Overview of Cyborg Reporting Options

2.0

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Introduction to Overview of Cyborg Reporting Options

The Solution Series provides a great deal of flexibility when you want to report on data in the system. This class provides an overview of the reporting options provided by The Solution Series.

Cyborg provides several tools within The Solution Series 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. The tools available to you with The Solution Series include:

- Solution View
- Reporting Administration
  - Cognos Impromptu
  - Cognos PowerPlay and Analytics
- Communications events

The types of reports that can be produced when reporting on information in The Solution Series include:

- Cyborg-delivered packaged reports
  - Cyborg Scripting Language (CSL) reports
  - Pay process reports
- Queries
- Reporting Administration reports

Scenario

During this class, an example report will be produced using some of the reporting tools discussed. This example should facilitate illustration and comparison. The report will be created using the criteria as outlined here:

The requirement is to produce a report that lists the following:

- The employees' legal name
- Their city and state
- Their annual salary
- The date of their next scheduled salary review

Only those employees who have a job code higher than 12550 and earn more than $35,000.00 annually need be displayed.

In addition, at the end of the list, there should be a count of employees listed, as well as a total and an average of their annual salaries.

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Packaged reports

Packaged reports are traditional reports produced to assist in the management of information within The Solution Series. These types of reports can be launched online to run as a background process or scheduled to run on a regular basis.

Cyborg-delivered reports

Cyborg delivers hundreds of packaged reports using Cyborg's Fourth Generation scripting language, Cyborg Scripting Language (CSL). These reports are available for use as delivered, or for customization. You can also use CSL or Solution View to create your own reports.

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

☞ *Refer to the Solution View documentation and training for details on how to create batch report programs using Solution View.*

To help you identify reports that your organization may wish to run, you can view the details and an example of each Cyborg-delivered report by using the Report Information icon in the Navigator:

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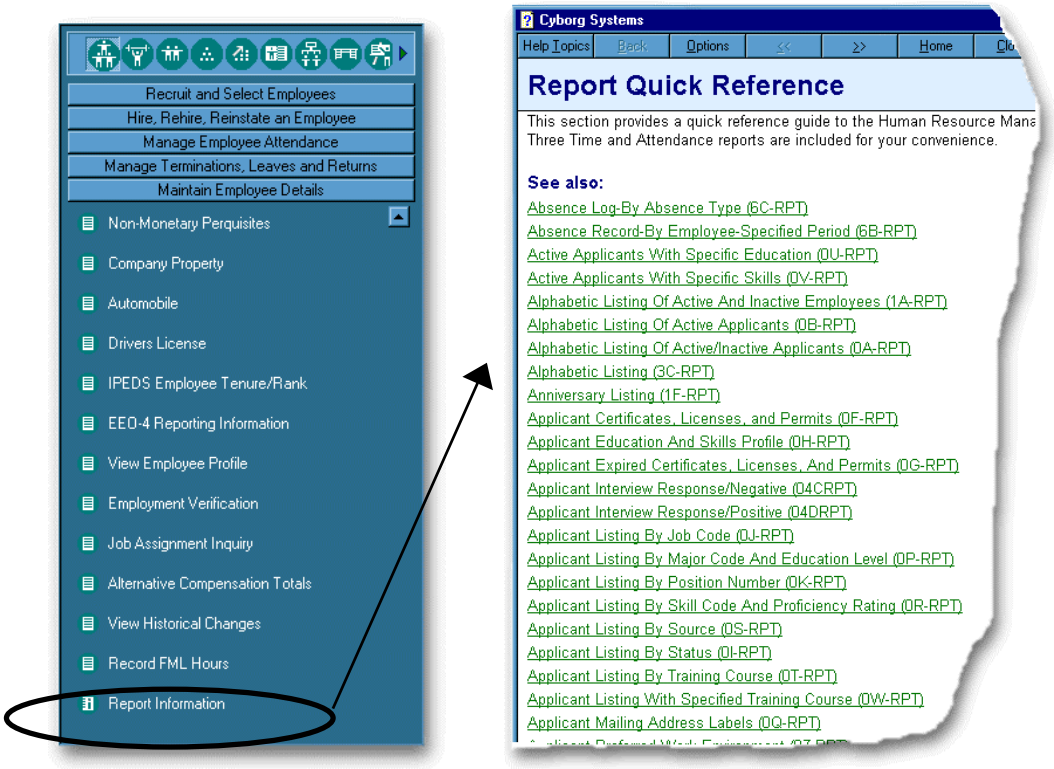

Alternatively, you could perform a search from within the online help to find which delivered reports may meet your reporting need (select Help ▶ Help on all of the Solution Series). For instance, you may wish to find out which of the delivered reports produces an alphabetic listing of employees. The example that follows shows how the Ask Me feature of the online help can be used to assist you:

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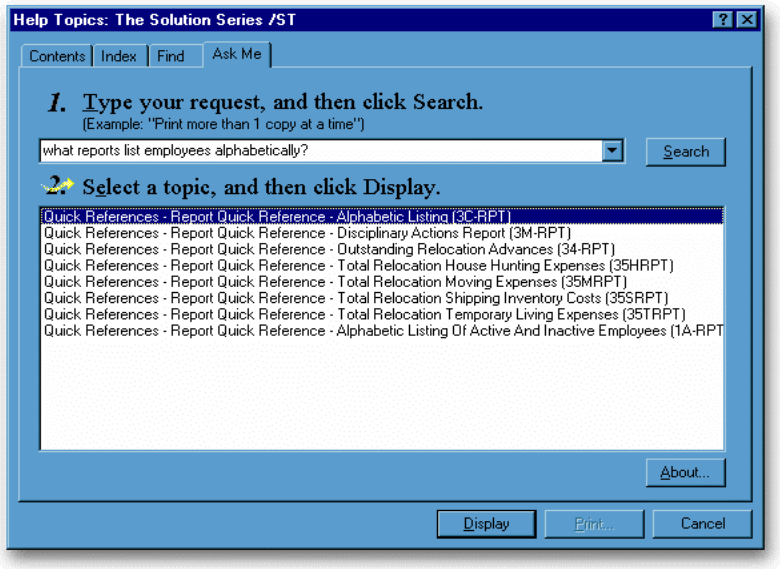

Double-clicking on one of the options presented will display some information on that report, as can be seen in the example that follows, and will also provide a link to an example of that report so that you can check to see if it contains the information that you need.

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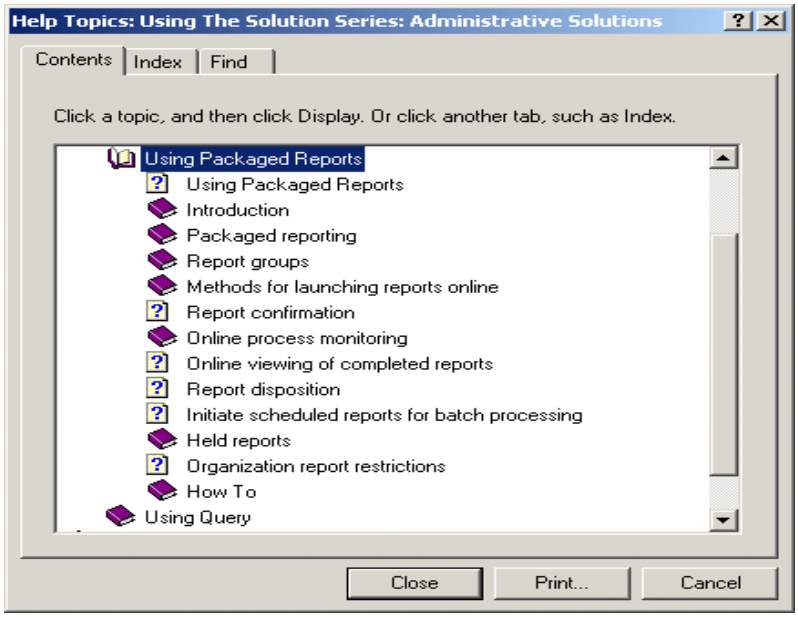

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Alphabetic Listing (3C-RPT)

Example

The Alphabetic Listing report (3C-RPT) provides an alphabetical listing of active employees on file. Modification instructions to print this report in strict alphabetical sequence (not by organization), are documented internally in the report source program.

Business Tasks

This report is used to complete the following business tasks:

- Review employee organization level information.
- Verify active employee total count.

Report field details

Column title	Description
Employee Name	Employee's legal name.
Control One	A value that represents the highest level of your company's hierarchy.
Control Two	A value that represents the second level of your company's hierarchy.
Control Three	Organization level 3 value assigned this employee.
Control Four	Organization level 4 value assigned this employee.
Control Five	Organization level 5 value assigned this employee.
Control Six	Organization level 6 value assigned this employee.
Employee Number	Unique employee identifier, up to 10 characters in length.
Social Security	Unique employee identifier used for taxation in the USA.

Report sort order

As delivered, the sort order of this report is CONTROL-1, CONTROL-2, and EMPLOYEE-NAME.

Parameter options and setup

There are no parameters specified for this report.

See also:

- Reports used for hiring, rehiring, reinstating, recalling, and transferring employees
  For information about this report.

Launching a report

When launching a report online, you have the choice of running reports directly from the Report Group Activities form (RGMSTR), from the menus and Navigator, or from checklists. For example, you could produce an employee listing of training courses by selecting the appropriate Cyborg-delivered (or customized) report from the Report Group Activities form (RGMSTR) and clicking the Execute button:

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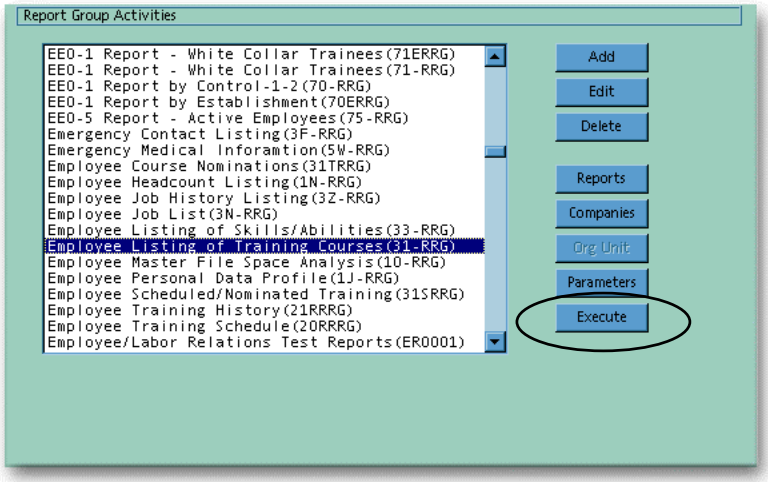
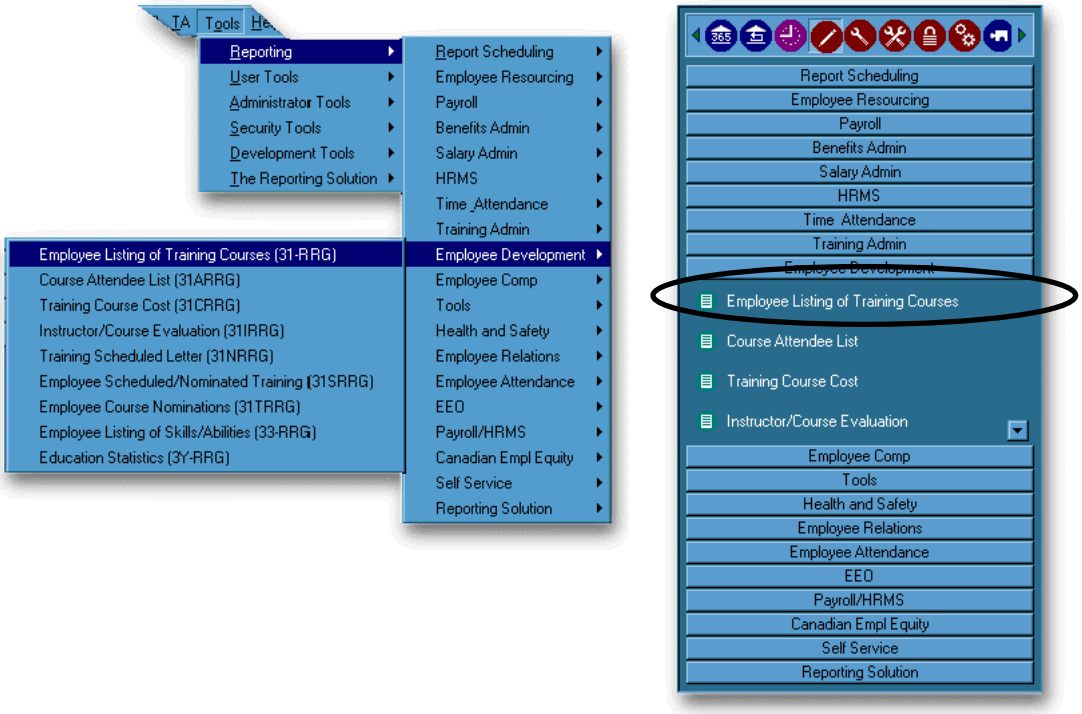


Or you could select it from the menu or Navigator:



The following chart shows the steps used in launching a report:

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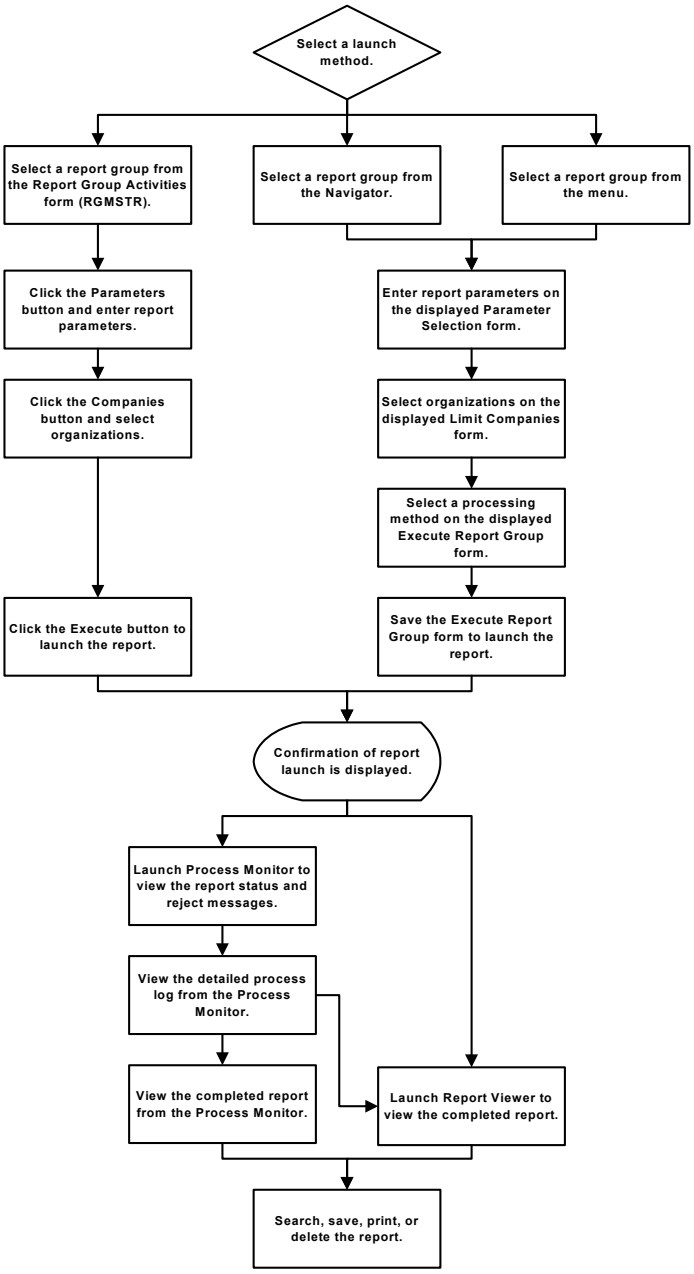
Overview of Cyborg Reporting Options



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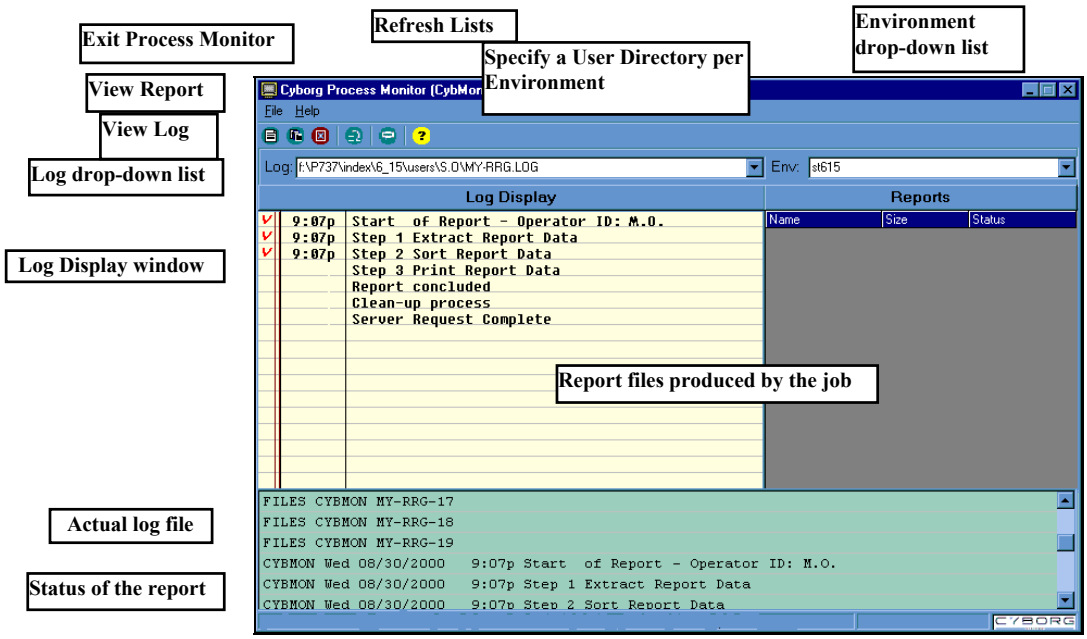
Monitoring report progress

You may find it helpful to monitor the progress of a report. If a report is expected to produce a very large output file, you may be able to determine and resolve significant errors before the report process ends.

Using the Process Monitor utility, you will be able to determine which processes and reports have been completed. You can also view and print the completed reports from the Process Monitor.

The Process Monitor utility

The Process Monitor utility allows you to view the progress of a report while it is running. It also stores logs of previously run reports. Using this utility, you can set up and select processes by 'environment', or by user.



☞ *Refer to the Using the Solution Series: Administrative Solutions documentation for further information on the Process Monitor utility.*

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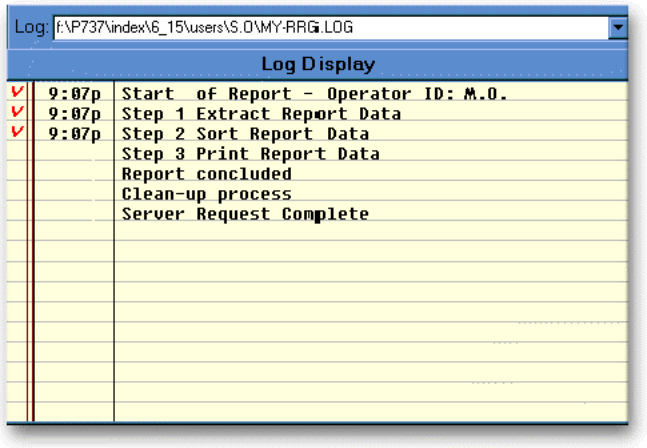
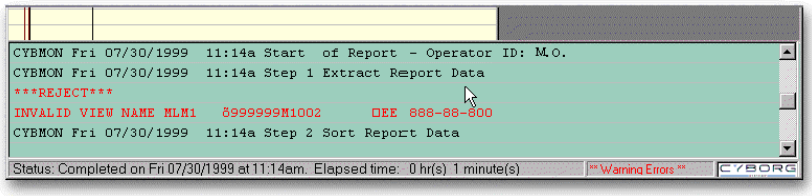
View the process log

You can view the process log in three different ways. First, the checklist in the Log Display window is a display of the log by steps. A checkmark and time stamp will signal the completion of the step.



After all the steps have been completed, the status bar at the bottom of the process log will display 'Completed'.

The second method to view the process log is the scroll window on the bottom section of the Process Monitor. This window will permit you to scroll through the file looking for messages or errors. Errors will be displayed in red. There will also be a red error message flashing ** Warning Errors ** on the status bar located at the bottom of the Process Monitor.



The third method to view the process log is to display it in a separate window. Display the entire log by using the View Log button or by selecting from the menu:

File ► View Log

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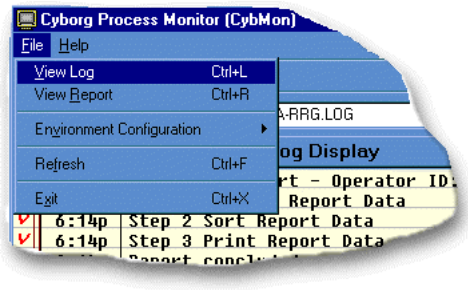
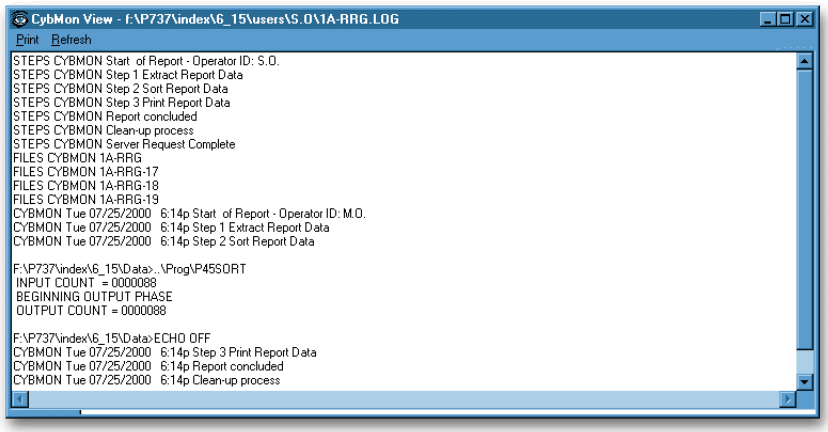


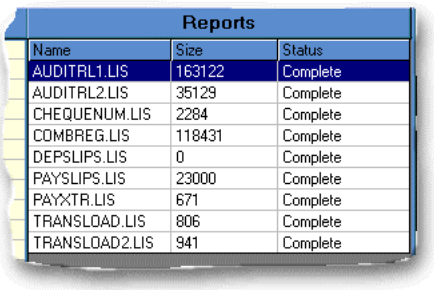
The log can be viewed, and then printed from the resulting window:



Note *if the process log is not complete, this window will not refresh automatically. Use the Refresh button to manually invoke the refresh function.*

Viewing a report from the Process Monitor

You may select a report to view by double-clicking on the report in the Reports window in the Process Monitor dialog. The Report Viewer utility is launched in a separate dialog and the selected report is displayed. Only reports that have an extension of LIS are viewable. LIW files are reports that are in progress.



