_5_OWN
VARCHAR, 020

This field contains the code to indicate whether or not the employee was a 5% Owner of stock in the company in the prior year.

PRIOR_YEAR_50000
CHAR, 001

This is the indicator of whether or not the employee earned $50000 or more in the prior calendar year.

PRIOR_YEAR_50000_D
VARCHAR, 020

This field contains the indicator of whether or not the employee earned $50000 or more in the prior calendar year.

PRIOR_YEAR_75000
CHAR, 001

This is the indicator of whether or not the employee earned $75000 or more in the prior calendar year.

PRIOR_YEAR_75000_D
VARCHAR, 020

This field contains the indicator of whether or not the employee earned $75,000 or more in the prior calendar year.

PRIOR_YEAR_OFFICER
CHAR, 001

This code indicates whether or not the employee was an officer in the prior year.

PRIOR_YEAR_TOP_20
VARCHAR, 020

This code indicates whether or not the employee was in the top 20% of paid employees in the prior year.

PRIOR_YR_DEF_EARN
NUMERIC, 10,2

This is the amount of deferred earnings reported on the employee's US W-2 form for the prior year.

PRIOR_YR_EARNINGS
NUMERIC, 10,2

This is the Federal earnings reported on the employee's US W-2 form for the prior year.

PRIOR_YR_OFFICER_D
VARCHAR, 020

This field contains the code to indicate whether or not the employee was an officer in the prior year.

PROFILE_SEPARATE_1
CHAR, 1

This is the dash (-) between the first and second Profile percentage fields.

PROMOTABILITY
VARCHAR, 020

This field displays the description from the option list translation of the Promotability Assessment code.

PROMOTABILITY_DATE
DATETIME

This is the date the employee may be considered for a promotion.

PROMOTION_ASSMNT
CHAR, 001

This code indicates the employee's promotability potential as listed on his/her performance appraisal.

PROTO_HED_CONTRIB
CHAR, 4

This is the Control Number of the TS table to be used for this organization (Control 1-2).

PROV_NET_CLAIM
NUMERIC, 5,2

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

PROV_TAX_AMOUNT
NUMERIC, 07,0

This is used with a Tax Method Code of four through eight or B.

For Tax Method Codes four and six, enter the amount with two decimals.

For codes five, seven, and eight, enter four decimals (for example, enter five percent as '0500').

For code B, enter a whole dollar amount.

For Tax Method Code A, the week-to-date taxable wages is stored here.

PROVIDER_CODE
CHAR, 10

This is the provider of the course. This must be a valid provider from the provider screen. This is a mandatory field.

PROVIDER_CODE_DESC
VARCHAR, 20

This field displays the description from the option list translation of the PROVIDER-CODE.

PRV_LCP_TAX_CREDIT
NUMERIC, 11,2

This field is used to store the annual labor-sponsored funds federal tax credit.

This is the amount deducted or withheld during the year for the acquisition by the employee of approved shares of the capital stock of a prescribed labor-sponsored venture capital corporation.

(Canadian field.)

PS_CLASS1
CHAR, 1

This is the class number for the first course in a program.

PS_COURSE1_START
DATETIME

This is the start date of the first course in a program.

PS_PROGRAM_DESC
VARCHAR, 50

This field contains a brief description of the program.

PS_PROGRAM_SCHED
CHAR, 5

This is a unique identifier for a program.

PS_PROGRAM_SCHED_D
VARCHAR, 20

This field displays the description from the option list translation of the PS-PROGRAM-SCHED code.

PS_PROGRAM_START
DATETIME

This is the start date of a program.

PS_PROGRAM_UNTIL

DATETIME

This is the end date of a program.

PS_TRAIN_LOC_1

CHAR, 2

This location differentiates between the same courses being offered at different training centers within an organization.

PS_TRAIN_LOC_1_D

VARCHAR, 20

This field displays the description from the option list translation of the PS-TRAIN-LOC-1 code.

Q

QC_OTH_DEDUCTIONS

NUMERIC, 05,0

This is used when only a percentage of the wages earned should be taxable for withholding.

If the Reciprocal Option field contains an A or a five, this amount is treated as a whole number and subtracted from the taxable gross.

In Canada, enter the federal exemption amount (2XX tax body) or the provincial exemption amount (3PQ tax body).

QC_OTH_TAX_CREDITS

NUMERIC, 11,2

This field is used to store non-refundable tax credits for the year authorized by the Quebec tax authority (for example, charitable donations and medical expenses).

(Canadian field.)

QUAL_EVNT_TO_COBRA

DATETIME

This is the date on which the event was passed to the COBRA Solution system by the interface program.

QUALIF_EVENT_CD

CHAR, 002

This is the COBRA qualifying event.

QUALIFYING_EVENT

VARCHAR, 020

This field displays the description from the option list translation of the QUALIFYING-EVENT-CD.

R

RACE_CODE
CHAR, 002

This is the employee's RACE-CODE used in EEO reporting. This code is only applicable if Basic HR is purchased (that is, if only Payroll is purchased, this field will not validate).

RANGE_INDICATOR
VARCHAR, 20

This field displays the description from the option list translation of the RED/GREEN-INDICATOR code.

RANGE_PENETRATION
NUMERIC, 5,0

The POSITION-IN-RANGE (RANGE-PENETRATION) percent is automatically calculated as the difference between the employee salary and the minimum of the range, divided by the difference between the range's maximum and minimum.

This field may not be overridden.

RATER_IDENTIFIER
CHAR, 010

This is the employee number or any other identification scheme that indicates the person or persons responsible for completing and/or administering the employee's performance appraisal.

RATING
VARCHAR, 020

This field displays the description from the option list translation of the Rating Value code.

RATING_DATE
DATETIME

This is the employee's performance appraisal date applicable to this segment.

RATING_TYPE
CHAR, 002

This code identifies the type of performance appraisal performed for the employee.

RATING_UNTIL
DATETIME

This is the ending effective date of the employee's performance appraisal.

RATING_VALUE

CHAR, 001

This code identifies an employee's performance appraisal rating.

REASON_TO_COBRA

VARCHAR, 20

This field displays the description from the option list translation of the REASON-TO-COBRA-CODE.

REASON_TO_COBRA_CD

CHAR, 2

This code identifies the Qualifying Event which prompted the employee's or spouse/dependent data to be sent to the COBRA Solution PC System.

RECIP_RULES_SW_DES

VARCHAR, 020

This field displays the description from the option list translation of the RECIP-RULES-SWITCH.

RECIP_RULES_SWITCH

CHAR, 001

This field is used to indicate if the system should use Reciprocal Rules Tables to calculate taxes.

RECIPROCAL_CODE

CHAR, 001

This field is used to specify whether resident state and/or work state tax bodies receives the employee's tax payment.

RECIPROCAL_STATE

CHAR, 002

When an employee lives in one state and works in another and one of the states has a value of four in the Reciprocal Code field then each state should have the state code of the other in this field.

For tax body 102 only, enter EI in this field if the employee is eligible to receive advanced payments of the Earned Income Credit.

To turn off the advanced payment of the Earned Income Credit, change this field to any non-blank value except EI.

If RA is entered in this field, and the Tax Method Code is a five, the percentage entered in the Tax Amount/Percent field is used to compute the tax, even if it is less than the standard calculation.

This option can be used to handle cases where an employee lives in one Ohio city and works in another, and is required to pay tax to both, but where less than the normal amount is paid to his/her resident city.

This field is not applicable to Canada.

RECON_CLEAR_CODE

CHAR, 001

This field indicates whether the payment has cleared the bank or is still outstanding.

If the field displays 3 or 4, the payment has already cleared the bank or you are not using the check reconciliation feature. These payments cannot be automatically reversed. If the field displays R or V, the payment has already been reversed or voided.

Displayed values and their meanings are listed below:

1 - uncleared this run (current)

2 - uncleared previous run

3 - cleared this run

4 - cleared previous run

R - reversed this run

V - reversed previous run

RECON_NUMBER

NUMERIC, 08,0

The value displayed in this field was assigned during the payroll run process. It is a unique, system-assigned reconciliation number for this payment. For a manual payment, it contains the check number entered for the payment.

You have three entry choices for this field on the Calculate Pay For: form, depending on the type of calculation required. They are:

(1) Leave the field blank for simulated calculations

(2) Type the pay document number to be used for the resulting payment

(3) Type eight 9s if you want a pay document to be printed during the next payroll run for this company

RECORD_DATE

DATETIME

This is the effective date of the screen's information.

RECORD_GROUP

CHAR, 002

This field indicates how the system-created payment was generated (for example, manual payment or normal payment). Displayed values and their meanings are listed below:

9H = normal payment

+H = plus adjustment

-H = minus adjustment

MH = manual payment

0H = multiple payments

RECORD_UNTIL

DATETIME

This is the ending effective date of the screen's information.

RED_GREEN_IND

CHAR, 1

The system compares the salary to the appropriate TB table's minimum and maximum salary range to determine if the salary is over maximum, under minimum, or within the TB Table range.

This code may not be overridden.

RELATIONSHIP

VARCHAR, 020

This field displays the description from the option list translation of the RELATIONSHIP-CODE.

RELATIONSHIP_CODE

CHAR, 002

This code identifies the relationship of the spouse or dependent named on this form to the employee.

RELIGION

VARCHAR, 020

This field displays the description from the option list translation of the RELIGION-CODE.

RELIGION_CODE

CHAR, 002

This code identifies the employee's religious preference.

This information is optional, but may be useful in an emergency situation.

RELO_WILLINGNESS

VARCHAR, 020

This field displays the description from the option list translation of Willing to Relocate Code.

RELOCATION_AREA

CHAR, 002

This code identifies the employee's geographic preference for relocation.

RELOCATION_EXPENSE
NUMERIC, 05,0

This is the amount of all relocation expenses paid to the employee. Round this figure to the nearest dollar when entering; all entries in this field are automatically right justified.

REMAIN_AS_OF_DATE
DATETIME

This is the as of date for the data on the segment being recorded.

REMAIN_UNTIL
DATETIME

This is the ending date for the data on the segment being recorded.

REMAINING_AMOUNT
NUMERIC, 05,2

This field contains the remaining amount of authorized time the employee currently has or has been awarded for future use.

REMAINING_TYPE
VARCHAR, 20

This field designates the type of authorized time off (for example, vacation, funeral, sick, and so forth).

REMAINING_YEAR_END
DATETIME

This is the year end date of the period for which the authorized time off category amounts are recorded.

REPORT_FREQ_CODE
CHAR, 001

This indicates whether the system will report on all frequencies or only on the frequencies that are being paid according to the AE-SCR and/or AE2-SCR.

REPORT_FREQUENCY
VARCHAR, 020

This field displays the description from the option list translation of the Report Freq Code.

REQ_TRACK_SWITCH
CHAR, 1

This field determines whether the Requisition Tracking module is turned on or off.

REQ_TRACK_SWITCH_D
VARCHAR, 20

This field displays the description from the option list translation of the REQ-TRACK-SWITCH code.

RES_HEAD
NUMERIC, 01,0

This specifies the tax table to be used for the resident head of household category. Valid entries are:

0 = No tax for resident head of household (Default)

1 - 6 = The table to be used for resident head of household

RES_MAR
NUMERIC, 01,0

This specifies the tax table to be used for the resident married category. Valid entries are:

0 = No tax for resident married (Default)

1 - 6 = The table to be used for resident married

RES_SINGLE
NUMERIC, 01,0

This specifies the tax table to be used for the resident single category. Valid entries are:

0 = No tax for resident single (Default)

1 - 6 = The table to be used for resident single

RESIDE_WAGES
NUMERIC, 11,2

This field contains the employee's Resident Wages.

RESIDE_WAGES_CUR
NUMERIC, 11,2

This field contains the employee's current Resident Wages.

RESIDE_WAGES_MTD
NUMERIC, 11,2

This field contains the employee's month-to-date Resident Wages.

RESIDE_WAGES_QTD
NUMERIC, 11,2

This field contains the employee's quarter-to-date Resident Wages.

RESIDE_WAGES_YTD
NUMERIC, 11,2

This field contains the employee's year-to-date Resident Wages.

RESIDENT_CODE
CHAR, 001

This code indicates whether this taxing authority is in the employee's resident state, work state, or both.

RESIDENT_STATUS
VARCHAR, 020

The Resident Status field contains the description of the Resident Code specified for each earnings.

RESPOND_DATE_ACT
DATETIME

This is the actual date on which the employee or dependent notified HR or the insurance company of their intent to extend coverage.

RESPOND_DATE_LAST
DATETIME

This is the date by which the employee or their dependent must notify HR or the insurance company of their intent to extend coverage.

RESTRICTED_WORK_CD
CHAR, 3

This code identifies the employee's work restriction.

RESTRICTIO
VARCHAR, 20

This field displays the description from the option list translation of the Restricted Work Code.

RESULT_PLAN_STATUS
CHAR, 1

This indicates the employee's participation status in the welfare benefits plan indicated by the PLAN-ID.

It is a derived field, determined from a number of factors which, in turn, are dependent upon employee activities and elections affecting status in the plan.

Participation status is initially set as a result of eligibility determination. It may change when factors affecting the employee's eligibility change, or when the employee elects a different option or set of conditions in the plan.

For example, assume an employee has been newly hired and elects to participate in a welfare benefits plan that has no waiting period. The initial status in the plan would then be 'Active Participant', assuming the employee meets the other eligibility

conditions. If, at some later time, the employee changes options, but remains a participant, he/she cannot change status. However, if the employee later chooses to stop participating in the plan and suspends contributions, the status can change to 'Suspended' or 'Waived', depending upon how the plan is defined and how the Plan Rules Table record has been set up for the plan.

RESULT_STATUS_1

CHAR, 1

This code identifies the Benefit Plan status that will become the new Plan status on the participant's record if the participant's current Plan status falls within the range of Plan Status Codes defined in the STATUS-1L and STATUS-1H fields.

RESULTING_EMP_STAT

CHAR, 002

This is the employee's status as a result of the ACTIVITY-CODE entry.

The RESULTING-EMP- STATUS value is returned from the TF table. In fact, any entry made in this field, except XX when applicable, is ignored by the system and replaced with the Table value.

On the 01-SCR, 04-SCR, and 08-SCR forms, the only available non-key entry field is the RESULTING-EMP-STATUS field. On these forms, you are required to make an entry in this field. The only acceptable entry is 'XX'.

Leave the RESULTING-EMP-STATUS field blank when it is not used as the non-key entry. This causes the system to display the RESULTING-EMP-STATUS from the appropriate TF segment.

RESULTING_FREQUENC

VARCHAR, 20

This field displays the description from the option list translation of the CONTRIB-RESULT-FREQ code.

RETAIN_HISTORY

VARCHAR, 020

This field displays the description from the option list translation of the Retain History Code.

RETAIN_HISTORY_CD

CHAR, 001

This code tells the system whether or not to retain history and/or labor records on the Employee Database.

RETIRE_AGE

CHAR, 8

This is a time span field that defines the earliest age an employee may be eligible for early retirement.

RETIRE_DATE_RULE
CHAR, 4

This is the Control Number of the TJ table to be used for this organization (Control 1-2).

RETIRE_SERVICE
CHAR, 8

This is a time field that defines the period of service an employee must attain before becoming eligible for early retirement.

RETIRE_TYPE
VARCHAR, 20

This field defines the retirement type (for example, normal, early, latest).

RETIREMENT
VARCHAR, 020

The translation of the Pre/Post Retirement Option code used to identify the type of 'retirement' the employee has elected.

RETIREMENT_DATE
DATETIME

This is the actual date of the retirement (or termination in the case of a vested termination). It is usually saved by the system upon entry of a retirement activity in the Human Resource Base module, but can be manually entered.

RETIREMENT_OPTION
CHAR, 002

This is the Pre/Post Retirement Option code used to identify the type of retirement the employee has elected.

Retirement may take the form of early retirement, postponed retirement, vested termination (actually, not a form of retirement, per se), disability retirement, and so forth.

RETURN_DATE
DATETIME

This date is the date the perquisite was returned or cancelled.

RETURN_DT_EXPECTED
DATETIME

This is the date the performance appraisal form is due back to the originating department.

REVIEWER_NAME
VARCHAR, 030

This is the name of the person who is responsible for either the collection of completed salary review forms, as in the case of mass distribution; or performing the review and returning the form.

REVOCATION_DATE
DATETIME

This field contains the date when the FORM-OF- PAYMENT election was revoked. FORM-OF-PAYMENT elections may typically be revoked at any time prior to the actual date of retirement. One such situation might occur due to the death of a spouse where the join option would no longer be applicable.

RL_AWARD
VARCHAR, 10

This is an awards field used by Australia.

NOTE: This field is not included in the standard Position Administration module.

RL_BGT_FTE_HOURS
NUMERIC, 10,2

This is the number of hours that have been budgeted for the position. Derived from T0A.

RL_BGT_FTE_UNITS
NUMERIC, 6,2

This is the Full Time Equivalent value that has been budgeted for the position. Derived from T0A.

RL_BUDGET_HC
NUMERIC, 6,0

This field stores head count data that is budgeted for a specific position. This is used with the Position Administration module.

RL_BUDGET_SALARY
NUMERIC, 12,0

This field stores the total salaries budgeted for a specific position. This is used with the Position Administration module.

RL_CONTROL_NBR
CHAR, 2

This is the position control number used with the Position Administration module.

RL_DIRECT_RPTS_TO
VARCHAR, 6

This field contains the position code to which the specific position directly reports. This is used with the Position Administration module.

RL_EDUC_COMMENT
VARCHAR, 30

This is a field that allows the user to comment about an educational competency related to a particular position.

This is used with the Position Administration module.

RL_EDUC_STRM_CODE
VARCHAR, 4

This is the educational subject competency specific to a position used with the Position Administration module.

RL_EDUC_STRM_DESC
VARCHAR, 20

This field displays the description from the option list translation of the EDUC_STRM_CODE.

RL_EDUC_TYPE_CODE
VARCHAR, 4

This is the educational level of a competency subject specific to a position used with the Position Administration module.

RL_EDUC_TYPE_DESC
VARCHAR, 20

This field displays the description from the option list translation of the EDUC_TYPE_CODE.

RL_EMP_STATUS_CODE
CHAR, 1

This is the employment status related to a specific position (for example, casual, full-time, part-time, or temporary).

This is used with the Position Administration module.

RL_EMP_STATUS_DESC
VARCHAR, 20

This field displays the description from the option list translation of the EMP_STATUS_CODE.

RL_EVAL_COMMENT
VARCHAR, 30

This is a field where comments can be entered specific to the evaluation of a position. Used with the Position Administration module.

RL_EVAL_CR_CMNT
VARCHAR, 30

This is a field where comments can be entered specific to the criteria used to evaluate a position. This is used with the Position Administration module.

RL_EVAL_CRIT_DESC
VARCHAR, 20

This is the description of a particular criteria used to evaluate a position. This is used with the Position Administration module.

RL_EVAL_CRIT_PTS
NUMERIC, 3,0

These are the points that are assigned to a particular criteria used in the evaluation of a specific position. This is used with the Position Administration module.

RL_EVAL_CRIT_RATE
VARCHAR, 6

This is a rating assigned to a criteria used in the evaluation of a specific position. This is used with the Position Administration module.

RL_EVAL_CRIT_TY_DS
VARCHAR, 20

This field displays the description from the option list translation of the EVAL_CRIT_TYPE.

RL_EVAL_CRIT_TYPE
CHAR, 3

This is the evaluation criteria type. This is used with the Position Administration module.

RL_EVAL_TOTAL_PTS
NUMERIC, 4,0

This is the total of the evaluation points for a specific position. This is used with the Position Administration module.

RL_EVAL_TYPE_CODE
CHAR, 2

This is the type of evaluation code used for this position.

I.e. scheduled, unscheduled, etc. This is used with the Position Administration module.

RL_EVAL_TYPE_DESC
VARCHAR, 20

This field displays the description from the option list translation of the EVAL_TYPE.

RL_EXP_COMMENT
VARCHAR, 30

This is a field that allows the user to comment about a work experience related to a particular position.

This is used with the Position Administration module.

RL_EXP_DURATION
CHAR, 2

This is the amount of specific work experience required for a specific position. This is used with the Position Administration module.

RL_EXP_DURATN_DESC
VARCHAR, 20

This field displays the description from the option list translation of the EXP_DURATION.

RL_EXPERIENCE_DESC
VARCHAR, 20

This is the work experience required for a particular position. This is used with the Position Administration module.

RL_EXPERIENCE_TYPE
VARCHAR, 3

This field displays the description from the option list translation of the EXPERIENCE_TYPE.

RL_FAMILY_CODE
VARCHAR, 4

This is the job family to which the position belongs.

This is used with the Position Administration module.

RL_FAMILY_DESC
VARCHAR, 20

This field displays the description from the option list translation of the FAMILY_CODE.

RL_FILE_FORMAT
VARCHAR, 3

This is a field which references the format of the document used with the Position Administration module.

RL_FILE_FRMT_DESC
VARCHAR, 20

This field displays the description from the option list translation of the FILE FORMAT CODE.

RL_FILE_PATH
VARCHAR, 45

This is the file/directory path of the document used with the Position Administration module.

RL_FUND_BY_HRMS_ID
VARCHAR, 10

This field is used in relationship to the TOE table records. These tables show the relationship of a position to a job. This is used in the Position Administration module.

RL_FUND_COMMENT
VARCHAR, 30

This field is used in relationship to the TOE table records.

NOTE: At the position level, this field is not used.

This is part of the Position Administration module.

RL_FUND_END_DATE
DATETIME

This is the ending date of the funding for the position.

Used with the Position Administration module.

RL_FUND_PERCENT
NUMERIC, 4,1

This is a percentage of the position's budget that is being funded. This is used with the Position Administration module.

RL_FUND_PROG_CODE
VARCHAR, 6

This code is used to identify the funding program for the position. This is used with the Position Administration module.

RL_FUND_PROG_DESC
VARCHAR, 20

This field displays the description from the option list translation of the FUND_PROG_CODE.

RL_FUND_SOURCE_CD
VARCHAR, 6

This code is used to identify the source of the funding for the position. This is used with the Position Administration module.

RL_FUND_SRC_DESC

VARCHAR, 20

This field displays the description from the option list translation of the FUND_SOURCE_CD.

RL_GRADE

VARCHAR, 6

This is the salary grade for the position entry. This is used with the Position Administration module.

RL_INDIR_RPTS_TO

VARCHAR, 6

This field contains the position code to which the specific position indirectly reports. This is used with the Position Administration module.

RL_JOB_DESCRIPTION

VARCHAR, 30

This is a free form description of a job entry.

This is used with the Position Administration module.

RL_LICENSE_CODE

CHAR, 4

This field holds the license required for a position.

This is used with the Position Administration module.

RL_LICENSE_COMMENT

VARCHAR, 30

This is a free form field used for comments used to record information for the license required. This is used with the Position Administration module.

RL_LICENSE_DESC

VARCHAR, 20

This field displays the description from the option list translation of the LICENSE-COMMENT. This is used with the Position Administration module.

RL_LOCATION_CODE

VARCHAR, 4

This code is used to identify the physical location of the position.

This is used with the Position Administration module.

RL_LOCATION_DESC

VARCHAR, 20

This field displays the description from the option list translation of the Location-Code.

This is used with the Position Administration module.

RL_MEMBER_COMMENT

VARCHAR, 30

This is a free form comment field used to record information related to the membership.

This is used with the Position Administration module.

RL_MEMBERSHIP_CODE

VARCHAR, 4

This code is used to identify the membership required for a position. This is used with the Position Administration module.

RL_MEMBERSHIP_DESC

VARCHAR, 20

This field displays the description from the option list translation of the Membership-code.

This is used with the Position Administration module.

RL_NXT_JOB_COMMENT

VARCHAR, 30

This is a free form comment field used to record information relating to the possible next job.

This is used with the Position Administration module.

RL_NXT_JOB_ID

VARCHAR, 6

This is the ID for the next possible job. This is used with the Position Administration module.

RL_NXT_REVIEW_DATE

DATETIME

This is the date on which the position will be reviewed.

This is used with the Position Administration module.

RL_OCC_CAT_CODE

VARCHAR, 6

This is the occupation group of the position.

This is used with the Position Administration module.

RL_OCC_CAT_DESC

VARCHAR, 20

This field displays the description from the option list translation of the OCCUPATIONAL-CATEGORY-CODE.

This is used with the Position Administration module.

RL_ORG_UNIT_CODE

VARCHAR, 6

This is the Organizational Unit to which the position belongs.

This is used with the Position Administration module.

RL_POS_CODE

CHAR, 6

The code of the position.

his is used with the Position Administration module.

RL_POS_CODE

VARCHAR, 6

The code of the position. This is used with the Position Administration module.

RL_POS_JOB_ID

VARCHAR, 6

This is the ID of the job associated with one or more positions. This is used with the Position Administration module.

RL_REASON_CODE

CHAR, 2

This option is used to identify a Position as being created, changed, or abolished. This is used with the Position Administration module.

RL_REASON_DESC

VARCHAR, 20

This field displays the description from the option list translation of the REASON-CODE. This is used with the Position Administration module.

RL_REVIEW_COMMENT

VARCHAR, 30

This is a free form comment field used to enter information about position reviews. This is used with the Position Administration module.

RL_REVIEW_DESC

VARCHAR, 20

This is the code used to identify the reason the position will be reviewed. This is used with the Position Administration module.

RL_REVIEW_REASON

CHAR, 2

This field displays the description from the option list translation of the REVIEW-REASON-CODE. This is used with the Position Administration module.

RL_SEQ_NUMBER
NUMERIC, 3,0

This is a position sequence number. This is used with the Position Administration module.

RL_SKILL_COMMENT
VARCHAR, 30

This is a free-form comment field used to record information related to the skill/competency. This is used with the Position Administration module.

RL_SKILL_COMP_CODE
VARCHAR, 10

This option is used to identify the skill/competency required for the Position. This is used with the Position Administration module.

RL_SKILL_COMP_DESC
VARCHAR, 20

This option is used to identify the skill/ competency required for the Position. This is used with the Position Administration module.

RL_SKILL_LEVEL_CD
VARCHAR, 3

This code is used to identify the proficiency for the skill/competency. This is used with the Position Administration module.

RL_SKILL_LEVEL_DSC
VARCHAR, 20

This field displays the description from the option list translation of the SKILL-LEVEL-CODE. This is used with the Position Administration module.

RL_STATUS_CODE
VARCHAR, 4

This option is used to identify the status of the Position incumbency (for example, Permanent, Acting). This is used with the Position Administration module.

RL_STATUS_DESC
VARCHAR, 20

This field displays the description from the option list translation of the STATUS-CODE. This is used with the Position Administration module.

RL_TABLE_DATE_01
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_02
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_03
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_04
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_05
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_06
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_07
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_08
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_09
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_10
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_11
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_12
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_13
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_50
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_51
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_52
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_53
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_54
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_55
DATETIME

This is the effective date of the table entry.

RL_TABLE_DATE_56
DATETIME

This is the effective date of the table entry.

RL_TABLE_DT_UNTIL
DATETIME

This is the ending date of the selected table data.

RL_TRAIN_COMMENT
VARCHAR, 30

This is a free form field used to hold comments related to training required for a position. This is used with the Position Administration module.

RL_TRAINING_COURSE
VARCHAR, 6

This is the training course required for a position. This is used with the Position Administration module.

RL_TRAINING_DESC
VARCHAR, 20

This field displays the description from the option list translation of the TRAINING-COURSE CODE.

RL_TYPE_FILE_DESC
VARCHAR, 20

This field displays the description from the option list translation of the TYPE-OF-FILE code.

RL_TYPE_OF_FILE
VARCHAR, 3

This option is used to identify the type of document reference file (for example, Org chart). This is used with the Position Administration module.

RL_USER_DESC

VARCHAR, 20

This is a user defined field.