Reports

Name	Size	Status
AUDITRL1.LIS	163122	Complete
AUDITRL2.LIS	35129	Complete
CHEQUENUM.LIS	2284	Complete
COMBREG.LIS	118431	Complete
DEPSLIPS.LIS	0	Complete
PAYSLIPS.LIS	23000	Complete
PAYXTR.LIS	671	Complete
TRANSLOAD.LIS	806	Complete
TRANSLOAD2.LIS	941	Complete

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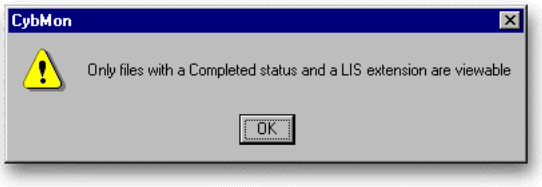
An error message is displayed if a file with an extension of LIW is selected:

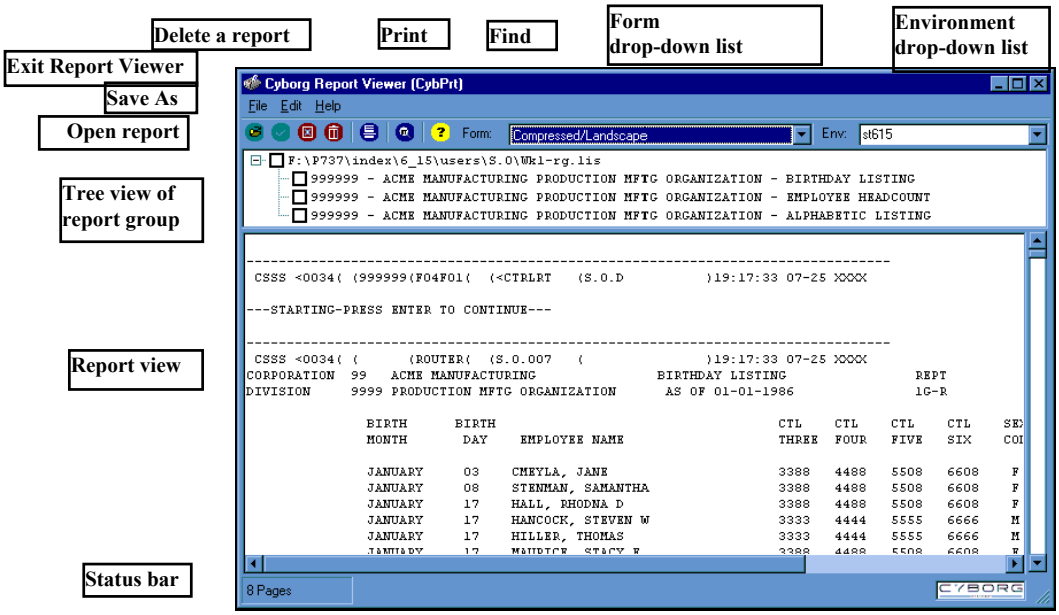


Online viewing of completed reports

After a report has been initiated online, you may want to review it prior to making the decision to save or print it. Viewing the report online provides you with an opportunity to review any errors and verify the report content and totals.

The Report Viewer is a Solution Series utility that provides a quick and intuitive method to manage, view, print, save, and delete selected reports.

The Report Viewer displays the completed report in a customizable window. The reports are stored in your own user folder, and you can customize your viewing and printing preferences. You can print all or selected portions of a report, and you can search and jump within reports. You can also save and delete reports.



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From the Report Viewer, you may select a report to view by clicking the Open Report button on the toolbar. The Open dialog will display all the output files available in the specified User directory. You may select a report (LIS file) from the list to view it.

The status bar at the bottom of the Report Viewer window displays the total number of pages in the report.

☞ *Refer to the Using the Solution Series: Administrative Solutions documentation for further information on the Report Viewer utility.*

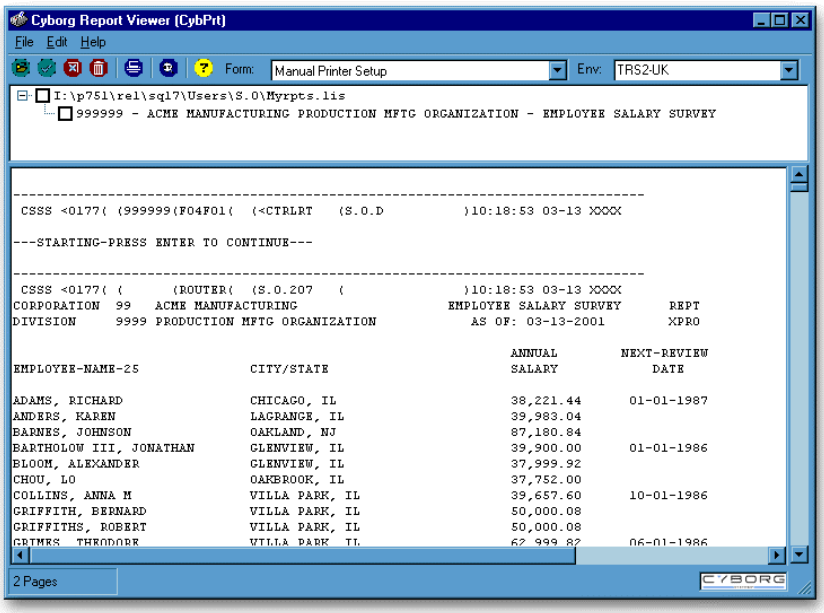
Scheduling a report

Rather than launching a report manually and viewing the results online, you could schedule a report to run automatically on a regular basis and get a printed output. You would need to arrange this with your System Administrator.

☞ *Refer to the Technical Administration documentation for details on running batch jobs.*

Scenario

To produce the required report as outlined in the scenario at the start of this chapter, you would need to create a Cyborg Scripting Language (CSL) program, or customize an existing CSL program. You would then add the report to a report group using the Report Group Activities form (RGMSTR), and to the Navigator, menu, or checklist, and run it online. The resulting report would look similar to the following example:



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Note *the example shown has been displayed online using Report Viewer (CYBPRT), but you could also view the report using the VIEW utility.*

The totals you requested are displayed at the end of the report:

```
GRIMES, THEODORE              VILLA PARK, IL                 62,999.82      06-01-1986
HALL, RHODNA D                CHICAGO, IL                1,662,970.40
JOHNSEN, RICH                 JAMAICA ESTATES, NY            68,499.96      11-01-1985
LANNON, PATRICE               EL SEGUNDO, CA                 44,200.00
LAUGHLIN, SANDRA T            EL SEGUNDO, CA                 45,000.00
MARGOLIS, DAVID               OAK LAWN, IL                   40,500.00
MOORE, SAMUEL                 JAMAICA ESTATES, NY            60,000.00      10-01-1985
MORITZ, KATHERINE C           EL SEGUNDO, CA                 45,000.00      09-01-1985
PATEL, LAURENCE               CHICAGO, IL                    43,314.96
TEACHEN, JUDITH               VILLA PARK, IL                 86,720.00

*CONTROL-1-2     999999                                  2,529,900.14
 EMPLOYEE COUNT:     19
 AVERAGES:                                                 133,152.64

*REPORT CODE     XPRO                                    2,529,900.14
 EMPLOYEE COUNT:     19
 AVERAGES:                                                 133,152.64

--------------------------------------------------------------------------------
 CSSS <0177( (      (RTPRNT(  (XPROP     (              )10:18:53 03-13 XXXX

----Complete----
```

☞ *Refer to the CSL training materials for further information on creating or customizing CSL programs.*

Pay process reports

Some reports are delivered and run by the payroll process. Pay process reports must be selected (and loaded) before you process the payroll, using the Report Requests form (DD-SCR). This does not mean that you must select the same reports each time you process payroll—once you have established a report's selection criteria on the Report Requests form (DD-SCR), its Report Select value remains for all subsequent payroll runs until you turn it off.

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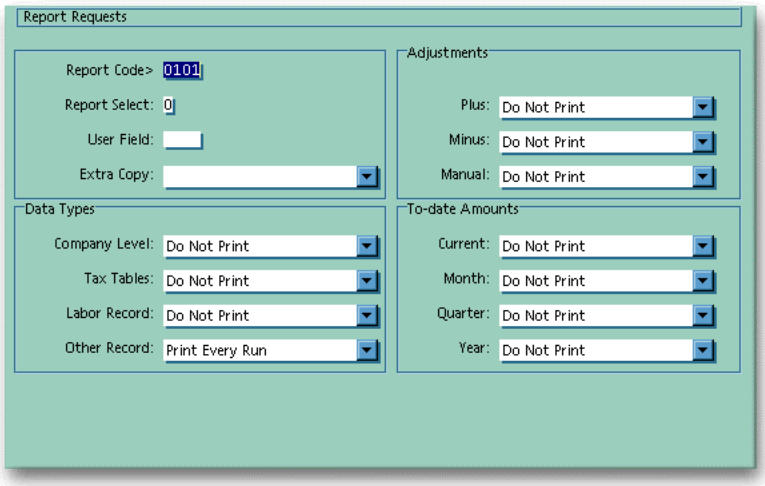

The Report Requests form (DD-SCR) is used to add, change, or delete report requests by organization. The various fields determine whether the report has been requested for execution during a payroll or maintenance run and what type of information will be reported from the organization and employee records. Report requests are maintained in a portion of the organization-level setup.

☞ *Refer to the Payroll Reports and Balancing documentation and training for further information on setting up and scheduling payroll reportsl.*

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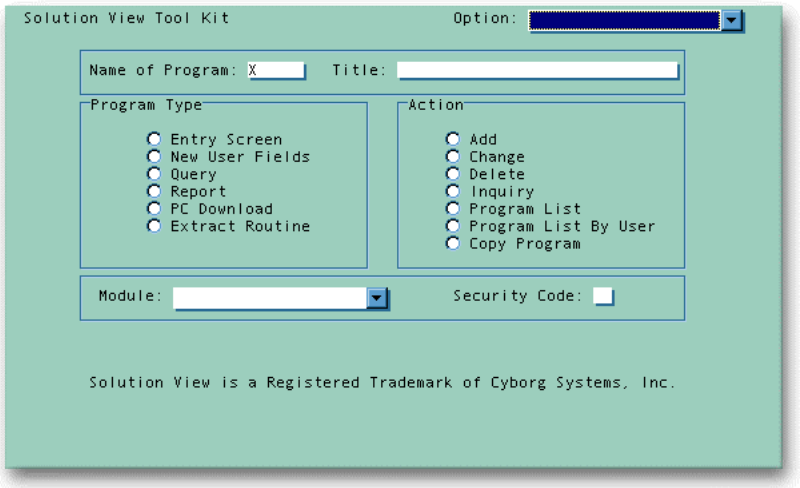
Solution View

Solution View is a delivered user tool for developing forms, fields, on-request queries, extracts, and reports. It provides live data access across all system components. With Solution View you have the ability to specify data fields to be displayed and utilize a comprehensive range of mathematical operations (such as total, average, and count).



Solution View consists of two main components:

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

Query Writer

The Query Writer is a Solution View tool used to write programs that are run online by the Query program. The data you request is displayed on a series of forms that can be viewed consecutively, and totals can be displayed at the end of the report. You are not required to know the Cyborg Scripting Language (CSL) programming language.

Solution View allows you to create a query that generates the specific information you want using live data.

Queries are typically used for getting specific information quickly and easily, rather than reporting on more complicated information. For example, you need to establish which employees have a certain code in a particular field as you are considering amending an option list, and you want to be sure that you know which employee fields will be affected. You could, in this case, create a query and run it using the Query dialog box.

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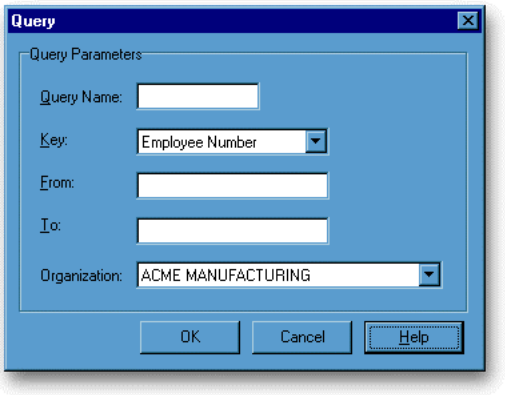
Launching a query

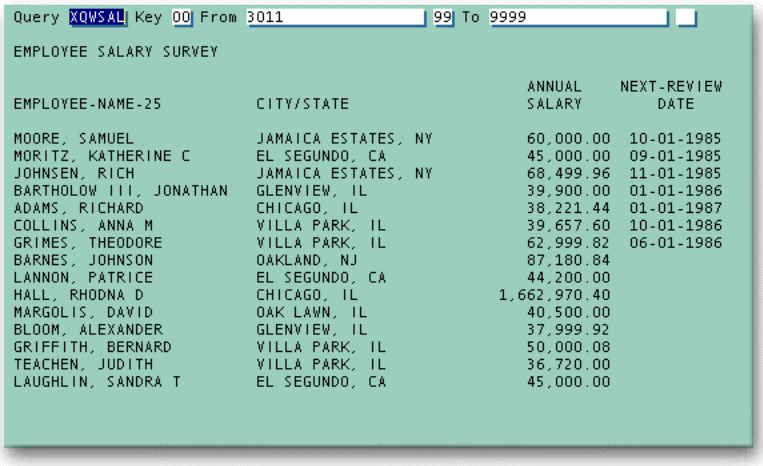
It is not possible to launch a query from the Report Group Activities form (RGMSTR). Rather, you would view the query online using the Query dialog box:



Depending on which option you select as the Key, you can display the report by Employee Number, Employee Social Security Number, or Employee Name. The From and To options allow you to select a range of employees to be shown in the report. The resulting report displays and lists all employees who fit the criteria of the Query program and who are within the range of the From and To fields.

Scenario

Using Query to produce the report outlined in the scenario, the resulting report would resemble the following example:



Query XQWSAL Key 00 From 3011 99 To 9999

EMPLOYEE SALARY SURVEY

EMPLOYEE-NAME-25	CITY/STATE	ANNUAL SALARY	NEXT-REVIEW DATE
MOORE, SAMUEL	JAMAICA ESTATES, NY	60,000.00	10-01-1985
MORITZ, KATHERINE C	EL SEGUNDO, CA	45,000.00	09-01-1985
JOHNSEN, RICH	JAMAICA ESTATES, NY	68,499.96	11-01-1985
BARTHOLOW III, JONATHAN	GLENVIEW, IL	39,900.00	01-01-1986
ADAMS, RICHARD	CHICAGO, IL	38,221.44	01-01-1987
COLLINS, ANNA M	VILLA PARK, IL	39,657.60	10-01-1986
GRIMES, THEODORE	VILLA PARK, IL	62,999.82	06-01-1986
BARNES, JOHNSON	OAKLAND, NJ	87,180.84	
LANNON, PATRICE	EL SEGUNDO, CA	44,200.00	
HALL, RHODNA D	CHICAGO, IL	1,662,970.40	
MARGOLIS, DAVID	OAK LAWN, IL	40,500.00	
BLOOM, ALEXANDER	GLENVIEW, IL	37,999.92	
GRIFFITH, BERNARD	VILLA PARK, IL	50,000.08	
TEACHEN, JUDITH	VILLA PARK, IL	36,720.00	
LAUGHLIN, SANDRA T	EL SEGUNDO, CA	45,000.00	

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If the report extends to more than one page, pressing Enter will allow you to view the rest of the report, one form at a time. A prompt will show when the totals are ready to be displayed:

```
NDERS, KAREN            LAGRANGE, IL                39,983.04
RIFFITHS, ROBERT        VILLA PARK, IL              50,000.08

Totals for QUERY program XQWSAL ready to be displayed. Press your ENTER key.
```

Pressing Enter will display the requested totals:

```
                    TOTALS FOR QUERY PROGRAM XQWSAL:

EMPLOYEE COUNT:                              19

ANNUAL-SALARY:                    2,529,900.14  AVERAGE:        133,152.64


----Complete----

                00  Employee Number
                01  Employee Soc Sec Nbr
                02  Employee Name
                    See Documentation for Others
```

A hard-copy of your Query report may be produced by executing Query in batch mode.

☞ *Refer to the Technical Administration documentation for details on running batch jobs.*

☞ *Refer to Using Solution View training materials for further information on Query Writer.*

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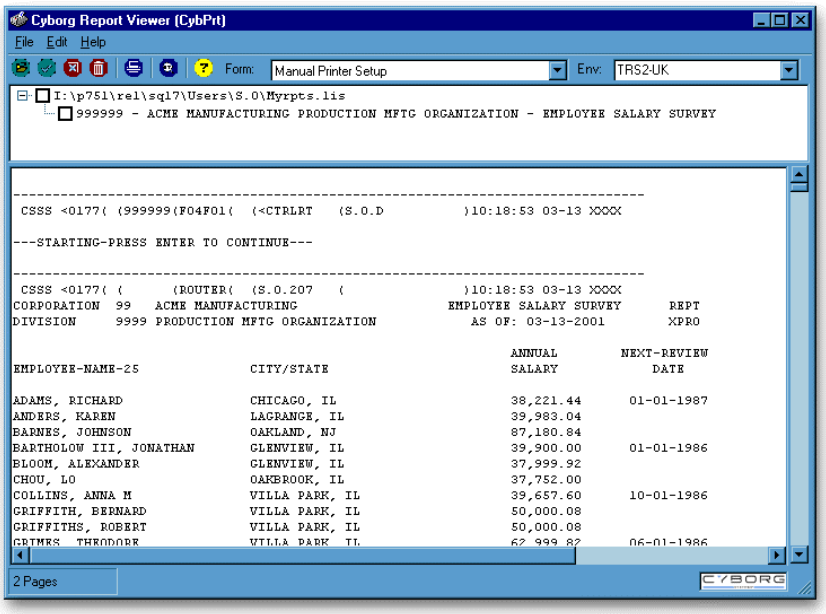
Report Writer

Similar to Solution View Query, the Solution View Report Writer is a report writing tool that helps you create The Solution Series batch reports without needing to write Cyborg Scripting Language (CSL) code. Once you have written the report, using the formatted forms provided, you can add the report to a report group using the Report Group Activities form (RGMSTR), (and, if you wish, to the menus, Navigator, and checklists), and run it just like the Cyborg-delivered CSL reports.

Scenario

To produce the required report as outlined in the scenario earlier in this chapter, you would need to create a Cyborg Scripting Language (CSL) program using Solution View Report Writer, (or you could amend an existing CSL program). You would then add the report to a report group using the Report Group Activities form (RGMSTR), and to the Navigator, menu, or checklist, and run it online. The resulting report would look similar to the following example:



Note *The example shown has been displayed online using Report Viewer (CYBPRT), but you could also view the report using the VIEW utility.*

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The totals you requested are displayed at the end of the report:

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GRIMES, THEODORE              VILLA PARK, IL                 62,999.82      06-01-1986
HALL, RHODNA D                CHICAGO, IL                1,662,970.40
JOHNSEN, RICH                 JAMAICA ESTATES, NY            68,499.96      11-01-1985
LANNON, PATRICE               EL SEGUNDO, CA                 44,200.00
LAUGHLIN, SANDRA T            EL SEGUNDO, CA                 45,000.00
MARGOLIS, DAVID               OAK LAWN, IL                   40,500.00
MOORE, SAMUEL                 JAMAICA ESTATES, NY            60,000.00      10-01-1985
MORITZ, KATHERINE C           EL SEGUNDO, CA                 45,000.00      09-01-1985
PATEL, LAURENCE               CHICAGO, IL                    43,314.96
TEACHEN, JUDITH               VILLA PARK, IL                 36,720.00

*CONTROL-1-2     999999                                   2,529,900.14
 EMPLOYEE COUNT:     19
 AVERAGES:                                                  133,152.64

*REPORT CODE     XPRO                                     2,529,900.14
 EMPLOYEE COUNT:     19
 AVERAGES:                                                  133,152.64

-------------------------------------------------------------------------------
 CSSS <0177( (      (RTPRNT(  (XPROP     (               )10:18:53 03-13 XXXX