RL_USER_FIELD_1

VARCHAR, 8

This is a user defined field.

RL_USER_FIELD_2
VARCHAR, 2

This is a user defined field.

RL_VEHICLE_COMMENT
VARCHAR, 30

This is free form field used to make comments about a vehicle that is associated with a position.

This is typically used in the U.K.

This is used with the Position Administration module.

RL_VEHICLE_REG_EXP
DATETIME

This is a field used to identify expired registration to a vehicle associated with a position.

This is typically used in the U.K.

This is used in the Position Administration module.

RL_VEHICLE_REG_NBR

VARCHAR, 10

This is a field used to store the registration number of a vehicle associated with a position.

This is typically used in the U.K.

This is used with the Position Administration module.

RL_VEHICLE_RETURN

DATETIME

This is a field used to identify whether a vehicle associated with a position has been returned.

This is typically used in the U.K.

This is used with the Position Administration module.

RL_VEHICLE_TYPE_CD

CHAR, 2

This is a field that describes the type of vehicle associated with a position.

This is typically used in the U.K.

This is used with the Position Administration module.

RL_VHCLE_TYPE_DESC

VARCHAR, 20

This field displays the description from the option list translation of the VEHICLE-TYPE code.

RL_WP_REF

VARCHAR, 30

This field is used in relationship to the TOE table records. This is part of the Position Administration module.

ROUTING_NBR

NUMERIC, 09,0

This field contains bank routing information specific to the company selected.

ROUTING_NUMBER

CHAR, 009

This is used to store the routing number of the bank your company writes its payroll checks against. This number is used by the ACH Tape report generator (6A6A) and the Direct Deposit Register (6D6D).

RQ_APPROVED_BY

CHAR, 3

This field contains an Approved By value for the Requisition. The Approved By code represents the name or job title of managers authorized to approve Requisitions. This option list should be reviewed and edited to reflect your organization's requirements.

RQ_APPROVED_DESC

VARCHAR, 20

This field displays the description from the option list translation of the RQ-APPROVED-BY.

RQ_CAMPAIGN_ID

CHAR, 3

This field contains a three-character designation for a specific recruiting campaign.

You can identify Requisitions that are part of a particular recruiting campaign by entering this field for the Requisition. This enables you to analyze a particular recruitment cycle and identify whether efficiency improvements can be made. For example, you can check how long the recruitment cycle took and how successful it was.

RQ_CAND_AMOUNT

NUMERIC, 9,0

This field is the unit amount for the Requisition Candidate, based on the unit of measure that was selected for the Requisition.

The format in which you enter the amount depends on the unit of measure you are using:

For FTE or hours, enter up to a 7-digit figure with two decimal places (for example, '99,999.99').

For headcount, enter up to a 6-digit figure (or example, '999,999').

For salary, enter up to a 12-digit figure (for example, '999,999,999,999').

RQ_CAND_NAME

VARCHAR, 50

This is the legal name of the Requisition Candidate. Enter the name in this field in the format Last comma space First Name space Middle Initial. If the Requisition Candidate is an existing employee, this field will propagate if the Control 1-2 and Number fields are entered.

RQ_CAND_POS_NBR

CHAR, 6

This is the position number for a candidate. Used with the Requisition Tracking module.

RQ_CAND_STATUS

CHAR, 2

This field contains the status value used to designate the various stages of activity of the Requisition Candidate. A new Requisition Candidate may only have a status of 'Candidate'.

A Requisition Candidate's status can be changed manually or will change when certain processes are carried out. For example, you may change the Candidate Status to 'Selected/Not Emply'd' when the candidate has been selected for the vacancy. The Candidate Status will automatically change from 'Selected/Not Emply'd' to 'Selected/ 'Employed' when the candidate is hired.

RQ_CAND_STATUS_D

VARCHAR, 20

This is the description of the value used to designate the various stages of activity of the Requisition Candidate.

RQ_CAND_UNIT

CHAR, 2

This field displays the description from the option list translation of the RQ-CAND-UNIT code.

RQ_CAND_UNIT_D

VARCHAR, 20

This inquiry field displays the value of the associated Requisition expressed as FTE, hours, salary, or headcount.

RQ_EFFECTIVE_DATE

DATETIME

This is the date on which a record was either created or modified. Once the original record has been created, changing the Effective date creates a new occurrence for the segment.

This field may also appear on a form to allow selection of records 'as of' a certain date. Records with a date equal to or less than the value in this field are selected. Past dates can be entered to see records from some prior point in time.

RQ_EFFECTIVE_UNTIL

DATETIME

This is the ending effective date.

RQ_KEY_SEPARATOR

CHAR, 1

This field contains a value used to distinguish between two or more changes effective on the same date.

If only one record is created on a date, '1st Occurrence' (9) must be selected in this field.

If more than one record change is effective on the same date, you must enter a key separator in descending sequence for each record change. For example, the first change for the date must be entered with a key separator of ‘2nd Occurrence’ (9), the second with ‘3rd Occurrence’ (8), and so on. This puts the most recent change at the top of the segment stack.

RQ_KEY_SEPARATOR_D

VARCHAR, 20

This field is the description of the value that is used to distinguish between two or more changes effective on the same date.

RQ_LIMIT_AMOUNT

NUMERIC, 9,0

This is the total value of the Requisition expressed as FTE, hours, salary, or headcount.

Setting this limit ensures that no hires or transfers take place in excess of available vacancies. When the vacancies filled equal the Limit Amount on the Requisition, the Requisition Status is automatically changed to ‘Closed’.

The format in which you enter the amount depends on the unit of measure you are using:

For FTE or hours, enter up to a 7-digit figure with two decimal places (for example, ‘99,999.99’).

For headcount, enter up to a 6-digit figure (or example, ‘999,999’).

For salary, enter up to a 12-digit figure (for example, ‘999,999,999,999’).

RQ_NUMBER

CHAR, 6

This is a unique six-character code that identifies a Requisition. Once a number is assigned to a requisition, it may not be changed.

It is also used to tie the Requisition Candidate to a specific Requisition, allowing you to view candidates by requisition.

You may use letters as part of the Requisition Number, allowing you to group requisitions by type (for example, ‘ENG001’ for engineering requisitions).

RQ_POSITION_DATE

DATETIME

This is the date from which the Position is available.

RQ_POSITION_NBR

VARCHAR, 6

This field is used to identify the position associated with the Requisition. It is required only if the Position Administration Solution is in use.

By selecting an entry for this field, you can search for all Requisitions associated with a specific position.

RQ_REASON_CLOSED

CHAR, 2

This is the reason for which a requisition has been closed. When a Requisition's status changes to 'Closed' because the vacancies it represents have been filled, this field will automatically default to 'Filled'. If you manually close a Requisition because of a recruitment freeze, you could select 'Recruitment Freeze' as the reason for closure.

RQ_REASON_DESC

VARCHAR, 20

This is the description of the code that is used to record the reason for which a Requisition has been closed.

RQ_SEQUENCE_NBR

CHAR, 4

This is the requisition sequence number.

RQ_STATUS

CHAR, 2

This field contains the status value used to designate the various stages of activity of the Requisition.

A new Requisition may only have a status of 'Open-Not Authorized'. A Requisition's status can be changed manually or will change when certain processes complete (for example, a Requisition's status changes to 'Closed' when the vacancies it represents have been filled). No further Requisition Candidates can be assigned to a Requisition that is 'Closed'.

RQ_STATUS_DESC

VARCHAR, 20

This is the description of the value that is used to designate the various stages of the Requisition.

RQ_THRESHOLD_AMT

NUMERIC, 9,0

This is the unit value (less than the Limit Amount) that must be met in order for the Requisition to be considered filled.

By setting a Threshold Amount, you can prevent a Requisition from remaining open when the vacancies have been filled before reaching the Requisition's Limit Amount.

The Total Amount needs to be equal to, or exceed, the Threshold Amount to close the Requisition automatically.

The Requisition's status changes to 'Pending Closure' or 'Closed' once its Total Amount is equal to or greater than its Threshold Amount. For example, the salary Threshold Amount could be 45,000 with a 55,000 Limit Amount for a requisition. Filling the requisition for 46,000 would exceed the Threshold Amount, causing a Requisition Status change. Instead of remaining open, the Requisition status would

then change to reflect that the Requisition was closed because it met the condition of the Threshold Amount.

RQ_UNITS_CODE

CHAR, 2

This is the value of a Requisition expressed as an FTE, hours, salary, or headcount. Vacancies are represented on a Requisition by selecting one of these units and then entering a limit based on the unit selected. A formal request to fill four full-time vacancies could be represented by selecting a Unit of 'Headcount' and entering a limit Amount of 4.

The same unit must be used throughout the life of the Requisition and for Requisition Candidates. Although different units can be used for different Requisitions, you may find it helpful to use one unit consistently or to have a clear guideline as to which units are used for which types of Requisitions.

If you do not want one or more of these unit options to be used, you may delete them, but the values should not be changed. For instance, an organization may never want to allow requisitions to be filled by Salary units.

RQ_UNITS_CODE_DESC

VARCHAR, 20

This is the description of the code that is used to represent the value of a Requisition.

RULE_1

CHAR, 2

This defines the method used to determine if an employee returning from a service interruption has incurred a break-in-service under the plan for the conditions described.

Rule-1 pertains to an employee returning from a service interruption whose separation activity option falls into the continuous range of Activity Options defined in the TU ACT 1L and TU ACT 1H fields (prefixed with the TU Major Activity Option in the TU table key).

This is a required entry field when any other field is entered on the same line.

RULE_1_DESC

VARCHAR, 20

This field displays the description from the option list translation of the RULE-1 code.

S

SALARY_CALC_METHOD
CHAR, 001

This is system generated and contains the indicator of which ZF segment fields was used as calc base.

SALARY_CHANGE
VARCHAR, 020

This field displays the description from the option list translation of the SALARY-CHANGE-TYPE code.

SALARY_CHANGE_TYPE
CHAR, 003

This code identifies the reason for the employee's salary change.

SALARY_CHANGES
CHAR, 4

This is the Control Number of the Salary Administration TD Table (TD1, 2, 3, 4, 5, 6, 7, 8, 9, 0) to be used for the organization (Control 1-2).

SALARY_EFFECTIVE
DATETIME

This is the effective date of the employee's salary change.

SALARY_GRADE
CHAR, 006

This is the SALARY-GRADE code assigned to this JOB-CODE/JOB-CODE-EXTENT on the TA Table. The SALARY-GRADE defines the assigned salary range.

SALARY_GRADES
CHAR, 4

This is the Control Number of the Basic Human Resource Recordkeeping TB Table (TBA, TBB, TBC) to be used for the organization (Control 1-2).

SALARY_INCREASE_DT
DATETIME

This date is the salary effective date of the Salary Plan/Budget increase. It may be overridden prior to the conversion of the Plan data to an actual salary change and used as the SALARY-EFFECTIVE-DATE in creating an actual increase.

SALARY_PER_PERIOD
NUMERIC, 08,2

This is the amount of the employee's salary per pay period. This amount may be entered directly, or the result of a system calculation.

SALARY_PER_SWITCH
CHAR, 1

This value indicates how information entered in the Salary Per Period field on employee-level screens should be handled.

SALARY_PER_SWITCHD
VARCHAR, 20

This field displays the description from the option list translation of the SALARY-PER-SWITCH Code.

SALARY_PLANS
CHAR, 004

This is the Control Number of the Salary Administration TH (TH1, 2, 3, 4) Table to be used for the organization (Control 1-2).

SALARY_PLANS
CHAR, 4

This is the Control Number of the Salary Administration TH (TH1, 2, 3, 4) Table to be used for the organization (Control 1-2).

SALARY_SEQ_DESC
VARCHAR, 20

This field displays the description from the option list translation of the SALARY-SEQUENCE code.

SALARY_SEQUENCE
CHAR, 1

This is another field name for the KEY- SEPARATOR field on salary segments. The definition for SALARY- SEQUENCE can be found in KEY-SEPARATOR.

SALARY_UNTIL
DATETIME

This is the ending effective date of the salary.

SAVE_DEDUCTION
NUMERIC, 1,0

This is the number of the previous deduction cycle. Put an entry here only when this is the first time the system is used to pay this frequency.

If NEW-PERIOD contains a Y, the entry in the SAVE-DEDUCTION field is incremented by one.

After your initial entry, the system continues to maintain the SAVE-DEDUCTION field automatically.

This field is set to zero when month-to-date figures are cleared for this frequency.

SAVE_NUMBER

NUMERIC, 2,0

This is the previous period number. Make an entry here only when it's the first time the system is used to pay this frequency.

If New Period contains a Y, the entry in the Save Number field is incremented by one. After your initial entry, the system continues to maintain the Save Period field automatically.

This field is set to zero when year-to-date figures are cleared for this frequency.

SAVE_PAY

NUMERIC, 1,0

This is the number of the previous pay cycle. Make an entry here only when this is the first time the system is used to pay this frequency.

If New Period contains a Y, the entry in the Save Pay field is incremented by one. After your initial entry, the system continues to maintain the Save Pay field automatically.

This field is set to zero when month-to-date figures are cleared for this frequency.

SAVE_PERIOD

DATETIME

This is the previous period end date. Make an entry here only when it is the first time the system is used to pay this frequency.

If New Period contains a Y, a new period end date is computed and placed in the Save Period field.

After your initial entry, the system continues to maintain the Save Period field.

SCHED_COMMENTS

VARCHAR, 55

This field contains narrative comments that might need to be made about the class.

SCHEDULE_NAME

CHAR, 2

This defines the rules to be used for calculating vesting data for a Deferred Benefits Plan. The value entered here is used to obtain the vesting schedule, specific to the Plan, to calculate percent vested and vesting dates for Plan participants.

An entry in this field is required when contributions under plan rules become owned by the participant after the service requirements are satisfied.

SCHEDULE_NAME_DESC

VARCHAR, 20

This field displays the description from the option list translation of the SCHEDULE-NAME code.

SCHOOL_CODE
CHAR, 006

This code identifies the school that the employee attended or is currently attending.

SCHOOL_CODE_Z2
CHAR, 006

This code identifies the school the employee attended or is currently attending.

SCHOOL_NAME
VARCHAR, 020

This field displays the description from the option list translation of the SCHOOL-CODE.

SCHOOL_NAME_Z2
VARCHAR, 020

This field displays the description from the option list translation of the SCHOOL-CODE-Z2.

SEARCH_ARGUMENT
CHAR, 6

This is the name of an English Language program if the Search Type is ‘00’; else the field is blank.

SEARCH_NAME
VARCHAR, 20

This field displays the name of the Search Argument selected.

SEARCH_TYPE
VARCHAR, 20

The translation of ELIG-SEARCH-TYPE code indicates the type of search argument used to build the Table keys.

SEARCH_TYPE_CD
CHAR, 2

This code defines the type of search argument to be used to build the key to the TL (Plan Eligibility Rules) and TT (Activity Validation Table).

‘00’ in this field indicates the HED Search Argument field contains the name of an English Language program to be used for special processing.

SECOND_QTR_FICA
NUMERIC, 10,2

This is the total FICA-HI considered earnings for the second quarter of the calendar year.

SECURITY_CLEARANCE
CHAR, 001

This identifies the level of security which has been granted this employee.

SELECTION_IND_CON
CHAR, 001

This determines if a benefit confirmation letter is to be produced.

SELECTION_IND_ENR
CHAR, 001

This determines if a benefit enrollment letter is to be produced.

SEMESTER_QUARTER
NUMERIC, 01,0

This is the semester or quarter the recorded course was taken by the employee.

SEPARATION_DATE
DATETIME

This is the date of the most recent separation occurrence found in the employee's record. Separation activities include terminations, retirements, deaths, transfers, and layoffs.

SEQ_NBR
CHAR, 1

This is a sequence number.

SEQ_NUMBER
NUMERIC, 1,0

This is a sequence number.

SERVICE
CHAR, 8

This defines the amount of service an employee must accumulate to participate in the plan described by the TN Table.

Service is entered as time in YYMMDD format. For example, if employees must complete six months of service before they are allowed to enroll in the plan, you would enter' 000600'.

SERVICE_BREAK_RULE
CHAR, 4

This is the Control Number of the TU table to be used for this organization (Control 1-2).

SERVICE_CALC_DATE
DATETIME

This is the date which is used by the welfare benefit plan as the basis from which service or other plan service dates are calculated.

This date is initially system generated at plan enrollment based upon the SERVICE-DATE-CD entered on the welfare plan's TK Table record.

SERVICE_DATE
VARCHAR, 020

This is the date when service begins for purposes of accruing a benefit in a deferred benefits plan.

For example, the employee may become a participant at hire (age 19) but benefits may not begin to accrue until age 21.

Benefits service dates are initialized according to plan rules when an employee becomes a participant in the plan.

SERVICE_DATE_CODE
CHAR, 001

This code identifies which date from the employee's record is to be moved into the PLAN-SERVICE-DATE field.

SERVICE_METHOD
CHAR, 1

This field contains the code which defines the method by which an individuals Participation Service Date is calculated.

SERVICE_METHOD_DES
VARCHAR, 20

This code defines the method by which an individual's Vesting Service Date is calculated.

SERVICE_REC_UNTIL
DATETIME

This is the ending date of the benefit service.

SERVICE_RECORD_DT
DATETIME

This is the effective date of a Q3 segment containing the service dates used for calculating service time in a deferred benefits plan.

SERVICE_TYPE
VARCHAR, 20

This field designates the type of Benefits service (for example, Participation, Vesting and/or Benefit).

SEX
VARCHAR, 020

This field displays the description from the option list translation of the SEX-CODE. It represents the employee's sex at the time of the selected History and/or Labor record.

SEX_CODE
CHAR, 001

This is the sex code for this employee. Enter the proper value as soon as possible to avoid creating problems in Benefits Administration module calculations.

SHIFT_CODE
CHAR, 001

This field specifies the employee’s normal shift.

The system uses the SHIFT-CODE to access the appropriate shift differential HED for computing the premium amount.

SHIFT_CODE_DESC
VARCHAR, 020

This field displays the description from the option list translation of the SHIFT-CODE. It represents the employee's shift at the time of the selected History and/or Labor record.

SHIFT_DIFF_CODE
CHAR, 001

This is an indicator which defines if the shift differential is to be calculated.

SHIFT_DIFFERENTIAL
VARCHAR, 020

This field displays the description from the option list translation of Shift Differential Code.

SKILL_COURSE
VARCHAR, 020

This field displays the description of the option list translation of the SKILL-COURSE-CODE.

SKILL_COURSE_CODE
CHAR, 003

This code identifies the training course at which the employee obtained the skill. The course details are located on the Z3 segment which is viewed using the 31-SCR.

SKILL_FIELD_1
CHAR, 006

This is provided to allow the user to define and enter skill-related data for analysis purposes. If applicable, this field's definition may be modified to access a user-defined option list.

SKILL_FIELD_2
CHAR, 006

This is provided to allow the user to define and enter skill-related data for analysis purposes. If applicable, this field's definition may be modified to access a user-defined option list.

SKILL_FIELD_3
CHAR, 006

This is provided to allow the user to define and enter skill-related data for analysis purposes. If applicable, this field's definition may be modified to access a user-defined option list.

SKILL_FIELD_4
CHAR, 006

This is provided to allow the user to define and enter skill-related data for analysis purposes. If applicable, this field's definition may be modified to access a user-defined option list.

SKILL_PROFICIENCY
VARCHAR, 020

This field displays the description of the option list translation of the SKILL-PROFICIENCY-CD code.

SKILL_SCHOOL
VARCHAR, 020

This field displays the description of the option list translation of the SKILL-SCHOOL-CODE.

SKILL_SCHOOL_CODE
CHAR, 006

This is the code assigned to the school or university where the employee or applicant obtained the skill.

SKILL_VERIFICATION
VARCHAR, 020

This field displays the description of the option list translation of the SKILL-VERIFY-CODE.

SKILL_VERIFY_CODE
CHAR, 002

This code identifies the means used to verify the fact the employee does possess the skill.

SKILLS
VARCHAR, 020

This field displays the description of the option list translation of the SKILLS-CODE.

SKILLS_CODE
CHAR, 006

This code describes the skill which the employee or applicant possesses.

SKILLS_SOURCE
VARCHAR, 020

This field displays the description of the option list translation of the SKILLS-SOURCE-CODE.

SKILLS_SOURCE_CODE
CHAR, 001

This code describes the means by which the employee or applicant obtained the skill.

SKL_PROFICIENCY_CD
CHAR, 002

This code describes the assessment of the employee or applicant's skill proficiency.

SMOKER
VARCHAR, 020

This field displays the description from the option list translation of the SMOKER-ID code.

SMOKER_ID
CHAR, 001

This code identifies whether the employee is a smoker or not.

SOSN
VARCHAR, 5

This is a 5 character field used within the Position Administration module to indicate sort order sequence numbers.

SOURCE
VARCHAR, 020

This field displays the description from the option list translation of the HIRE-SOURCE code.

SPLIT_CODE
CHAR, 001

This indicates how time document earnings and automatic earnings are to be divided for labor distribution purposes. This field is relevant only if the employee needs labor charged to multiple locations (through multiple G-SCR forms).

SPLIT_CODE_DESC
VARCHAR, 020

This field displays the description from the option list translation of the SPLIT-CODE. It represents the split type of the employee's earnings at the time of the selected History and/or Labor record.

SSN_OR_SIN
CHAR, 12

This is the social security number or social insurance number of the employee or applicant being added to the Employee Database.

If no entry is made in this field on the Employee Information (EE- SCR) form, the system uses the default from the LMODEL.

START_CODE
CHAR, 001

The Start Code describes the contents of the Start Field. It can be used to start a deduction or an automatic earnings when an event occurs.

When that event occurs, this field is changed to an S for that run, and then to a zero on the next run. An exception to this rule is Start Code 7. This code specifies that this HED is to be processed if the date in the Start Field is not greater than the period end date; the next period end date is then to be placed in the Start Field.

For HED 002 (Future Raise), only codes zero and one are operative. Do not use this field for HED 001.

START_DESCRIPTION
VARCHAR, 020

This field displays the description from the option list translation of the Start Code.

START_FIELD
NUMERIC, 06,0

This specifies a date or amount which, when reached, starts a deduction or an automatic earnings. If a date is used, a start occurs if it is less than or equal to the Period Date on the AJ-SCR.

For Start Codes two through five, enter the whole dollar amount.

STATE_OR_PROV
VARCHAR, 20

This is the state/province in which the company resides.

STATE_OR_PROVIN
VARCHAR, 20

This is the state/province in which the employee resides.

STATUS
VARCHAR, 020

This field displays the description from the option list translation of the Status Code. It represents the employee's status type at the time of the selected History and/or Labor record.

STATUS_1H
CHAR, 1

This code identifies the Benefit Status option which will (if when either the Option Elected is processed for the participant or the Separation Major Activity occurs to the current Plan Status is less or equal to this value but greater than STATUS-1L) cause the participant's Plan status to change to the value in the RESULT-STATUS-1 field.

STATUS_1L
CHAR, 1

This code identifies the Benefit Status option which will (if when either the Option Elected is processed for the participant or the Separation Major Activity occurs to the participant and their current Plan Status is equal to this value or greater than it but less than STATUS-1H) cause the participant's Plan status to change to the value in the RESULT-STATUS-1 field.

STATUS_CODE
CHAR, 002

This is used to designate part-time versus full-time employee status for Vers80 reports.

STOP_CODE
CHAR, 001

This describes the contents of the Stop Field.

It can be used to stop a deduction or an automatic earnings when an event occurs.

When that event occurs, this field is changed to an S and the Frequency Code is changed to 00 (except for codes 8, 9, and A). The S is reset to a zero on the next run.

EARNINGS: Do not use this field with HED 001.For code seven, adjustments to year-to-date earnings automatically adjusts the Stop Field (except those adjustments entered with a '$' in the Action Code).

DEDUCTIONS: A 'P' causes report generator 6A6A to create a prenotification record. The 'P' is changed to a 'Q' on the next run, and then to a zero after that.

The Stop Field contents are immaterial or this entry.

Any deduction with a Stop Code of seven must not be assigned a Type Code of '00' or '51' to skip arrears.

When the Stop Code specifies an amount to be decremented as the deduction is taken, the Type Code must be coded to recover arrears or the amount could be lost.

STOP_DESCRIPTION

VARCHAR, 020

This field displays the description from the option list translation of the Stop Code.

STOP_FIELD

NUMERIC, 06,0

This is a date or amount which, when reached, stops a deduction or an automatic earnings. If a date is used, a stop occurs if it is less than or equal to the Period Date on the AJ Company Pay Frequencies form (AJ-SCR).

For STOP-CODEs 2 through 6, enter a w amount.

For STOP-CODEs 7 through 9 and A, enter an amount with two decimals.

For deductions showing code seven, adjustments to year-to-date figures automatically adjust the Stop Field (except adjustments entered with a ‘$’ in the Action Code).

STOP_PAYMENT_DATE

DATETIME

This is used to record the date payments of retirement benefits are to stop when the form of payments specifies a term of payment (for example, 5 year certain, 10 year certain installments, and so forth).

Retirement benefits are payable over a specific period of time, based on the option elected by the employee.

STUDENT_STATUS

VARCHAR, 020

This field displays the description from the option list translation of the FULL-TIME-STUDENT code.

SUFFIX_NAME

VARCHAR, 20

This field represents any suffix name attached to the employee’s name (for example, ‘DDS’, ‘CPA’, and so forth).

SUPERVISOR

VARCHAR, 020

This field displays the name of the supervisor from the option list translation of the SUPERVISOR-CODE.

SUPERVISOR_CODE

CHAR, 004

This code identifies the supervisor involved.

SURVEY_IND_01
CHAR, 002

This is the first indicator code which indicates if and in which survey the JOB-CODE/JOB-CODE-EXTENT has been used as a Benchmark position.

SURVEY_IND_02
CHAR, 002

This is the second indicator code which indicates if and in which survey the JOB-CODE/JOB-CODE-EXTENT has been used as a Benchmark position.

SURVEY_IND_03
CHAR, 002

This is the third indicator code which indicates if and in which survey the JOB-CODE/JOB-CODE-EXTENT has been used as a Benchmark position.

SURVEY_IND_04
CHAR, 002

This is the fourth indicator code which indicates if and in which survey the JOB-CODE/JOB-CODE-EXTENT has been used as a Benchmark position.

SURVEY_INDS_05
CHAR, 002

This is the fifth indicator code which indicates if, and in which survey, the JOB-CODE/JOB-CODE-EXTENT has been used as a Benchmark position.

SUSPEND_END_DATE
DATETIME

This is the date on which an employee's suspension from participation in a welfare benefits plan ends. If you attempt to re-enroll an employee in a plan prior to this date, the system will reject the enrollment.

The SUSPEND-END-DATE must be re-entered in every new Q1 segment to which it applies. Enter the date in either CCYYMMDD or MM-DD-CCYY format.

SUSPENSE_DATE
DATETIME

This is the date the employee becomes eligible to participate in the Plan.

This date is normally calculated by the system during the RA segment creation process.

You can enter a date in this field or override an existing one if necessary.

SYSTEM_OPT_UNTIL
DATETIME

This is the ending date of the system options.

SYSTEM_OPTION_DATE

DATETIME

This is the first effective date of the Table entry is recorded in this field.

SYSTEM_OPTIONS

CHAR, 4

This is the Control Number of the Basic Human Resource Recordkeeping TG Table to be used for the organization (Control 1-2).

T

T_S_ANNUITY
VARCHAR, 020

This field displays the description from the option list translation of the T/S Annuity Type code.

T_S_ANNUITY_TYPE
CHAR, 001

This identifies the type of annuity corresponding to the withdrawal payment method option when the withdrawal is paid in the form of an annuity.

Subject to the provisions of the thrift/savings plan, an employee can be allowed to make withdrawals from the monies held in the account. These withdrawals must be recorded for accounting purposes.

T_S_CONTRB_AMT_PCT
NUMERIC, 07,0

This is a deduction for a particular Thrift/ Savings Plan benefit. This can be expressed as a fixed dollar amount or a percentage of earnings based upon the Plan definition of contributions. Enter dollar amounts with two decimals (for example, $5.00 would be ‘500’). Use four decimals for percentages (for example, 5% would be ‘0500’).

T_S_CONTRIB_ACTION
CHAR, 001

This code identifies whether types of contributions available under a Plan have been accepted rejected or overridden.

A value must be entered in this field.

T_S_DEDUCT_EFFECT
DATETIME

This is the date on which the Thrift/Savings Plan becomes effective. This date must be manually entered.

T_S_FUND_A_PCT
NUMERIC, 03,0

This is the percent of the contributions (as identified by Contribution Type) that are to be invested in Fund A. To find the name of Fund A, see option list BA27.

Fund allocations must be expressed in increments of five percentage points (for example, 000, 005, 010, and so on through 100 percent).The sum of all fund allocations for a Contribution Type must equal 100 percent.

Subject to the provisions of the thrift/savings plan rules, the employee’s basic and supplemental contributions and any company contributions can be directed to various investment vehicles--funds.

Six funds, named Fund A, Fund B, and so on through Fund F are used for recording how the employee's basic or supplemental contributions, or the company's contributions are being invested.

T_S_HED_NAME

VARCHAR, 15

This is the Thrift/Savings HED name.

T_S_HED_XREF

NUMERIC, 03,0

This is the HED number (also found on the Plan's TK Table) which identifies the HED for which the fund allocations apply.

For example, if T/S-HED-XREF contains the value of 561 and FUND-A contains the value of 100, this means that the deductions accumulated in HED 561 are 100% allocated to FUND- A.

This HED number must be manually entered.

T_S_PYMT_DURATION

NUMERIC, 04,0

This specifies the number of months of payments to be paid the employee corresponding to the withdrawal payment method.

For example, if the payment is in installments, this field would contain the number of months over which installments are to be paid.

Subject to the provisions of the thrift/savings plan, an employee may be allowed to make withdrawals from the monies held in his/her account. These withdrawals need to be recorded for accounting purposes.

T_S_SERVICE_CHARGE

NUMERIC, 08,2

This is the amount of the service

Charge being levied on the employee's account. The amount is entered in dollars and cents.

Certain thrift/savings plans allow the administration to place service charges on all or selected employees' accounts. Because service charges result in debits to the employees' fund balances, they must be recorded.

T_S_SUSPEND_END_DT

DATETIME

Active participation in the thrift/savings plan may be suspended when certain types of withdrawals are made.

When an employee's active participation (contribution) is being suspended, the date the suspension is to end must be entered here. The system auto contributions until the suspension date has been reached, and then creates a warning notice concerning the employee's eligibility for active participation at the next payroll cycle.

Subject to the provisions of the thrift/savings plan, an employee can be allowed to make withdrawals from the monies held in his/her account. These withdrawals need to be recorded for accounting purposes.

T_S_TRANSFER_AMT

NUMERIC, 08,2

This is the amount being transferred, corresponding to the TRANSFER-TYPE option.

The amount is entered in dollars and cents.

An employee can transfer monies in his/her accounts among funds, or to different plans.

Certain plans allow for the lump sum buy-in of the employee. ERISA provides for the rolling over of monies from one 'qualified' plan to another.

T_S_TRANSFER_POST

DATETIME

This the date the transfer was posted and is only used by the system's automatic Account Balancing feature.

This field automatically updated by the system when the transfer recorded has been posted in the Account Balancing process.

T_S_WITHDRAW_MTHD

CHAR, 001

This is a method of payment code corresponding to the Withdrawal Type and Amount.

It indicates how the monies are being paid to the employee (for example, a lump sum in installments through an annuity and so on).

These withdrawals must be recorded for accounting Subject to the provisions of the thrift/savings purposes. plan, an employee can be allowed to make withdrawals from the monies held in his/her account.

T_S_WITHDRAW_PAYME

VARCHAR, 020

The translation of the T/S Withdrawal Pay Method Code that corresponds to the Withdrawal Type and Amount.

It indicates how the monies are being paid to the employee.

T_S_WITHDRAW_POST

DATETIME

This field contains the date the withdrawal was posted to the Account Balance and is only used by the system's automatic Account Balancing feature.

This field is automatically updated by the system when the withdrawal recorded has been posted in the Account Balancing process.

T_S_WITHDRAWAL
VARCHAR, 020

This field displays the description from the option list translation of the T/S-WITHDRAWAL-TYPE code.

T_S_WITHDRAWAL_AMT
NUMERIC, 08,2

This is the amount of money being withdrawn (in dollars and cents).

The amount of money being withdrawn must not exceed the amount of money in the employee's combined accounts.

Also, there are strict rules for how much money can be withdrawn according to each type of withdrawal. Subject to the provisions of the thrift/savings plan, an employee may be allowed to make withdrawals from the monies held in his/her account.

These withdrawals must be recorded for accounting purposes.

T_S_WITHDRAWAL_TP
CHAR, 001

This code identifies the type of withdrawal that pertains to the monies recorded.

Subject to the provisions of the thrift/savings plan, an employee can be allowed to make withdrawals from the monies held in his/her account.

These withdrawals must be recorded for accounting purposes.

TA_JOB_CODE
CHAR, 006

This is the code to which data on the TA Table is assigned. Other Tables containing more detail or specialized information about this job are tied using this code.

TA_JOB_CODE_EXTENT
CHAR, 4

This is an extension code allowing the same JOB-CODE to be used to define a job which is the same except for a few attributes. This is a NUMERIC field, however, edits require the entered value be '0001' or greater.

TA_NOC_CODE
CHAR 005

This is the National Occupation Classification code from option list CE05, as defined in Canada's Employment Equity Act.

TA_NOC_DESC
VARCHAR 020

This field displays the description from option list CE05.

TA_PREV_JOB_CD_EXT
NUMERIC, 04,0

This is the previous JOB-CODE-EXTENT assigned to this job.

TA_PREV_JOB_CODE
CHAR, 006

This is the previous JOB-CODE assigned to this job.

TA_TABLE_DATE
DATETIME

This is the first effective date of Table entry.

TA_TABLE_UNTIL
DATETIME

This is the ending effective date of Table entry.

TABLE_7
NUMERIC, 01,0

The entry in the Table 7 field specifies the tax table to be used when the entry '7' is placed in the Tax Table field (JJ-SCR). Valid entries

0 = No seventh Table (Default)

1 - 9 = The table to be used when a seven is entered in the Tax Table field (JJ-SCR).

TABLE_8
NUMERIC, 01,0

The entry in the Table 8 field specifies the tax table to be used when the entry '8' is placed in the Tax Table field (JJ-SCR). Valid entries:

0 = No eighth table (Default)

1 - 9 = The table to be used when an eight is entered in the Tax Table field (JJ-SCR).

TABLE_9
NUMERIC, 01,0

The entry in the Table 9 field specifies the tax table to be used when the entry '9' is placed in the Tax Table field (JJ-SCR). Valid entries:

0 = No ninth table (Default)

1 - 9 = The table to be used when a nine is entered in the Tax Table field (JJ-SCR).

TAX
NUMERIC, 11,2

A contribution for the support of a government required by law.

TAX_AMOUNT_PERCENT

NUMERIC, 07,0

This is used with a Tax Method Code of four through eight or B.

For Tax Method Codes four and six, enter the amount with two decimals.

For codes five, seven, and eight, enter four decimals (for example, enter five percent as '0500').

For code B, enter a whole dollar amount.

For Tax Method Code A, the week-to-date taxable wages is stored here.

TAX_BASIC

CHAR, 003

This field is used when a tax authority is being accessed/added within the T1-SCR.

TAX_BASIC_END

NUMERIC, 01,0

This field is used when a tax authority is being accessed/added within the T1-SCR.

TAX_BODY

VARCHAR, 015

This is the name of the tax body. Tax body names are listed in Section 6 of the Payroll Reference Manual.

Your entry in this field must be left justified.

When you add a city tax body without an asterisk after its name, enter the name of the tax body here (for example, YORK, PA).

This field can be left blank for other tax bodies; the entry is supplied by a Cyborg tax screen.

If 'Drop Tables' is entered here, all T4 and T5 data for this tax body is deleted from the Employee Database.

You can enter new T4 and T5 forms on the same run in which the Drop Tables option is used.

The T4 and T5 data is added to the Employee Database.

You should use the Drop Tables option whenever the number of T5 forms for the tax body is decreasing.

TAX_C12

CHAR, 006

This is used to identify the COMMON-TAX-C12 that contains the Tax Tables. The system will only execute the COMMON-TAX-C12 logic if an entry is made in this field.

TAX_CLASS_1
NUMERIC, 01,0

The Tax Class 1 field interacts with the HED Tax Flag Option field (A8-SCR) to specify whether the 401(k) plan (set up through the A8-SCR) is subject to taxation by the tax body named on this T1 form or if it is exempt from taxation.

TAX_CLASS_2
NUMERIC, 01,0

The Tax Class 2 field interacts with the HED Tax Flag Option field (A8-SCR) to specify whether the Section 125 plan (set-up through the A8-SCR) is subject to taxation by the tax record named on this T1 form or if it is exempt from taxation.

TAX_CLASS_3
NUMERIC, 01,0

The Tax Class 3 field interacts with the HED Tax Flag Option field (A8-SCR) to specify whether a tax-deferred annuity (set up through the A8-SCR) is subject to taxation by the tax body named on this T1 form or if it is exempt from taxation.

TAX_CLASS_4
NUMERIC, 01,0

The Tax Class 4 field is available for client use.

TAX_CLASS_5
NUMERIC, 01,0

The Tax Class 5 field is available for client use.

TAX_CLASS_6
NUMERIC, 01,0

The Tax Class 6 field is available for client use.

TAX_CLASS_7
NUMERIC, 01,0

The Tax Class 7 field is available for client use.

TAX_CLASS_8
NUMERIC, 01,0

The Tax Class 8 field is available for client use.

TAX_CLASS_9
NUMERIC, 01,0

The Tax Class 9 field is available for client use.

TAX_CODE
CHAR, 006

This code identifies the specific tax body that you are adding or changing through the J-SCR. The allowable codes are listed in Section 6 of the Payroll Manual.

A J-SCR need not be entered for tax body 101 (FICA) because the system automatically set up for every employee.

If US FICA must be turned off (such as for a foreign employee), enter a J-SCR for tax body 101 with a zero in the Unemployment Code field.

For state tax bodies, a 941A unit number can be entered in the last four positions of this field. This requires a change to the State Unit Number in format 24 by your data processing department.

For Canadian tax bodies, PREF can be entered in the last four positions of this field to indicate a preferred UIC rating.

All entries made in this field must be left justified.

TAX_CUR

NUMERIC, 11,2

The EMPLOYEE-TAX-CUR field contains the current figure for the employee's portion of US FICA.

TAX_DEPENDENTS

NUMERIC, 02,0

This is the number of dependents upon which the employee's taxes are based.

Valid entries in this field range from 00 to 99.

For tax body 102 (Federal), the default is 00.

For state, county, and city tax bodies, the default is the number of dependents entered for tax body 102.

The default values are used only when this field is left blank and the tax body is being added to the employee's record. Thus, changing the number of dependents for tax body 102 does not change the number of dependents.

The Tax Dependents field is not applicable to Canada.

TAX_FILING_NUMBER

VARCHAR, 025

This is the Tax Filing ID Number for withholding purposes. Left justify your entry and include dashes.

When you add a tax body to the Employee Database, enter the appropriate number here.

TAX_FLAG_1

CHAR, 001

The Tax Flag 1 field is reserved for future use.

TAX_FLAG_2

NUMERIC, 01,0

The Tax Flag 2 field is reserved for future use.

TAX_FLAG_3
NUMERIC, 01,0

The Tax Flag 3 field is reserved for future use.

TAX_FREQUENCY_CODE
CHAR, 001

This is the frequency to be used for taxation when an earning is paid as a separate payment. This may be used when making inquiries of the file in a batch report or with a QUERY.

TAX_MARITAL_CODE
CHAR, 001

This code indicates the employee's marital status for tax purposes.

TAX_MARITAL_STATUS
VARCHAR, 020

This field displays the description from the option list translation of the Tax Marital Code.

TAX_MC_OVERRIDE
CHAR, 001

This is used to permit the withholding of additional tax when normal table calculations result in no tax withheld.

Y = Take additional tax

Blank or N = Do not take additional tax

TAX_MC_OVERRIDE_DE
VARCHAR, 020

This field displays the description from the option list translation of the TAX-MC-OVERRIDE code.

TAX_METHOD
VARCHAR, 020

This field displays the description from the option list translation of the Tax Method Code.

TAX_METHOD_CODE
CHAR, 001

This is a required field used to determine how the withholding tax for the tax record is computed (table, table + additional withholding, and so forth).

TAX_MISC

NUMERIC, 11,2

For certain tax bodies, this is a surtax factor that is multiplied by the table tax calculated to determine the total tax to be withheld. In conjunction with this, the Tax Credit field must equal one.

For U.S. tax body 101 (FICA), this field contains the maximum FICA tax amount that must be paid by the employer (per employee).

For Canadian tax body 2XX (CPP/QPP), this field contains an annual exemption amount.

For Canadian tax body 3XX (UIC), this field contains last year's minimum annual UIC wage limit.

TAX_MISC2

NUMERIC, 01,0

This field is reserved for future use.

TAX_MTD

NUMERIC, 11,2

This field contains the Month to Date figure for the selected tax body.

TAX_QTD

NUMERIC, 11,2

This field contains the Quarter to Date figure for the selected tax body.

TAX_QTR

NUMERIC, 02,0

This field contains the quarterly amount for the selected tax body.

TAX_RECIPROCAL

VARCHAR, 020

The Tax Reciprocal field contains the description of the Reciprocal Code specified for the tax body.

When a Reciprocal Code has been entered, the system searches option list PJ05 for the code's corresponding description.

TAX_TABLE

NUMERIC, 01,0

This specifies the tax table to be used to calculate the employee's taxes. Valid entries:

0 = Not in use (Default)

1 - 9 = Table to be used for calculating withholding tax, regardless of this employee's Marital Status or Resident Code.

The employee's Marital Status is used to decide which of the earned income credit tables is to be used. If there is a conflict between the employee's Marital Status for the

purpose of computing federal withholding and for the earned income credit, use this field to enter the Marital Status for withholding purposes.

For employees to whom only the Medicare portion of FICA applies, enter '3' in the Tax Table field for tax body 101.

Do not set up a J-SCR for tax body 103 for the employee.

NOTE: If this field is not entered, the system uses the Tax Marital Status and the Resident Code to determine the tax table to be used.

TAX_TYPE

CHAR, 001

This is used to identify which type of tax body is being described on this J-SCR. Valid entries:

1 = Federal (U.S.)

2 = State (U.S.) or federal (Canada)

3 = County (U.S.) or province (Canada)

4 = City

TAX_TYPE_EDIT

VARCHAR, 020

This is the tax edit type.

TAX_UI_NUMBER

VARCHAR, 025

Enter the Unemployment Filing Number. Left justify your entry and include dashes. When you add a tax body to the Employee Database, enter the appropriate number here.

TAX_YEAR

NUMERIC, 04,0

This field contains the year of the selected tax body.

TAX_YTD

NUMERIC, 11,2

This is the year to date figure for the employee's portion of FICA.

TAXABLE_BENEF_CUR

NUMERIC, 11,2

The Taxable Benefits Current field contains the current figure for taxable benefit deductions.

TAXABLE_BENEF_MTD

NUMERIC, 11,2

This is the month-to-date figure for taxable benefit deductions.

TAXABLE_BENEF_QTD

NUMERIC, 11,2

The Taxable Benefits Quarter-to-Date field contains the quarter-to-date figure for taxable benefit deductions.

TAXABLE_BENEF_YTD

NUMERIC, 11,2

The Taxable Benefits Year-to-Date field contains the year-to-date figure for taxable benefit deductions.

TAXABLE_BENEFITS

NUMERIC, 11,2

This field contains the amount of federal taxable benefits earned by the employee.

TAXABLE_WAGES

NUMERIC, 11,2

This shows the wages that are subject to withholding tax for the applicable taxing authority.

You are not permitted to make an entry here.

TAXABLE_WAGES_CUR

NUMERIC, 11,2

The Taxable Wages Current field contains the current wages that are subject to withholding tax for the applicable taxing authority.

TAXABLE_WAGES_MTD

NUMERIC, 11,2

This is the month-to-date wages that are subject to withholding tax for the applicable taxing authority.

TAXABLE_WAGES_QTD

NUMERIC, 11,2

This is the quarter-to-date wages that are subject to withholding tax for the applicable taxing authority.

TAXABLE_WAGES_YTD

NUMERIC, 11,2

This is the year-to-date wages that are subject to withholding tax for the applicable taxing authority.

TB_GEOGRAPHIC_IDX

CHAR, 001

This allows you to establish by location multiple salary ranges for one salary grade.

TB_GEOGRAPHIC_RANG
VARCHAR, 020

This field displays the description from the option list translation of the TB-GEOGRAPHIC-INDEX code.

TB_SALARY_GRADE
CHAR, 006

This is the code for which salary grade range information is defined on this form.

TB_SALARY_TYPE
CHAR, 001

This is used internally to identify which of TB Salary Grade Tables was used to create this Table record.

TB_SEQUENCE_NUMBER
CHAR, 1

This is used to combine two or more of the same salary grade Table forms.

TB_TABLE_DATE
DATETIME

This is the first effective date of the Table entry.

TB_TABLE_FREQUENCY
VARCHAR, 020

This field displays the description from the option list translation of the FREQUENCY-INDICATOR code.

TB_TABLE_UNTIL
DATETIME

This is the ending effective date for the salary table.

TC_2_AMOUNT
CHAR, 001

This allows you to assign this HED to the Amount field on the Format 2 time document.

TC_2_AMOUNT_EDIT
VARCHAR, 020

This field displays the description from the option list translation of the TC-2-AMOUNT code.

TC_2_HOURS
CHAR, 001

This allows you to assign a particular earnings to one of the HOURS fields on the Time Entry-Format 2 form (TC2SCR).

TC_2_HOURS_EDIT
VARCHAR, 020

This field displays the description from the option list translation of the TC-2-HOURS code.

TC_CODE
CHAR, 6

This is used to record the code (score) this Job Code/Job Code Extent received in the category defined as Knowledge. Each job is evaluated using several categories outlined by your company's Job Evaluation System. The coding scheme used is user-defined an include symbols such as dashes, parenthesis, etc.

TC_JOB_CODE
CHAR, 6

This code identifies the particular job which relates to the job evaluation data entered in each TC table form.

TC_JOB_CODE_EXTENT
CHAR, 4

This further defines the JOB-CODE that is used to identify the job evaluation data entered in the TC table.

The Job Code Extent value must be one of those set up for the Job Code on the TA Job Code Table.

TC_KEY_SEPARATOR
CHAR, 1

This is used to uniquely identify the two parts that comprise the TC table record for a specific Plan ID. Valid entries:

Value A = the first part of the TC record

Value B = the second part of the TC record

In order to access the entire TC record, it is necessary to issue two Read Unique FILE01 commands to obtain all information for a specific TC record.

TC_POINTS
NUMERIC, 4,0

This is used to record the Knowledge Points value associated with the point score this Job Code/ Job Code Extent received in the category defined as Knowledge.

TC_SEQUENCE_NUMBER
CHAR, 1

This is used to combine TC tables in the event you need more than five option and point categories.

You are only required to enter a Sequence Number if you are combining TC table entries.

The tables are combined in sequential order. If you are using the standard five category set up, do not make an entry in this field. The system automatically zero fills this field.

NOTE: Standard calculations are performed on each form individually. Therefore, if you combine multiple tables using sequence numbers, the calculations will not reflect the full job point profile.

TC_TABLE_DATE

DATETIME

This is the first effective date of the table entry is recorded in this field.

TC_TABLE_UNTIL

DATETIME

This is the ending effective date for the selected table.

TE_OCCUPATION

VARCHAR, 20

This field displays the description from the option list translation of the TE-OCCUPATION-GROUP code.

TE_OCCUPATION_GRP

CHAR, 3

This code entered in the TE Table is used to relate the occupation group codes your company recognizes for each of your Job Families and their EEO-1 EEO-4 EEO-5 or EEO-6 Job Category. There are 514 government-defined Occupation Group codes.

TE_TABLE_DATE

DATETIME

The first effective date of the Table entry is recorded in this field.

TE_TABLE_UNTIL

DATETIME

This is the ending effective date for the selected table.

TEMPORARY_ORDER

NUMERIC, 03,0

This is the sequence in which automatic earnings and deductions are processed. The system sets this field to the value of the Permanent Order field on the run following a pay run.

Valid entries for this field are 001 through 999. If this field is left blank when the A8-SCR is initially entered, it defaults to the HED Number. An entry of 000 specifies that this HED is inactive for this pay run only.

TERM_CAUSE
VARCHAR, 020

This field displays the description from the option list translation of the Termination Code. It represents the cause for terminating the employee at the time of the selected History and/or Labor record.

TERMINATION_CODE
CHAR, 002

This field is user-defined.

TEST_1CODE
CHAR, 005

This code identifies one of the physical examination tests that you want or require be performed for an employee or applicant. Multiple sets of tests may be entered.

TEST_AS_OF_DATE
DATETIME

This is the effective date of the TPD Table Record.

TEST_AS_OF_UNTIL
DATETIME

This is the ending effective date of the TPD Table Record.

TEST_PLAN_ID
CHAR, 3

This is the first Plan ID code which is to be part of the Nondiscrimination Test defined on this TV Table record.

TFPC_EFFEC_UNTIL
DATETIME

This is the ending date of the flex credit.

TFPC_EFFECTIVE_DT
DATETIME

This is the effective date of the flex credit.

TG_CONTROL_NBR
VARCHAR, 4

This is the control number for the system options.

TH_ABSENCE_RSN
CHAR, 3

This is the reason an employee was absent from a course.

TH_ABSENCE_RSN_DSC
VARCHAR, 20

This field displays the description from the option list translation of the TH-ABSENCE-RSN code.

TH_CLASS
CHAR, 1

This is the class the employee attended.

TH_COST_1
NUMERIC, 7,2

This is the amount this item cost for this class.

TH_COST_CAT_1
CHAR, 1

This is the category of costs this expense is associated with.

TH_COST_CAT_1_DESC
VARCHAR, 20

This field displays the description from the option list translation of the TH-COST-CAT-1 code.

TH_COST_TYPE_1
CHAR, 2

This defines the specific reason the amount was spent.

TH_COST_TYPE_1_DSC
VARCHAR, 20

This field displays the description from the option list translation of the TH-COST-TYPE-1 code.

TH_COURSE_CANCEL
CHAR, 1

If the course has been cancelled this field will contain a ‘Y’.

To cancel an employee from a course and keep the training history segment enter ‘C’.

To cancel an employee from a course and remove the training history segment enter ‘D’.

TH_COURSE_CANCEL_D
VARCHAR, 20

This field displays the description from the option list translation of the TH-COURSE-CANCEL code.

TH_COURSE_CODE
CHAR, 6

This is the unique identifier for the course on the course directory.

TH_COURSE_CODE_DSC
VARCHAR, 20

This field displays the description from the option list translation of the TH-COURSE-CODE.

TH_COURSE_START
DATETIME

This is the start date of a scheduled class.

TH_DAYS_ABSENT
NUMERIC, 3,1

This contains the number of days the student was absent from class.

TH_METHOD_CODE
CHAR, 1

This field defines how to calculate the cost of the employee's salary to be used in the calculation of total class costs.

TH_METHOD_DESC
VARCHAR, 20

This field displays the description from the option list translation of the TH-METHOD-CODE.

TH_OBJECT_1_MET_D
VARCHAR, 20

This field displays the description from the option list translation of the TH-OBJECTIVE-1-MET code.

TH_OBJECTIVE_1
CHAR, 3

This is one of the objectives to be met by this course.

TH_OBJECTIVE_1_DSC
VARCHAR, 20

This field displays the description from the option list translation of the TH-OBJECTIVE-1 code.

TH_OBJECTIVE_1_MET
CHAR, 1

This indicates whether or not this objective was met.

TH_SALARY
NUMERIC, 7,2

This is the salary for the purposes of Training Guarantee. The salary can be entered here, if the TH- METHOD is entered as '9', or calculated by the system if the TH-METHOD is any other value.

If TH-METHOD is left blank, the system will try to calculate salary based on HED 001 values, or if these are not present, the salary history segment will be used.

TH_SCHOOL_CODE
CHAR, 6

This value identifies the school the student was attending and through which they took this class.

TH_SCHOOL_CODE_DSC
VARCHAR, 20

This field displays the description from the option list translation of the TH-SCHOOL-CODE.

TH_TRAIN_LOCA_DSC
VARCHAR, 20

This field displays the description from the option list translation of the TH-TRAIN-LOCATION code.

TH_TRAIN_LOCATION
CHAR, 2

This location differentiates between the same courses being offered at different training centers within an organization.

TH_TRAIN_UNITS
NUMERIC, 3,0

This is the number of training credits awarded to the student.

THIRD_QTR_FICA
NUMERIC, 10,2

This is the total FICA-HI considered earnings for the third quarter of the calendar year.

THIRD_QUARTILE
NUMERIC, 13,4

This represents the 75th percentile amount of the annual salary range. This amount is the midway point between the Midpoint and Maximum amounts in the salary range.

TIME_USED_AMOUNT
NUMERIC, 05,2

This is the number of hours Tardy this employee has accumulated for this year.

TIME_USED_AS_OF_DT
DATETIME

This is the date through which the hours recorded on this segment have been accumulated.

TIME_USED_TYPE
VARCHAR, 20

This is the number of hours this employee has left early for this year.

TIME_USED_UNTIL
DATETIME

This is the ending effective date of the selected time used.

TIME_USED_YEAR_END
DATETIME

This is the year-end date for which the unexcused time accumulated on this segment applies.

TJ_RULE
CHAR, 1

The TJ Early Rule field indicates the rules for determining early retirement eligibility under the plan.

TJ_RULE_DESC
VARCHAR, 20

This field indicates the rules for determining early retirement eligibility under the plan.

TJ_SEARCH_ARGUMENT
CHAR, 6

This six-character TJ Search Argument field is part of the key to the TJ table records. It is a required field and is directly associated with the TJ Search Type. This field contains the information indicated by search type.

TJ_TABLE_DATE
DATETIME

This is the first effective date of the Table entry.

TJ_TABLE_UNTIL
DATETIME

This is the ending effective date of the Table entry.

TK_ACCUM_NAME
CHAR, 003

This is the CE/H Accumulator which contains Considered Earnings/Hours for this Plan.

TK_DEFAULT_OPT_DES
VARCHAR, 020

This field displays the description from the option list translation of the TK-DEFAULT-OPTION code.

TK_DEFAULT_OPTION
CHAR, 002

This identifies the option used for Flex Benefit default 'core' Plan enrollments.

TK_PRE_POST_DESC
VARCHAR, 020

This field displays the description from the option list translation of the TK-PRE-POST-IND code.

TK_PRE_POST_IND
CHAR, 001

This indicates whether the Flexible Benefit Plan contribution is to be set up as a basic Pre-tax or Post-tax contribution type.

TK_TABLE_DATE
DATETIME

This is the first effective date of the Table entry.

TK_TABLE_UNTIL
DATETIME

This is the ending effective date of the Table entry.

TKF_CR_CALC_RULE
CHAR, 1

This is an indicator to define whether a flex credit calculation is performed before or during enrollment processing.