----Complete----
```

☞ *Refer to Using Solution View training materials for further information on Report Writer.*

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Communication events

In addition to recording and reporting on employee information in The Solution Series, your workflow process may require that some of that information be communicated to the employee or other areas of your organization. The Solution Series provides a communication events tool for this purpose.

Communication events are letters or emails that can be triggered automatically or manually within The Solution Series. Communication events include data from the current form or record. For example, you could set up a communication event that automatically generates a salary increase confirmation letter to an employee when his or her salary is changed on the Salary Assignment/Changes form (40-SCR).

Workflow management can be substantially enhanced when you implement communication events to replace the often unwieldy task of communicating manually. Coupled with the speed of email to reach the recipients at your location and around the world, keeping people informed about updates to The Solution Series employee database through automated events can help to improve the overall performance of your organization.

After it has been implemented, a communication event is system-wide and available to all system users. However, each user can specify unique options to provide departmental flexibility. Consider the following examples of ways to use the communications event process to improve workflow and communications capabilities throughout your organization:

- Email notifications to managers about applicants or candidates
- Welcome letters based on new hire information
- Email confirmations of employee job and location changes
- Congratulatory letters for employee promotions
- Email notifications of employee transfers or leaves of absence
- Scheduling confirmations for annual reviews
- Salary and salary range change notifications
- Disciplinary action and grievance communications
- Email notifications of training course refund information

☞ *Refer to the Optimizing System Features documentation for further information on implementing communications events.*

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Letter communication event

A letter communication event provides your organization with the ability to automatically generate customized letters based on specific trigger parameters. It can be triggered automatically or manually.

Microsoft Word template and merge features are included in the letter communication event process. All the functionality will work as described by Microsoft while creating the letter text. In addition, you will be able to insert fields from The Solution Series forms into the text so that employee-specific information can be automatically displayed.

The following example could be the text of a letter that is sent to an employee who has been awarded a bonus or commission:

«Date_Recorded»

Congratulations «Employee_Name»,

You have been awarded a «HED_Xref» in the amount of $«Amount_Awarded». You will receive this amount on «Date_Paid».

Sincerely,

G. Zarmin
Vice President, HR

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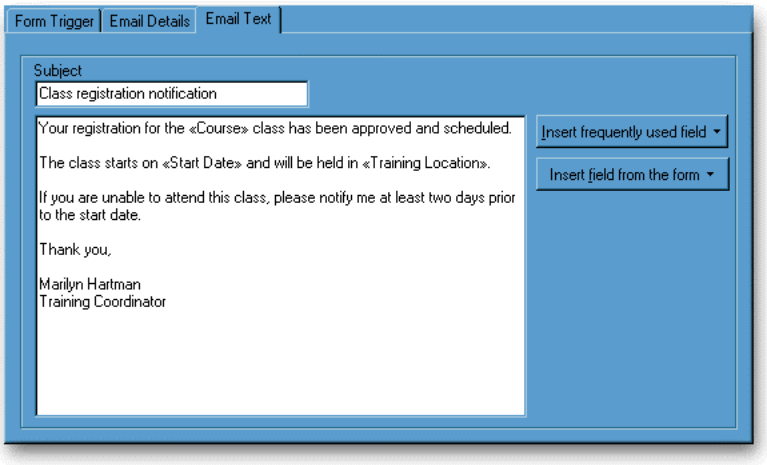
Email communication event

An email communication event provides your organization with more capabilities than standard email software. You are provided with multiple methods for specifying the email recipient. In addition, you are able to insert data from The Solution Series forms into the text, so that employee-specific information can be automatically displayed.

The following example could be the text of an email that is sent to an employee on registration for a class:



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Reporting Administration

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

- Additional functionality in The Solution Series so you can launch the Cognos reporting tools directly from The Solution Series.
- Cognos reporting tools (Impromptu, PowerPlay).
- Cyborg-specific Impromptu catalogs for the delivered Data Mart, which promote intuitive user access to the data extracted from The Solution Series and placed in the datamart.
- Support for Cognos' PowerPlay Online Analytical Processing (OLAP) package and the delivered Workforce Planning Models.

Extract

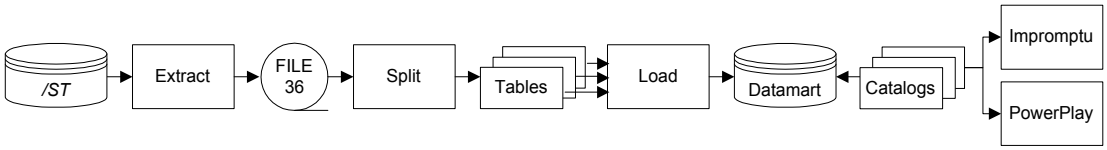
Data from The Solution Series is extracted and then loaded into the Workforce Data mart. The data is then available for access by the Cognos tools, Impromptu and PowerPlay, through the catalogs and cubes.

The baseline of activities necessary to (re)populate the datamart can be logically divided into three stages:

- Extracting all necessary data from The Solution Series
- Splitting the extracted data into per-table groupings (files)
- Loading the data for each table individually into the Workforce 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 the System Control Repository and Employee Database and places the copied data in the Datamart Extract File (FILE36), a temporary system file. A COBOL program, the Datamart Extract File Splitter (RSPLIT), creates separate files for every representative table, with the Datamart Extract File as input. A script generated by the extract process truncates (empties) the target datamart table via a platform-specific interpreter. A bulk loader then loads the data from the tables created by the splitter program into the datamart table.

The following figure depicts the extraction process:



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The core system extract has been enhanced to support both a full or incremental extract. The system administrator has the ability to run the extract in Full or Incremental mode. After implementation a full core system extract will be performed. Afterwards, organizations may employ the incremental extract methodology to improve system performance. The incremental extract only occurs for employee-level segments since the last extract. The incremental extract process only works for the employee level data extracts and does not apply to Position Administration or Company data.

Note *The data in the Workforce Data Mart is only as current as the last extract. How frequently an extract is run is dependent on your organization's needs.*

Data mart

The extract process automatically (re)populates the 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 Management Information
- Earnings and Deductions
- Labor and History
- Training Administration
- Employee Skills, Competencies, and Abilities
- Benefits Administration

When the data is pulled from The Solution Series during the extract process, Reporting Administration is able to automatically populate its tables, making the data available for users to report upon.

☞ *Refer to The Solution Series Data Model for detailed information on the datamart.*

Impromptu

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

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.

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.

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Four catalogs, essential for Cognos Impromptu to report on Solution Series data, are delivered with Reporting Administration:

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

Scenario

Using Impromptu, the report produced for the common scenario we are using would resemble the following sample:

Date: 03/15/2001

Employee Annual Salary

EE Legal Name - Last, First	City/State-EE	EE Annual Salary	Next Review Date
ADAMS, RICHARD	CHICAGO, IL	38221.44	01-01-1987
ANDERS, KAREN	LAGRANGE, IL	39983.04	
BARNES, JOHNSON	OAKLAND, NJ	87180.84	
BARTHOLOW III, JONATHAN	GLENVIEW, IL	39900.00	01-01-1986
BLOOM, ALEXANDER	GLENVIEW, IL	37999.92	
CHOU, LO	OAKBROOK, IL	37752.00	
COLLINS, ANNA MARIE	VILLA PARK, IL	39657.60	10-01-1986
GRIFFITH, BERNARD	VILLA PARK, IL	50000.08	
GRIFFITHS, ROBERT	VILLA PARK, IL	50000.08	
GRIMES, THEODORE	VILLA PARK, IL	62999.82	06-01-1986
JOHNSEN, RICH DANIEL	JAMAICA ESTATES, NY	68499.96	11-01-1985
MOORE, SAMUEL	JAMAICA ESTATES, NY	60000.00	10-01-1985

Once created, this report can be sorted or formatted online to achieve a polished result.

☞ *Refer to the Using Reporting Administration training materials for further details on using Impromptu.*

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 and summarize data for use in PowerPlay. The delivered Cyborg datamart 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

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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 PositionAdministration.

☞ *Refer to the Using Reporting Administration training materials for further details on using PowerPlay.*

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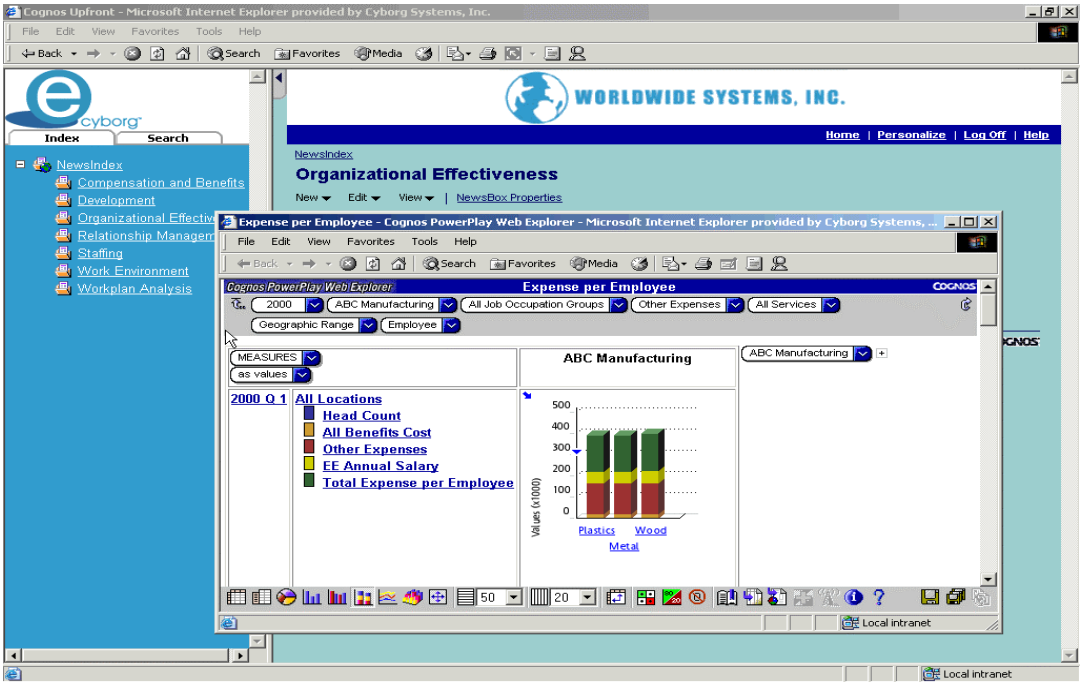
Analytics

eCyborg Analytics refers to the web-based capabilities offered through Cognos' PowerPlay Web product. Customers can access their analytics cubes anywhere, anytime through a browser. eCyborg 5.0 featured two delivered PowerPlay models (cubes): one for Position Administration and one for non-Position Administration data; these cubes are currently offered with Reporting Administration.

eCyborg 5.1 Analytics seeks to further enhance an organization's ability to measure and analyze the performance of their employees by offering three, possibly four, new analytics models. These cubes will be created using PowerPlay. Once created, the models are able to be viewed via PowerPlay Web. When data is updated, users must refresh the cube data using PowerPlay (at the Client level). This cannot be done using PowerPlay Web as it is a read-only application.



The new models being delivered are:

- Turnover Analysis
- Time Away (Absence) Analysis
- Work Related Injury Analysis

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Analytics Cubes

Turnover Analysis Model

This cube allows an organization to evaluate its turnover from a number of different employee, organizational structure and occupation perspectives. Analysis can be performed on the employee demographics of gender, age, and length of service. Analysis can also be performed against structural elements of the organization such as organization units, jobs, and positions. The reasons that employees are leaving can be evaluated against these elements to pinpoint problem areas and areas of success.

Time Away (Absence) Analysis Model

This cube allows an organization to evaluate its absenteeism as an employee relations or relationship management metric. Determining whether absenteeism is increasing or decreasing is important and being able to pinpoint segments of high absenteeism to determine the root cause of this absenteeism is the first step in determining most effective corrective initiatives.

Work Related Injury Analysis Model

This cube provides an organization with the ability to evaluate the work-related injury history from the perspective of severity and frequency. The alternate drill-down paths from Injury Category through to the specific injury description allow the user to evaluate severity along with the additional measures of number of days lost and number of days restricted. This evaluation can be performed for the organization as a whole or down through the organizational structure to pinpoint problem areas and areas that are showing improvement. Employee demographics of age, sex and length of service can be evaluated in relation to the other dimensions. Occupations groups, jobs and positions add more dimensions for analysis.

Compensation Change Analysis Model

This cube allows the organization to evaluate changes in monetary compensation specific salary, bonuses, commissions and monetary perquisites. It allows the monetary compensation factors to be analyzed from a number of different employee, organizational structure and occupation perspectives. Analysis can be performed on the employee demographics of

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gender, age, and length of service. Analysis can also be performed against structural elements of the organization such as organization units, jobs and positions.

☞ *Refer to the Using Reporting Administration for further information on the delivered cubes.*

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How to determine which reporting option to use

As you have learned, there are many ways to report on data from The Solution Series. Which reporting option to use could be confusing, and there is not always just one option to use to produce the report you need. There are some important factors to consider which help in your decision as to the best option. Here are some questions you can ask yourself when needing to create a report:

- How current does the data need to be?
  Packaged reports, Solution View, RG reports, and communication events all use live Solution Series data, whereas Reporting Administration uses data that has been extracted from The Solution Series into the Workforce Data Mart—the data available is therefore only as current as the last extract. You would need to contact your administrator to establish how frequently the datamart is updated.
- How easy does the process need to be to create the report?
  Reporting Administration tools (Impromptu and PowerPlay) are powerful and very easy to use and enable you to quickly and easily produce business-driven reports, and to manipulate the data and format those reports online to achieve a pleasing and readable report.

  Cyborg-delivered packaged reports are extremely easy to run online.

  However, knowledge of Cyborg Scripting Language (CSL) is needed if you need to customize the delivered reports or create new batch reports.
- Will the data need to be manipulated online?
  Reporting Administration tools allow you to manipulate the data online to answer your questions quickly and easily.
- Does the data need to be displayed graphically?
  Impromptu and PowerPlay allow you to display the reported data in a number of graphical styles.
- Does this report need data produced during a pay run?
  Report Generator reports are used for payroll-produced data.

This list is by no means exhaustive. The chart that follows may help you further in your decision process when deciding which Cyborg reporting option to use to meet a reporting need.

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Overview of Cyborg Reporting Options

	Packaged Reports		Queries		Pay Process Reports		Reporting Administration		Communication Events	
Report Criteria	**Existing**	**New**	**Existing**	**New**	**Existing**	**New**	**Impromptu**	**PowerPlay**	**Email**	**Letter**
Data Needed										
Payroll	✓	✓		✓	✓	✓	✓	✓	✓	✓
HR/Benefit	✓	✓	✓	✓		✓	✓	✓	✓	✓
Applicant Tracking	✓	✓		✓		✓			✓	✓
Position Administration	✓						✓	✓	✓	✓
Data Currency										
Up to the minute	✓	✓	✓	✓					✓	✓
As of extract date					✓	✓	✓	✓		
Presentation Format										
List report	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Crosstab report							✓	✓		
Graphics							✓	✓		
Extract file	✓	✓		✓	✓	✓	✓	✓		
Delivery Method										
E-mail							✓	✓	✓	
Online viewing	✓	✓	✓	✓	✓	✓	✓	✓	Preview	Preview
Printed report	✓	✓	✓	✓	✓	✓	✓	✓		✓
Type of report										
Statutory reporting	✓	✓					✓			
Trend analysis								✓		
Summary reporting	✓	✓	✓	✓			✓	✓		

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Practice

Determine which reporting option is the most appropriate for producing the following reports:

1. You have been asked to provide an up-to-date alphabetic listing of all active and inactive employees.

2. You would like a report containing an employee's name and address details (old and new) to be automatically generated when changes are made to the Employee Name and Address form (FF-SCR). The report should be sent to the employee concerned for verification of the changes.

3. You have been asked to provide an alphabetic listing of all active employees which can be used as an internal telephone listing. It should show the employee name (surname, first name), their work phone number, location, and job title.

4. Use the delivered catalogs to create a custom report containing the following information:

   Job Salary Grade, Job Title, Employee Number, Employee Legal Name (Last, First), Employee Annual Salary, Hourly Rate, and Pay Frequency.

5. You need to know how many people were employed within the ACME RETIREES organization, Production MFTG, Region 3333, in May 1998. Use the delivered non-Position Management PowerCube to answer this question.

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NOTES

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Using The Solution Series: Administrative Solutions

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PART 1

Introduction

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CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the use of The Solution Series to perform your business tasks.

This manual has been designed as a reference document. It is also used in classroom training. You will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is designed to be used by anyone who will be working with the Solution Series administrative solutions. It will be useful to new users and to users who will be setting up or maintaining Solution Series utilities.

Prerequisite skills

Users of this manual should have a basic understanding of Microsoft Windows 2000.

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	Provides an overview of the manual and The Solution Series.
2. Working with The Solution Series	4–9	Provides concepts and detailed instructions for navigating, using support tools and entering, modifying, and deleting data.
3. Reporting	10-12	Provides concepts and detailed instructions for navigating, using support tools and entering, modifying, and deleting data.
4. Appendices	A–C	Provides detailed reference information.

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 Solution Series:

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, and where to get help.