TKF_DED_METHOD_ID
CHAR, 1

This is an indicator to select the method used to store and process credits for a flex benefits plan

TKF_DEF_HED_1
CHAR, 3

This is the HED related to the first deferred plan included in the flex master component plan.

TKF_DEF_OPT_RULE
CHAR, 1

When set to yes the enrollment options default to the current year's options.

TKF_DEF_PLAN_1
CHAR, 3

This is used to record a plan ID for deferred Benefit plan contributions made through the flex plan.

TKF_ENROL_COST_DSP
CHAR, 1

This is a Y/N indicator that defines the processing option to report benefit deductions in pay-period amounts.

TKF_FLEX_WAVD_RULE
CHAR, 1

This is a Y/N indicator which defines the processing option to create a record for an employee who does not select a flex component plan.

TKF_NET_DED_HED
CHAR, 3

This is the payroll-defined deduction HED which holds the number of credits used in excess of credits allotted to the employee.

TKF_NET_EARN_HED
CHAR, 3

This is the payroll-defined Earnings HED which holds the number of allotted credits unused in the flex enrollment.

TKF_TABLE_DATE
DATETIME

This identifies the effective date of the table entry.

TKF_TABLE_UNTIL
DATETIME

This is the ending effective date of the table entry.

TKF_TOTAL_CRED_HED
CHAR, 3

This is the payroll-defined earnings HED which holds the total amount of flex credits of an employee.

TKF_YR_END_SHUTOFF
CHAR, 1

This is a Y/N indicator that defines the processing option to shut off a prior year enrollment in a benefit plan.

TL_SEARCH_ARGUMENT

CHAR, 6

This is used to establish multiple entries for the TL Table. It can contain any valid value for any valid field referenced by TL Search Type.

This is the first effective date of the Table entry.

TL_TABLE_DATE

DATETIME

This is the first effective date of the Table entry.

TL_TABLE_UNTIL

DATETIME

This is the first effective date of the Table entry.

TM_OPTION

VARCHAR, 20

This field displays the description from the option list translation of the TM-OPTION-ELECTED code.

TM_OPTION_ELECTED

CHAR, 2

This key field contains the Option Elected code for which the TM Table calculation definitions belong.

TM_SEARCH_ARGUMENT

CHAR, 6

This is used to establish multiple entries for the TM Table. It can contain any valid value for any valid field referenced by TM Search Type.

TM_TABLE_DATE

DATETIME

This is the first effective date of the Table entry.

TM_TABLE_UNTIL

DATETIME

This is the ending effective date of the Table entry.

TN_KEY_SEPARATOR

CHAR, 1

This is a one-character code used in table processing to handle records in excess of 80 characters. This field is only used internally within the table form generator programs.

TN_SEARCH_ARGUMENT
CHAR, 6

This is used to establish multiple entries for the TN Table. It can contain any valid value for any valid field referenced by TN Search Type.

TN_TABLE_DATE
DATETIME

This is the first effective date of the Table entry.

TN_TABLE_UNTIL
DATETIME

This is the ending effective date of the Table entry.

TO_ACCUMULATOR_0
CHAR, 1

This is the indicator of whether or not Overtime Straight Time Earnings and Hours are to be included in the CE/H Accumulator defined on the TO Table.

TO_DATE_CODE
CHAR, 001

This field represents a one digit to date code.

TO_TABLE_DATE
DATETIME

This is the first effective date of the Table entry.

TO_TABLE_UNTIL
DATETIME

This is the ending effective date of the Table entry.

TW_EEO_EST_DESC
VARCHAR 020

This is the description of the EEO establishment code from the EO069 option list.

TX_NAIC_CODE
CHAR 006

This is the unique industrial classification code from the EO23 option list. This records your 6 character North American Classification System (NAICS) code.

TX_NAIC_DESC
VARCHAR 020

This field displays the description from the code from option list EO23. This fields displays the description from the option list translation of the TX_NAIC_CODE.

TOT_TEST_NONHIGHLY
NUMERIC, 6,0

This is the total number of employees who have been identified as non-highly compensated and have been further selected for the calculation purposes for this nondiscrimination test.

TOTAL_DEPENDENTS
NUMERIC, 02,0

This records the number of the employee's dependents.

It should not be confused with tax dependents/exemptions.

TOTAL_HIGHLY_COMPD
NUMERIC, 6,0

This is the total number of employees who have been identified as highly compensated for the purposes of this nondiscrimination test.

TOTAL_JOB_POINTS
NUMERIC, 5,0

This is the Total Job Points field in the system that is added to the sum of the five job evaluation points categories. This field is system-calculated at all times.

TOTAL_NON_HIGHLY
NUMERIC, 6,0

This is the total number of employees who have been identified as non-highly compensated for the purposes of this nondiscrimination test.

TOTAL_TEST_GROUP
NUMERIC, 6,0

This is the total number of employees who are part of the test group for the nondiscrimination test defined on this TV Table.

TOTAL_TEST_HIGHLY
NUMERIC, 6,0

This is the total number of employees who have been identified as highly compensated and have been further selected for the calculation purposes for this nondiscrimination test.

TOTAL_WAGES
NUMERIC, 11,2

This field stores the employee's total wages for a selected pay period.

TOTAL_WAGES_CUR
NUMERIC, 11,2

This field stores the employee's current total wages for a selected pay period.

TOTAL_WAGES_MTD
NUMERIC, 11,2

This field stores the employee's Month to Date total wages for a selected pay period.

TOTAL_WAGES_QTD
NUMERIC, 11,2

This field stores the employee's Quarter to Date total wages for a selected pay period.

TOTAL_WAGES_YTD
NUMERIC, 11,2

This field stores the employee's Year to Date total wages for a selected pay period.

TP_PLAN_1
CHAR, 3

This is the first of a series of plans to be included in a specific flex benefit master plan.

TR_COURSE_CODE
CHAR, 6

This is the unique identifier for the course on the course directory.

TR_COURSE_CODE_DSC
VARCHAR, 20

This field displays the description from the option list translation of the TR-COURSE-CODE.

TR_REQUIRED_BY
DATETIME

This date identifies the date by which the employee needs to take this course.

TRAIN_COMP_CD
CHAR, 001

This identifies the status of the trainee in the course recorded on this segment.

This code also identifies the courses in which the employee is enrolled but has not yet attended.

TRAIN_COMPANY_PD
NUMERIC, 06,2

This is the amount of the training cost paid by the company. It is intended that this field contain only costs, but you may wish to have included such charges as housing, meals, and so forth.

TRAIN_COMPLETION
VARCHAR, 020

This field displays the description from the option list translation of the TRAIN-COMPLETION-CD code.

TRAIN_COURSE_CD
CHAR, 003

This identifies the Training Course which the employee has or is scheduled to attend.

TRAIN_COURSE_CD_D
VARCHAR, 020

This field displays the description from the option list translation of the TRAIN-COURSE-CD.

TRAIN_COURSE_CODE
CHAR, 006

This is the unique identifier for the course on the course directory.

TRAIN_REQ_ELECT
CHAR, 1

This field identifies if the student is taking this class as a requirement or they elected to take this class.

TRAIN_REQ_ELECT_D
VARCHAR, 20

This field displays the description from the option list translation of the TRAIN-REQ-ELECT code.

TRAIN_REQ_ELECT_D2
VARCHAR, 20

This field displays the description from the option list translation of the TRAIN-REQ-ELECT2 code.

TRAIN_REQ_ELECT2
CHAR, 1

This field identifies if the student is taking this class as a requirement or they have elected to take this class.

TRAIN_REQ_REASON
CHAR, 1

This value defines the reason why the employee is required to take the course.

TRAIN_REQ_REASON_D
VARCHAR, 20

This field displays the description from the option list translation of the TRAIN-REQ-REASON code.

TRAIN_REQ_STATUS
CHAR, 1

This value defines the results of an employee's previous attempts at taking the class.

TRAIN_REQ_STATUS_D
VARCHAR, 20

This field displays the description from the option list translation of the TRAIN-REQ-STATUS code.

TRAINEE_JOB
VARCHAR, 020

This field displays the description from the option list translation of the TRAINEE-JOB-IND code.

TRAINEE_JOB_IND
CHAR, 001

This code identifies whether or not the job is a white collar or production job code.

TRAINER_DAYS
NUMERIC, 5,1

This is the number of days the trainer will spend teaching the class.

TRAINING_ADMIN
CHAR, 2

This is the Control Number for the tables used in the Training Administration module for a specific organization (Control 1-2).

TRAINING_CONTROL_3
CHAR, 004

This is the Control 3 value to which the costs of the training course are to be charged.

TRAINING_CONTROL_4
CHAR, 004

This is the Control 4 value to which the costs of the training course are to be charged.

TRAINING_CONTROL_5
CHAR, 004

This is the Control 5 value to which the costs of the training course are to be charged.

TRAINING_CONTROL_6
CHAR, 004

This is the Control 6 value to which the costs of the training course are to be charged.

TRAINING_COSTS
NUMERIC, 06,2

This is the cost of the training course that the employee attended. It is intended that the amount you enter in this field will represent the total amount whether or not the company pays a portion or all of the cost.

TRAINING_COURSE

VARCHAR, 020

This field displays the description from the option list translation of the TRAINING-COURSE-CODE.

TRAINING_COURSE_NO

CHAR, 001

This is which course in the year this record identifies. Begin numbering with 0 or A, whichever is lower for your computer.

TRAINING_CREDIT

NUMERIC, 02,0

This is a number of credits that may have been granted to the employee for satisfactory completion of the training course. An example of when credits may be granted is a training course offered by a professional association in conjunction with an accredited program. This field will be blank when credits do not apply.

TRAINING_CTRL_3_D

VARCHAR, 020

This field displays the description from the option list translation of the TRAINING-CONTROL-3 code.

TRAINING_CTRL_4_D

VARCHAR, 020

This field displays the description from the option list translation of the TRAINING-CONTROL-4 code.

TRAINING_CTRL_5_D

VARCHAR, 020

This field displays the description from the option list translation of the TRAINING-CONTROL-5 code.

TRAINING_CTRL_6_D

VARCHAR, 020

This field displays the description from the option list translation of the TRAINING-CONTROL-6 code.

TRAINING_RATING

NUMERIC, 04,3

This is the rating the employee received for his or her performance in the training course. This field will be blank when attendees do not receive ratings.

TRAINING_TYPE
VARCHAR, 020

This field displays the description from the option list translation of the TRAINING-TYPE-CODE.

TRAINING_TYPE_CODE
CHAR, 003

This code describes the type of training course being recorded.

This code identifies whether the training is internal or external and if taking it has any impact on the employee's job or employment status.

TRAINING_UNITS
NUMERIC, 3,0

This is the number of training credits awarded to a student who successfully completes this course.

TRAINING_YEAR
NUMERIC, 04,0

This is the year in which the training is scheduled to be or was taken.

TRAVEL_PERCENT
NUMERIC, 03,0

This is the percent of time the employee is willing to travel as part of the job.

TS_AMOUNT_ONE
NUMERIC, 9,2

This is the equivalent of the HED AMOUNT-ONE field and may contain a value if it is relevant to the HED defined on the TS Table record if not the field is left blank.

TS_AMOUNT_TWO
NUMERIC, 10,2

This is the equivalent of the HED AMOUNT-TWO field and may contain a value if it is relevant to the HED defined on the TS Table record if not the field is left blank.

TS_AUTO_DEDUCTION
CHAR, 2

This code determines whether or not the HED defined on the TS Table record will be written over to the Payroll H HED segment when the HED becomes effective on the Benefits segment.

TS_CONTRIBUTION

VARCHAR, 20

This field displays the description from the option list translation of the TS Contribution Code.

TS_CONTRIBUTION_CD

CHAR, 1

This code defines the Contribution Type of the HED defined on the TS Table record.

TS_HED_AMT_PCT

NUMERIC, 7,0

This specifies a deduction value for a particular benefit.

This may be expressed as a fixed dollar amount or a percentage of earnings.

It is the HED-METHOD- CODE that tells the system whether the value is an amount or percent.

Enter amounts with two decimals (for example, five dollars would be expressed as ‘500’).

Use four decimals for percentages (for example, five percent would be expressed as’0500’).

TS_HED_FREQ_CD

CHAR, 2

This code establishes the pay period in which deductions are to be taken for the benefit described on the TS table.

TS_HED_FREQUENCY

VARCHAR, 20

This field displays the description from the option list translation of the TS HED Frequency Cd.

TS_HED_METHOD

VARCHAR, 20

This field displays the description from the option list translation of the TS HED Method Code.

TS_HED_METHOD_CODE

CHAR, 2

The HED Method Code describes the calculation method used to determine the amount of deduction for the benefit.

TS_HED_TYPE

VARCHAR, 20

This field displays the description from the option list translation of the TS HED Type Code.

TS_HED_TYPE_CODE

CHAR, 2

This establishes the tax rule for the benefit deduction described.

TS_SEARCH_ARGUMENT

CHAR, 6

This is the value of the employee level Employee Database data element that is used to determine selection. The valid value is controlled by the Plan Search Type.

TS_START_CODE

CHAR, 1

This code describes the contents of the TS-START- FIELD.

It can be used to start a deduction or an automatic earnings when an event occurs. The code in this field is written to the HED-XREF-START-CODE field at the employee level.

TS_START_DESCRIPT

VARCHAR, 20

This field displays the description from the option list translation of the TS Start Code.

TS_START_FIELD

NUMERIC, 6,0

This is a date or amount which, when reached, starts the deduction or automatic earnings for this HED-XREF- NUMBER. If a dollar amount is being entered, enter it as a whole dollar amount. The value in this field is passed to the HED-XREF-START-FIELD at the employee level.

TS_STOP_CODE

CHAR, 1

This code describes the contents of the TS-STOP- FIELD.

It can be used to stop a deduction or an automatic earnings when an event occurs. The value entered in this field is passed to the HED-XREF-STOP-CODE field at the employee level.

TS_STOP_DESCRIPT

VARCHAR, 20

This field displays the description from the option list translation of the TS Stop Code.

TS_STOP_FIELD

NUMERIC, 6,0

This is a date or amount which when reached stops the deduction or automatic earnings for this HED-XREF- NUMBER.

For STOP-CODEs 2 - 6, enter a whole dollar amount.

For STOP-CODES 7 - 9, and A, enter an amount with two decimals.

The value in this field is passed to the HED-XREF-STOP-FIELD at the employee level.

TS_TABLE_DATE
DATETIME

This is the first date on which this table record was effective.

TS_TABLE_UNTIL
DATETIME

This is the ending date on which this table record was effective.

TT_DATE_CALC_METH
VARCHAR, 20

This field displays the description from the option list translation of the TT Date Calc Method code.

TT_DATE_CALC_MTHD
CHAR, 1

This is used to indicate the proper method for creating starting and ending dates for benefit plans.

For example, if the plan rules set retirement dates as the first of the month coincident with or following the date projected by age/service requirements, the appropriate value entered here would cause those dates (based on age/service) to be adjusted in accordance with plan rules.

TT_DELAY_TIME_1
CHAR, 8

This is a time span which will be added to the resulting effective date of the plan status change if the first condition defined on TT Table record is met by the participant's record.

This would be used if a specified amount of time is to elapse before the change becomes effective; such as giving the participant one additional month of coverage before he or she is removed from the plan.

This is not to be confused with the date rounding rule.

TT_MAJOR_ACTIVITY
VARCHAR, 20

This field displays the description from the option list translation of the TT-Option code.

TT_RESULT_STATUS_1
VARCHAR, 20

This field displays the description from the option list translation of the Result Status 1 code.

TT_SEARCH_ARGUMENT
CHAR, 6

This is used to establish multiple entries for the TT table. It can contain any valid value for any valid field referenced by TT Search Type.

TT_STATUS_1H
VARCHAR, 20

This field displays the description from the option list translation of the Status 1H code.

TT_STATUS_1L
VARCHAR, 20

This field displays the description from the option list translation of the Status 1L code.

TT_TABLE_DATE
DATETIME

This is the first date on which this table record is effective.

TT_TABLE_UNTIL
DATETIME

This is the ending date on which this table record is effective.

TU_KEY_SEPARATOR
CHAR, 1

This is a system-generated value used to allow more than one TU Table record with the same key on the System Control Repository. This is required because the TU Table record is longer than 80 characters.

TU_TABLE_DATE
DATETIME

This is the first date on which this table record was effective.

TU_TABLE_UNTIL
DATETIME

This is the ending date on which this table record is effective.

TUITION_AMOUNT
NUMERIC, 06,2

This is the amount of the tuition reimbursement.

TUITION_PAID_DATE
DATETIME

This is the date on which the Tuition Reimbursement was paid to the employee.

TUITION_PERCENT
NUMERIC, 03,0

This is the percent of reimbursed tuition granted the employee for this course.

TUITION_YEAR
NUMERIC, 04,0

This field contains the Year of Course for Refund.

TW_EEO_EST
CHAR, 4

This field contains the EEO Establishment Code for the previous year.

TW_TABLE_DATE
DATETIME

This is the first date on which this table record was effective.

TW_TABLE_UNTIL
DATETIME

This is the ending date on which this table record is effective.

TW_TOT_B_K
NUMERIC, 8,0

This field contains the total of employees recorded on last year's EEO1 Report.

TX_ADDRESS
VARCHAR, 30

This is the establishment address for the EEO-1 Multi- Establishment report.

TX_SEC_C_1
VARCHAR, 17

This is the

TX_APPRENT_EMPLD
CHAR, 1

This field indicates if Apprentices are employed at the EEO Establishment. This field is reported on the EEO-1 Computerized Format Reports.

TX_APPR_EMPLD_DESC
VARCHAR, 20

This field displays the description from the TX-APPRENT-EMPLD option list.

TX_COMPANY_NO
CHAR, 8

This is the company identification number assigned by the Joint Reporting Committee the first time you file a report for a company or a new unit.

TX_COUNTY
VARCHAR, 13

This is the establishment county for the EEO-1 Multi-Establishment report.

TX_DUNS_NO
VARCHAR, 11

This records your Dun and Bradstreet Identification Number.

TX_EEO_ESTABLISH_D
VARCHAR, 20

This field displays the description from the option list translation of the TX-EEO-ESTABLISHMNT code.

TX_EEO_ESTBLSHMNT
CHAR, 4

This code identifies the EEO establishment defined on the EEO-ESTABLISHMENT Table. This value is user- defined. Any value entered in this field must also be set up in option list EO069.

TX_EIN_NUMBER
CHAR, 9

This field stores the Employer Identification Number (EIN) associated to the EEO Establishment.

TX_EST_CITY
VARCHAR, 17

This is the establishment city for the EEO-1 Multi- Establishment report.

TX_EST_NAME
VARCHAR, 30

This is the establishment name for the EEO-1 Multi-Establishment report.

TX_EST_ST_PROV
CHAR, 2

This is the establishment state for the EEO-1 Multi-Establishment report.

TX_HEADQUARTERS
VARCHAR, 17

This is the

TX_HEADQTR_DESC
VARCHAR, 17

This is the

TX_KEY_SEP_1
CHAR, 1

This is the key separator for the EEO Establishments.

TX_SEC_C_1
CHAR, 1

This field answers Question 1 in section C on the Employer Information Report EEO-1 (Does the entire company employ at lease 100 employees -- yes or no)

TX_SEC_C_1_DESC
VARCHAR, 20

This field displays the description from the TX-SEC-C-1 option list.

TX_SEC_C_2
CHAR, 1

This field answers Question 2 in section C on the Employer Information Report EEO-1 (Is the company affiliated through common ownership…with other entities in an enterprise with a total employment of 100 or more -- yes or no)

TX_SEC_C_2_DESC
VARCHAR, 20

This field displays the description from the TX-SEC-C-2 option list.

TX_SEC_C_3
CHAR, 1

This field answers Question 3 in section C on the Employer Information Report EEO-1 (Does the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt…AND either is a prime government contractor…..serves as a depository…or is a financial institution -- yes or no)

TX_SEC_C_3_DESC
VARCHAR, 20

This field displays the description from the TX-SEC-C-3 option list.

TX_SIC
CHAR, 4

This records your three digit Standard Industrial Classification Code.

TX_SIC_DESC
VARCHAR, 20

This field displays the description from the option list translation of the TX-SIC code.

TX_TABLE_DATE
DATETIME

This contains the first effective date of the Table entry.

TX_TABLE_UNTIL
DATETIME

This is the ending date on which this table record is effective.

TX_UNIT_NO
CHAR, 8

This is the company unit number assigned by the Joint Reporting Committee the first time you file a report for a company or a new unit.

TX_VETS_COMPANY_NO
CHAR, 8

This field represents the Company Indication Number assigned by the Vet-100 Reporting Committee the first time a report is filed for a company or a new reporting unit.

TX_VETS_UNIT_NO
CHAR, 8

This field represents the Unit Identification Number assigned by the Vet-100 Reporting Committee the first time a report is filed for a company or a new reporting unit.

TX_ZIP_POST
VARCHAR, 12

This is the establishment postal code for the EEO-1 Multi-Establishment report.

TYPE_CODE
CHAR, 002

This contains the Type Code assigned to an Earnings or Deduction HED on the H segment.

The field may be used when making inquiries of the file in a batch report or with a QUERY.

It CANNOT be used in a form or report that will update the file, as it is not a option list.

TYPE_DESC
VARCHAR, 020

This field displays the descriptions from the option list translation of the TYPE-CODE.

TYPE_OF_RATING
VARCHAR, 020

This field displays the description from the option list translation of the Rating Type code.

TYPE_OF_TRANSFER

VARCHAR, 020

This field displays the description from the option list translation of the Type of Transfer Code.

TYPE_OF_XFER_CD

CHAR, 001

This option identifies the type of transfer that occurred in this transaction.

For example, the transfer can actually reflect a Rollover of monies from another qualified plan, a lump sum contribution or a transfer of monies out of or into the Plan specified.

This option identifies the type of transfer that occurred during this transfer of monies between Thrift/Savings Plans.

U

UI_RATE

NUMERIC, 06,4

For federal and state tax bodies this field contains the unemployment experience rate.

For U.S. tax body 101 (FICA), you can enter the current minimum hourly wage.

This rate must be entered to six decimal places (for example, $3.10 is entered as '3100000').

If the minimum hourly wage is entered in this field for tax body 101, employee earnings with a Category Option (A8 Form) of 08 or 09 (tips) updates the Employer Wages field and an employer FICA tax amount is computed. However, the amount of tips so treated is limited by the minimum hourly wage.

For example, if the minimum wage is $2.65 per hour and an employee receives $80.00 in regular wages for 40 hours of work ($2.00 per hour) and another 40.00 is reported as tips earnings ($1.00 per hour), the Employer Wages field are increased by $106.00 ($2.65 per hour).

UI_REC

NUMERIC, 01,0

This specifies the unemployment reciprocal. Valid entries:

0 = Other state (or provincial) wages apply toward the maximum

1 = Only this state's (or province's) wages apply toward the maximum

UI_TAX

NUMERIC, 11,2

This is the employee's Unemployment Insurance tax.

UI_TAX_CUR

NUMERIC, 11,2

This is the employee's current Unemployment Insurance tax.

UI_TAX_MTD

NUMERIC, 11,2

This is the employee's Month to Date Unemployment Insurance tax.

UI_TAX_QTD

NUMERIC, 11,2

This is the employee's Quarter to Date Unemployment Insurance tax.

UI_TAX_YTD

NUMERIC, 11,2

This is the employee's Year to Date Unemployment Insurance tax.

UI_WAGES
NUMERIC, 11,2

This is the employee's wages eligible for Unemployment Insurance.

UI_WAGES_CUR
NUMERIC, 11,2

This is the employee's current wages eligible for Unemployment Insurance.

UI_WAGES_MTD
NUMERIC, 11,2

This is the employee's Month to Date wages eligible for Unemployment Insurance.

UI_WAGES_QTD
NUMERIC, 11,2

This is the employee's Quarter to Date wages eligible for Unemployment Insurance.

UI_WAGES_YTD
NUMERIC, 11,2

This is the employee's Year to Date wages eligible for Unemployment Insurance.

UNEMPLOYMENT
VARCHAR, 020

This field displays the description from the option list translation of the Unemployment Code.

UNEMPLOYMENT_CODE
CHAR, 001

This code indicates whether unemployment/ disability should be accumulated for this employee in this tax body.

Whenever the RESIDENT-CODE is set up, this field is automatically set to '0' or '1' based on the contents of the DEFAULT-UNEMPLOYMENT-CODE field on the AF-SCR.

UNION_CODE
CHAR, 005

This is the employee's appropriate UNION-CODE. A code may be entered whether or not the system deducts union dues.

UNION_JOB
VARCHAR, 020

This field displays the description from the option list translation of the UNION-JOB-CODE.

UNION_JOB_CODE
CHAR, 006

This is the UNION-JOB-CODE for the JOB-CODE/JOB-CODE-EXTENT. An entry is required in this field for the Benefits Module if this is a union job, regardless of whether or not it differs from the JOB-CODE.

UNION_NAME
VARCHAR, 020

This field displays the description from the option list translation of the UNION-CODE. It represents the employee's union at the time of the selected History and/or Labor record.

UNION_SWITCH
CHAR, 1

This value indicates how information entered in the UNION-SWITCH field on employee-level forms should be handled.

UNION_SWITCH_DESC
VARCHAR, 20

This field displays the description from the option list translation of the UNION-SWITCH Code.

USE_TAX
CHAR, 001

The USE-TAX field flags whether a tax body is to be added to the Employee Database or not retained at all.

If the tax body is retained, special options are available to restrict its use. Valid options are:

Blank = Do not retain (ADD) this tax body to the Employee Database (Default)

Y = Add this tax body to the Master File; allow it to be updated AND used for tax calculations

N = Add this tax body to the Master File; allow it to be updated, BUT it may not be used in tax calculations

A currently existing tax body can ONLY be deleted in batch. This is done by entering a pound-sign (#) in the USE-TAX field.

Online, the "#" sign blanks out a character field and a delete would not occur.

If changes are made to the TAX-FILING-NUMBER or the TAX-UNEMPLOYMENT-NUMBER of a tax body that already exists on the Master File, this field can be left blank.

USE_TAX_STATUS
VARCHAR, 020

This field displays the description from the option list translation of USE-TAX.

USER_CODE

CHAR, 002

The User Code field is normally an undefined field; its use is left to the discretion of the user. However, for Category 52 deductions, the system stores the number of bond purchases in this field.

USER_FIELD_E

CHAR, 001

This is an undefined field.

USER_NUMBER

VARCHAR, 011

The USER-NUMBER field is user-defined.

V

VACATION_FLAG
VARCHAR, 020

This field displays the description from the option list translation of VACATION-FLAG-CODE.

VACATION_FLAG_CODE
CHAR, 001

This indicates whether or not this earnings or deduction is to apply to vacation pay.

VARIABLE_FACTOR
NUMERIC, 8,2

This is the variable amount used in the calculation of the coverage or contribution for the Plan.

VARIANCE_PERCENT
NUMERIC, 05,3

This represents the degree of spread between the minimum and maximum amounts of a wage or salary range. This figure is system calculated when not manually entered.

By entering the VARIANCE- PERCENT and SALARY-GRADE-MIDPOINT, the system calculates all remaining salary grade values.

VESTING_CALC_DATE
DATETIME

This is the date on which the vesting percentage was calculated.

VESTING_CALC_UNTIL
DATETIME

This is the ending date on which the vesting percentage was calculated.

VISA
VARCHAR, 020

This field displays the description from the option list translation of the VISA-TYPE code.

VISA_EXPIRE
DATETIME

This records the expiration date of the employee's current visa.

VISA_TYPE
CHAR, 002

This code identifies the visa type a non-citizen employee has been granted.

W

WEEKS_WORKED
NUMERIC, 06,2

This is the number of weeks the employee has worked during the selected time frame.

WEEKS_WORKED_CUR
NUMERIC, 06,2

This is the current number of weeks the employee has worked during the selected time frame.

WEEKS_WORKED_MTD
NUMERIC, 06,2

This is the Month to Date number of weeks the employee has worked during the selected time frame.

WEEKS_WORKED_QTD
NUMERIC, 06,2

This is the Quarter to Date number of weeks the employee has worked during the selected time frame.

WEEKS_WORKED_YTD
NUMERIC, 06,2

This is the Year to Date number of weeks the employee has worked during the selected time frame.

WHITE
NUMERIC, 6,0

All individuals with origins in any of the original peoples of Europe, North Africa, or the Middle East are listed as white. Not of Hispanic origin.

WILL_GIVE
VARCHAR, 020

This field displays the description from the option list translation of the WILL-GIVE-CODE.

WILL_GIVE_CODE
CHAR, 001

This code identifies the employee's willingness to donate blood.

WILLING_RELOCATE
CHAR, 001

This code identifies the employee's willingness to relocate for the job.

WILLING_TO_TRAVEL
CHAR, 001

This code indicates whether or not the employee is willing to travel as part of the job.

WKERS_COMPENSATION
CHAR, 005

This identifies which Worker's Compensation policy relates to each JOB-CODE/JOB-CODE-EXTENT defined for your company. Worker's Compensation codes are user-defined.

WORK_AREA_CODE
CHAR, 003

This is the area code of the employee's work telephone number. If you change either the WORK-PHONE or WORK-EXTENSION field, you must re-enter the WORK-AREA-CODE.

WORK_CONTACT_HOURS
VARCHAR, 015

This is the time frame in which the applicant will be available to be contacted by you at the applicant's work telephone number.

WORK_EXTENSION
CHAR, 004

This is the employee's work telephone extension number. If you change the WORK-AREA-CODE or the WORK-PHONE, you must re-enter the WORK-EXTENSION.

WORK_FLAG
VARCHAR, 020

This field displays the description from the option list translation of the WORK-FLAG-CODE.

WORK_FLAG_CODE
CHAR, 001

This is used to track employees active in state and/or county tax bodies on the 12th of each month of the quarter.

WORK_IN_WAGES
NUMERIC, 11,2

This field stores the wages that are worked in a specific resident/state.

WORK_IN_WAGES_CUR
NUMERIC, 11,2

This field stores the current wages that are worked in a specific resident/state.

WORK_IN_WAGES_MTD

NUMERIC, 11,2

This field stores the Month to Date wages that are worked in a specific resident/state.

WORK_IN_WAGES_QTD

NUMERIC, 11,2

This field stores the Quarter to Date wages that are worked in a specific resident/state.

WORK_IN_WAGES_YTD

NUMERIC, 11,2

This field stores the Year to Date wages that are worked in a specific resident/state.

WORK_PHONE

CHAR, 007

This is the employee's work telephone number. If you change either the WORK-AREA-CODE or the WORK-EXTENSION, you must re-enter the WORK-PHONE number. You are not required to make an entry unless you have entered a WORK-EXTENSION.

WORKER_COMP

VARCHAR, 020

This field displays the description from the option list translation of the WORKER-COMP-CODE.

WORKER_COMP_CODE

CHAR, 001

This is a code that designates whether or not Worker's Compensation has been received for the injury. Valid entries:

1 = No Worker's compensation

2 = Worker's compensation received

WORKERS_COMP_CODE

CHAR, 005

This is the Workers' Compensation Code associated with the employee's job.

Y

YEAR_GRADUATED
NUMERIC, 02,0

This is the year the employee graduated from the indicated school.

YEARS_ATTENDED
NUMERIC, 02,0

This is the number of years the employee attended at the indicated school.

YES_NO_EDIT
VARCHAR, 020

Yes or No option list description for showing on HED register.

YTD_FICA
NUMERIC, 10,2

This is the Total FICA considered earnings YTD. The YTD-FICA field value is the sum of the 1ST-QUARTER- FICA, 2ND-QUARTER-FICA, 3RD-QUARTER-FICA and 4TH-QUARTER-FICA field values.

Z

ZIP_POST
VARCHAR, 12

This field contains the appropriate five-digit ZIP-CODE.

ZIP_POST_CODE
VARCHAR, 12

This is the postal code of the corporation or company.

ZR_KEY_SEP_DESC
VARCHAR, 020

This field displays the description from the option list translation of the ZR-KEY-SEPARATOR code.

ZR_KEY_SEPARATOR
CHAR, 001

This is used to ensure multiple entries of a segment on the same date will be sequenced properly on the Employee's Master Record.

PART 3

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NOTES

APPENDIX A

Entity Relationship Diagrams

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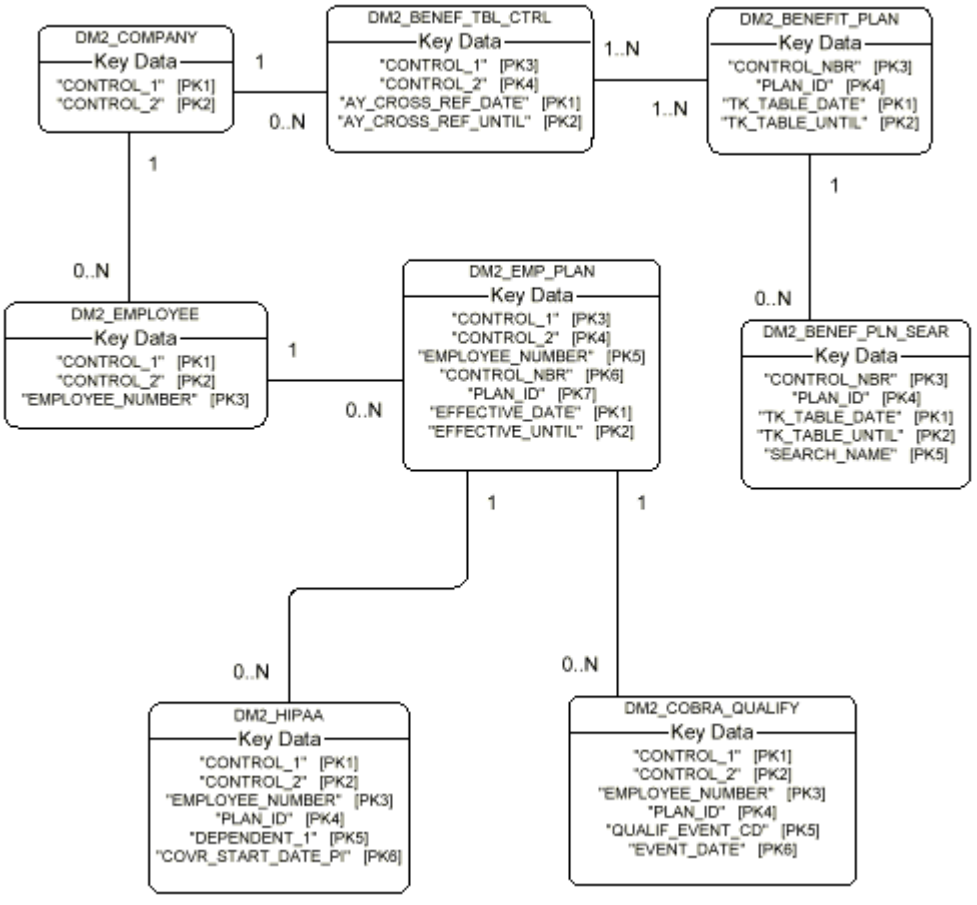
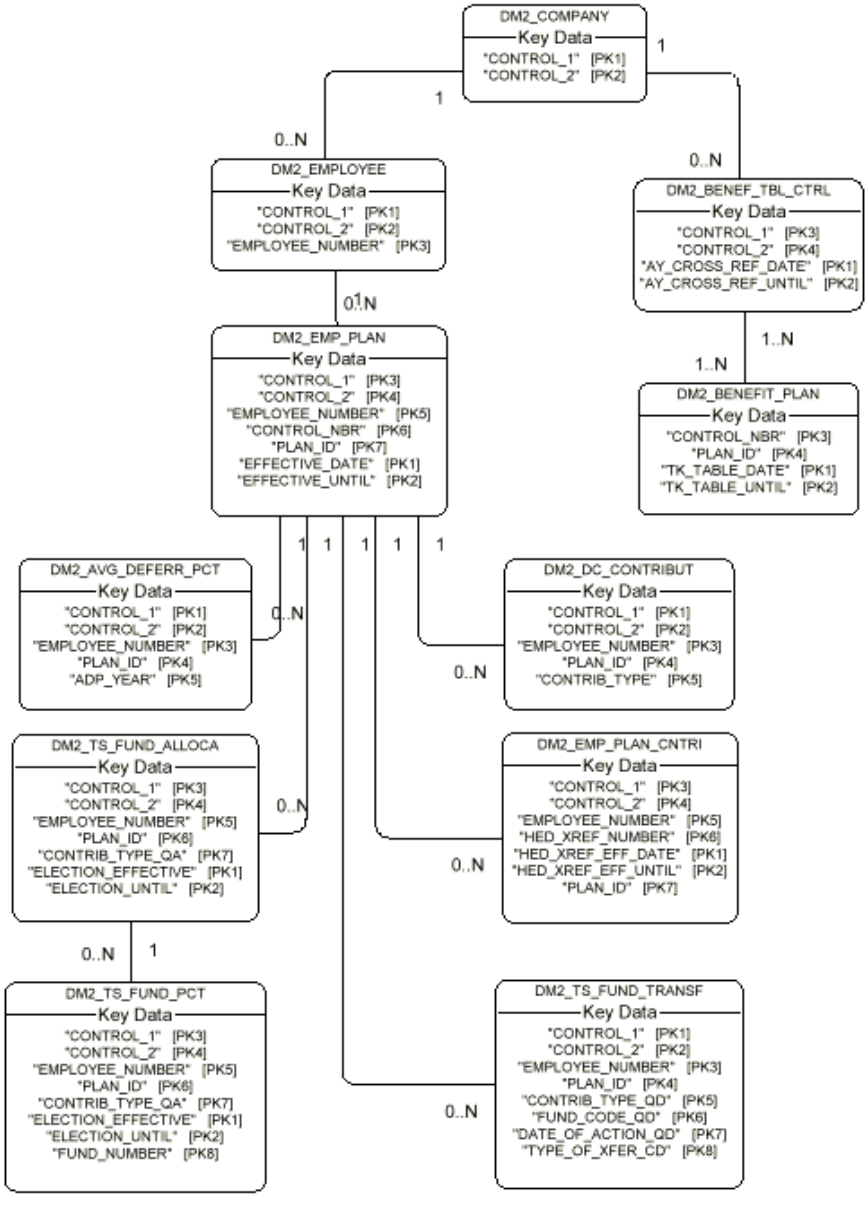
In this appendix

In this section of the reference guide, we provide diagrams of the 35 submodels delivered with Reporting Administration.

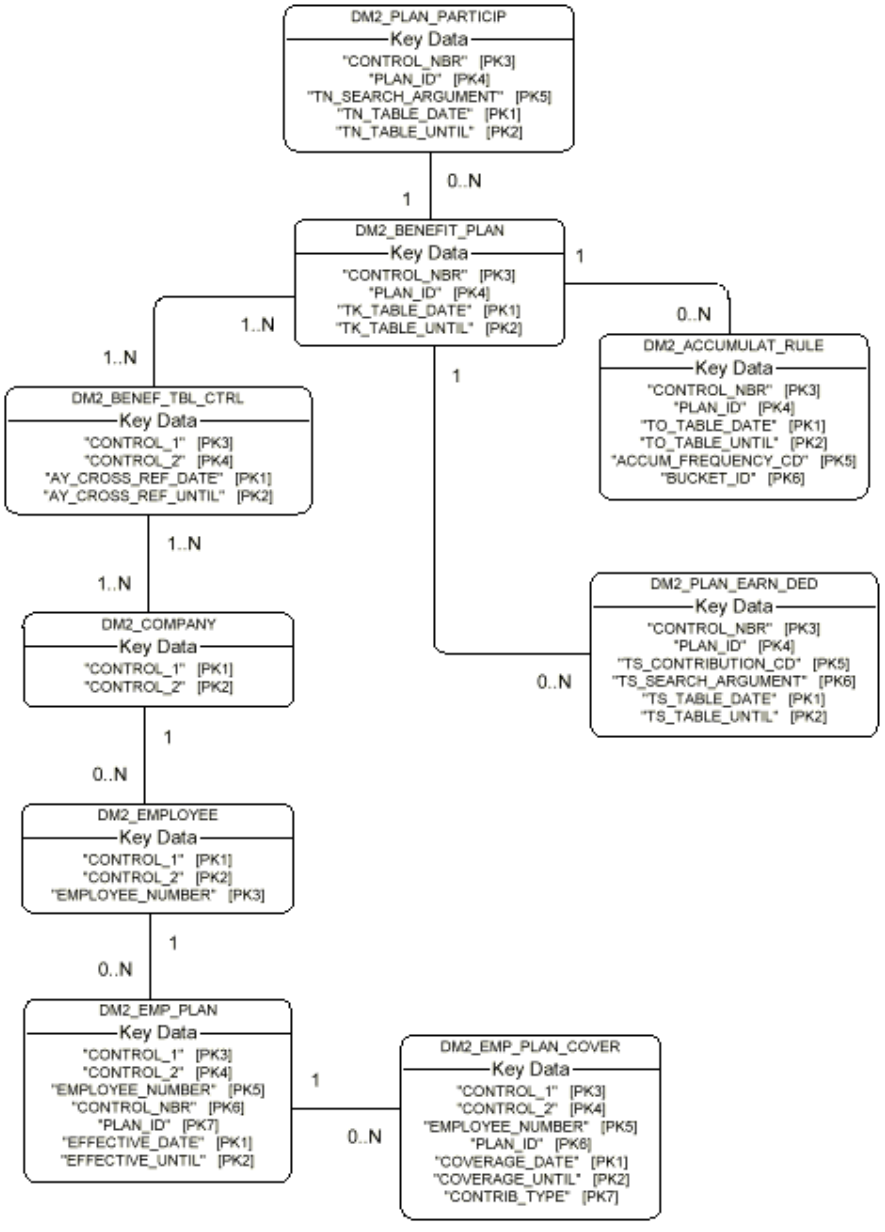
Benefit Administration



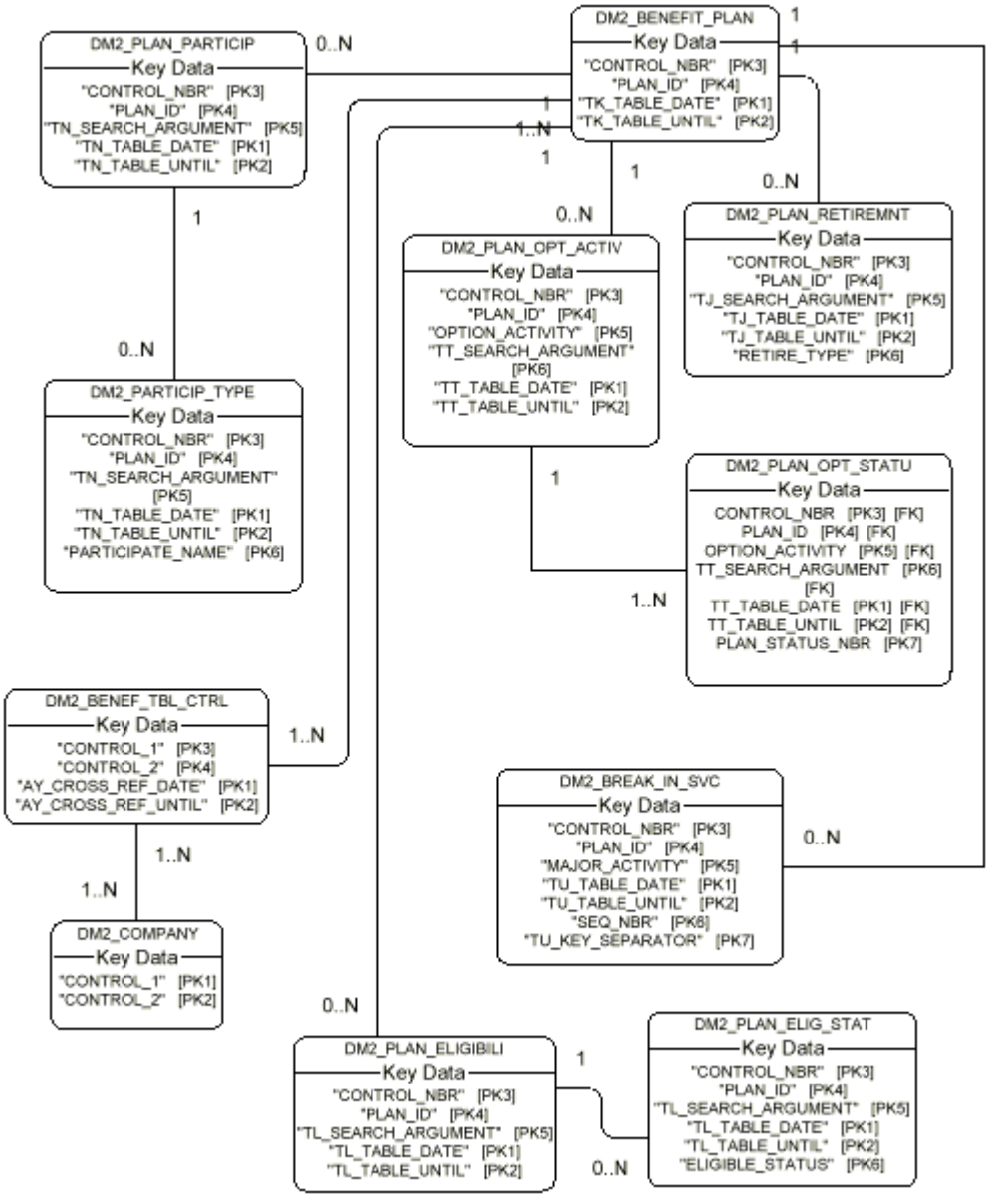
Benefit Plan Contribution Data



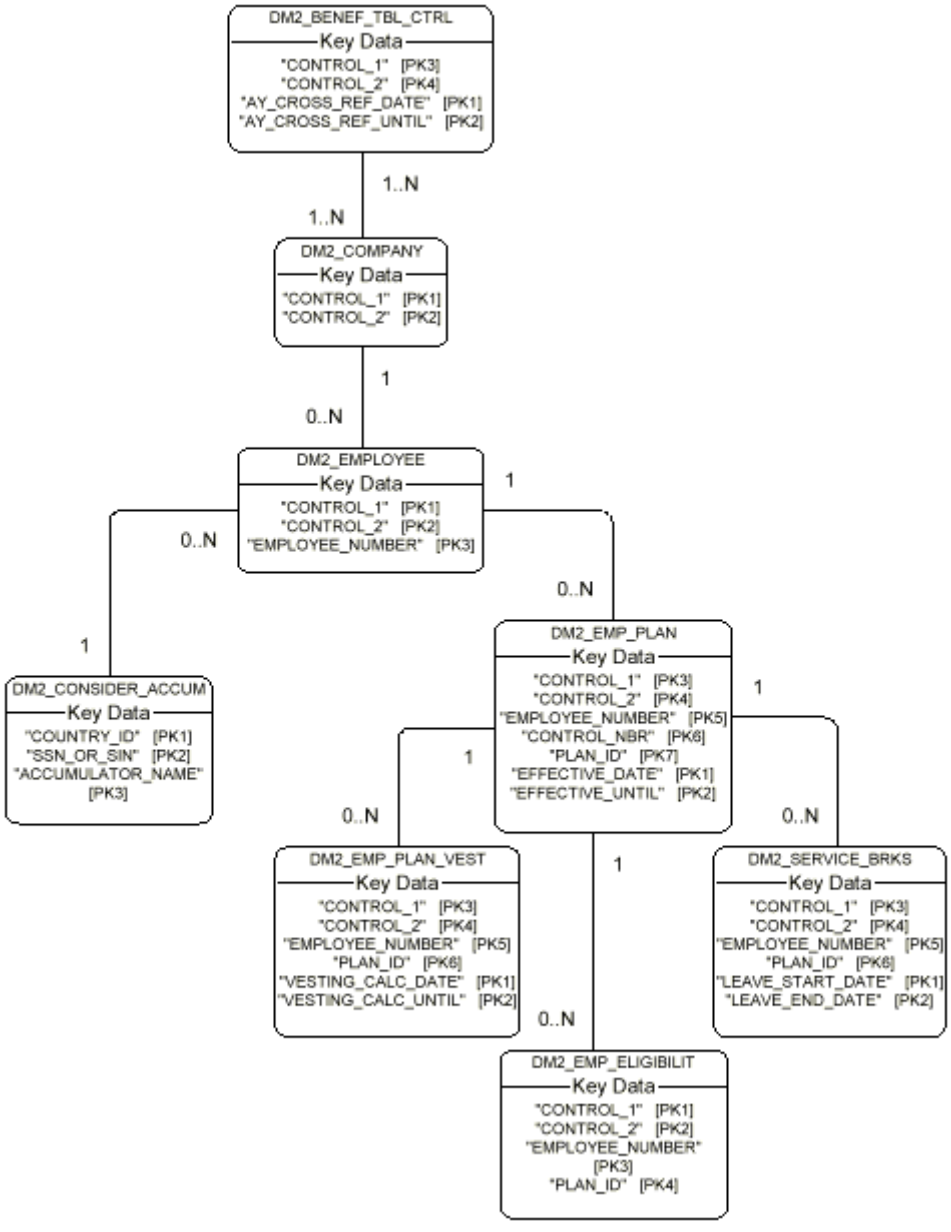
Benefit Plan Coverage/Rules



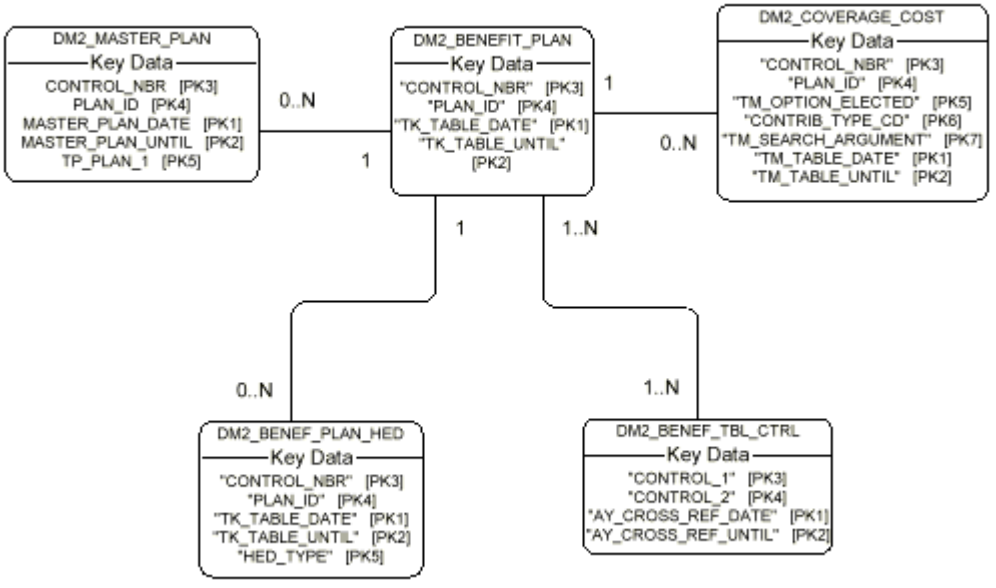
Benefit Plan Eligibility (Company Rules)