2	Overview of The Solution Series	The functions and features of The Solution Series.
3	Getting Started	Signing on and off, and changing a user code and a password.

Part 2: Working with The Solution Series

The chapters in Part 2 describe how to utilize and navigate the Work Area:

Read this chapter		To learn about
4	Exploring the Work Area	How the Work Area is organized, and about toolbars, menus, and the Navigator.
5	Personalizing the Work Area	Specifying layout, display detail, form and table options.
6	Navigating the System	Different ways of navigating through the system and displaying information.
7	Personalizing Navigation Options	Adding, customizing, and removing a bookmark or favorite.
8	Using the Support Tools	The types of support tools, including help files and online manuals.
9	Working with Data	Viewing, adding and modifying data, employee information deletion and system messages

Part 3: Reporting

The chapters in Part 3 describe describe the reporting options available in The Solution Series:

Read this chapter		To learn about
10	Reporting Administration	How Reporting Administration can be used to meet your reporting needs.
11	Using Packaged Reports	How to set up and run reports and report groups.
12	Using Query	The online Query facility.

Part 4: Appendices

The appendices in Part 4 contain the following quick reference appendices:

Use this appendix		To learn about
A	GUI Controls Quick Reference	The various buttons and toolbars available.
B	Practice and Review Answers	Detailed answers to the practices and reviews at the end of the instructional chapters.
C	Dialog Quick Reference	Quick reference guide to dialog boxes in The Solution Series.

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

This 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 will help 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 appendixes.

Detailed Directions

Detailed Directions provide the specific steps to complete a task. The Detailed Directions contain navigation for both North American and UK users.

A supplemental training data document accompanies this manual, which provides examples of data that you can use with the Detailed Directions. Using the data provided in this document to complete the tasks will help to give you a better understanding of the task you are performing.

To successfully complete a task using this data, you may have to complete the previous tasks in the manual using the data provided. The training data document uses the test data installed with our software, and for the exercises to work as shown, this test data must not be altered.

Note: *To complete the Detailed Directions using the example data in the training data document, you must either have your own copy of the test data or have the test data restored for you.*

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 appendixes.

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

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the Review of Questions Answered at the end of a chapter. The answers to these questions can be found in the appendixes.

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 for you 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 cannot 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 http://www.hewitt.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 Solution Series

In This Chapter

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Introduction

This section provides you with the 'big picture' of The Solution Series. You will learn how it is organized into components, how your organization and its employees are identified to the system, and what reporting options are available.

Application solutions

The Solution Series provides an integrated solution to your organization's Human Resource processing needs. The Solution Series offers the following administrative solutions:

- Human Resources Administration
- Benefits Administration
- Payroll Administration
- Time and Attendance Administration
- Distributed Administration
- eCyborg Analytics

Human Resources Administration

Human Resources Administration provides organizations with a comprehensive, strategic solution to their human resource management requirements in these mission-critical areas:

- Employee Resourcing
  - Recruiting and selecting employees
  - Hiring, rehiring, reinstating, recalling, or transferring employees
  - Managing employee attendance
  - Managing employee status changes, leaves and returns, and separations
  - Position Administration and Complement Control
  - Requisition Tracking

- Employee Development
  - Tracking employee skills, competencies, and training
  - Tracking performance appraisals
  - Training Administration

- Employee Relations
  - Managing employee health and safety
  - Tracking disciplinary actions and grievances

- Employee Compensation
  - Managing employee compensation
  - Tracking employee relocation expenses
  - Allocating and recovering property from an employee
  - Salary Administration
  - Benefits Administration

☞ *Refer to the appropriate component documentation for more information.*

Payroll Administration

Payroll Administration provides the capability to internally manage the entire payroll and taxation process. The regulatory compliance, integration of payroll data with other applications, and control offered provide a solution for business operations of any size.

Payroll Administration provides a variety of features including the following:

- Virtually unlimited earnings and deductions
- Comprehensive tax processing and reporting
- In-depth labor distribution
- Bank services
- Multi-currency
- Complete online payment history tracking
- Online pay calculation
- Online retroactive pay calculation
- General ledger interface

☞ *Refer to the Payroll documentation for more information.*

Time and Attendance Administration

Time and Attendance Administration provides a table-driven data structure that gives users the flexibility to quickly and easily define, maintain, and change policy and scheduling rules. Its open design allows a wide choice of:

- Time entry methods
- Computing platforms
- Payroll interfaces

The system calculates all categories of hours for input to the payroll process, based on company-defined pay policies. Time entries for special hours may be created online.

Because Time and Attendance Administration is an integrated component of the system, it shares a common database, and has access to human resource information including employee status, emergency contact data, work restrictions, injury and other medical information, education and training, skills and abilities, and detailed termination data.

☞ *Refer to the Using Time and Attendance Administration documentation for more information.*

Interactive Workforce

Interactive Workforce is a member of the eCyborg family of web-based applications for HR management. It has been developed to integrate with the best-in-class HR Management Solution.

Interactive Workforce is a web-based employee self-service application that gives your employees real-time access to view, add, and update their personal information via a user-friendly, web-based interface. It does not display the forms used in the administrative solutions; rather, Interactive Workforce presents web pages on which users enter or update information.

Interactive Workforce gives managers real-time access to data about their team and the ability to approve employee requests.

The modules included in eCyborg Interactive Workforce are:

- Interactive Employee
- Interactive Benefits
- Interactive Manager

☞ *Refer to the Interactive Workforce documentation for more detailed information on the configuration and use of this functionality.*

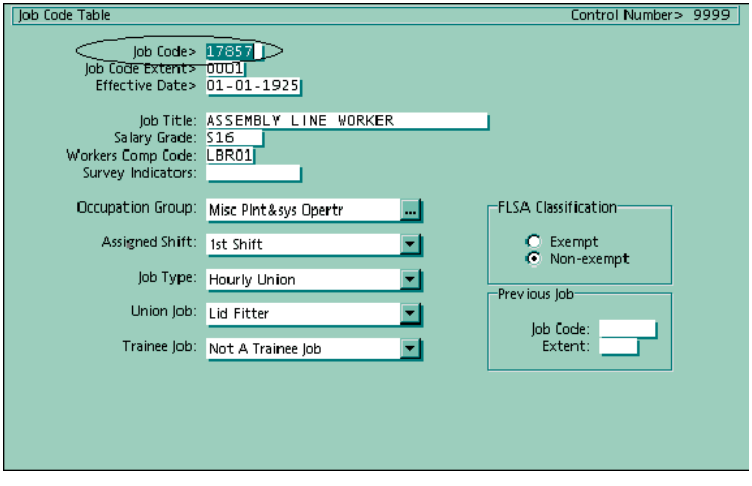
Tables

Most application tables contain standard information about your organization. A few application tables, such as the Company Cross-Reference Table-HR Control Numbers, are used strictly for internal processing.

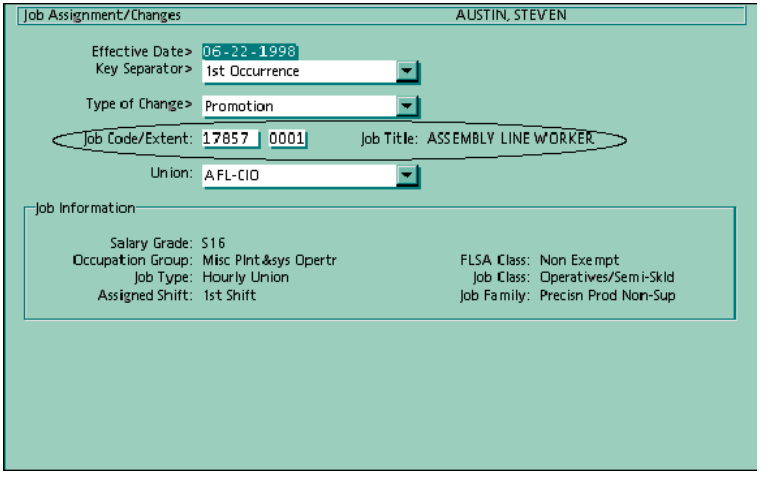
Using application tables greatly reduces the amount of information to be keyed in for an employee; instead, key data entered is cross-referenced to the tables. For example, the Job Code Table contains all possible jobs for an organization and some generic job-related information associated with those jobs. After validation, the information from the tables is referenced by the employee record.

There is a form associated with each table, allowing you to view or modify information. You can also run packaged reports showing the values for each table.

The following figure shows an entry in the Job Code Table form (TA-SCR):



The Job Code defined in this table can then be entered when hiring or promoting an employee. This figure shows that employee Steve Austin has been assigned Job Code 17857. The information set up on the Job Code Table is displayed at the employee level on the Job Assignment/Changes form (05-SCR):



You can use the same tables for all organizations, or each organization can have its own set of tables.

☞ *Refer to the appropriate component documentation for more information on setting up tables.*

User tools

User tools help you tailor the system to meet your needs. With the user tools, you can perform a variety of tasks, including the following:

- Change your display options
- Change your user code and password
- Look up information for an employee using a phonetic search on the employee's name

☞ *Refer to the Contents and Index for this manual to locate more information on the user tools.*

Administrator tools

Administrator tools allow you to set up and manage certain features to automate and standardize user tasks. You can perform a variety of tasks using the administrator tools, including the following:

- Create letter and email communication events
- Create checklists
- Create templates used by system functions

☞ *Refer to the Contents and Index for this manual and the Optimizing System Features documentation to locate more information on the administrator tools.*

Security tools

Security tools will only be available to the Security Officer at your site. Using the Security tools, the Security Officer will be able to perform tasks such as:

- Establish and maintain employee security
- Maintain user profiles

☞ *Refer to the Setting Up and Maintaining Security documentation for more information on these tools.*

Development Tools

Development tools allow you to tailor the system. Using the development tools you can perform a variety of tasks, including the following:

- Access database utilities
- Access system operation forms
- Access programming utilities

☞ *Refer to the Technical Administration documentation and the programming documentation for information on these tools.*

Performance support tools

Extensive performance support tools are available, including the following:

- Standard Windows help—cue cards, context-sensitive help, and so forth
- Electronic documentation—the complete set of One-Stop Documents that you can view and print

☞ *Refer to* **Using the Support Tools** *(on page 197) for more information.*

Data concepts

No matter what your role, you need to understand the following to work effectively with the system:

- Organizations
- Employee Numbers
- Tables

Organization structure

Your organization's structure will be mapped into organization levels in the system. The first two levels are used to define each company/organization separately on the Employee Database for reporting purposes. These levels relate to the two parts of the six-position Organization number. They are defined as follows:

- Organization (part 1)—Positions 1 and 2. Indicates the highest level within your company/organization's hierarchy. This usually refers to the corporate level.
- Organization (part 2)—Positions 3 through 6. Indicates subdivisions within an organization, or indicates a second level within the hierarchy.
- Organization—Represents a combination of both parts; that is, positions 1 through 6. It is synonymous with company/organization.

Consider the following example:

Organization level	Identifier	Stands for
Organization (part 1)	AC	ABC Department Store
Organization (part 2)	USDV	United States Division

This Organization identifier is typically shown together as ACUSDV.

The system is delivered with a series of test organizations, including the following. Notice that the delivered test organizations all start with 99. Part 2 of the Organization number is different for each:

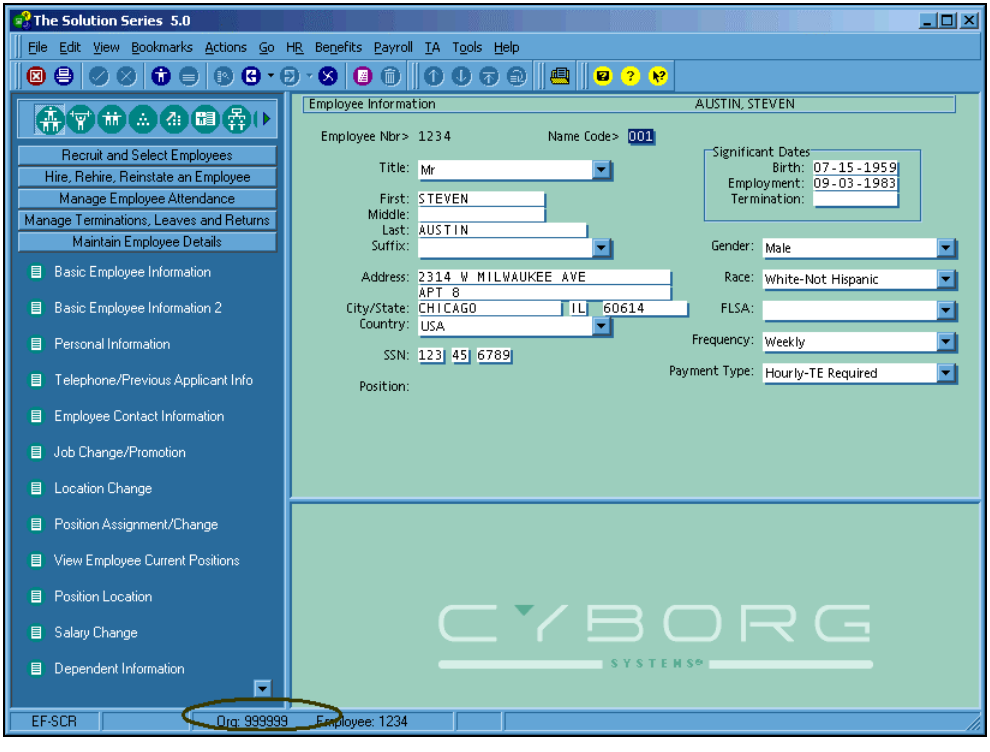
Organization	Stands for
993333	ABC Solutions, Inc—unpaid applicants
995555	ABC Solutions, Inc—retirees
999999	ABC Solutions, Inc—active employees

Even if you will not be defining Organizations, you need to understand their importance. When working with the system, you must make sure that you are using the correct Organization. Only the current Organization's data will be available to you.

☞ *Refer to* **Navigating the System** *(on page 129) for information on viewing a list of defined organizations and information on changing the current organization.*

As shown in the following figure, the current Organization number will display in the Status bar at the bottom of the Work Area.

In this example, the current Organization is the test company 999999:



Considerations for defining an Organization

Consider the following when defining your organization:

- Reports—delivered reports sort first by Organization part 1, then by Organization part 2.
- Security—security is established by organization.
- Payroll processing—basic payroll processing, for example, tax calculations and pay period tax reporting for employees, occurs at the organization level.
- Federal employer identification number—a single employer ID must apply to all employees in a single organization. Year-end tax reporting will process information together for all employees assigned to Organizations with the same employer ID number.
- Table record processing—policy guidelines that reference jobs, salary grades, and benefits can differ by organization. Alternatively, they can be established as guidelines that apply to all organizations.

Examples of Organization definitions

There are different ways to utilize the setup of your Organization. For example, you may have three legal entities that require a grand total for each entity. That is, they are unrelated. You could set up your Organization values as follows:

	Organization (Part 1)	**Organization (Part 2)**	**Organization**
Legal entity 1	AC	CORP	ACCORP
Legal entity 2	CC	CORP	CCCORP
Legal entity 3	EC	CORP	ECCORP

Or, you might have one legal entity with three different locations. You require one grand total for all locations combined, in addition to separate totals for each location. You could set up your Organization values as follows:

	Organization (Part 1)	**Organization (Part 2)**	**Organization**
US Division	AC	USDV	ACUSDV
Canadian Division	AC	CNDV	ACCNDV
European Division	AC	EPDV	ACEPDV

In this example, because each Organization, part 2 is unique, each location would generate its own totals. And, because the Organization part 1 is the same for all the locations, there would also be an automatic grand total for all locations.

Organization is used not only to reflect the structure of your company/organization, but also to reflect how you want to store and process information. You may want to set up Organizations for the following situations:

- Applicants
- Retirees
- Terminated employees

Note: *The Organization value cannot begin with a '9' or a 'Z'. These characters are reserved for delivered test data and audit records.*

☞ *Refer to the Technical Administration documentation for information on consolidated and roll-up reporting.*

Control Numbers

Control Numbers can be less than 4 "visible" characters. However, Solution Series registers each Control Number as 4 characters long because it counts blanks as valid characters. For example, if you enter a Control Number of "A-B-C", Solution Series reads it as "A-B-C-blank".

Employee Numbers

After your Organizations are defined on the Employee Database, you can begin adding employees. Each employee is uniquely identified by an Employee Number. This number provides access to the employee's data; it is the primary key to the employee's master record.

Employee Numbers are user-defined and have a maximum of 10 characters. You can use any combination of letters and numbers when defining Employee Numbers. However, the first character cannot be an 'L'. During implementation planning, you will determine the format for Employee Numbers in your organization.

Note: *Employee Numbers beginning with an 'L' are treated as 'Labor Only' employees by the payroll calculation program. No checks are produced for these employees.*

Following are examples of Employee Numbers:

- 123456789 (Social Security Number)
- 1234
- AB1234

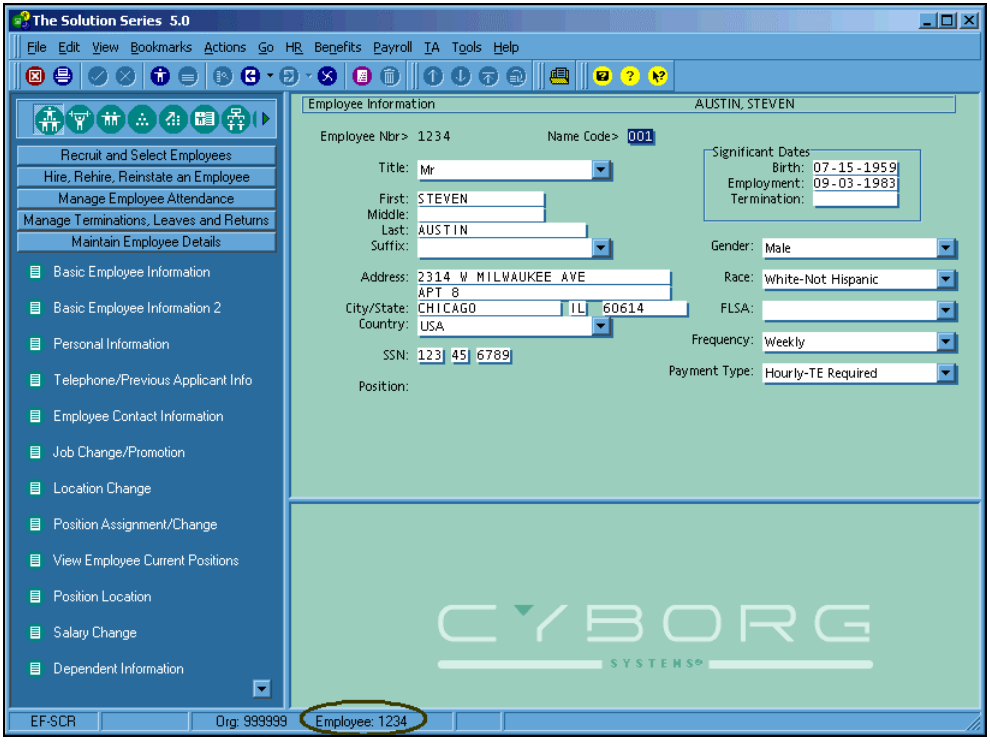
Employee Numbers must be unique within Organization; the system will edit for duplicates within each Organization. If an employee is transferred to a different Organization, you have the option of changing the employee's Employee Number.

When you work with the system, you indicate what Organization you want to work with, and within that Organization, which employee you want to add or work with.

☞ *Refer to* **Navigating the System** *(on page 129) for information on changing to a different employee.*

Like the Organization, the Employee Number is displayed in the Status bar of the Work Area.

The following figure shows the Employee Number '1234' displayed for employee Steve Austin:



Reporting options

Several tools are provided to help you analyze and report on information about your organization and employees. 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.

Options for reporting on information in The Solution Series include the following:

- Reporting Administration
- Delivered packaged reports
- Solution View (online queries and packaged reports)

Reporting Administration

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

- Ability for you to launch the Cognos reporting tools directly from the Launch toolbar