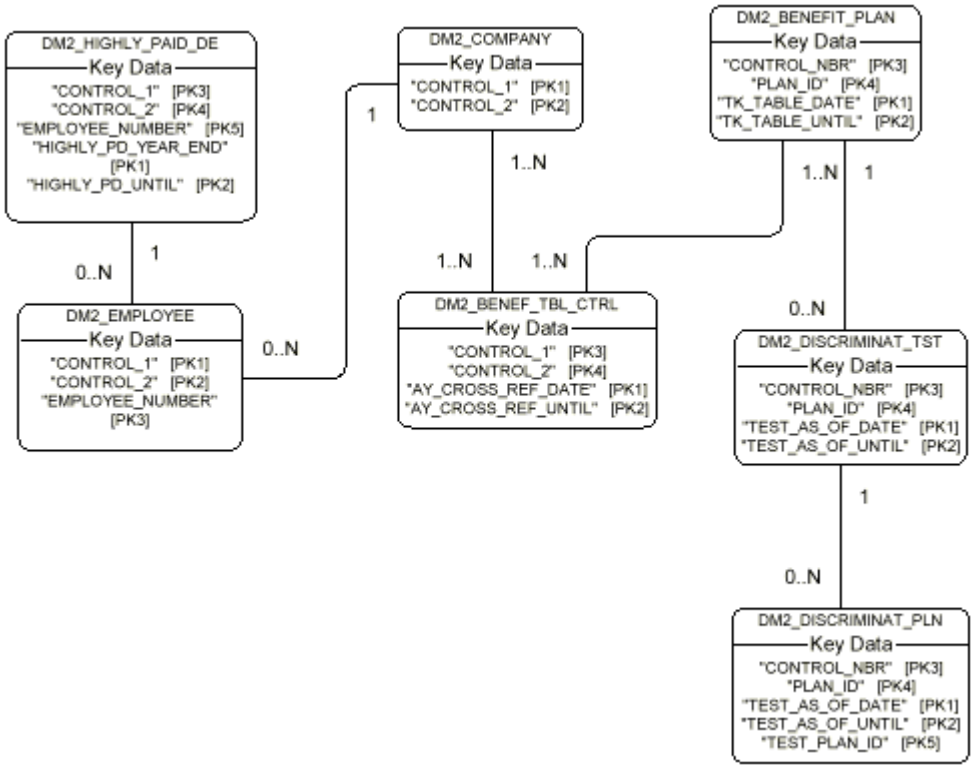
Employee Benefit Plan Eligibility



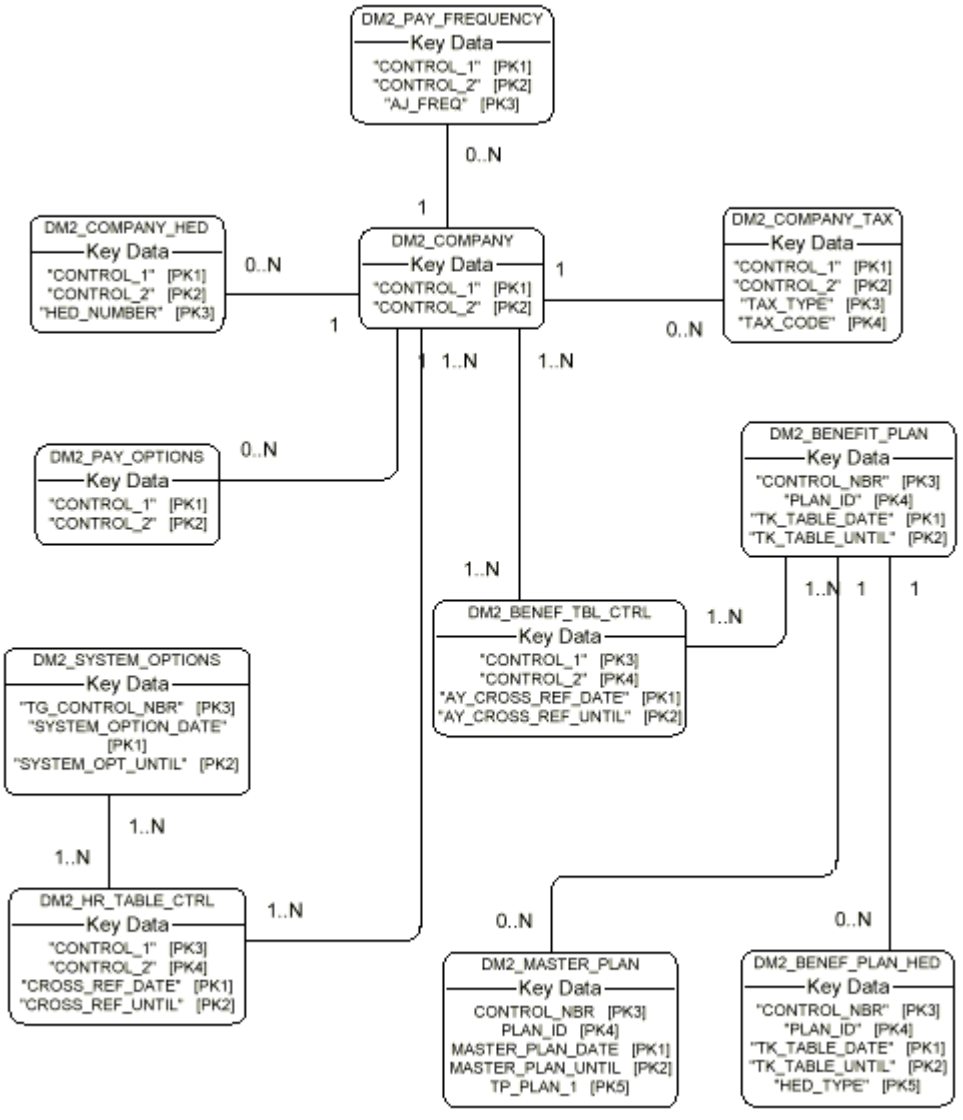
Benefit Plan Set-up



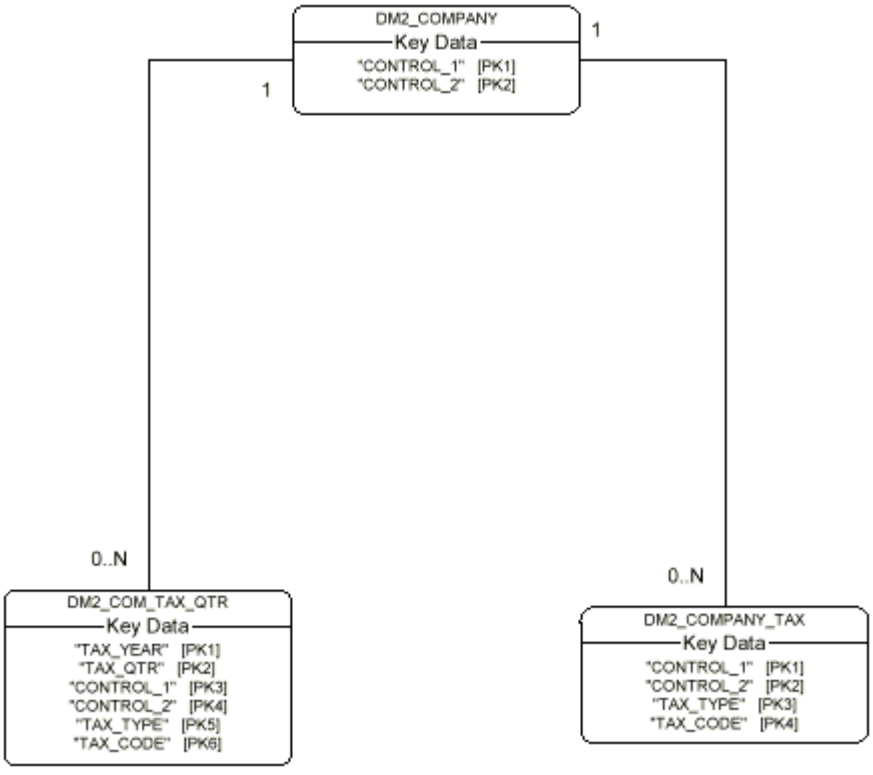
Benefit Plan Testing



Company Setup Information



Company Tax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"CONTROL_2" [PK2]
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1
0..N
0..N
DM2_COM_TAX_QTR
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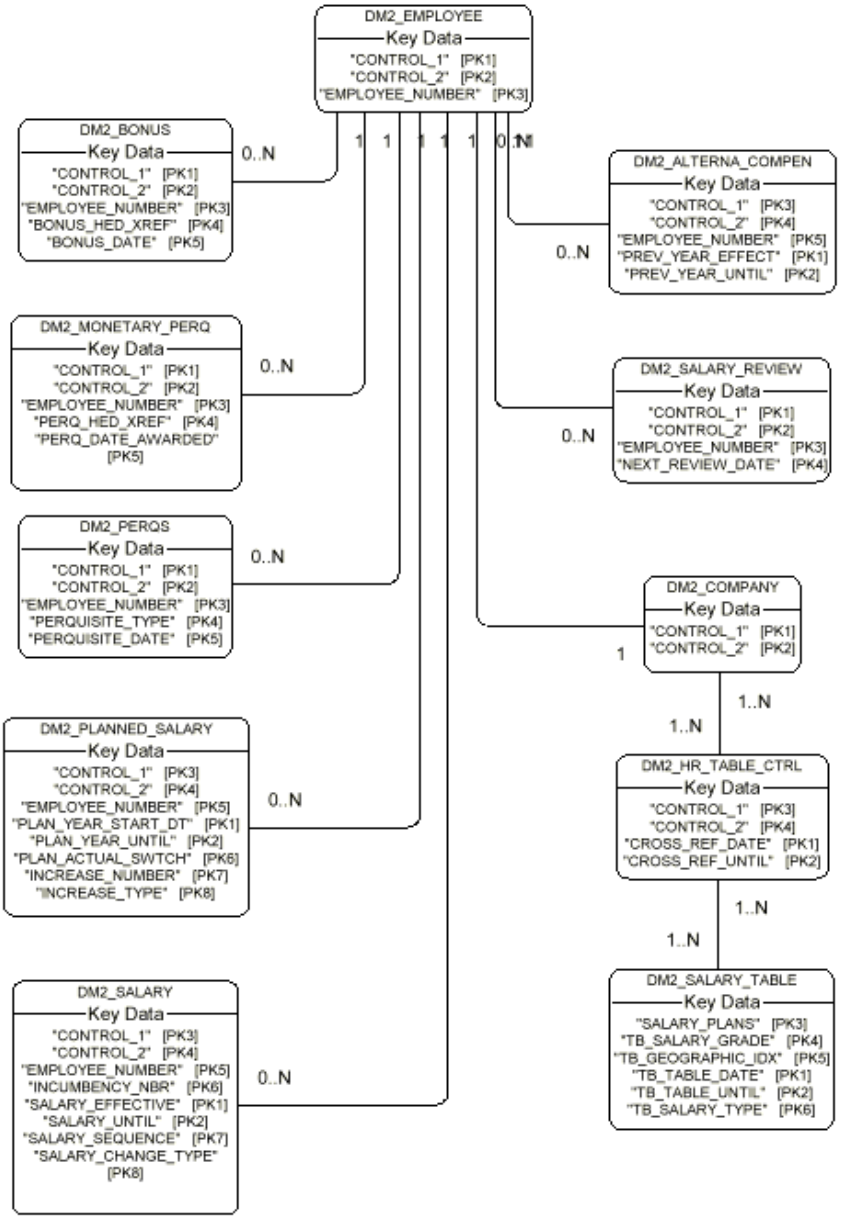
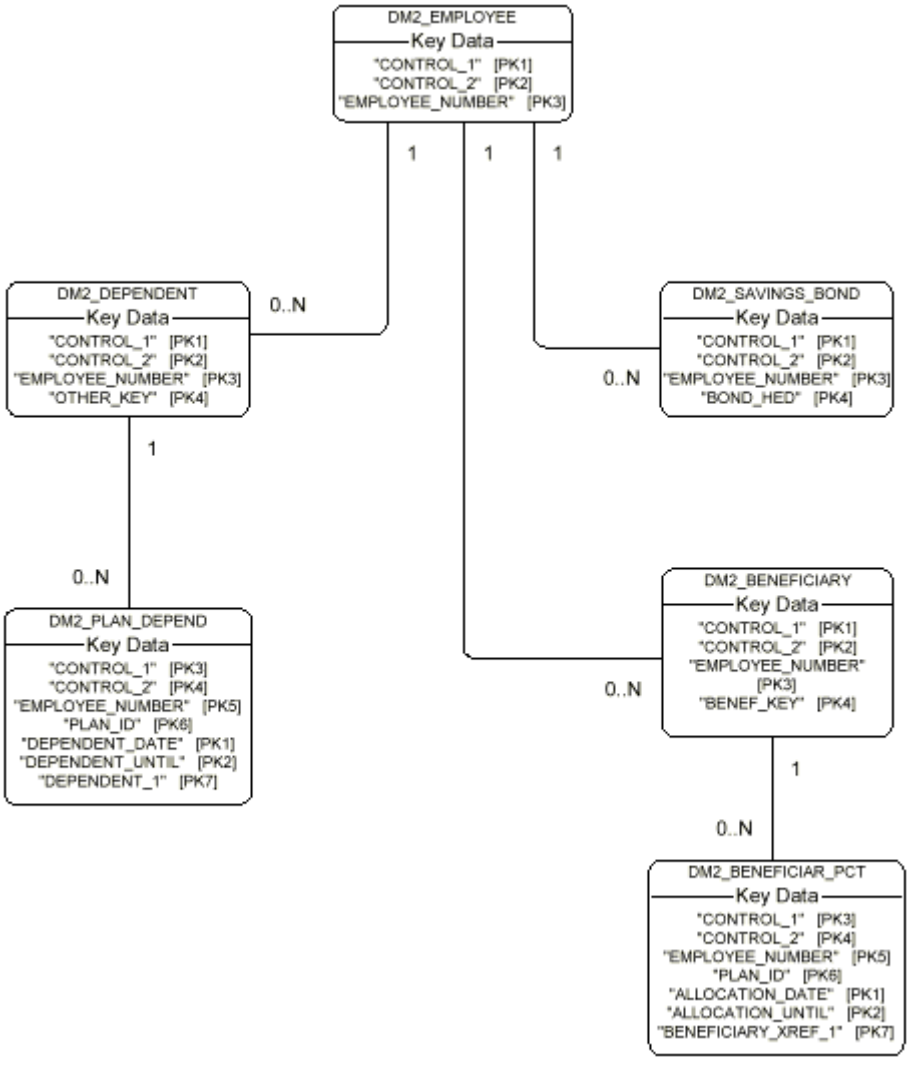
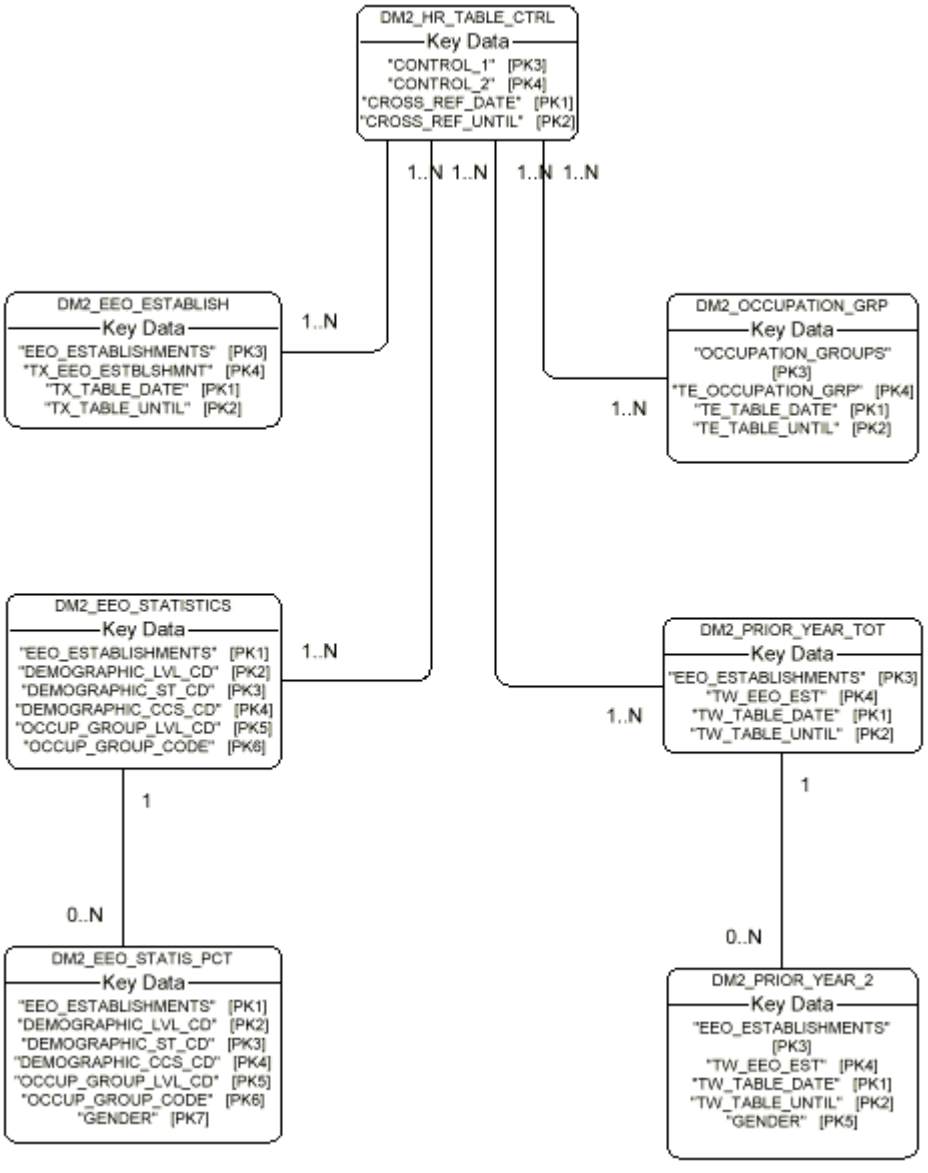
Compensation and Salary Administration



Dependents, Beneficiaries & Bond Holder



EEO/AAP Data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1..N 1..N
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"DEMOGRAPHIC_CCS_CD" [PK4]
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DM2_PRIOR_YEAR_TOT
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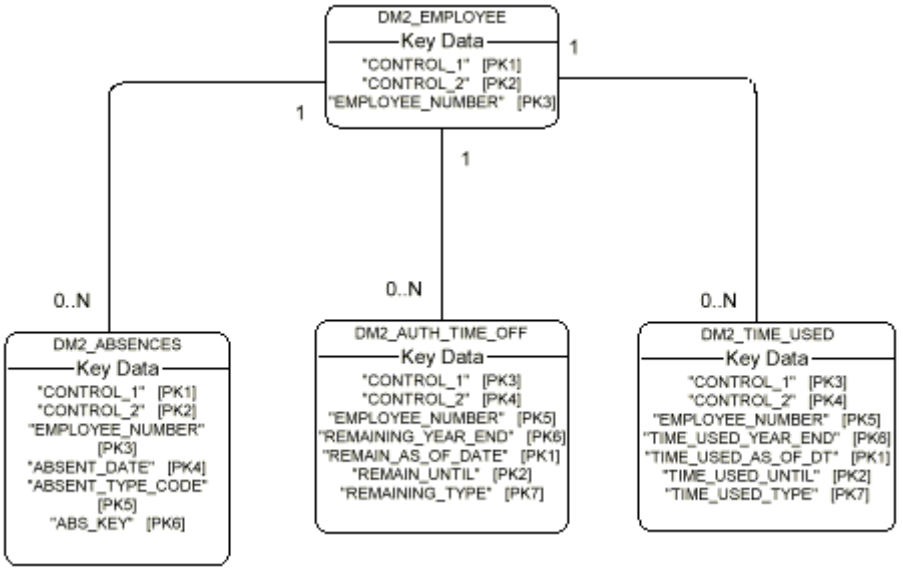
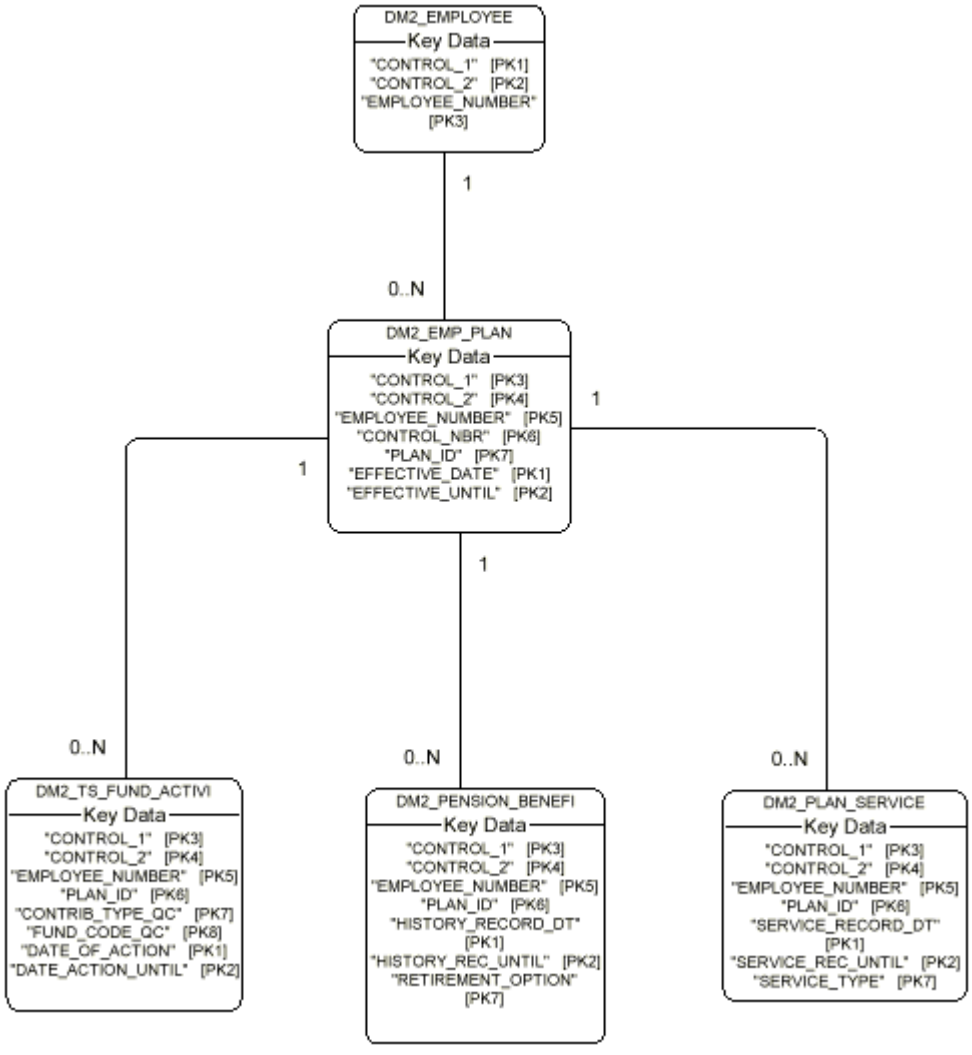
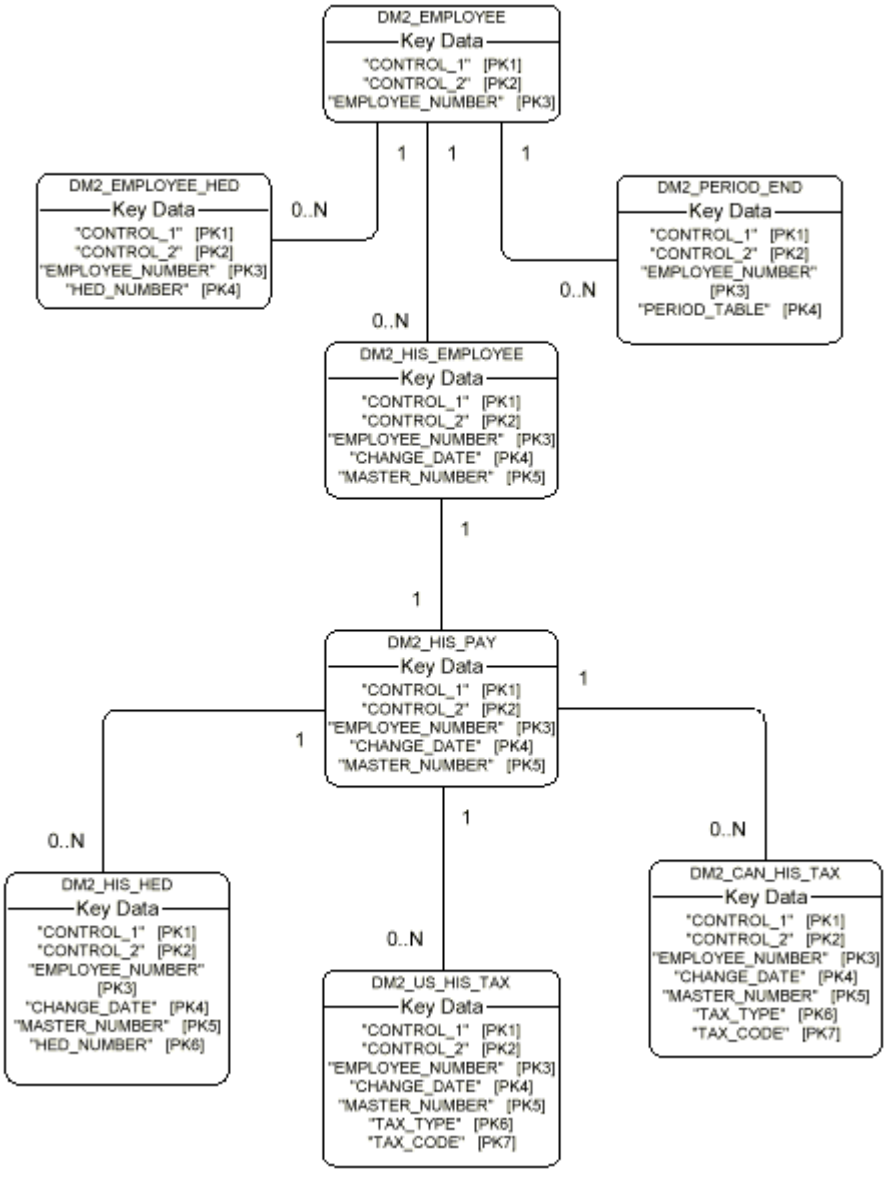
Employee Attendance Information



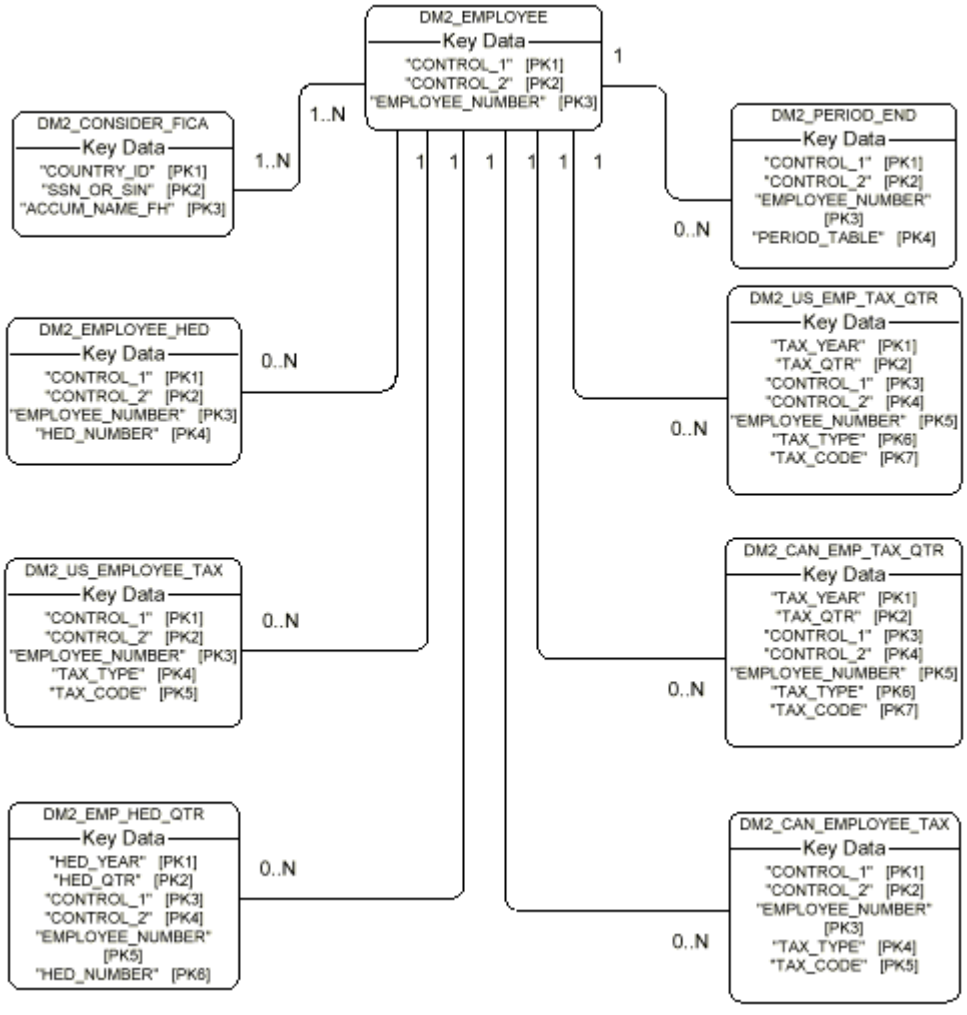
Employee Benefit Plan Information



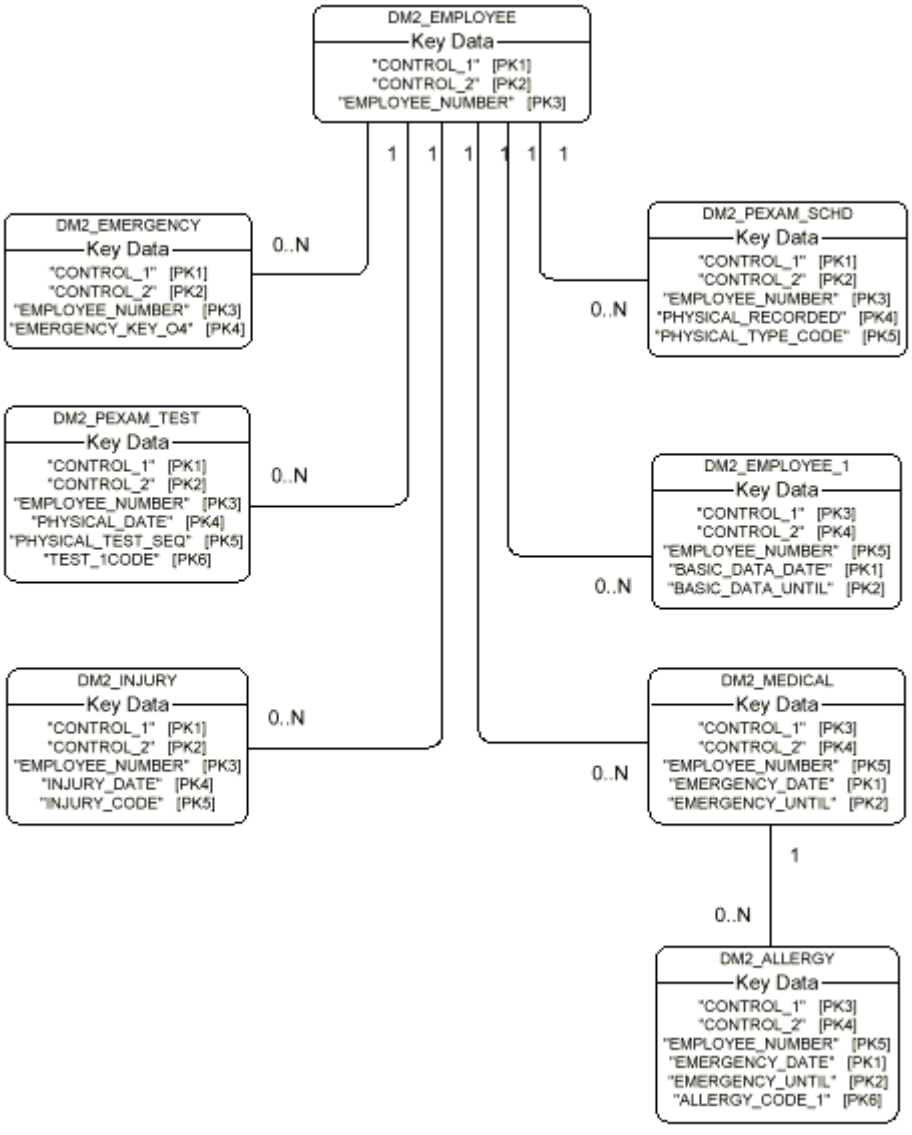
Employee History Information



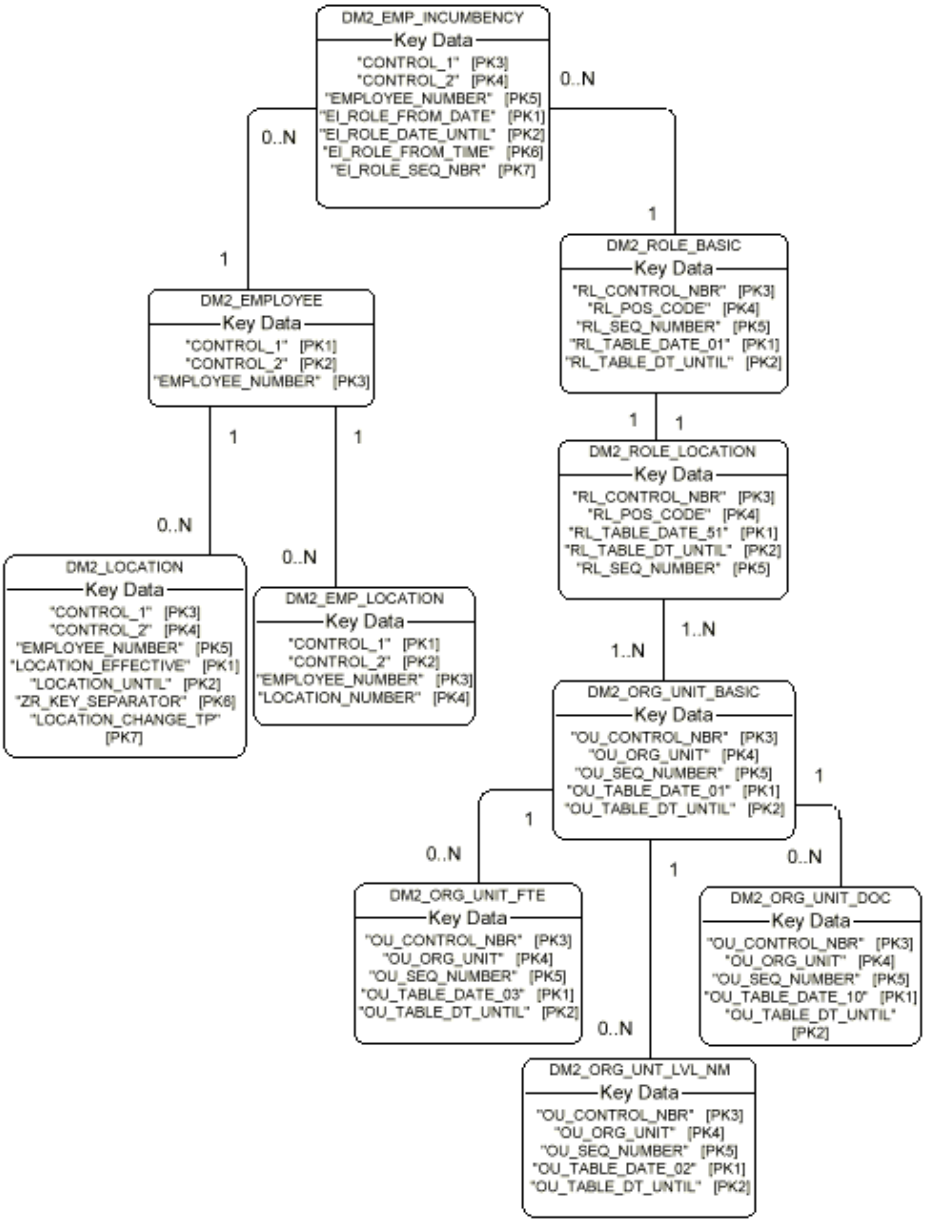
Employee Labor Information



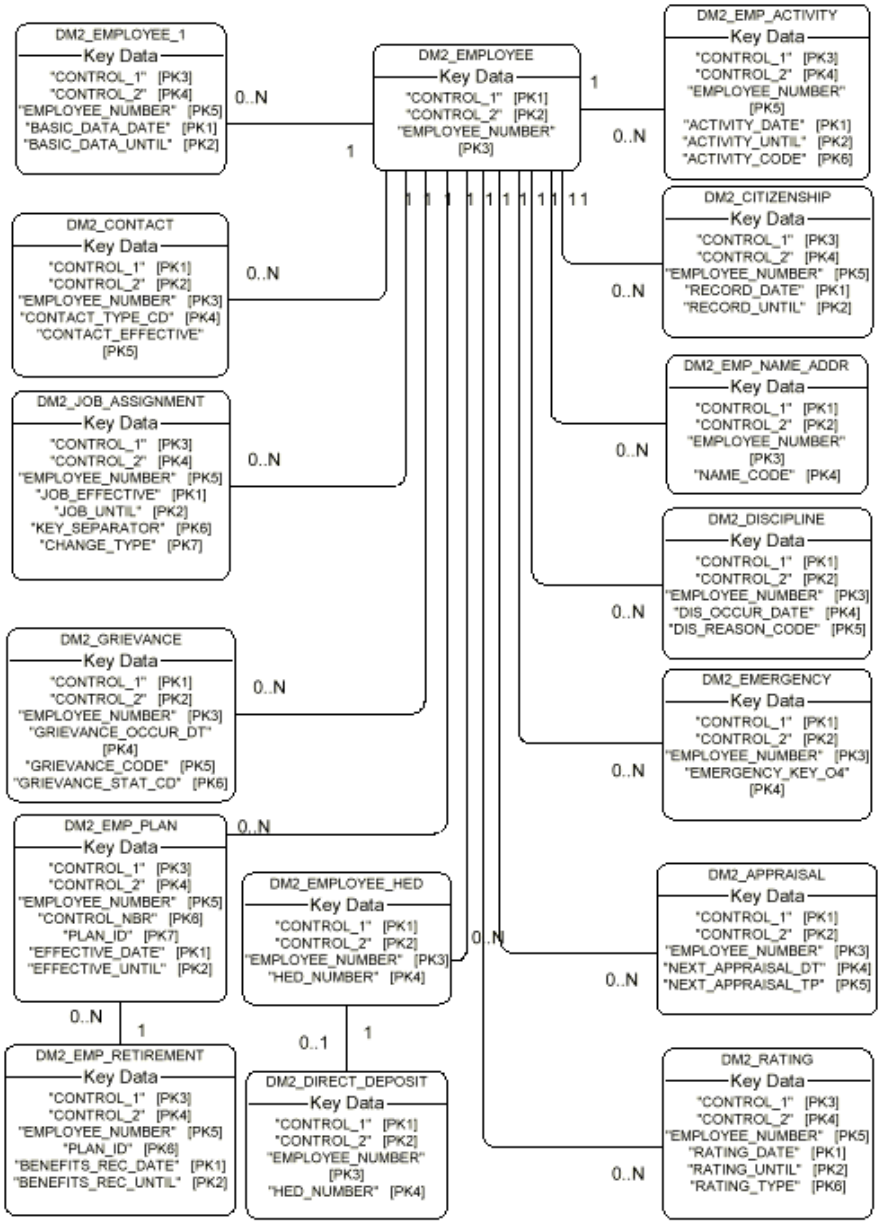
Employee Medical Information



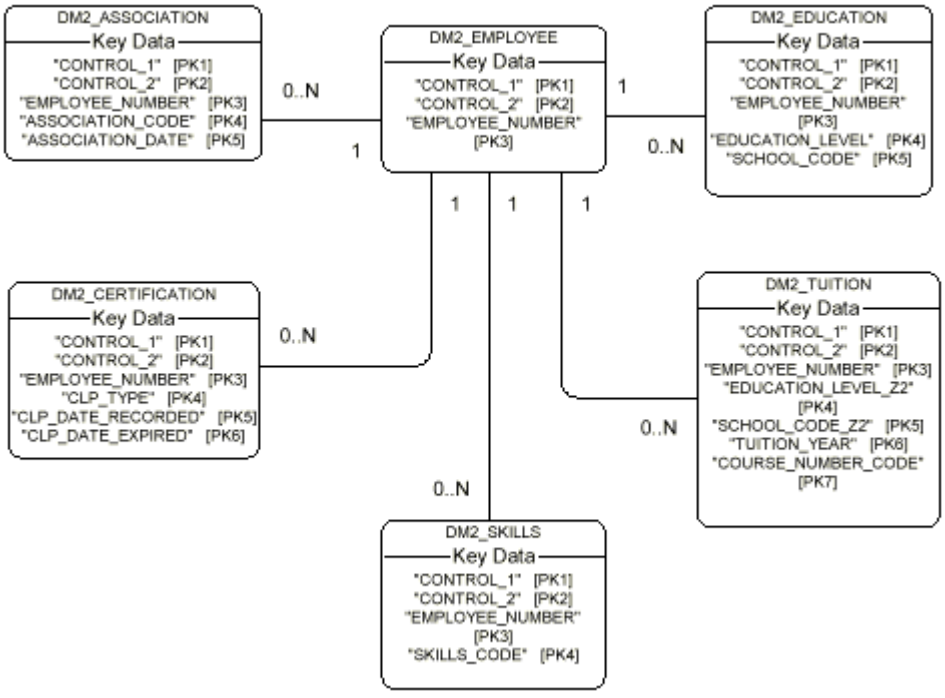
Employee Org/Location Information



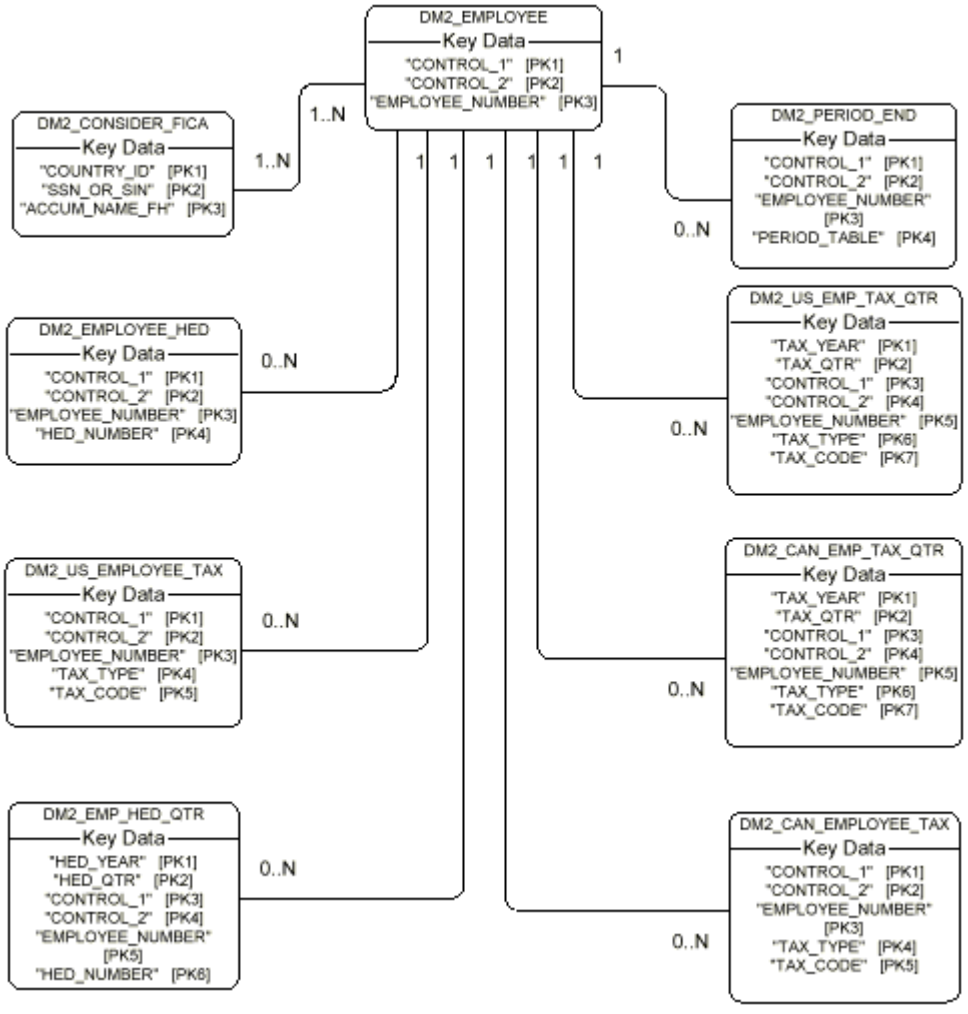
Employee Personal Information



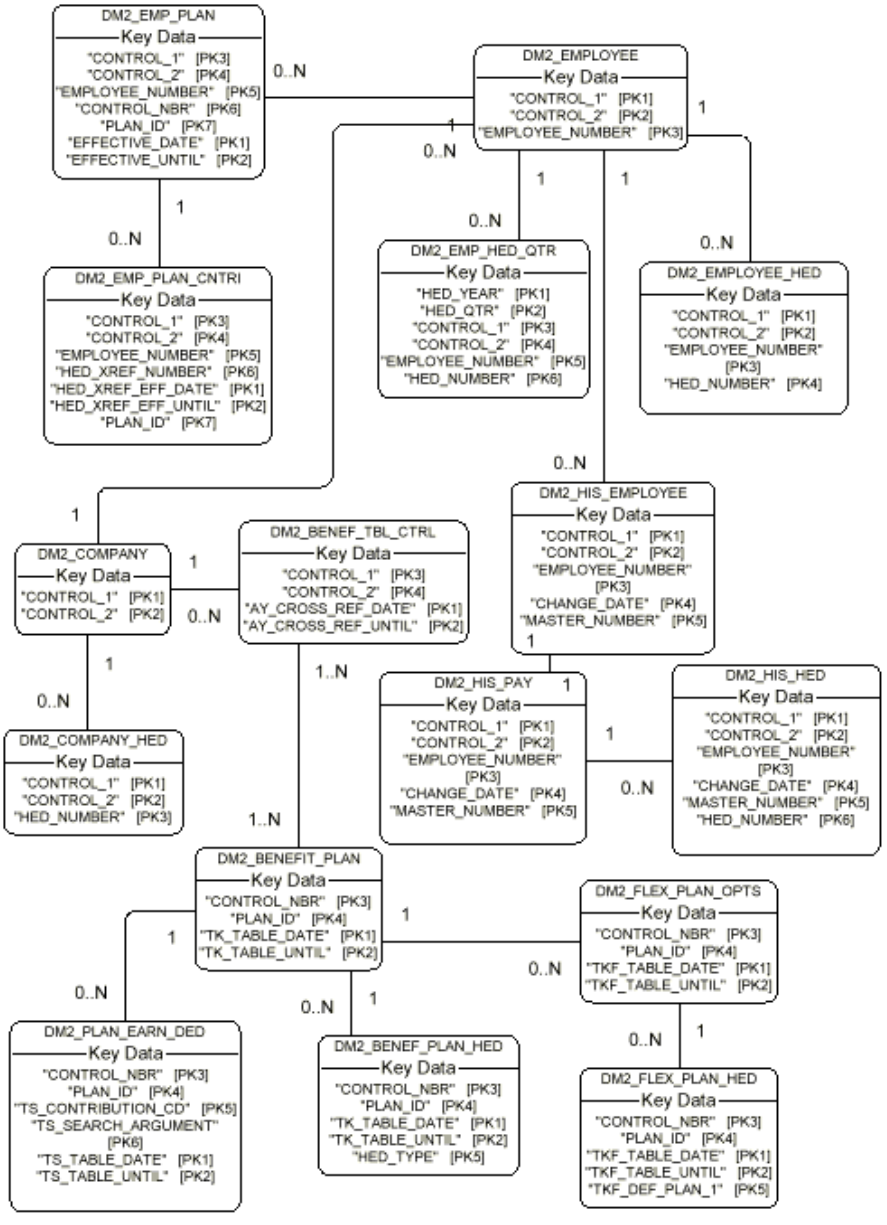
Employee Skills, Training, Education and Certification



Employee Tax Information



HEDs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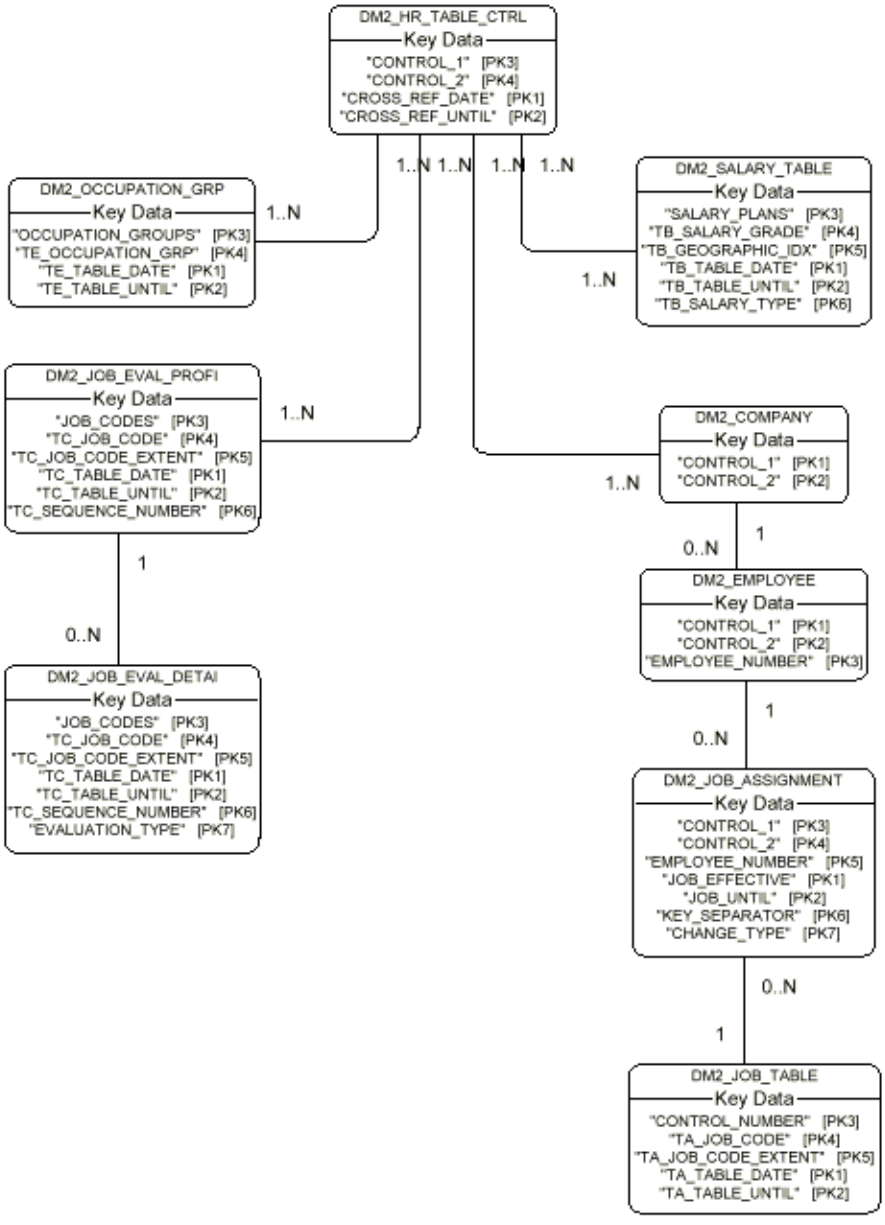
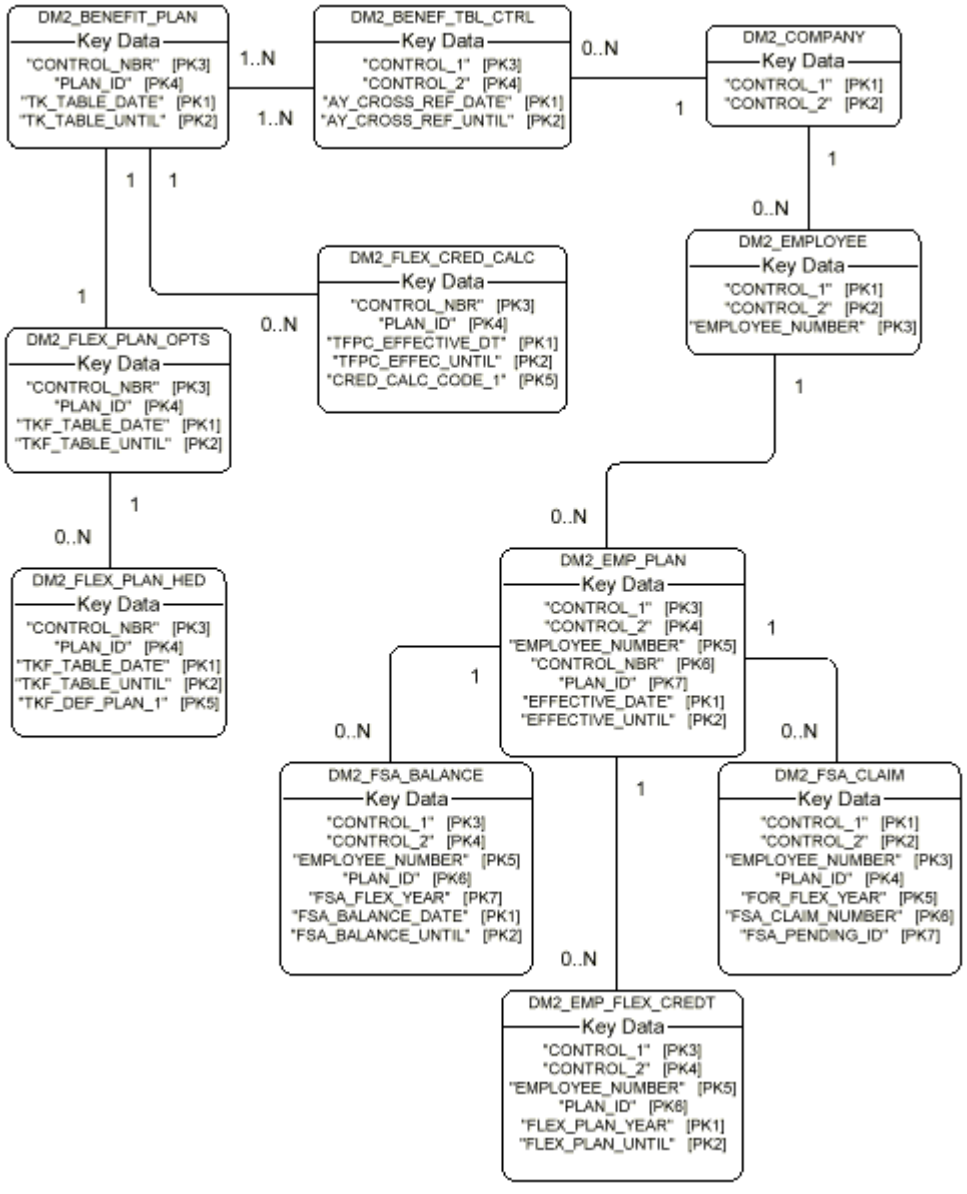
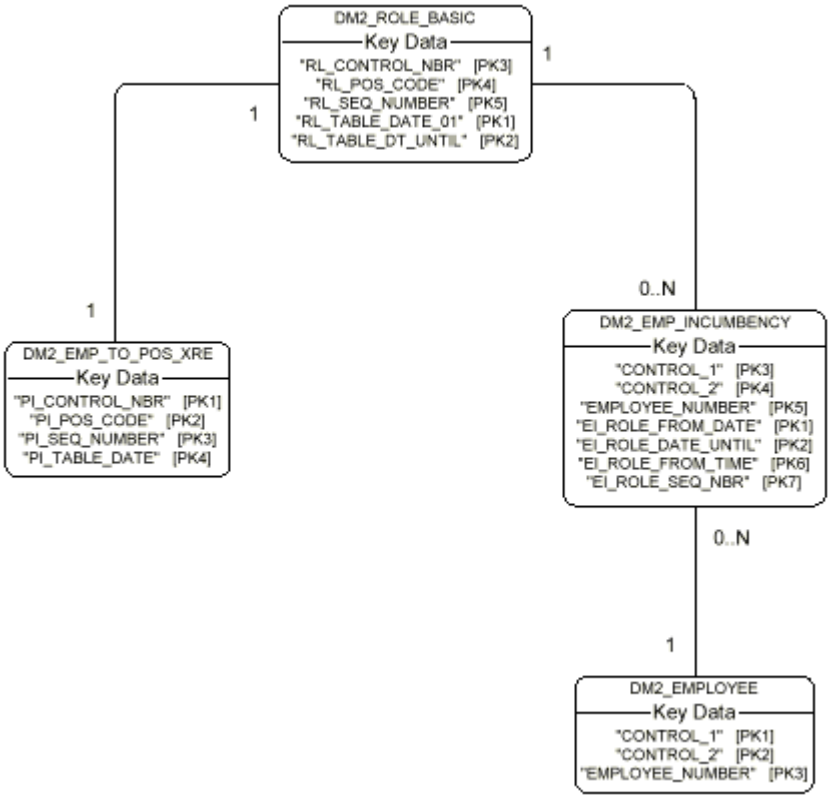
Job and Salary Table Information



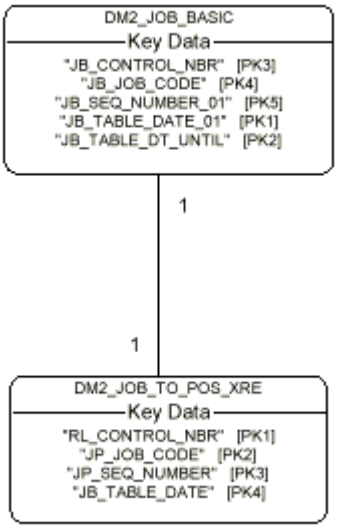
Plan Flex Rules, Definitions, Formulas and Balances