- Solution Series Impromptu catalogs for the delivered data mart, which promote intuitive user access to the extracted data
- Cognos reporting tools (Impromptu, PowerPlay)
- Support for Cognos' PowerPlay Online Analytical Processing (OLAP) package and the delivered Workforce Planning models

☞ *Refer to* **Reporting Administration** *(on page 271) for more information on performing relational reporting.*

Packaged reports

We deliver hundreds of report groups containing packaged reports developed using the Cyborg Scripting Language (CSL). You can schedule these reports to be run using the Report Group Activities form (RGMSTR). Or you have a choice of running these reports online directly from the Report Group Activities form (RGMSTR), from the menus and Navigator, or from checklists.

To supplement this process, the Process Monitor utility allows you to monitor the status of any report that is running. Similar to the View Held report form (VIEW), the Report Viewer utility displays the completed report in a customizable window. You can print all or selected reports from the report file, and you can search and jump within reports. You can also save and delete reports.

To help you identify reports that your organization may wish to run, you can view the details and an example of each delivered report by using the Report Info icon in the Navigator.

These reports are available for use as delivered or for customization. You can also use Cyborg Scripting Language to create your own reports.

☞ *Refer to* **Using Packaged Reports** *(on page 295) for more information on reporting.*

Solution View

Solution View is a delivered user tool that includes the following capabilities:

- Create and run Queries
- Create reports
- Create extracts
- Create new forms from new fields
- Create forms from existing fields

☞ *Refer to* **Using Query** *(on page 369) for information about this facility.*

CHAPTER 3

Getting Started

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Introduction

Before you can use The Solution Series, you need to be connected to the system. This section describes how to log on to The Solution Series and explains what the user code and password are and how they are used.

Tasks

This section explains the following:

- Logging on to The Solution Series
- Changing your user code
- Changing your password
- Logging off

Prerequisites

Before you can log on to The Solution Series, you must be set up as a user and be given a user code and password by your Security Officer.

You should also be a competent computer user and be familiar with Microsoft Windows 2000 or higher.

Questions answered

The following questions are answered in this section:

1. What information must you have before you can log on?
2. How can user codes and passwords be used as part of your organization's security strategy?
3. How do you log out of the system?

The process of logging on

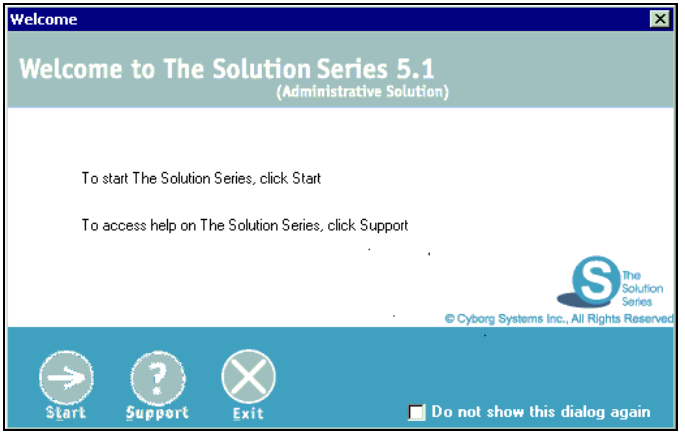
Logging on to The Solution Series is a very simple task. However, before you can log on, your Security Officer will need to give you a user code and a password. You will need to enter these when you log on, as they identify you to the system.

Note: Your user code and password are used for security purposes and should not be written down or revealed to anyone.

Note: Your user code and password can be used to access The Solution Series using the Web Client.

Note: This user code and password will not give you access to eCyborg Interactive Workforce. If you use Interactive Workforce, you will be given a separate User ID and password to gain access.

When you first run The Solution Series, a welcome splash screen displays:



The buttons on this screen are used to do the following:

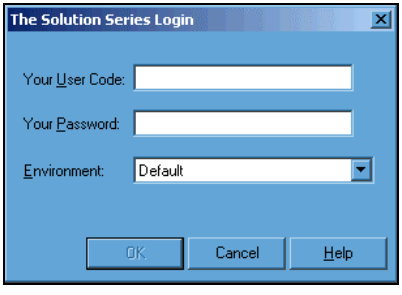
- Start—to access The Solution Series
- Support—to access Help on all of The Solution Series help file. From this help file you can access all the help files that are delivered with The Solution Series.
- Exit button—to cancel the logon process.

Note: You can stop the welcome screen from being displayed each time you access The Solution Series. To stop the welcome screen from appearing, select the 'Do not show this dialog again' check box.

If you select this check box, you will still be able to access the help files from either The Solution Series Help menu or Toolbar.

When you select the Start button, the Login dialog box will display.

The Login dialog



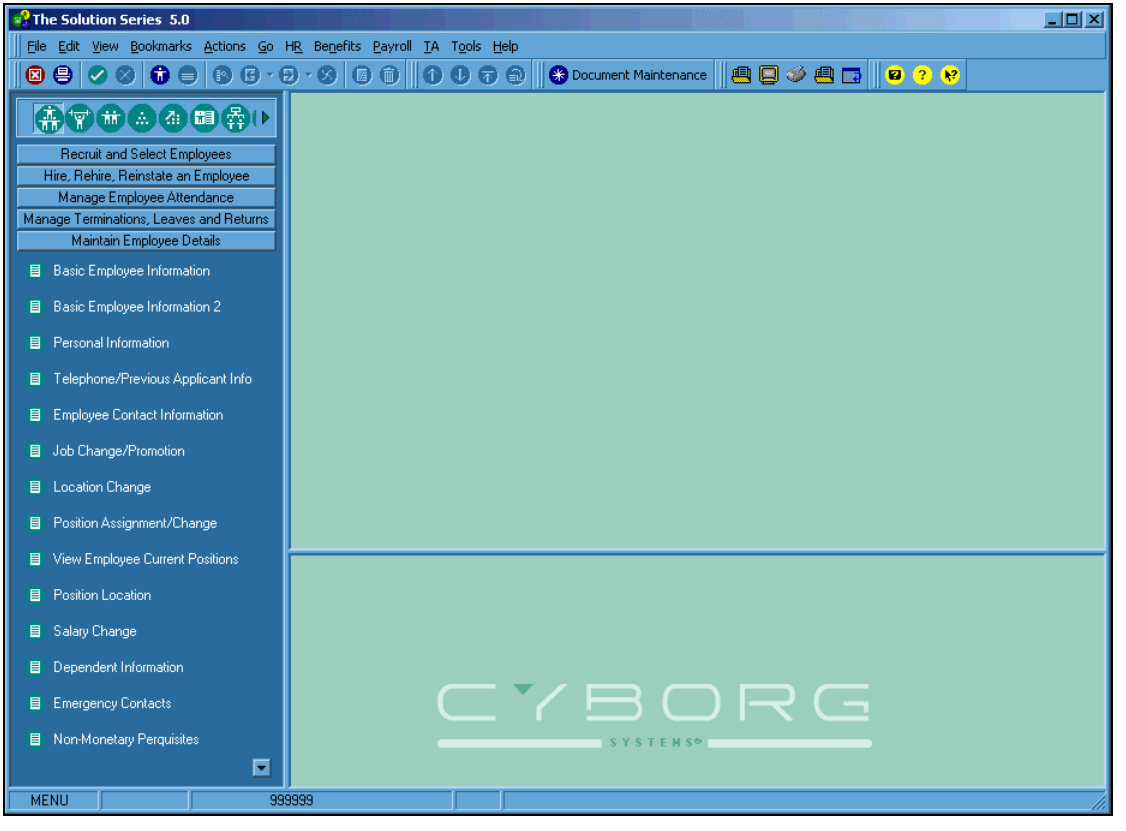
To log on to The Solution Series, you must enter the following three pieces of information:

- Your User code
- Your Password
- Environment

Note: *For security purposes, if you enter the wrong password three times in succession, your session will be locked out. If this happens, you will need to exit The Solution Series and then try and log on again using the correct password. If you cannot remember your password, contact your Security Officer.*

While your login details are being validated and your system is loading, the following screen will display:

When you have completed the logon process, the Work Area displays:



☞ *Refer to* **Exploring the Work Area** *(on page 49) for more information on the Work Area.*

Note: If, in a previous session, you started to complete a checklist and then paused the process, the Resume A Checklist dialog will display the next time you log on.

See also:

- Logging on with paused checklists ***(on page 38)***

For an explanation of Paused Checklists.

- Understanding user codes and passwords ***(on page 34)***

For an explanation of user codes.

- Understanding which environment you should log on to ***(on page 36)***

For an explanation of environments.

Understanding user codes and passwords

When you log on, you are prompted to enter a user code and password, which will be given to you by a Security Officer. Your user code and password are used by the system for security purposes to identify you as a valid user when you sign on.

Note: *Your user code and password are case sensitive (upper case, lower case). You must enter your user code and password using the correct case.*

Note: *For security purposes, when you enter your password it is displayed as a series of asterisks.*

You can change both your user code and password at any time. You may want to change them to something that you find easy to remember. If you want to change your user code, you must use the Change User Code dialog box. If you want to change your password, you must use the Change Password dialog box.

Note: *Your organization may not allow end users to change their password—you may not have access to the Change Password dialog box.*

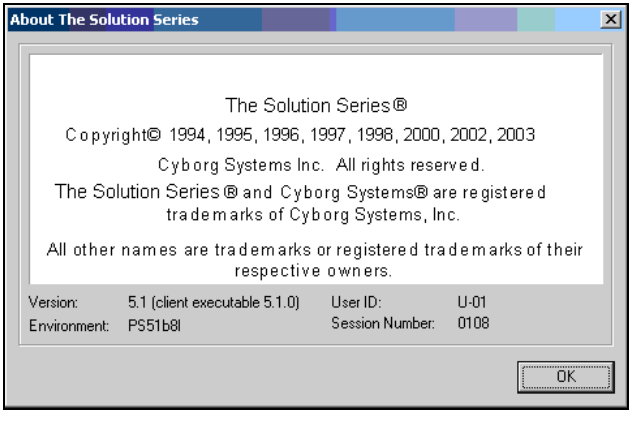
Note: *The system may be set up to prompt you to change your user code on a regular basis.*

Displaying your user code

You can display your user code on the About The Solution Series dialog box.

Select the following menus to access this dialog box:

Help ▶ About The Solution Series



☞ *Refer to the* **Detailed Directions** *(on page 40) in this section for more information on these dialog boxes.*

See also:

- Logging on to The Solution Series ***(on page 40)***

For detailed directions on logging on to The Solution Series.

- Changing your user code ***(on page 42)***

For detailed directions on changing your user code.

- Changing your password ***(on page 43)***

For detailed directions on changing your password.

Understanding which environment you should log on to

When you log on, you are also prompted to select which environment you want to log on to. Typically an organization will have two environments—a test environment that is used by new users while they learn how to use the system; and a live environment that contains your organization's data.

Your organization may have other environments, such as a test environment for year-end testing. When you log on, you must select which environment you want to use.

When you are assigned a user code and password, you should also be told which environment to use.

Understanding sessions and session numbers

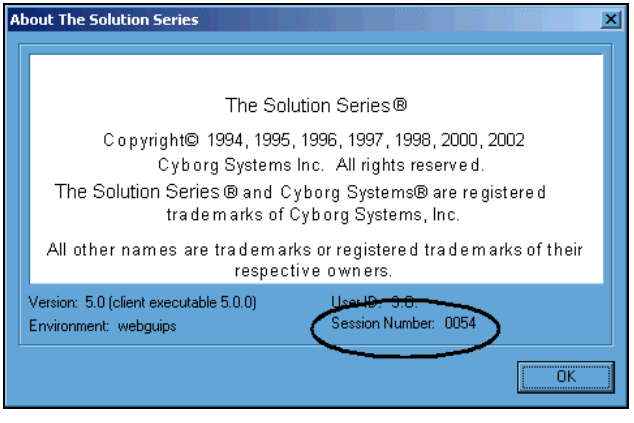
A session is a generic term used to describe the action of logging on to the system. Each time you log on to The Solution Series, you create a session number. This session number is stored by the system for audit purposes.

Displaying your session number

Session numbers are displayed on the About The Solution Series dialog box.

Select the following menus to access this dialog box:

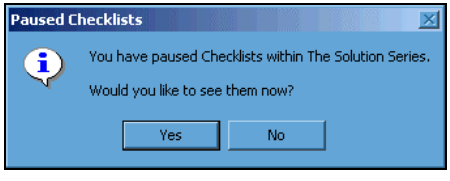
Help ▶ About The Solution Series



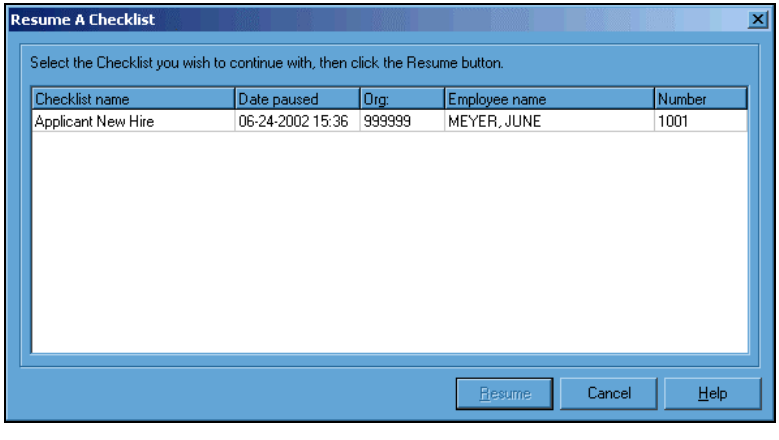
Logging on with paused checklists

The Solution Series has a feature that allows you to create checklists. The system is supplied with a default checklist called Hire a New Employee, which you can use to add new employees to the system.

If, in a previous session, you started to complete a checklist and then paused the process, the Paused Checklists dialog box will be displayed the next time you log on.



If you click Yes to see the paused checklist(s), the Resume A Checklist dialog box then displays. You can select a checklist and resume the checklist process.



☞ *Refer to* **Navigating the System** *(on page 129) for more detailed information on checklists.*

See also

- Logging on to The Solution Series ***(on page 40)***

For detailed directions on signing on to The Solution Series.

Log out methods

You can log out of The Solution Series using standard Windows actions.

If you usually use the mouse to navigate around the system, you can use the Exit button on the Standard toolbar to log out of the system.

If you use the menus as your navigation method, you can use the Exit option on the File menu to log out of the system.

See also:

- Logging out of The Solution Series using the toolbar ***(on page 45)***
- Logging out of The Solution Series using the File menu ***(on page 45)***

For detailed directions on logging out of The Solution Series.

Detailed Directions

This section provides detailed directions on completing a business task.

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Logging out of The Solution Series using the toolbar..... 45

Logging on to The Solution Series

To log on to The Solution Series, follow these steps:

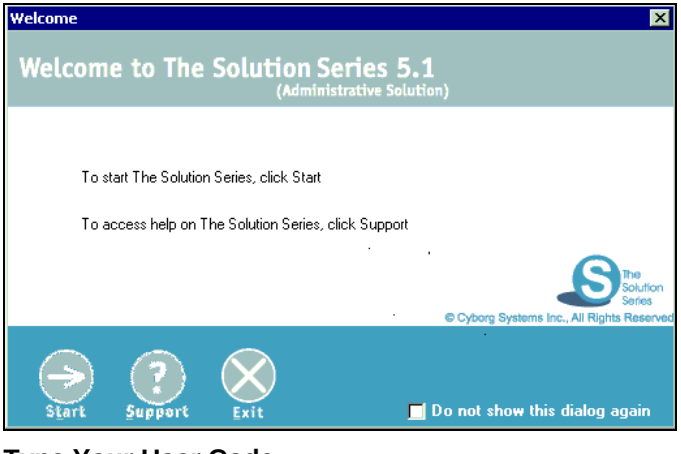
1. Access The Solution Series

The Solution Series can be accessed from the Programs menu or through a shortcut.

2. Click Start

When you first access The Solution Series, a welcome splash screen is displayed. From this screen you can access the Start button or the Support Interface.

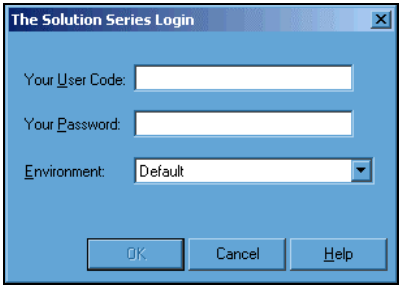
Note: The welcome splash screen can be disabled. If this screen does not appear, go to the next step.



3. Type Your User Code

In The Solution Series Login dialog box you must enter your user code. This will initially have been provided by your Security Officer. A user code can be up to 18 alphanumeric characters long.

Note: *Your user code and password are case sensitive (upper case, lower case). You must enter your existing user code using the correct case.*



4. Type Your Password

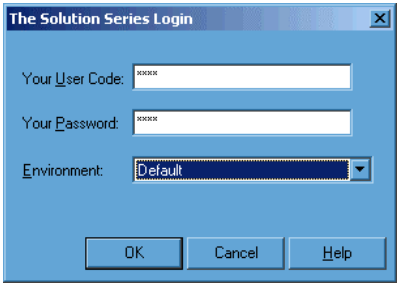
Enter your password. This will initially have been provided by your Security Officer. If you have forgotten your password, please contact your Security Officer who will provide you with a new one. A password can be up to 14 alphanumeric characters long.

Note: *For security purposes, your password is displayed as a series of asterisks.*

Note: *Your user code and password are case sensitive (upper case, lower case). You must enter your existing password using the correct case.*

5. Select an Environment

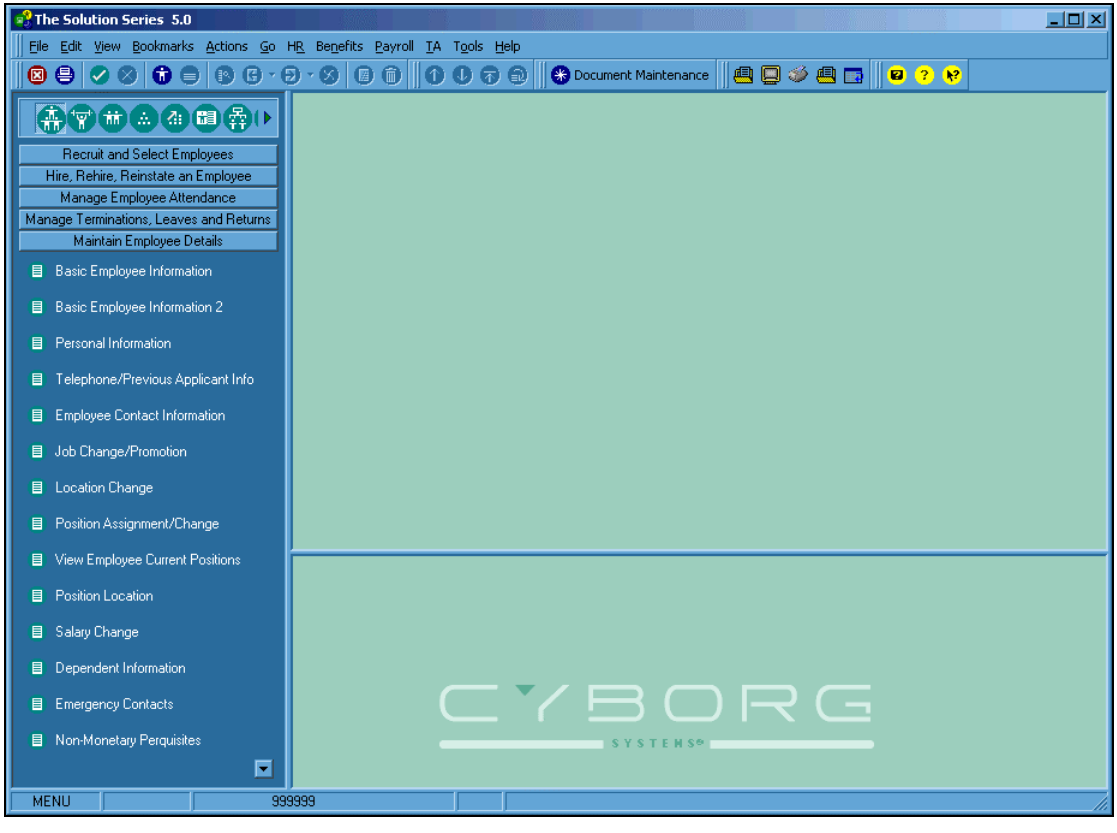
Select the environment you want to use. Typically your organization will have a live environment and a test environment.



6. Click OK or press Enter

The Solution Series will establish a connection to the server and verify your user code and password.

If you completed the previous steps, the results should look similar to the example that follows:



Note: *If, in a previous session, you started to complete a checklist and paused the process, The Solution Series will display the Paused Checklists dialog box the next time you log on.*

See also:

- The process of logging on ***(on page 31)***

For more information on the sign on process.

- Logging on with paused checklists ***(on page 38)***

For more information on paused checklists.

Changing your user code

You can change your user code at any time, or The Solution Series may be set up to prompt you to change your user code on a periodic basis. You enter your user code when you log on. To change your user code, complete these steps:

1. Access the Change User Code dialog box

Access this dialog box by making the following selections on the Navigator:

Component:	User Tools
Process:	User Tools
Task:	Change User Code

2. Type your New user code

Type the new user code. A user code can be up to 18 alphanumeric characters long.

Note: You can enter your new user code using either case (upper or lower) or a mixture of both. However, the new user code will be case sensitive.

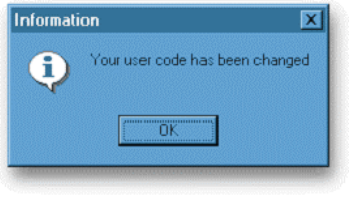
3. Confirm your user code

Retype your user code in the Confirm user code text box.

4. Click OK

To change your user code, click OK.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Understanding user codes and passwords ***(on page 34)***

For more information on user codes.

Changing your password

You can change your password at any time. You enter your password when you log on. To change your password, complete these steps:

Note: *Your organization may not allow you to change your password.*

1. Access the Change Password dialog box

Access this dialog box by making the following selections on the Navigator:

Component:	User Tools
Process:	User Tools
Task:	Change Password

2. Type your Old password

Type your existing password in the Old password text box.

Note: *Your password is case sensitive (upper case, lower case). You must enter your existing password using the correct case.*

3. Type your New password

Type a new password. A password can be up to 14 alphanumeric characters long.

Note: *You can enter your new password using either case (upper or lower) or a mixture of both.*

4. Confirm your new password

Type your new password again.

To check that you have entered the correct new password, The Solution Series will compare this entry with the entry you made in Step 3.

5. Operator ID

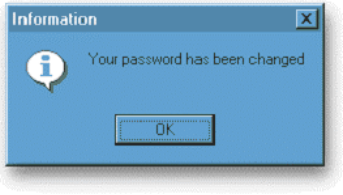
The Operator ID is assigned by your security officer and cannot be changed. The Operator ID is used for audit purposes and is shown on this dialog box for display purposes only.

6. Click OK

If the entries you made in Steps 3 and 4 match, your password will be changed and a confirmation dialog will be shown.

If the entries you made in Steps 3 and 4 do not match, an error message displays. You will need to repeat Steps 3 and 4.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

■ Understanding user codes and passwords ***(on page 34)***

For more information on passwords.

Logging out of The Solution Series using the File menu

You can log out from The Solution Series using one of two preferred methods:

- Logging out using the File menu (this task)
- ***Logging out using the toolbar*** (see "Logging out of The Solution Series using the toolbar" on page 45)

To log out using the File menu, follow this step:

Access the Exit menu option

Access this menu option by choosing:

File ▶ Exit

Logging out of The Solution Series using the toolbar

You can log out of The Solution Series using one of two preferred methods:

- ***Logging out using the File menu*** (see "Logging out of The Solution Series using the File menu" on page 45)
- Logging out using the toolbar (this task)

To log out using the toolbar, follow this step:

Note: To complete this task, the Standard toolbar must be displayed.

Click the Exit button

Click the Exit button.

See also

■ Standard toolbar ***(on page 55)***

For more information on the Standard toolbar.

Review of Questions Answered

1. What information must you have before you can log on?

2. How can user codes and passwords be used as part of your organization's security strategy?

3. How do you log out of the system?

PART 2

Working with The Solution Series

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CHAPTER 4

Exploring the Work Area

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Introduction

This section introduces you to The Solution Series interface. We refer to the interface as your Work Area. Your Work Area contains all the navigation methods and tools that you need to interact with the administrative solutions. The forms and dialog boxes that you need to enter data into are all displayed in the Work Area.

Tasks

This section explains how to perform the following task:

- Using a shortcut menu

Prerequisites

Before you can complete the task in this section you must log on to The Solution Series.

☞ *Refer to* **Getting Started** *(on page 29) for more information on how to log on to The Solution Series.*

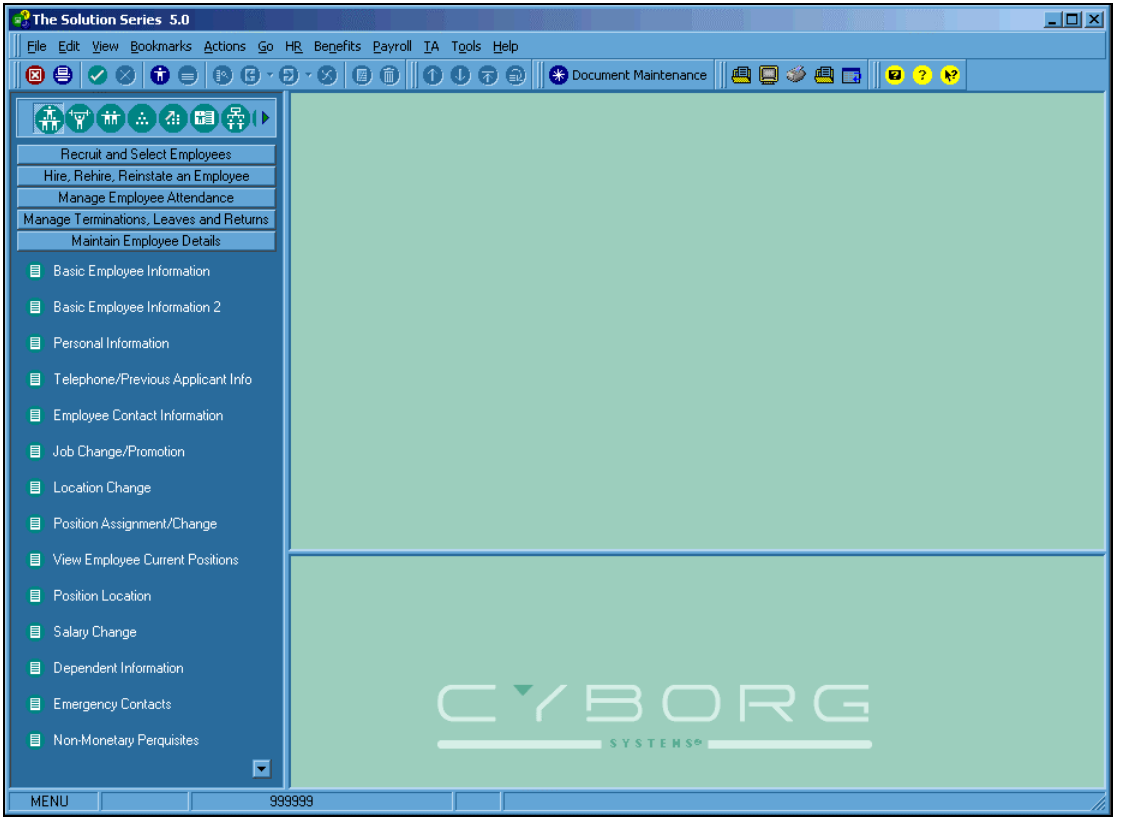
Questions answered

The following questions are answered in this section:

1. What is the Work Area?
2. What are the different types of menus?
3. What is the Navigator?
4. What is the Form area?
5. What is the Message area?
6. What is displayed on the Status bar?
7. What is a user profile?
8. What are the shortcut menus?

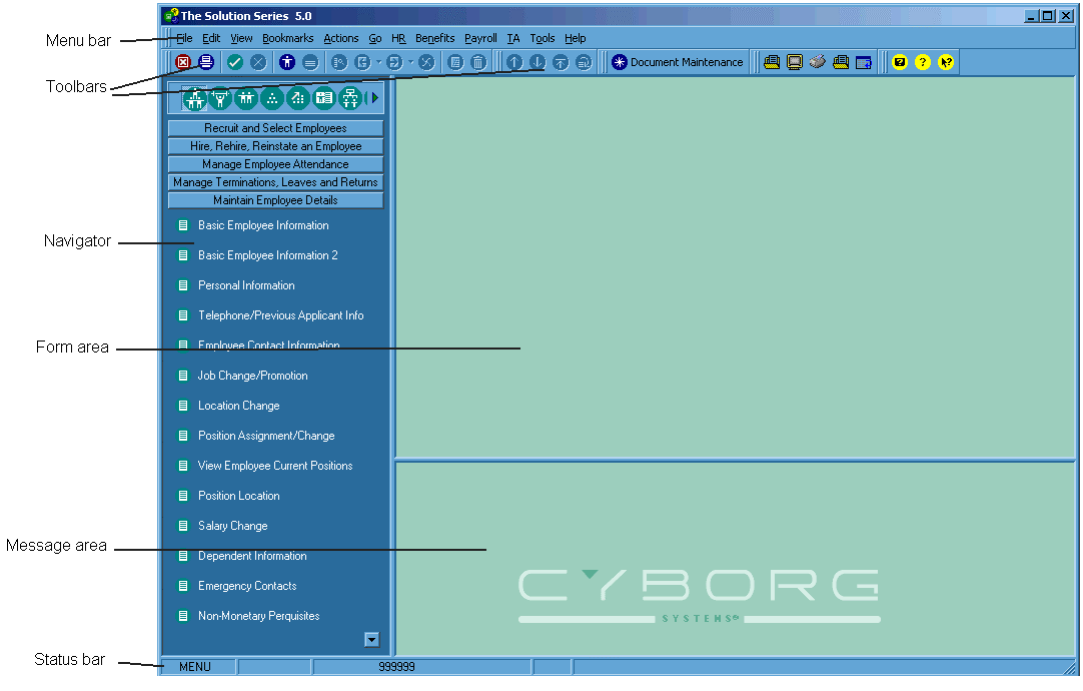
What is in the Work Area

The Work Area describes the entire display area that you see after you log on. The Work Area can be tailored to meet the needs of your organization and your personal work style. When you log on, the Work Area should look similar to this:



The Work Area can be broken down into six distinct areas:

- ***Menu bar*** (on page 53)
- ***Toolbars*** (on page 54)
- ***Navigator*** (on page 61)
- ***Form area*** (on page 63)
- ***Message area*** (on page 64)
- ***Status bar*** (on page 65)



Menu Bar