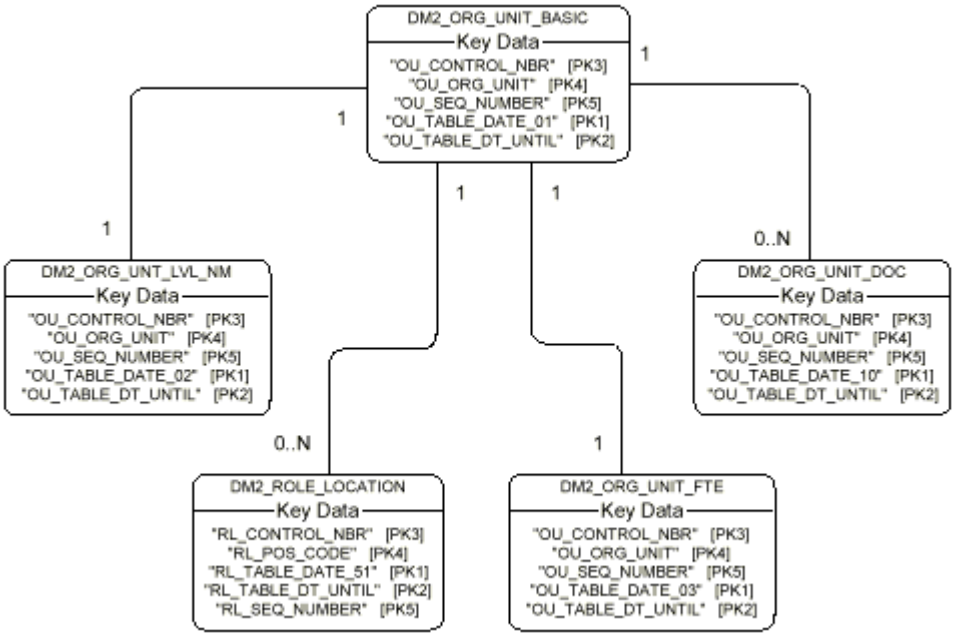
Position Administration—Incumbency



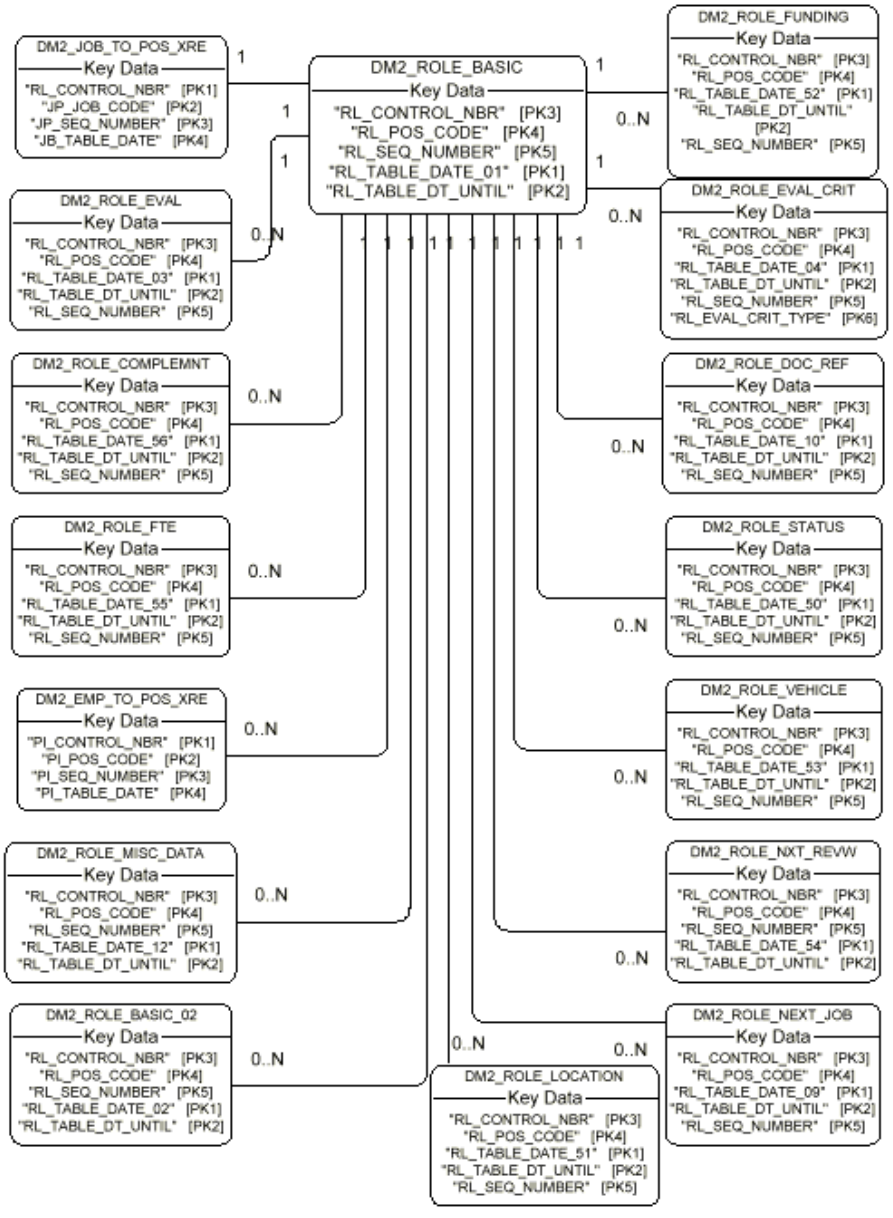
Position Administration—Job



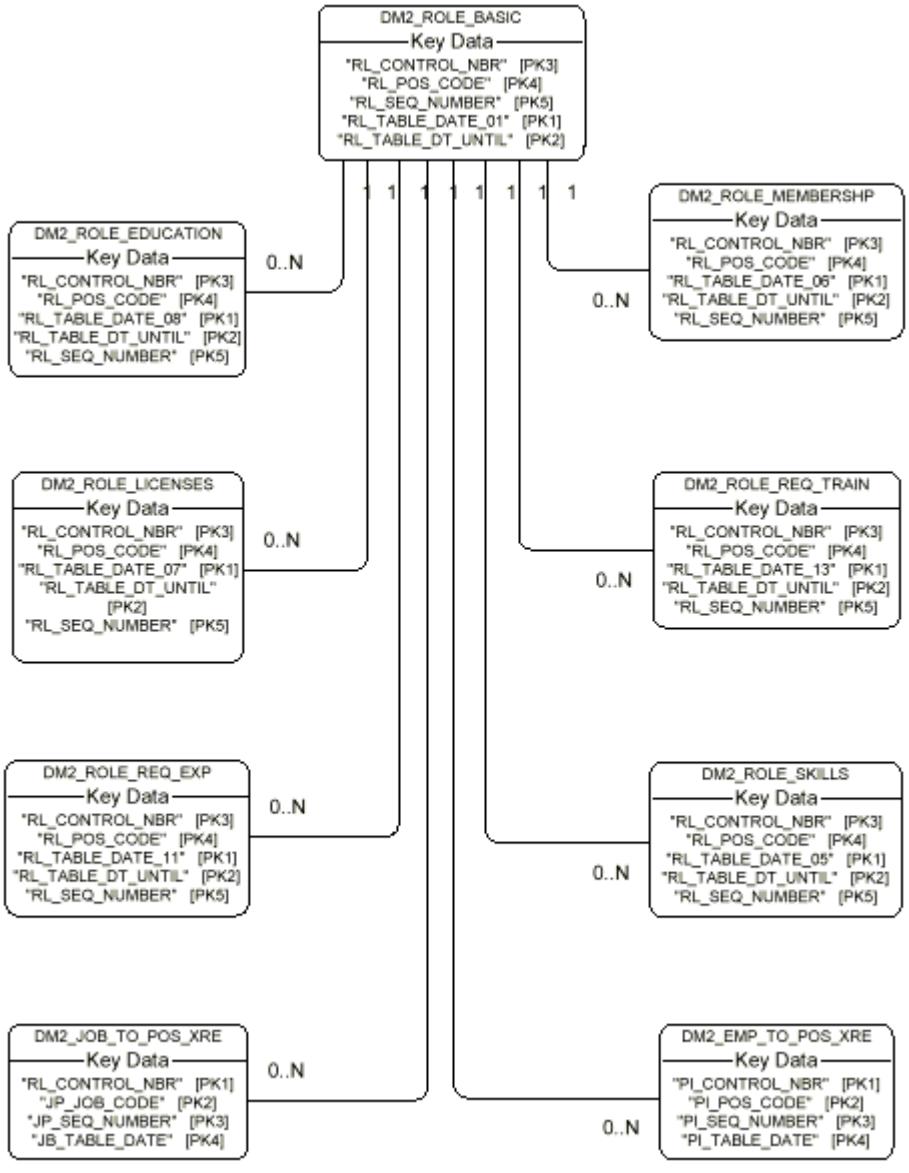
Position Administration—Org Unit



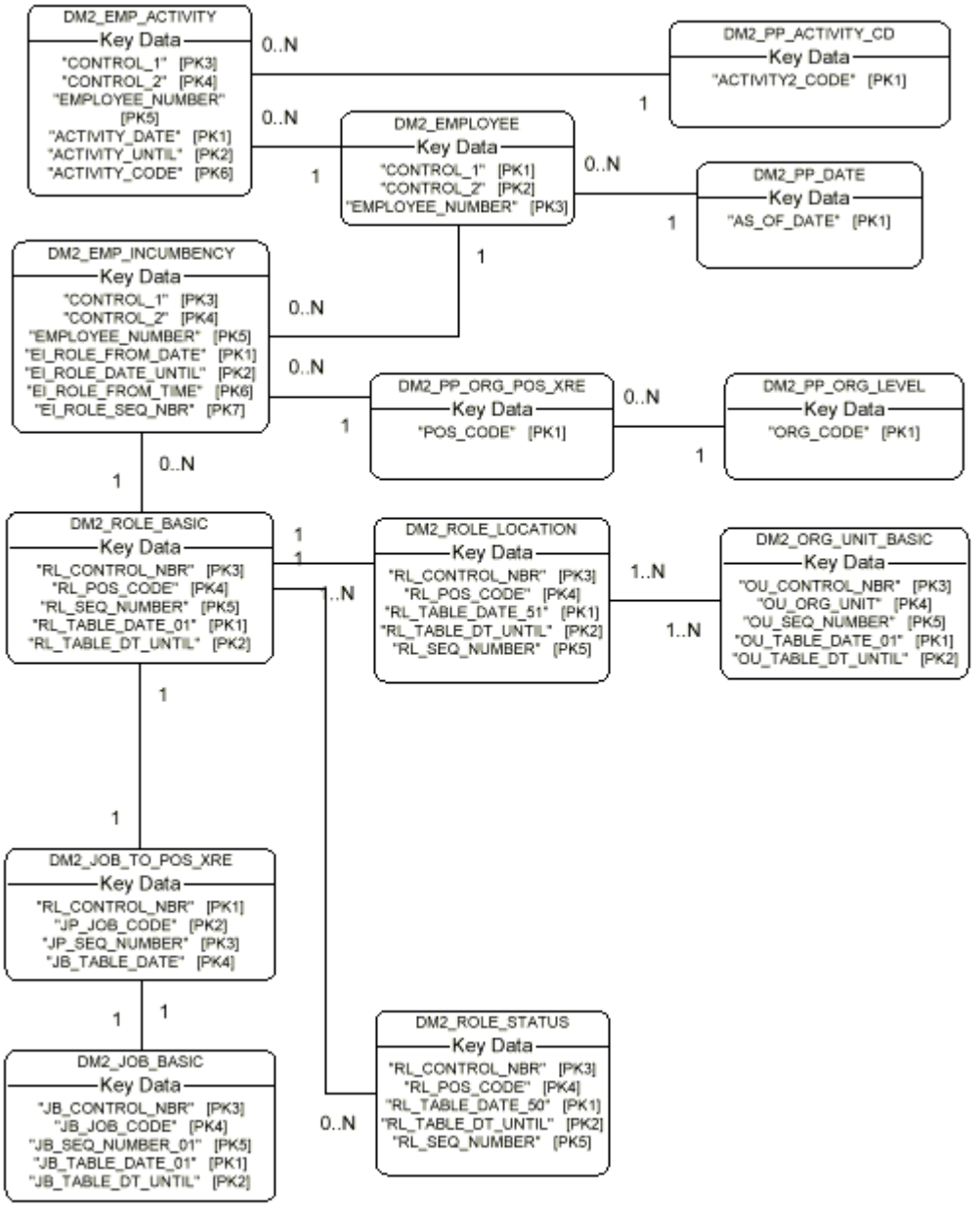
Position Administration—Position



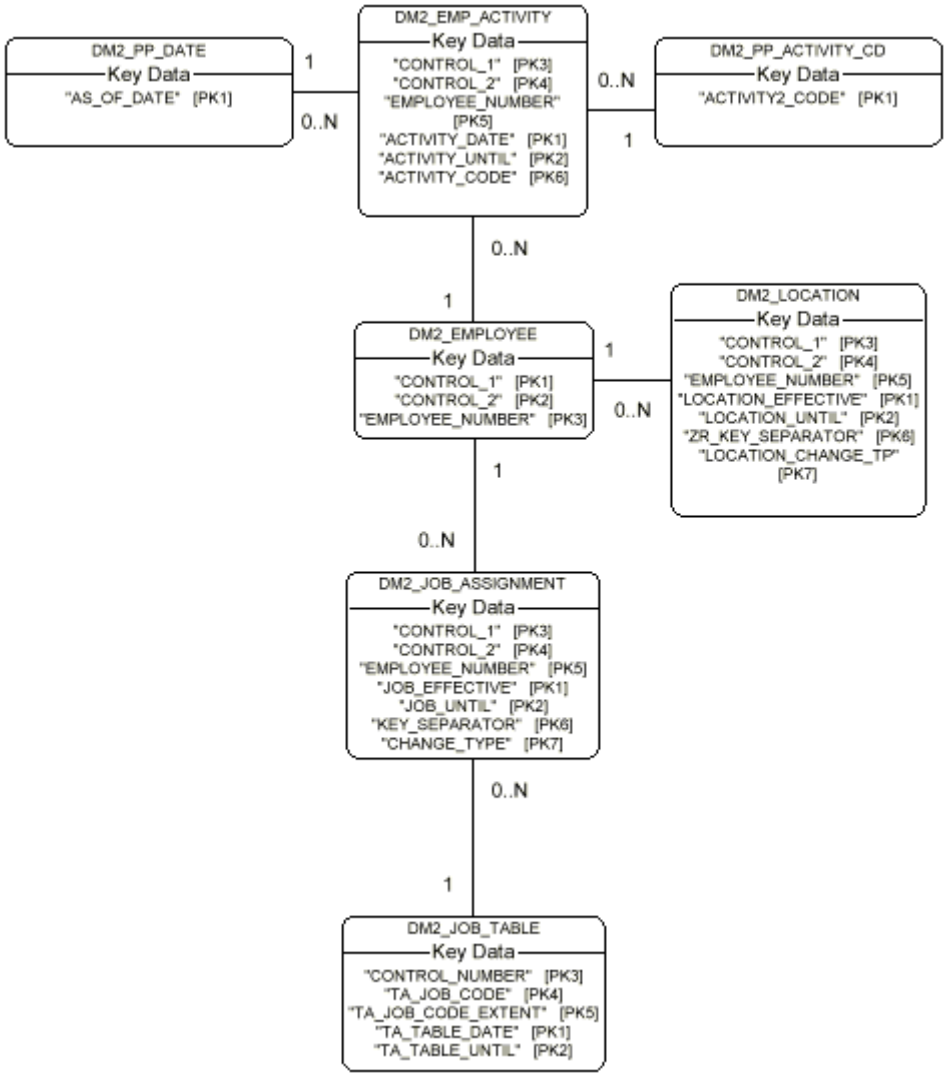
Position Administration—Position Requirements



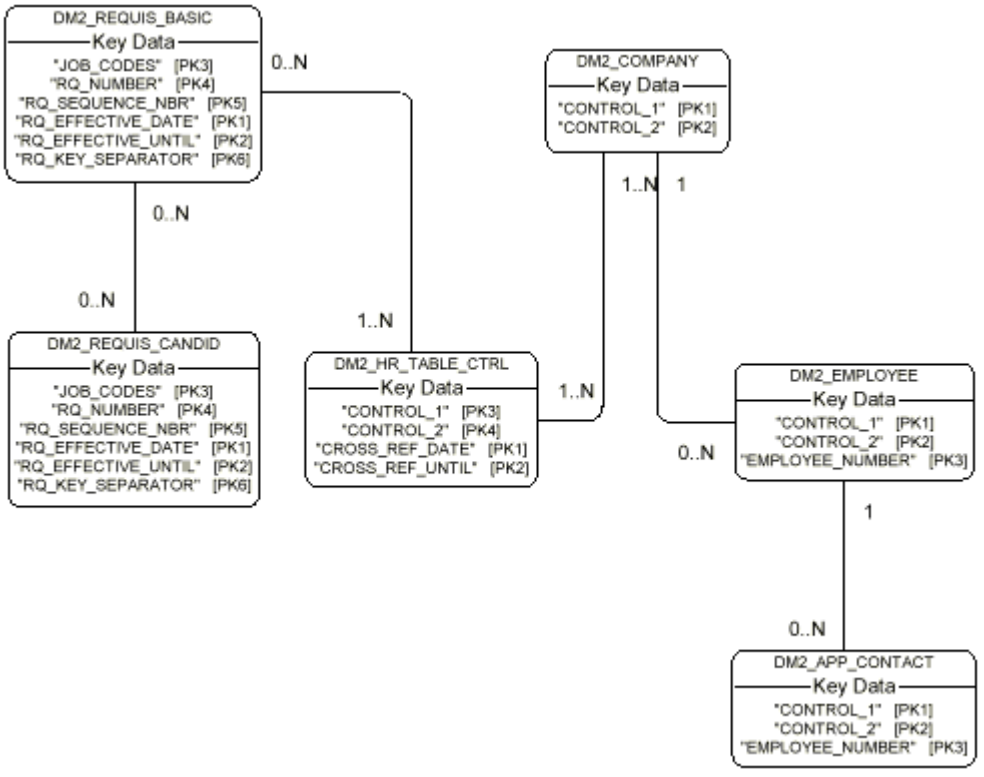
PowerPlay Model—Workforce Planning Organization (PM)



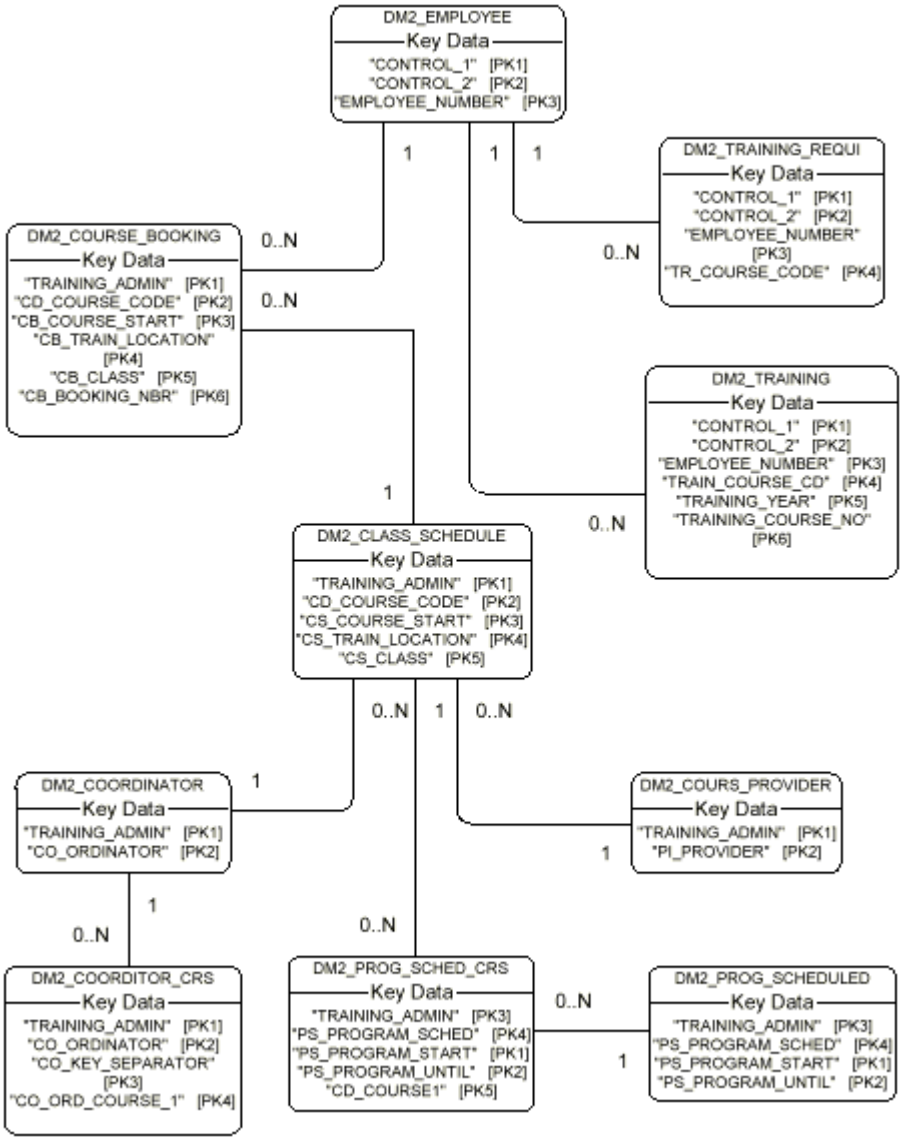
PowerPlay Model—Workforce Planning Organization (Non PM)



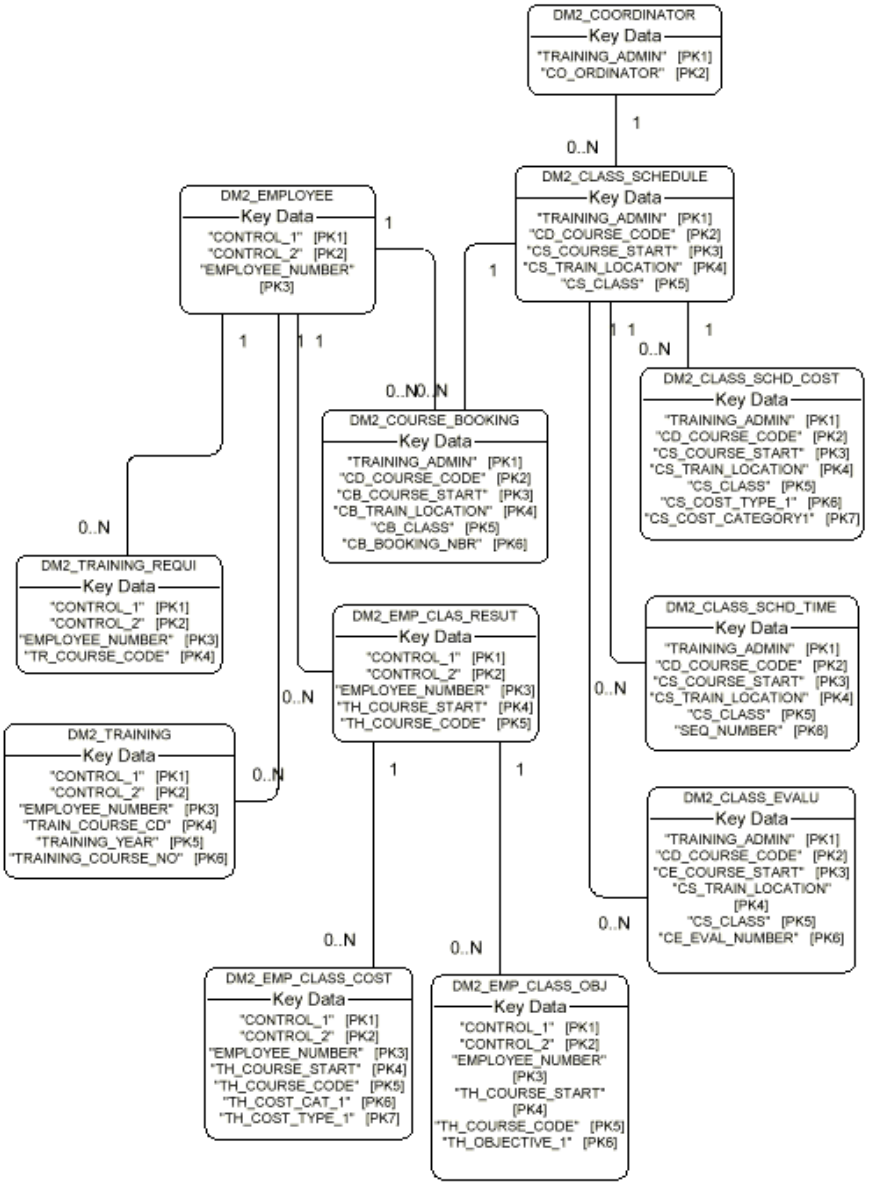
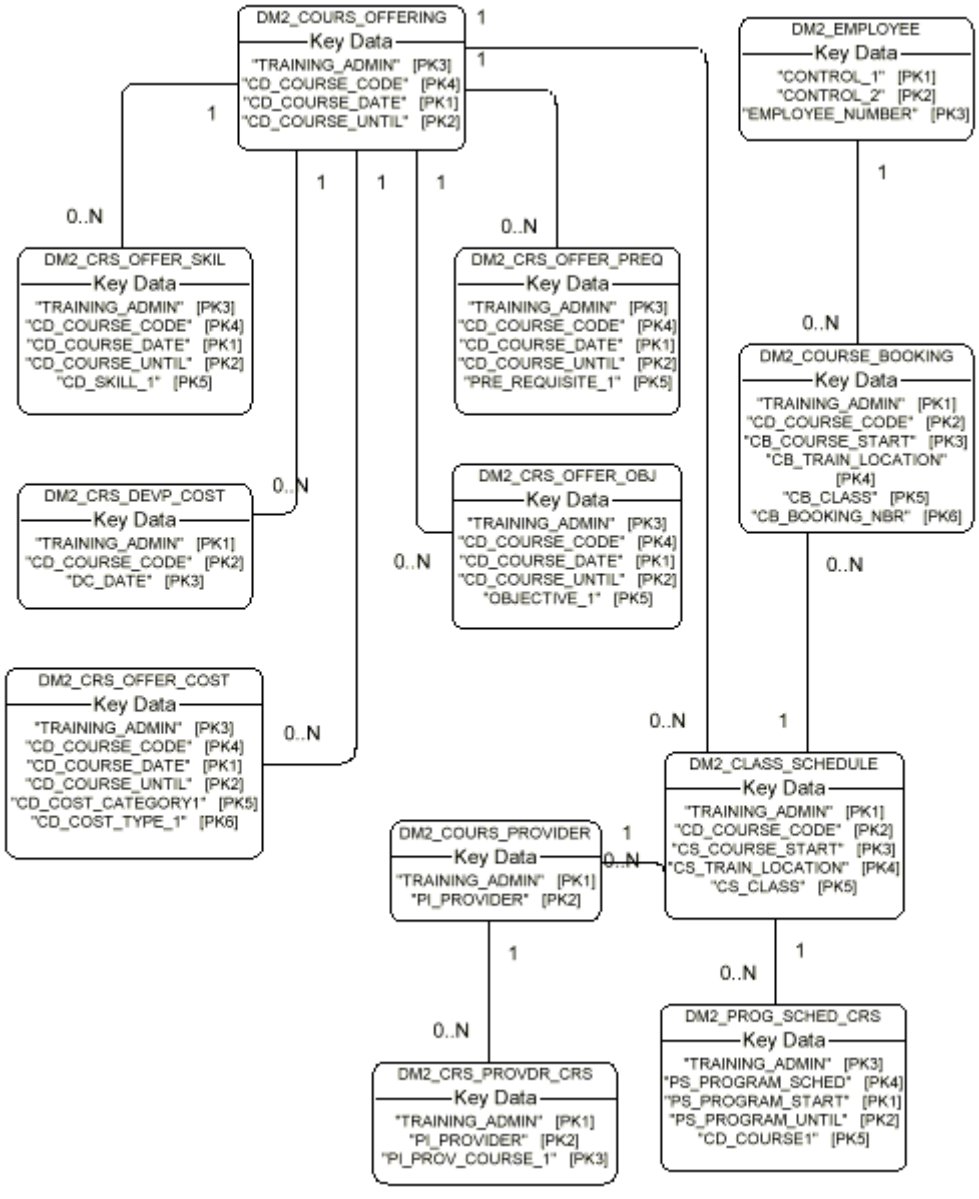
Requisition/Applicant Administration



Training Administration



Training Administration—Class Information



Training Administration—Course Information