The menu bar provides a way to access forms and perform actions.

The menus can be grouped into two categories:

- Function menus (File, Edit, View, Bookmarks, Actions, Go and Help)
- Applications menus (HR, Benefits, Payroll, TA (Time and Attendance), and Tools)

Function menus

If you are familiar with Microsoft Windows, you should be familiar with four of the Function menus—File, Edit, View, and Help.

The remaining Function menus (Bookmarks, Actions, and Go) allow you to take actions while working. For example, you can use the Actions menu to save or cancel data that you have entered into a form, or to delete a record.

Applications menus

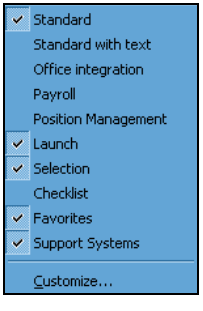
These menus provide access to the business components of The Solutions Series and to its tools and utilities. The Applications menus are HR, Benefits, Payroll, and TA (Time and Attendance). The tools and utilities for The Solution Series are accessed via the Tools menu.

Toolbars

The toolbar contains buttons that you can use to initiate activities. There are several different toolbars:

- ***Standard*** (see "Standard toolbar" on page 55)
- ***Standard with text*** (see "Standard with text toolbar" on page 55)
- ***Office integration*** (see "Office integration toolbar" on page 56)
- ***Payroll*** (see "Payroll toolbar" on page 56)
- ***Position Administration*** (see "Position Administration toolbar" on page 56)
- ***Launch*** (see "Launch toolbar" on page 57)
- ***Selection*** (see "Selection toolbar" on page 57)
- ***Checklist*** (see "Checklist toolbar" on page 58)
- ***Favorites*** (see "Favorites toolbar" on page 59)
- ***Support Systems*** (see "Support Systems toolbar" on page 60)

The toolbar menu can be accessed from the View menu, or you can open the shortcut menu by right-clicking on the toolbar to display the list:



You use the last option, Customize, to select which toolbars to display and to modify which buttons display.

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more specific information on Toolbars.*

See also:

- Shortcut menus ***(on page 69)***

For more information on shortcut menus.

Standard toolbar

The Standard toolbar contains items such as Save, Cancel, Exit, and Delete. The Standard toolbar is delivered with The Solution Series.

The following buttons are included on the Standard toolbar:

Button	Description
	Exit—exits The Solution Series
	Print—prints the current Work Area
	Save—saves the current data
	Cancel—cancels changes made to the current data
	Employee—accesses the Employee Selection dialog box
	Select—displays the Selection list in the Message area
	Show Paused Checklists—accesses the Resume A Checklist dialog box
	Back—displays the previous record (form, table, and so forth)
	Back drop-down—displays list of up to nine previous records
	Forward—displays the next record (form, table, and so forth)
	Forward drop-down—displays list of up to nine next records
	Add Bookmarks and Favorites—adds the current form to the Bookmarks menu
	Clear Fields—clears the data in the current record (form, table, and so forth)
	Delete This Entry—deletes the current selected record (form, table, and so forth)

☞ *Refer* **Navigating the System** *(on page 129) for more information on using these buttons.*

Standard with text toolbar

The Standard with text toolbar has the same buttons as the Standard toolbar while also displaying the button labels.

Office integration toolbar

The Office integration toolbar allows you to integrate system data with other desktop applications. The following buttons are included on the Office integration toolbar:

Button	Description
	Select a Letter—Generate a letter manually
	Select an Email—Generate an email manually
	Show Queued Letters List—Show and print queued letters
	Import Manager—Import data

☞ *Refer to* **Communication events** *(on page 151) for more information on using these buttons.*

Payroll and Position Administration toolbars

The Payroll module and Position Administration component have their own toolbars.

Payroll toolbar

The following buttons are included on the Payroll toolbar:

Button	Description
	Restore—restores you to the Online Pay Calculation form (PAY-CP) after processing a 'What If' or an 'Update'
	What-If—allows you to view calculated data without updating the employee record
	Update—updates the employee's record by applying the calculated pay information

☞ *Refer to the Payroll documentation for more information on using these buttons.*

Position Administration toolbar

The following buttons are included on the Position Administration toolbar:

Button	Description
	Job—the action associated with this button depends on where you are in Position Administration.
	Org Unit—the action associated with this button depends on where you are in Position Administration.
	Position—the action associated with this button depends on where you are in Position Administration.
	Incumbent—used to 'drill down' from Position level forms. Access incumbents associated with the positions.

☞ *These toolbars are used for these specific applications. Refer to the particular documentation for each application for more detailed information on these toolbars.*

Launch toolbar

The Launch toolbar is defined by you and provides a way to access applications that you use with The Solution Series. For example, with just one click you could access applications such as Impromptu. The sample below shows buttons for the Process Monitor, Report Viewer, Document Explorer, and Launcher:

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more information on how you add applications to the Launch toolbar.*

Note: The Document Explorer and Launcher functionality is available in Windows and Unix environments only.

Selection toolbar

The Selection toolbar allows you to navigate through the records in the Selection list which is displayed in the Message area.

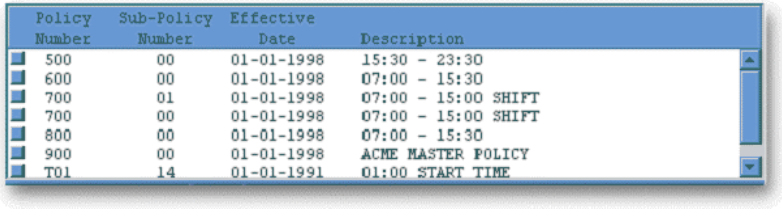
To display the Selection list for a form, you click the Select button.

You can then use the Selection toolbar to navigate the Selection list.

The following buttons are included on the Selection toolbar:

Button	Description
	Up—moves up to the previous record in the Selection list
	Down—moves down to the next record in the Selection list
	Top—moves to the first record in the Selection list
	Refresh—refreshes the Selection list

When multiple records are available for display on a form, these records can be displayed and listed in the Message area. The Message area can always be displayed, whether a form has multiple records or not. To select a different record, use the buttons in the Selection toolbar to move up or down through the records. If you add or edit a record, you can also refresh the list to update what is displayed in the Message area.



Policy Number	Sub-Policy Number	Effective Date	Description
500	00	01-01-1998	15:30 - 23:30
600	00	01-01-1998	07:00 - 15:30
700	01	01-01-1998	07:00 - 15:00 SHIFT
700	00	01-01-1998	07:00 - 15:00 SHIFT
800	00	01-01-1998	07:00 - 15:30
900	00	01-01-1998	ACME MASTER POLICY
T01	14	01-01-1991	01:00 START TIME

Note: *The Message area also displays error messages.*

☞ *Refer to* **Message area** *(on page 64) for more information on the message area.*

☞ *Refer* **Working with Data** *(on page 219) for more information on error messages.*

Checklist toolbar

A checklist is a list of tasks to be performed in sequence within the Navigator. For example, the 'New Hire' checklist delivered with the system allows you to add new employees to the system.

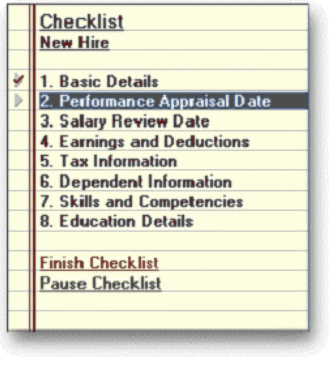
When you use a checklist, you can use the Checklist toolbar to do the following:

- Save a form
- Move to the next form in the checklist
- Move to the previous form in a checklist
- Pause the checklist
- Finish the checklist

The following buttons are included on the Checklist toolbar:

Button	Description
	Save—saves the form
	Next—moves to the next form in the checklist
	Previous—moves to the previous form in the checklist
	Pause—pauses the checklist
	Finish—finishes the checklist

When you are using a checklist, the items of the checklist appear in the Navigator area:



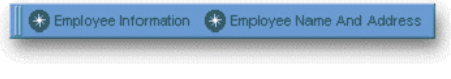
☞ *Refer the Optimizing System Features documentation for more detailed information on creating checklists.*

Favorites toolbar

The Favorites toolbar allows you to quickly access a form, checklist, or dialog box with one click or key press. This means that you can access these items without having to navigate to them using either the menus or the Navigator. The Favorites toolbar gives you even quicker access to the functions that you use regularly as part of your job.

The contents of the Favorites toolbar is defined by you, so no favorites are delivered with the system.

In this example, you can see that two forms have been added to the Favorites toolbar:



☞ *Refer to* **Personalizing Navigation Options** *(on page 177) for more information on how you add items to the Favorites toolbar.*

Support Systems toolbar

The Support Systems toolbar allows you to access three types of support tools:

- Help on all of The Solution Series—Access all the Windows help files for all of the components that are delivered with The Solution Series, enabling you to navigate through the help for all of the administrative solutions.
- Help for this form—Access Help for the form that is currently being displayed in the Form area.
- What's This help—Switches you into a special mode in which you can get help on different objects in the Work Area, including buttons and menus.

The following buttons are included on the Support Systems toolbar:

Button	Description
	Help Menu—access the delivered Windows help files
	Help on This Form—access Help for the selected form
	What's This?—standard Microsoft Help tool

☞ *Refer to* **Using the Support Tools** *(on page 197) for more information on these support tools.*

See also:

■ Effect of user options ***(on page 67)***
For an explanation of how you can customize the Toolbar.

■ Shortcut menus ***(on page 69)***
For information on the Toolbar shortcut menu and how to access it.

Navigator

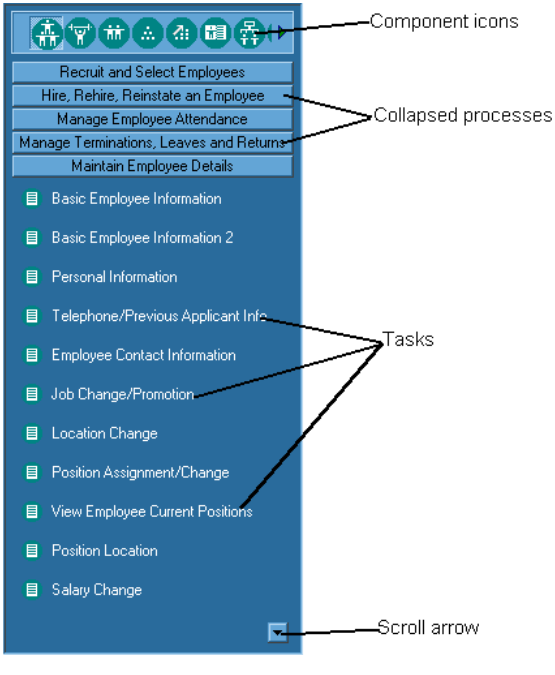
The Navigator provides an easy way to navigate the system. It uses a three-level navigation format that is composed of the following:

- Components
- The Processes associated with components
- The Tasks associated with a process

To navigate the system using the Navigator, you must first select the correct component. Each component of The Solution Series is represented by an icon.

If you are unsure of the meaning of an icon, you can place the pointer over the icon and the ToolTip will display the component name:

To navigate through the different components, you must click the arrows at the ends of the Component bar. When the component you are looking for is in view, click its icon to display the processes for that component.



After you select a component, you then select a process. Each process is represented by a process bar. A process is used to categorize a group of related tasks. After you select a process, you can then select a task.

Each task is represented by an icon and a description. Each icon indicates the type of task associated with it. The task icons include the following:

Icon	Description
	Checklist
	Dialog Box
	Form
	Report
	Wizard

When you select a task, the associated item (form, dialog, and so forth) is displayed in the Form area.

☞ *Refer to* **Navigating the System** *(on page 129) for more information on the Navigator.*

☞ *Refer to* **Working with Data** *(on page 219) for more information on completing tasks.*

Using the different navigation methods

The following methods are available for navigating the system:

- Navigator
- Menu
- Shortcut keys
- Shortcut menus

Your personal preferences determine which method you use. We recommend that you use the Navigator, as it has been designed to reflect the different business tasks and processes of a typical user.

Note: *If you do not use the recommended display settings for The Solution Series, you may be able to see only parts of the Work Area. In this case, you need to use a combination of the different navigation methods.*

See also:

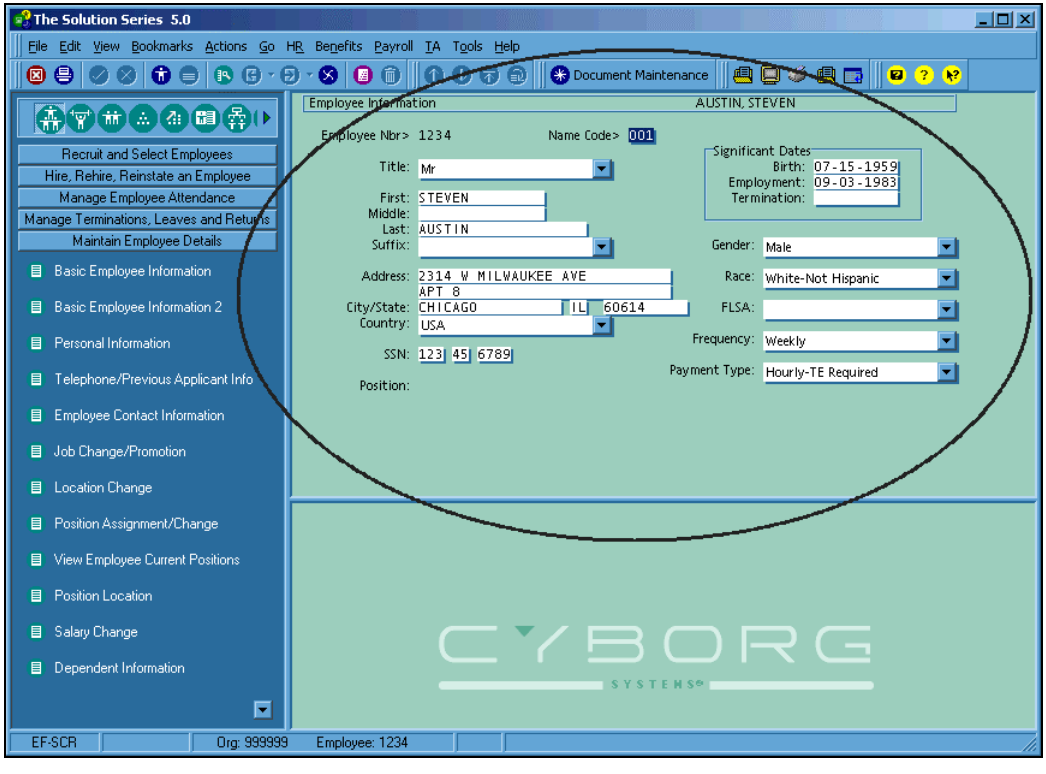
■ Effect of user options ***(on page 67)***
For an explanation of how you can customize the Navigator.

■ Shortcut menus ***(on page 69)***
For information on the Navigator shortcut menu and how to access it.

■ Using a shortcut menu ***(on page 79)***
For detailed directions on accessing a shortcut menu.

Form area

When you select a form, the form will be displayed in the Form area:



Note: *When you log on to The Solution Series, the Form area will be blank.*

When you enter data on a form, you can use the Save or Cancel buttons on the toolbar to save or cancel the information. It is good practice to clear data from the form or table before entering new data. To create a blank form, use the Clear Fields button. This button removes any data from the text boxes, but does not delete the record. If you need to delete the record, use the Delete button.

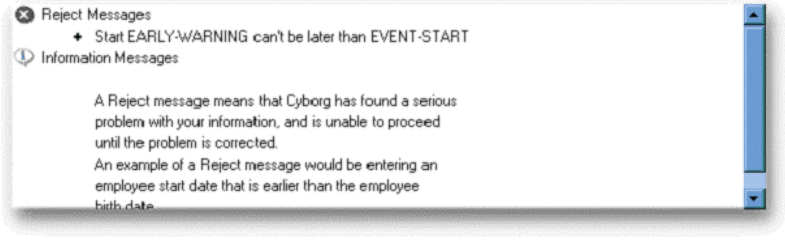
Note: *If you are unsure which are the correct buttons, hover the pointer over the buttons on the toolbar to see the ToolTip giving the name of the button.*

☞ *Refer to* **Working with Data** *(on page 219) for more information on using forms.*

Message area

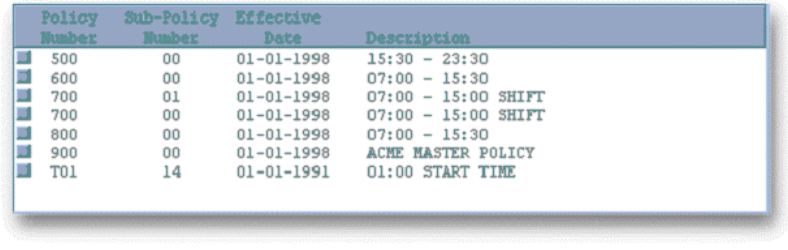
The Message area is used to display two types of information.

First, it is used to display information, warnings, and reject messages in response to data that you have entered on the form.



Second, it displays a selection list for forms that have multiple occurrences of the same type of information. You can use a selection list to choose the record that includes the information you want to work with.

The following example shows a Selection list for the Policy Master form (PT1SCR) used in the Time and Attendance system. Depending on your user options, the Selection list may be displayed automatically. To display it manually, you must click the Select button.



Policy Number	Sub-Policy Number	Effective Date	Description
500	00	01-01-1998	15:30 - 23:30
600	00	01-01-1998	07:00 - 15:30
700	01	01-01-1998	07:00 - 15:00 SHIFT
700	00	01-01-1998	07:00 - 15:00 SHIFT
800	00	01-01-1998	07:00 - 15:30
900	00	01-01-1998	ACME MASTER POLICY
T01	14	01-01-1991	01:00 START TIME

Status bar

The Status bar is used to display additional information about the data you have selected in the Form area. By default, the Status bar will display the following:

- Current Organization number, for example 'Org 999999'
- Current Employee Number, for example 'Employee 1234'

Note: *The Status bar can be customized to display additional information.*

See also:

- Effect of user options ***(on page 67)***

For an explanation of how you can customize the Status bar.

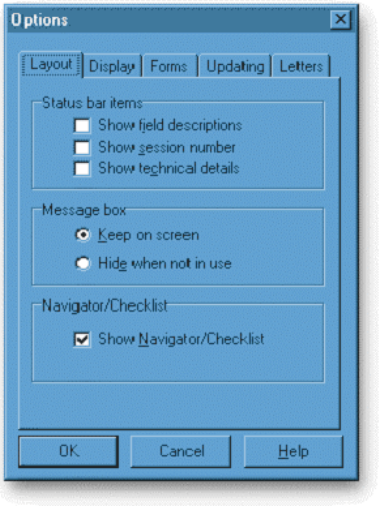
Effect of your user profile

A user profile is created and maintained for you by a Security Officer. Each user has a user profile. A user profile is 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.

For example, confidential information such as salary details are usually accessible only to users in your organization's payroll department. Typically, users who do not work in the payroll department would not receive access to the Salary Administration component.

Effect of user options

The Options dialog box allows you to personalize your Work Area so that the Work Area displays in a manner in which you feel most comfortable. For example, you can use the Options dialog box to increase the size of the font used on the forms.



The Options dialog box contains five tabs:

- Layout
- Display
- Forms
- Updating
- Letters

The options available on each tab control a distinct part of the system.

Layout

The Layout tab options determine what displays on the Work Area.

For example, if you prefer to use the menus to navigate the system, you can turn the Navigator off.

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more specific information on the Options dialog box.*

Display

The Display tab options determine how information on the Work Area displays.

One of the options of the Display tab allows you to control the automatic display of multiple records in the message area.

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more specific information on the Options dialog box.*

Forms

You can use the Forms tab to change the format in which employees names display in the title bar of the form or change the font and font size that appear on a form.

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more specific information on the Options dialog box.*

Updating

You can use the Updating tab to determine how frequently data on local tables is updated.

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more specific information on the Options dialog box.*

Letters

You use the Letters tab to specify when and how letters that are generated from a communication event are printed. You can also specify the location of letter templates that have already been set up.

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more specific information on the Options dialog box.*

Shortcut menus

Many of the different parts of the Work Areas and forms have shortcut menus. You access shortcut menus with a right-click of your mouse. The contents of the shortcut menus will depend on the location from which you access them.

Note: *If you are left-handed and the default settings of your mouse have been changed, you will need to use the left mouse button. When you see the words 'right-click', you will need to reverse this action and 'left-click'.*

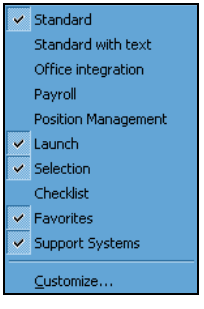
See also:

- Using a shortcut menu ***(on page 79)***

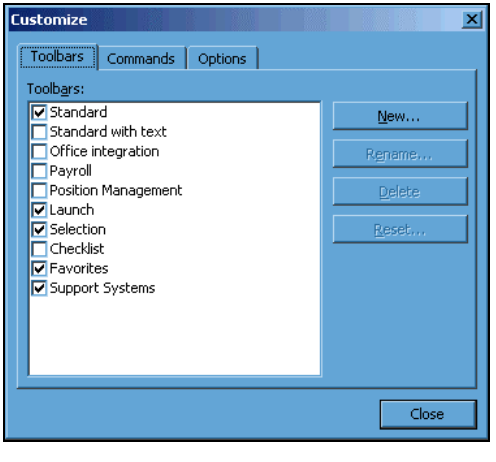
For detailed directions on accessing a shortcut menu.

Toolbars shortcut menu

When you right-click on a toolbar, you access the Toolbar shortcut menu:



From this menu, you can select which toolbars display, and you can access the Customize dialog box.



☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more specific information on toolbars.*

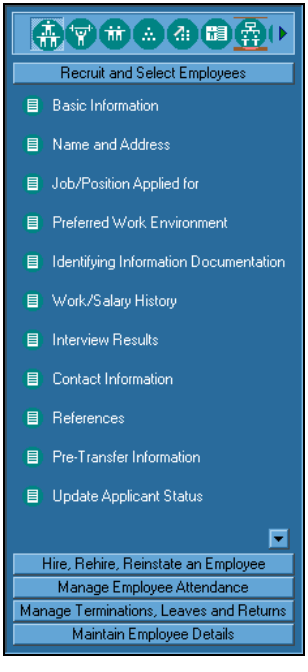
See also:

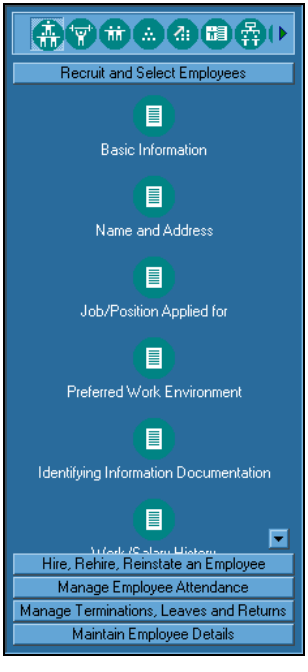
■ Using a shortcut menu ***(on page 79)***
For detailed directions on accessing a shortcut menu.

Navigator shortcut menu

When you right-click on the Navigator, you access a shortcut menu that has an option for controlling the display size of the task icons. Depending on the current Navigator display, the option will be 'Small Icons' or 'Large Icons'.

The following figures show the results of 'Small Icons' and 'Large Icons':



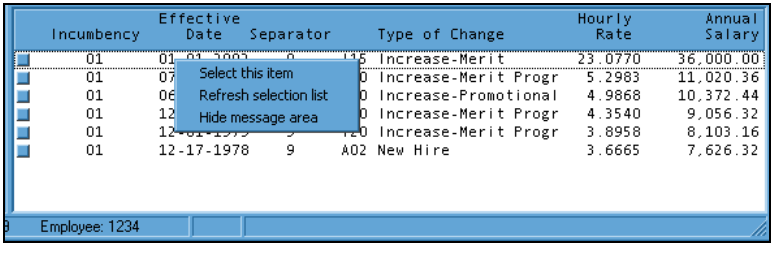


See also:

■ Using a shortcut menu ***(on page 79)***
For detailed directions on accessing a shortcut menu.

Message area shortcut menu

When you right-click on the Message area, you access a shortcut menu that displays the following three options:



- Select this item—When you have selected a record in the Message area, you can use this option to display the record in the Form area.
- Refresh selection list—When you save a new record, you can use this option to refresh the Selection list.
- Hide message area—Hide the Message area when not in use

.

See also:

- Using a shortcut menu ***(on page 79)***

For detailed directions on accessing a shortcut menu.

Shortcut menus and forms

There are a number of different shortcut menus available on a form. Which one you access is determined by where your pointer is positioned when you right-click. The different shortcut menus are accessed by right-clicking on one of the following:

- Blank area on the form
- Text box
- Date text box
- Option list
- Time text box
- Forms when used in a checklist

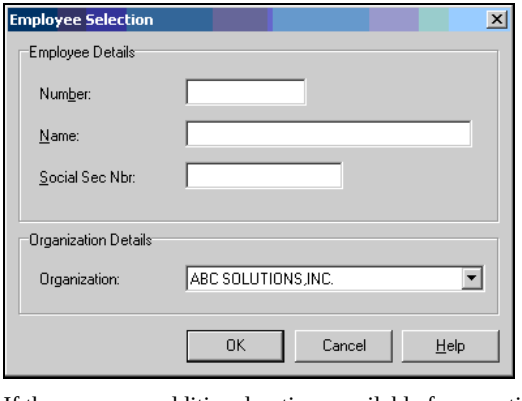
Blank area on the form

When you right-click on a blank area of a form, you access a shortcut menu that displays the following options:

- Save This Form
- Cancel This Form
- Select An Employee
- Show selection (if available)

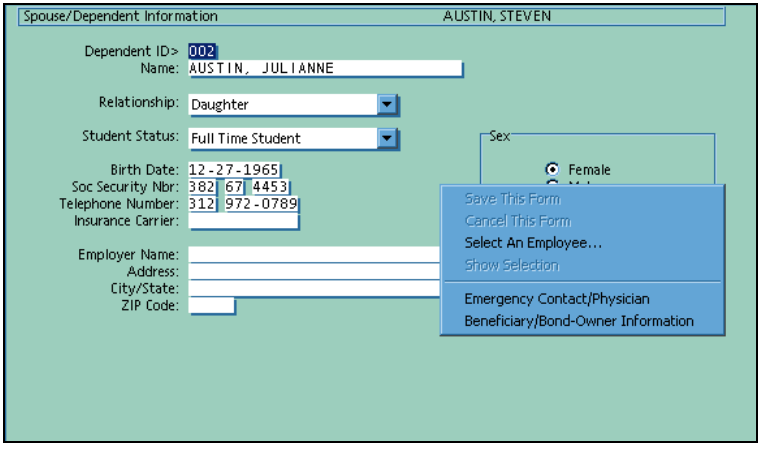
Some of these may be grayed-out, depending on the situation.

If you select the Select An Employee option, the Employee Selection dialog box appears. This dialog box allows you to change the employee with which you are currently working by entering any one of three pieces of employee information.



If there are any additional options available for a particular form, they are displayed at the end of the shortcut menu. Typically, these additional options are the names of related forms that you may want to access next. In this example you can access the following forms:

- Emergency Contact/Physician (16-SCR)
- Beneficiary/Bond Owner Information (58-SCR)



See also:

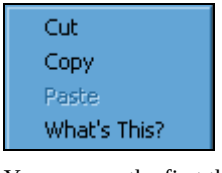
■ Using a shortcut menu ***(on page 79)***

For detailed directions on accessing a shortcut menu.

Text box shortcut menu

When you right-click on a standard text box, one that does not contain a date or time, you access a shortcut menu that displays the following options:

- Cut
- Copy
- Paste
- What's This?



You can use the first three editing options as you would in other applications. The last option, What's This?, displays help specific to the text box.

See also:

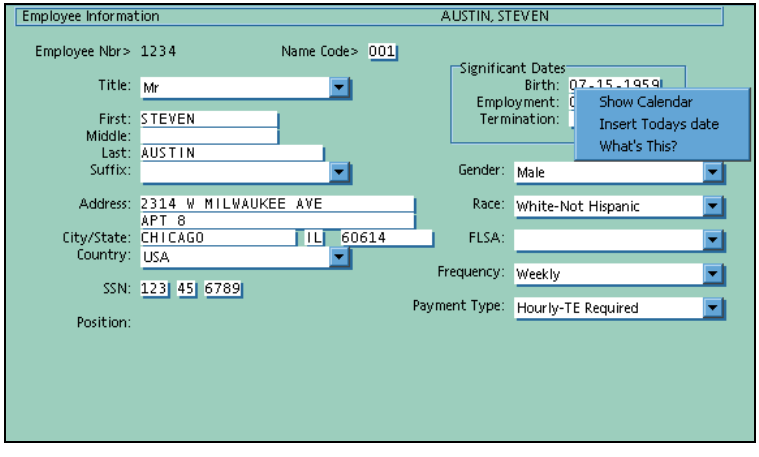
■ Using a shortcut menu ***(on page 79)***

For detailed directions on accessing a shortcut menu.

Date text box shortcut menu

When you right-click on a date text box, you access a shortcut menu that displays the following options:

- Show Calendar
- Insert Today's date
- What's This?



If you select the Show Calendar option, the Calendar dialog box appears.

You can select a date from the Calendar to insert into the date text box.

See also:

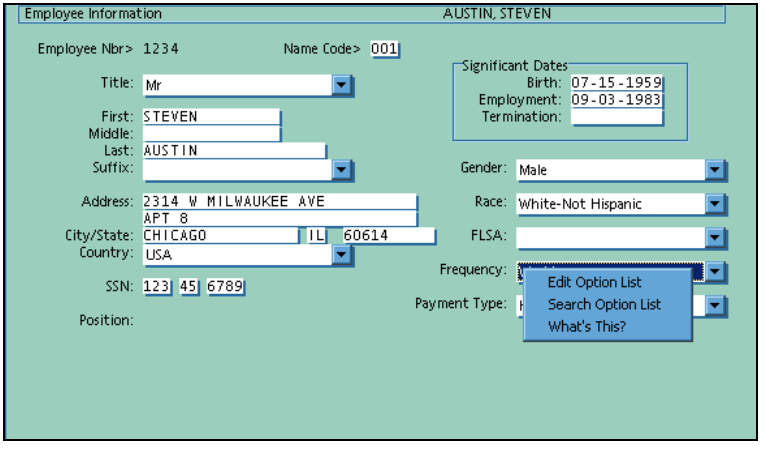
- Using a shortcut menu ***(on page 79)***

For detailed directions on accessing a shortcut menu.

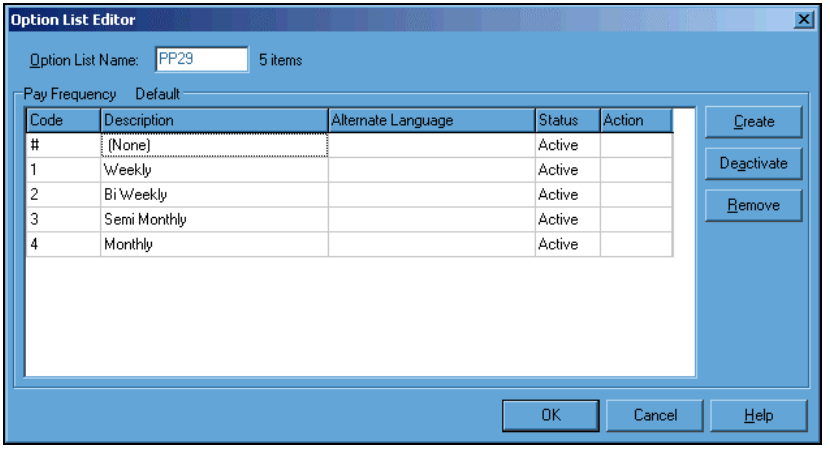
Option list shortcut menu

When you right-click on an option list, you access a shortcut menu that displays the following three options:

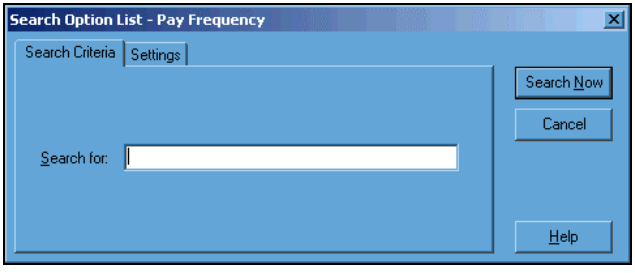
- Edit Option List
- Search Option List
- What's This?



If you select Edit Option List, the Option List Editor dialog box displays in option list code sequence:



If you select Search Option List, the Search Option List dialog box displays:



☞ *Refer to the Optimizing System Features documentation for more detailed information on editing option lists.*

See also:

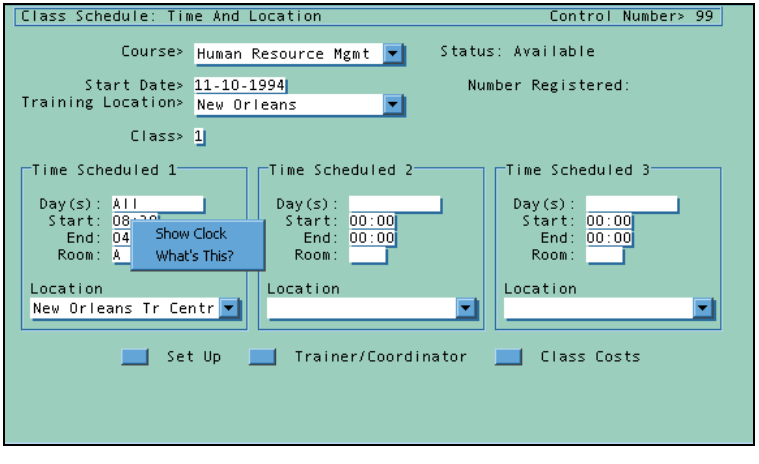
■ Using a shortcut menu ***(on page 79)***

For detailed directions on accessing a shortcut menu.

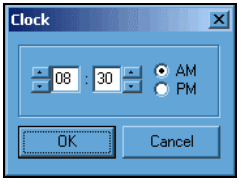
Time text box shortcut menu

When you right-click on a time text box, you access a shortcut menu that displays the following options:

- Show Clock
- What's This?



If you select the Show Clock option, the Clock dialog box displays:



You can select the time from the Clock dialog to insert into a time text box.

See also:

■ Using a shortcut menu ***(on page 79)***

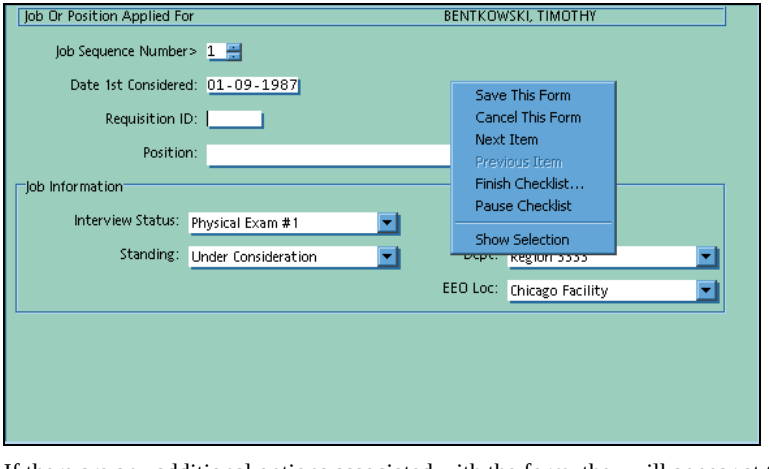
For detailed directions on accessing a shortcut menu.

Shortcut menus for forms used in a checklist

When a form is part of a checklist, the shortcut menu that appears when you right-click on a blank area of the form is different.

When you right-click on a blank area of a form, you access a shortcut menu that displays the following default options:

- Save This Form
- Cancel This Form
- Next Item
- Previous Item
- Finish Checklist
- Pause Checklist
- Show Selection



If there are any additional options associated with the form, they will appear at the end of the shortcut menu.

☞ *Refer to* **Navigating the System** *(on page 129) and the Optimizing System Features documentation for more information on checklists.*

See also:

- Using a shortcut menu ***(on page 79)***

For detailed directions on accessing a shortcut menu.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Using a shortcut menu 79

Using a shortcut menu

To access a shortcut menu, position the pointer over the item and right-click.

1. Position the pointer

Position the pointer above an item on the Work Area and right-click.

2. Select a menu option

Select an option from the shortcut menu.

See also:

- Shortcut menus ***(on page 69)***

For more information on how to access the different shortcut menus.

Review of Questions Answered

1. What is the Work Area?

2. What is the Navigator?

3. What is the Form area?

4. What is the Message area?

5. What is a user profile?

CHAPTER 5

Personalizing the Work Area

In This Chapter

Introduction 82
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Toolbars 94
The Launch toolbar 105
Log on options 106
Detailed Directions 107
Review of Questions Answered 127

Introduction

You have your own responsibilities and your own way of organizing your work. The Solution Series provides you with the ability to personalize the system to match the way you work. This section describes how you can personalize the Work Area to meet your needs.

Tasks

The following tasks are discussed in this section:

- Setting layout options
- Setting display options
- Setting form options
- Setting updating options
- Setting letters options
- Showing/hiding a toolbar
- Changing the location of a toolbar
- Modifying a toolbar
- Creating a custom toolbar
- Renaming a custom toolbar
- Deleting a custom toolbar
- Modifying the Launch toolbar
- Setting personal sign on options

Prerequisites

Before you can begin to personalize the Work Area, you must have:

- Logged on to The Solution Series
- Been given authority to customize your user options

☞ *Refer to* **Getting Started** *(on page 29) for information on how to log on to The Solution Series.*

Questions answered

The following questions are answered in this section:

1. What areas of the Status bar can you control?
2. What two areas of the Work Area can you show or hide?
3. How can you personalize the way forms look?
4. Where can you move toolbars?
5. What is the Launch toolbar?

User Options

You have your own preferences and work style. The Solution Series gives you the flexibility to customize the Work Area to the way you work.

There are several ways that you can personalize the Work Area:

- Layout of the Work Area—what is displayed in the Work Area and on the status bar
- Display—how messages, menus, and icons are presented
- Forms—how forms look and work
- Updating—when local tables, if used, are updated
- Letters—when and how communication event letters are printed

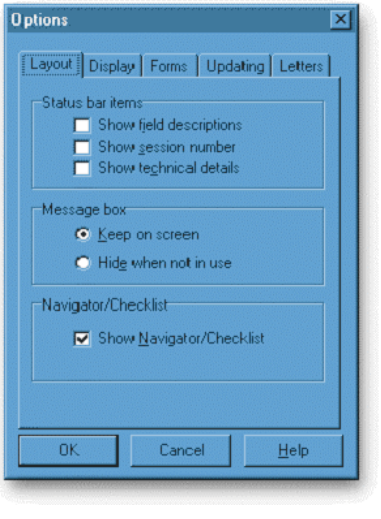
You use different tabs on the Options dialog box to personalize these parts of your Work Area. This dialog box is part of the User Tools component.

Layout options

Setting layout options gives you the flexibility to determine what is and is not shown in the Work Area. You can customize the layout of the Work Area in the following ways:

- Display certain areas on the status bar
- Display or hide the Message area
- Display or hide the Navigator

You control the layout of the Work Area using the Options dialog box Layout tab:



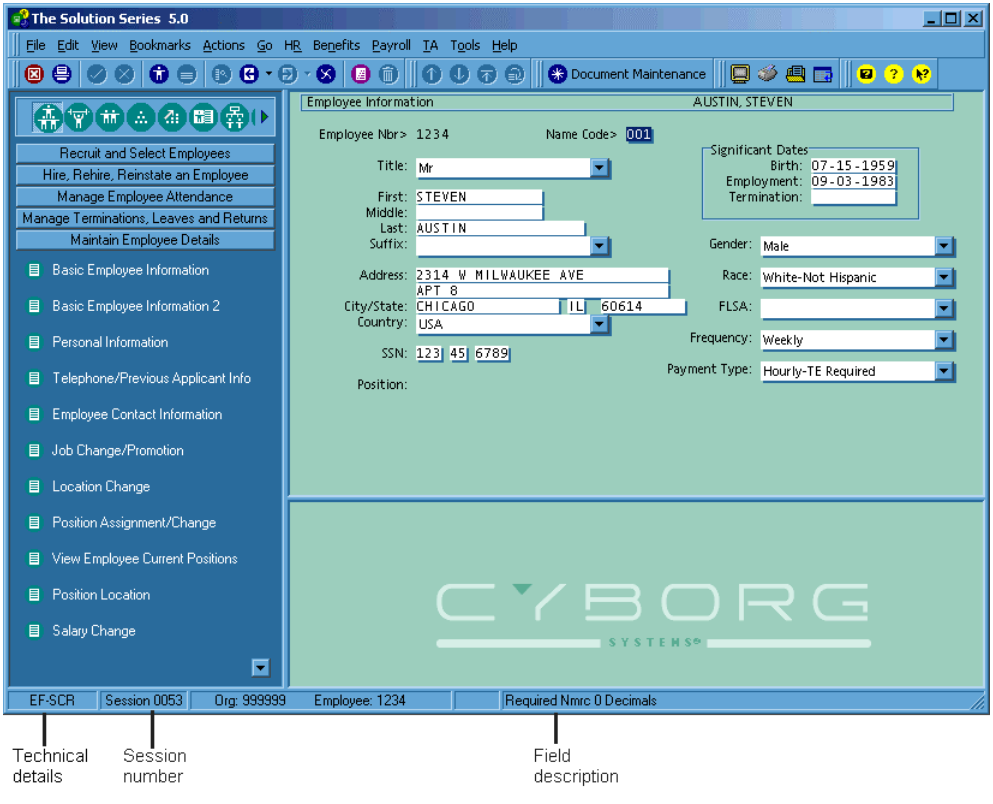
Status bar display

The status bar has several display areas. By default, two areas are shown—organization number (Org) and employee number (Employee). There are three areas that you can show on the status bar:

- Field descriptions—option list names and values and text box descriptions
- Session number—your session number
- Technical details—the name of the current form

You can select one or all of these areas for display. When unchecked, the corresponding status bar area is left blank.

The following is an example of the status bar with all three areas selected for display:



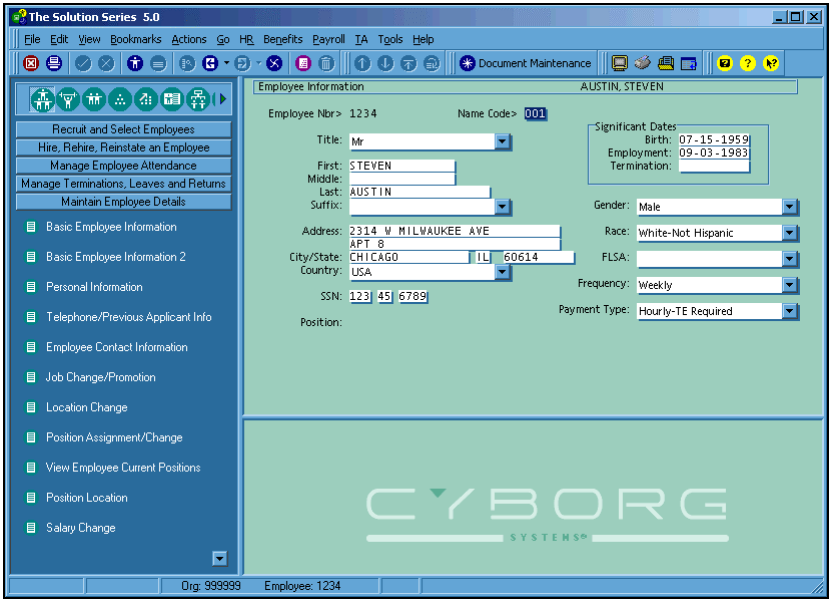
Navigator/Checklist and Message area

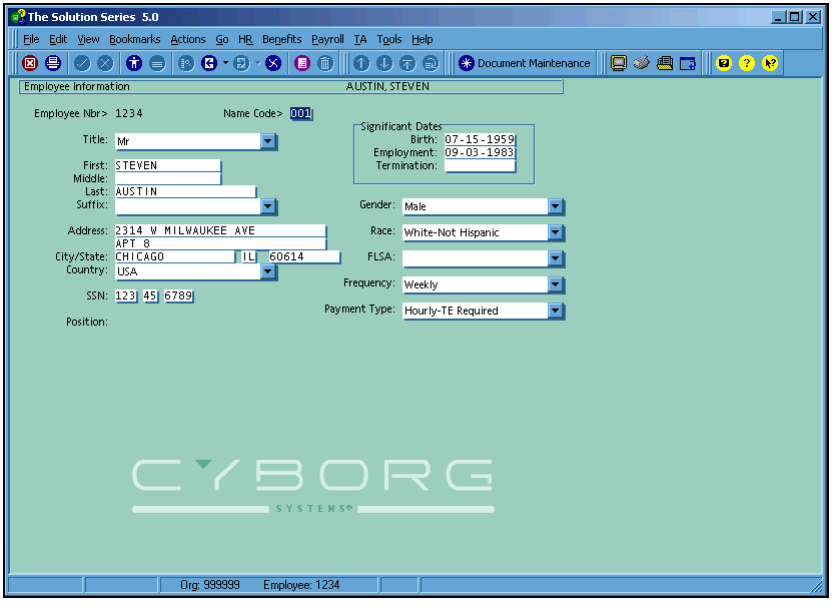
From the Options dialog box, you can control whether the Message area and Navigator display in the Work Area. If you are working in a low screen resolution (640 x 480), you may want to hide the Navigator and Message area so that the forms will fit on your screen.

You can choose to always display the Message area or only display it when there is information to display.

You can either show or hide the Navigator. A check mark next to 'Show Navigator/Checklist' in the Options dialog box indicates it is selected to display.

The following examples show the Work Area with and without the Navigator and Message area:





Note: *You can also resize the Navigator and Message areas using standard Windows techniques.*

See also:

■ Setting layout options ***(on page 107)***

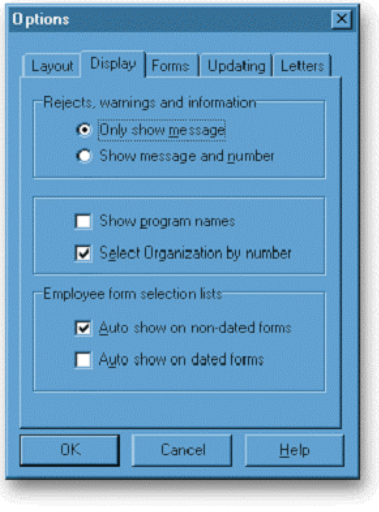
For detailed directions on setting or changing layout options.

Display options

You will use menus and buttons and receive various messages as you work. You can change how messages, menus, and buttons are presented:

- Show or hide numbers on messages
- Show program names
- Select an organization by number or name
- Show selection lists in the Message area on non-dated and dated forms

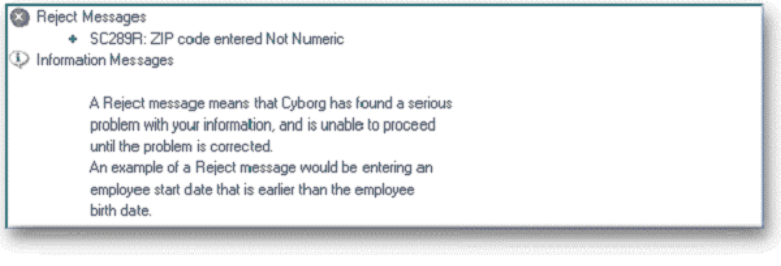
You control these using the Options dialog box Display tab.



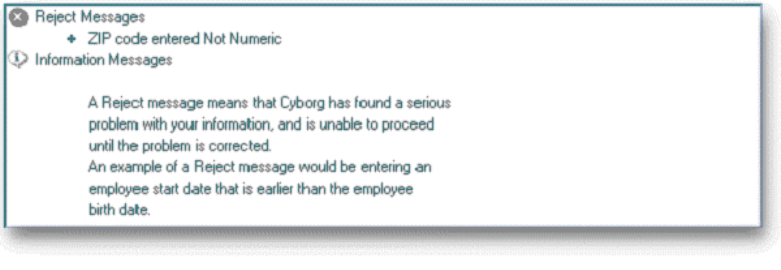
Message numbers

Messages are displayed in the Message area. You can choose to display reject, warning, and information messages with or without a message number.

The following example shows a reject message with a message number:



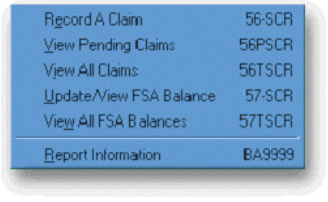
The following example shows a reject message without a message number:



Program names

You can choose to display program names where ever you choose a program.

The examples below show a menu with and without program names:



Selection lists

Some forms, such as the Salary Assignment/Changes form (40-SCR), could have multiple records. The most recent record is displayed in the form. Using the Employee form selection lists options, you can elect to automatically list all the form records in the Message area for dated and non-dated forms that have multiple records.

See also:

- Setting display options ***(on page 109)***

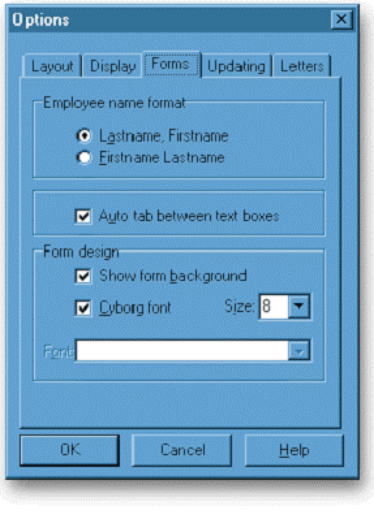
For detailed directions on setting or changing display options.

Forms options

The Solution Series uses forms to display and enter data. You can personalize these forms in the following ways:

- Display the employee's surname first or last
- Control the automatic movement of the insertion point from one text box to the next
- Design how the form looks

You use the Options dialog box Forms tab to personalize forms:



Employee name

When performing an employee-related task, the employee's name displays in the form header. You can display the employee's name in one of two ways by making the appropriate selection in the Employee name format section of the Forms tab:

- Last name, first name
- First name, last name

Your selection does not affect how data is stored or entered and displayed in text boxes.

Auto tab between text boxes

The 'Auto tab between text boxes' check box determines what the insertion point will do when you completely fill a text box. When 'Auto tab between text boxes' is checked, the insertion point will automatically move to the next text box when you enter the last character.

When 'Auto tab between text boxes' is unchecked, the insertion point will remain at the end of the text box in which you are entering data. To move to the next text box, you must press Tab.

Form Design

The Solution Series is delivered with an internal font called Cyborg. As delivered, text and data on all forms display in 8pt type size using the Cyborg font. You may want to change to a larger font if you are working on a small monitor.

Using the Forms tab, you can change the font to any fixed-width font currently defined in your Windows system. You can also specify the size of the fixed-width font.

When 'Cyborg font' is checked, forms display in Cyborg font and the Font option list is not enabled. To select a different font, deselect the Cyborg font; the Font option list will become enabled and you can select a fixed-width font and size.

You can also change the form background. Select 'Show form background' to display the background with the Cyborg watermark. When unchecked, the Cyborg watermark is not displayed.

See also:

- Setting form options ***(on page 110)***

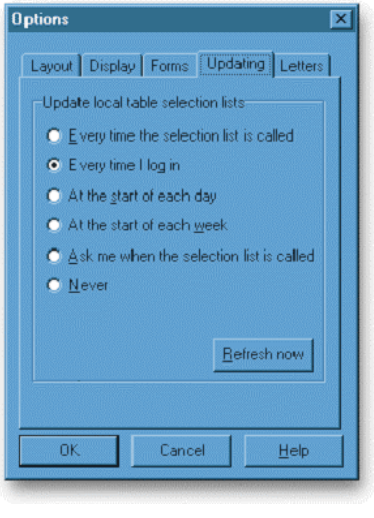
For detailed directions on setting or changing form options.

Updating options

Some data within The Solution Series are stored in the form of tables. For example, the Job Codes table stores the job titles and codes that are used on the Job Assignment/Changes form (05-SCR).

Some tables may be very large and may not change often. A copy of these tables can be stored locally. If your system is set up to use local tables, then you will have the option to control when these tables are updated from the server. Controlling when the tables are updated can give you the best performance for your circumstances.

You control when local tables are updated from the Options dialog box Updating tab:



If you want to update your local tables immediately, you can click Refresh now. Updating the tables immediately does not effect the selection made on the Updating tab.

You can also select one of the following options to determine when local tables are updated in the future:

- Every time the selection list is called—local tables are read from the server when used
- Every time I log in—local tables are updated after each sign on
- At the start of each day—local tables are updated after the first sign on of the day
- At the start of each week—local tables are updated on the first sign on of a Monday
- Ask me when the selection list is called—when a local table is used, prompt for updating
- Never—do not update local tables

Check with your Systems Administrator to see how often you should update your local tables.

See also:

- Setting updating options ***(on page 111)***

For detailed directions on updating local tables, or specifying when they need to be updated.

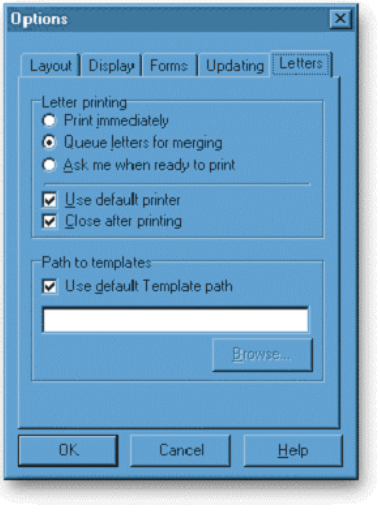
Letters options

Letters can be manually or automatically generated when you work with a form. For example, a letter might be automatically generated when an employee's salary is changed on the Salary Assignment/Changes form (40-SCR).

On the Letters tab, you can control when and how letters are printed:

- Printed immediately, queued for later printing, or prompt before printing
- Use the default printer
- Close the word-processing application after printing

You can also specify where letter templates that have already been set up are located.

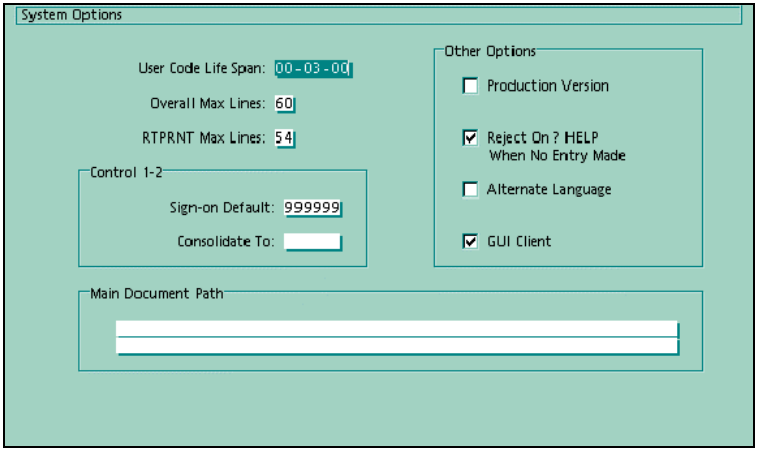


When you select 'Print immediately', the letter is sent directly to the printer.

Selecting 'Queue letters for merging' sends generated letters to a queue, which you can later access at any time from the Office Integration toolbar. From the queue, you can view, edit, and print the letters at a time that is convenient for you. Multiple occurrences of the same type of communication event letter are merged into one document.

Selecting 'Ask me when ready to print' allows you to decide what to do with the letter when it is generated. When the letter is generated, you are given the option to view it, print it, or add it to the queue.

When a communication event letter is created, the templates associated with the letter event are stored in the location specified on the System Options form (SCOPTS). This location applies to all users.



The Path to templates group box on the Options dialog tells the system where to look for letter templates that have already been created when you trigger a letter communication event. When the 'Use default Template path' check box is checked, the system looks for the templates in the location specified on the System Options form (SCOPTS).

You can override where the system first looks for existing templates by leaving the 'Use default Template path' check box unchecked and entering a location (drive and path) in the text box. This override location only applies to letter communication events triggered from your computer. Overriding the default location may be useful if the templates are stored on a network drive to which you temporarily do not have access. The letter templates must be copied from the location specified on the System Options form (SCOPTS) to the location you specify on your Options dialog. When a letter communication event is triggered, the system first looks for the templates in the override location specified on the Options dialog. If the templates are not found, the system then looks in the location specified on the System Options form (SCOPTS). If the templates are still not found, an error message is displayed.

☞ *Refer to* **Navigating the System** *(on page 129) for more information on viewing, editing, and printing queued letters.*

See also:

- Setting letters options ***(on page 112)***

For detailed directions on setting or changing when and how communication event letters are printed.

Toolbars

The Solution Series is delivered with a default set of function toolbars that perform various actions. Toolbars enable you to perform a variety of tasks with one click of the mouse. Utilizing toolbars will make your job easier and will help you work more efficiently.

There are several types of toolbars:

- Function—contains delivered functional items such as back, forward, cancel, and change the employee you are working with.
- Favorites—contain links to forms, Cyborg Scripting Language programs, and checklists that you define.
- Launch—provides access to other applications. You can add any application installed on your computer to your Launch toolbar.

☞ *Refer to* **Personalizing Navigation Options** *(on page 177), for information on defining favorites.*

There is one Favorites toolbar and one Launch toolbar. There are eight delivered function toolbars:

- Standard—exit, print, save, cancel, select an employee, show selection, display paused checklists, back, forward, create bookmark, clear all fields, and delete
- Standard with text—the Standard toolbar with button descriptions
- Office Integration—select a letter or email communication event, view and print queued letters
- Payroll—restore data, what-if, and update mode
- Position Administration—job, organization unit, position, and incumbent
- Selection—selection list navigation actions
- Checklist—navigation and control actions for the Checklist
- Support Systems—access to the help menu, form help, and what's this? function

You can get the most out of toolbars by personalizing them to meet your own specific needs. There are several ways in which you can personalize them. You can show and hide toolbars, move toolbars, modify toolbars, and create your own toolbars.

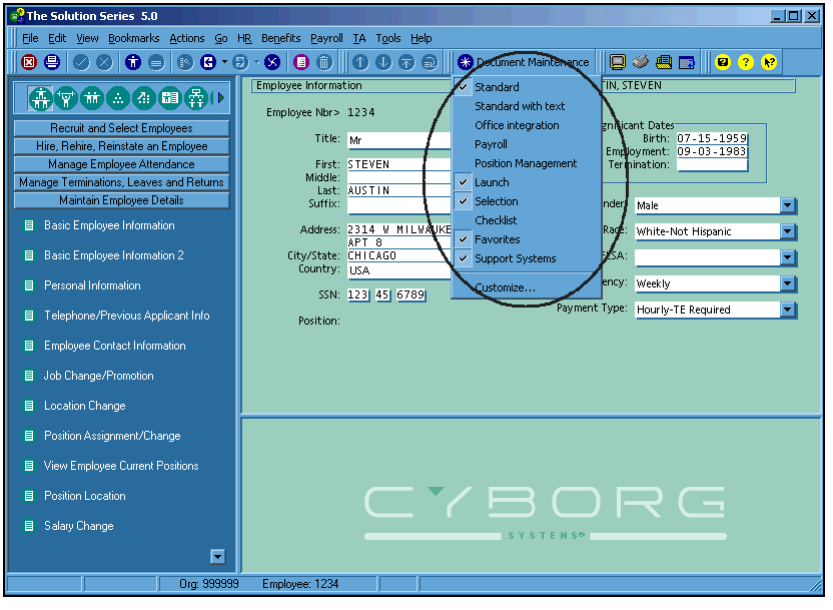
Showing and hiding toolbars

Your job may never require the use of all of the delivered toolbars, or you may only use a toolbar, such as the Payroll toolbar, once or twice a month.

You can show or hide a toolbar anytime. Your action takes effect immediately and remains in effect until you change it again. The procedure is the same whether you are showing or hiding a toolbar.

The quickest way to show or hide a toolbar is to use the toolbar shortcut menu. You can display the toolbar shortcut menu by right-clicking over the Toolbar area or by using the View menu. A check mark next to the toolbar indicates the toolbar is showing; a toolbar without a check mark indicates the toolbar is hidden. To change a toolbar's current setting, you select or deselect it.

The following example shows the toolbar shortcut menu with the Standard, Selection, Favorites, Launch, and Support Systems toolbars showing. Although not shown here, you can show and hide any custom toolbars that you have created from this shortcut menu.



If you display more toolbars than can fit on one area, only part of one or more toolbars will display. An arrow will display in the upper right corner of any toolbar that is not displaying all of its buttons. To see the whole toolbar, move it to another line in the toolbar area or an entirely different area.

The following example shows the Support Systems toolbar with only one of its buttons displayed. The arrows (>>) indicate that there are more buttons on the toolbar.

See also:

- Showing/hiding a toolbar ***(on page 114)***

For detailed directions on showing or hiding a toolbar.

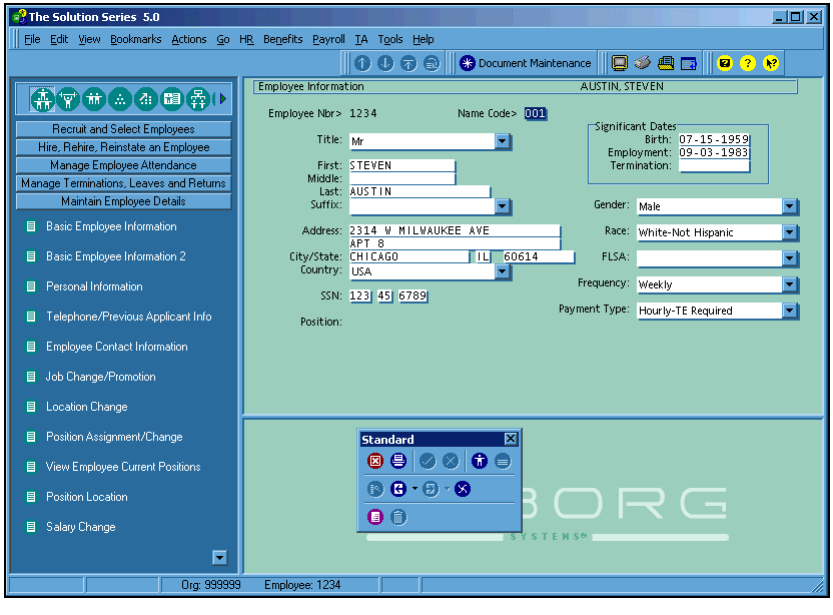
Moving toolbars

Another way that you can personalize the Work Area is by organizing the toolbars to the way that you work. You can move a toolbar almost anywhere on the Work Area. For example, you can change the order in which the different toolbars appear or move a toolbar off of the Toolbar area so that it is 'floating' in the Work Area. Each toolbar can be moved independently.

To move a toolbar off of the Toolbar area, you simply drag it by its move handle to another location. The following example shows the Support Systems toolbar with a move handle on the left:

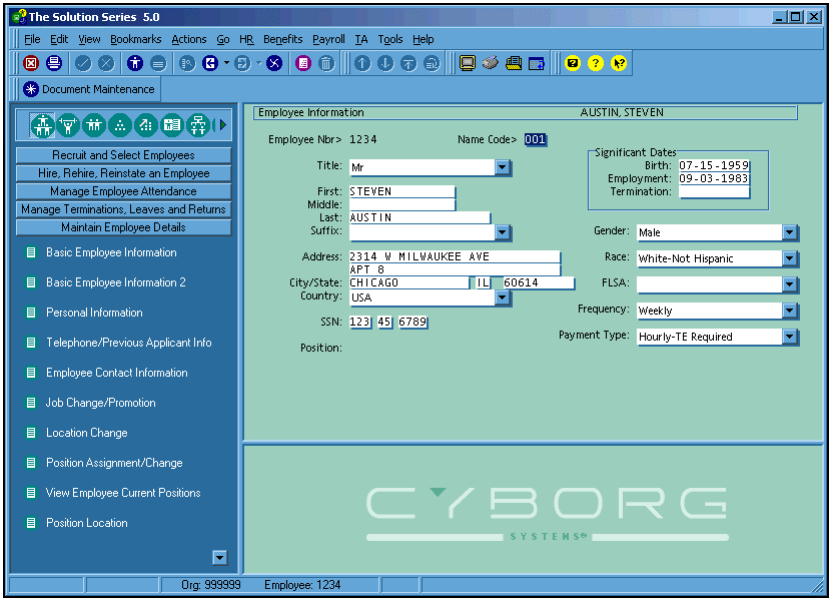
To put back a 'floating' toolbar, drag the toolbar by its title bar back to the Toolbar area. The following example shows the Support Systems toolbar with a title bar:

The following example shows the Standard toolbar 'floating' in the Message area:



If you show more toolbars than can fit on one toolbar line, you can create a second line of toolbars by dragging one or more toolbars slightly below the original line. Creating a second toolbar line takes space away from other sections of the Work Area.

The following example shows the Favorites toolbar (Document Maintenance) on a line below the other toolbars:



See also:

- Changing the location of a toolbar ***(on page 115)***

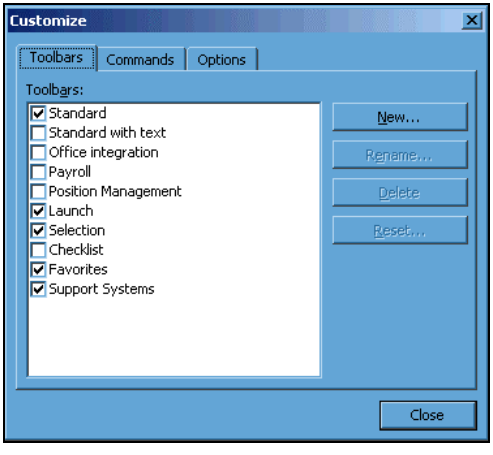
For detailed directions on moving a toolbar.

Modifying toolbars

As you work with The Solution Series day to day, you may find that you use certain toolbar functions more often than others or some not at all. You can modify a toolbar in the following ways:

- Delete buttons
- Move buttons
- Add buttons
- Customize display characteristics

You use the Customize dialog box to modify function toolbars. From this dialog box, you can delete buttons, move buttons, add buttons, and create your own toolbar. You can also show and hide a toolbar. Any custom toolbars that you create will be listed in the Toolbars area with the delivered toolbars.



Note: *You can show and hide the Launch and Favorites toolbar from the Customize dialog box, but you cannot modify them using this dialog box.*

See also:

- The Launch toolbar ***(on page 105)***

For information on adding and deleting buttons from the Launch toolbar.

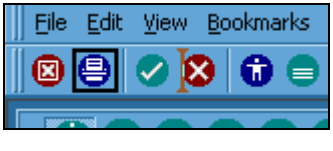
☞ *Refer to* **Personalizing Navigation Options** *(on page 177), for information on adding and deleting buttons from the Favorites toolbar.*

Deleting buttons

Using the Customize dialog box, you can delete buttons from a function toolbar that is showing. To delete a button, you simply drag it off of the toolbar.

Moving buttons

You may want to change the display order of buttons on your function toolbars according to how often you use them. You can move a button on its own toolbar or to another toolbar. You drag the button to the new location and release the mouse button when the insertion point (I-beam) displays where you want the button to be placed. The insertion point displays on the toolbar only when you drag a button over it. The example that follows shows the insertion point between the third and fourth icons:



See also:

- Moving buttons on a toolbar ***(on page 118)***

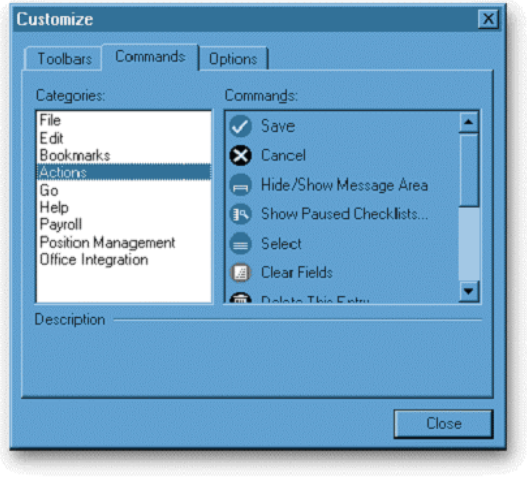
For detailed directions on moving a button on a toolbar.

Adding buttons

You can also add buttons to function toolbars. You can restore a toolbar button that you previously deleted or add a button that was not there to begin with. The toolbar must be showing in order to add a button.

To add a button, you use the Customize dialog box Commands tab. From the Commands tab, you select a category and then a button.

The following is an example of the Commands tab with the Actions category selected:



Note: *The Description is not used at this time.*

Each category contains one or more buttons that you can add to a toolbar. The following is a summary of what each category contains:

- File—print and exit commands
- Edit—commands used while editing such as cut, copy, and paste
- Bookmarks—add bookmark and customize bookmark buttons
- Actions—functions such as save, cancel, clear, change employee, and query
- Go—navigational commands such as back, forward, up, down, and refresh
- Help—support buttons such as form help and what's this
- Payroll—what-if and update mode, restore data
- Position Management—choose a job, organization, position, or an incumbent
- Office Integration—select a letter or email, show queued letters list

☞ *Refer to* **Personalizing Navigation Options** *(on page 177), for information on creating bookmarks.*

After you select a category, adding a button to a toolbar is as simple as dragging the button from the Commands tab to the toolbar. You can add one or more buttons from any of the categories to the toolbar, one at a time. You can add a new button before or after one that is already on the toolbar.

See also:

- Adding buttons to a toolbar ***(on page 116)***

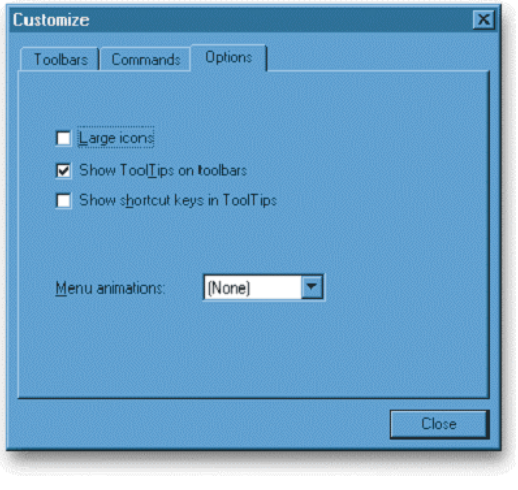
For detailed directions on adding a button to a toolbar.

Customize display characteristics

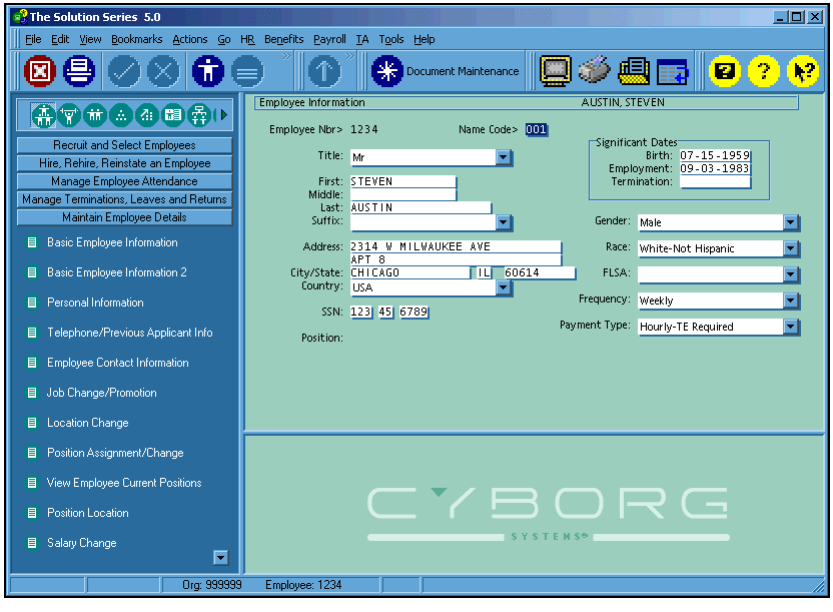
You can change the display characteristics of toolbar buttons using the Options tab on the Customize dialog and the toolbar button menu. The selections you make on the Options tab apply to all toolbar buttons. The selections you make from the toolbar button menu apply only to the selected button.

You can do the following from the Options tab on the Customize dialog box:

- Display all toolbars with Large icons
- Show ToolTips (when the pointer is held over a button)
- Show shortcut keys in ToolTips if one exists
- Show Menu animations on pull-down menus—unfold, slide, or random



The following example shows the toolbars with large icons:



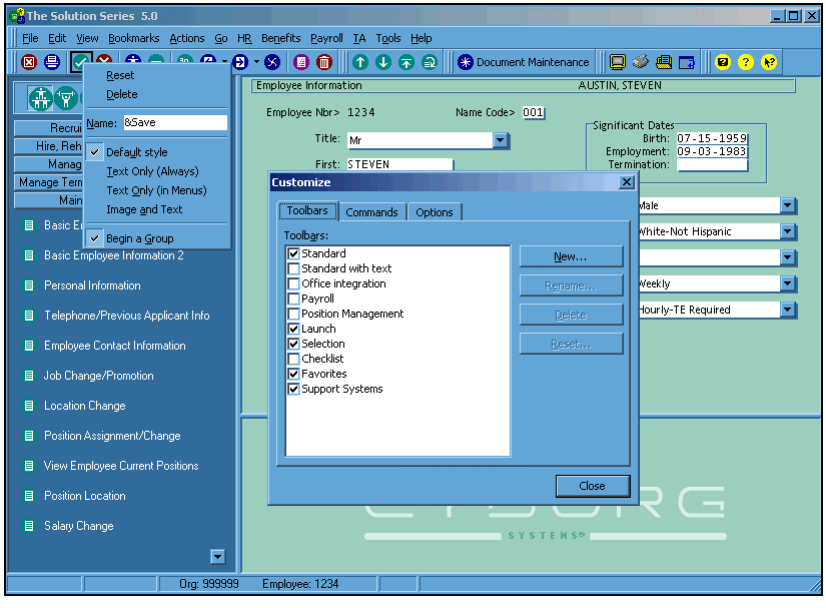
The two examples below show the Save button ToolTip with and without the shortcut key:

You can customize a specific button's display using the toolbar button menu. You display the button menu by first displaying the Customize dialog box and then right-clicking the button.

You can make the following changes to using the toolbar button menu:

- Reset the button to its original settings
- Delete the button from the toolbar
- Display the button's default style
- Display only the button's text (instead of its image)
- Display only the button's text in menus
- Display the button's text and image together
- Begin a group (a vertical separation line) with the selected button

The following example shows the menu for the Save button:



The following examples show different displays of the Save button based on various selections from the toolbar button menu—default, text only, text and image, and text and image with the name changed.

The following example shows the Cancel button as the beginning of a group:

Custom toolbars

Each delivered toolbar contains a group of related buttons. For example, the Support Systems toolbar contains support and help related buttons. Instead of using some or all of the delivered toolbars, you may want to create your own custom toolbars.

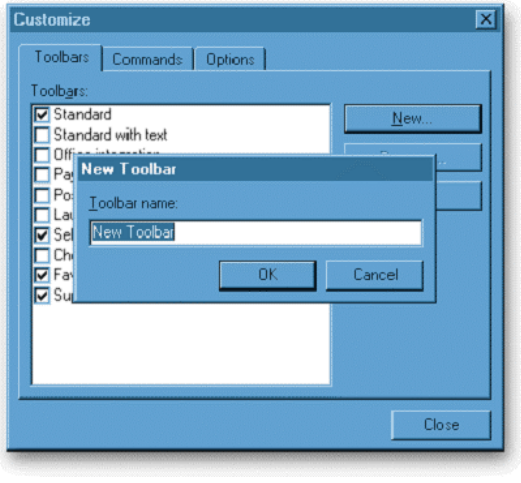
After you have created a custom toolbar, you can modify it. You can also rename and delete a custom toolbar.

Creating custom toolbars

You can create as many custom toolbars as you like using the Customize dialog box.

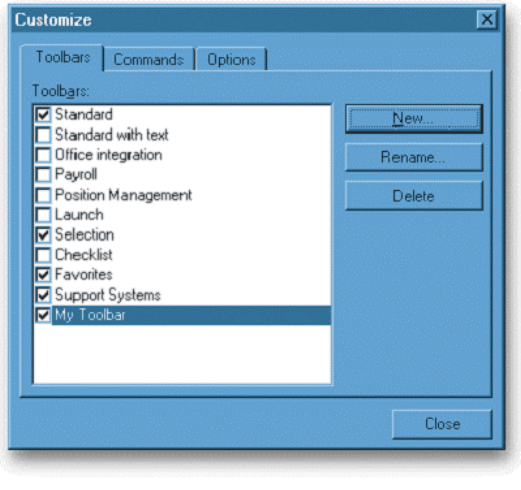
When you create a custom toolbar, you will be prompted to enter a name in the New Toolbar dialog box. The system will display a default name.

An example of the 'New Toolbar' dialog box follows:



After you have named the custom toolbar, it will display in the Toolbars area of the Customize dialog box and in the Work Area.

In the dialog box below, the custom toolbar 'My Toolbar' was added:



After you have named the custom toolbar, you can begin adding buttons to it.

See also:

- **Creating a custom toolbar** ***(on page 119)***

For detailed directions on creating a custom toolbar.

Modifying custom toolbars

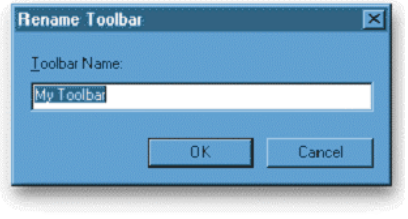
After you have created a custom toolbar, you can modify it to meet your changing needs. As with the delivered toolbars, you can delete, move, and add buttons after displaying the Customize dialog box.

Renaming custom toolbars

As you add and delete buttons from your custom toolbar, the name that you originally assigned it may no longer apply. You can rename a custom toolbar.

To rename a custom toolbar, you must select it in the Customize dialog box. When you select a custom toolbar the Rename and Delete buttons become active.

You use the Rename Toolbar dialog box to change the name.



See also:

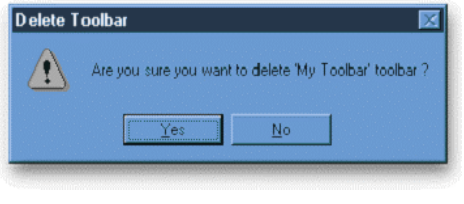
- Renaming a custom toolbar ***(on page 122)***

For detailed directions on renaming a custom toolbar.

Deleting custom toolbars

When you no longer need a custom toolbar, you can delete it.

To delete a custom toolbar, you use the Customize dialog box. You will be prompted to confirm the deletion.



See also:

- Deleting a custom toolbar ***(on page 122)***

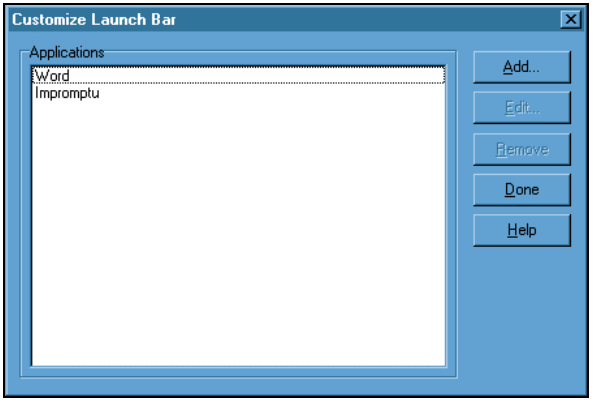
For detailed directions on deleting a custom toolbar.

The Launch toolbar

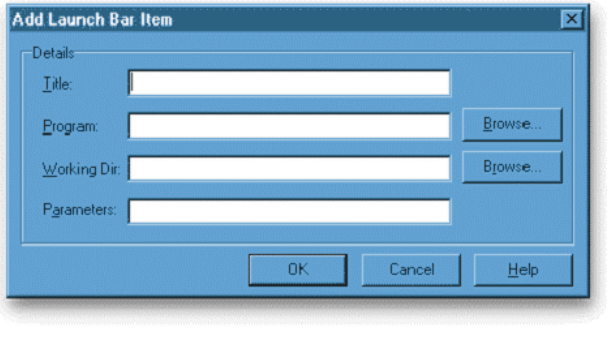
The Launch toolbar gives you access to other applications installed on your computer. From the Launch toolbar, you can start other applications such as Microsoft Word, Lotus Notes, and Cognos Impromptu.

You can add, edit, and remove Launch toolbar applications using the Customize Launch Bar dialog box. You access this dialog box from the Navigator.

The following is an example of the Customize Launch Bar dialog box with Word and Impromptu:



When you add or edit applications, you will use a dialog box similar to the Add Launch Bar Item dialog box shown below. To add an application, you must identify the application program by its executable filename. You can also enter a ToolTip title, working directory, and any application parameters. You can browse your computer when entering the program and working directory.

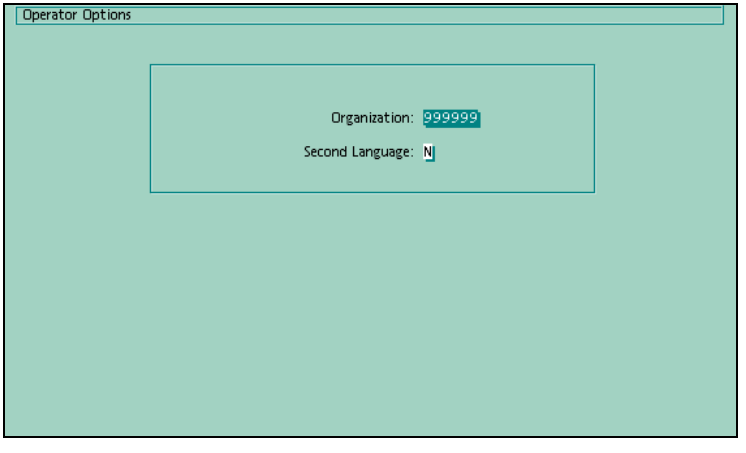


Log on options

Each time you log on, the Solution Series applies system defaults specific to your user code. These defaults include the default sign on organization and whether labels and text on forms display in the primary or in a secondary language.

You can change these defaults using the Operator Options form (MYOPTS). After you make a change, the defaults become effective the next time you sign on.

The following is an example of the Operator Options form (MYOPTS). The default sign on organization is 999999. A second language is not being used.



Changing the default log on organization

You may consider changing the default log on organization if you work within different organizations at certain times of the week or month. For example, if you work with retired employees in a different organization from current employees the last week of the month, you could change the default organization so that each time you log on you are working with the organization with retired employees.

Using a second language

A second language gives your organization the flexibility to set up and display text box labels and text on forms in a primary or secondary language.

Use the Second Language text box on the Operator Options form (MYOPTS) to select either the primary or secondary language. Enter 'N' to use the primary language or 'Y' to use the secondary language.

See also:

- Setting personal log on options ***(on page 126)***

For detailed directions on specifying personal log on options.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Setting display options 109
Setting form options 110
Setting updating options 111
Setting letters options 112
Showing/hiding a toolbar 114
Changing the location of a toolbar 115
Adding buttons to a toolbar 116
Deleting buttons from a toolbar 118
Moving buttons on a toolbar 118
Creating a custom toolbar 119
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Adding buttons to the Launch toolbar 123
Editing buttons on the Launch toolbar 124
Removing buttons from the Launch toolbar 125
Setting personal log on options 126

Setting layout options

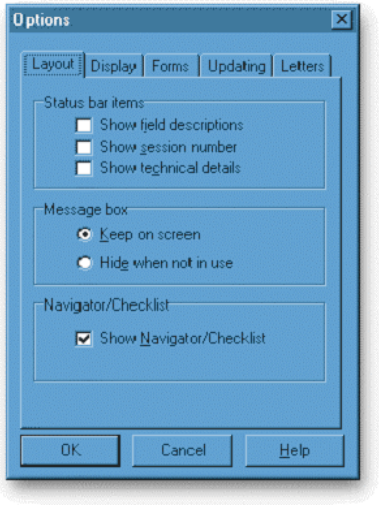
To set or change layout options, complete the following steps:

1. **Access the Options dialog box**

   Access this dialog box by making the following selections from the Navigator:

   Component: User Tools
   Process: User Tools
   Task: Change Options

An Options dialog box similar to the following example displays:



2. Select Show field descriptions

Select 'Show field descriptions' to show option list names and values and text box descriptions on the status bar when the insertion point is in a text box. When unchecked, this status bar area will be blank.

3. Select Show session number

Select 'Show session number' to show your current session number on the status bar. When unchecked, this status bar area will be blank.

4. Select Show technical details

Select 'Show technical details' to show technical information on the status bar including the program name of the current form. When unchecked, this status bar area will be blank.

5. Select Message box

Select 'Keep on screen' to display the Message area or 'Hide when not in use' to hide it when there is nothing to display in this area.

6. Select Navigator/Checklist

Select 'Show Navigator/Checklist' to display the Navigator in the Work Area. When unchecked, the Navigator will not display and the Form area and Message area (if selected) will use its space.

7. Click OK

The Options dialog box closes and any changes will take effect immediately.

See also:

- Layout options ***(on page 83)***

For more information on setting layout options.

Setting display options

To set or change display options, complete the following steps:

1. Access the Options dialog box

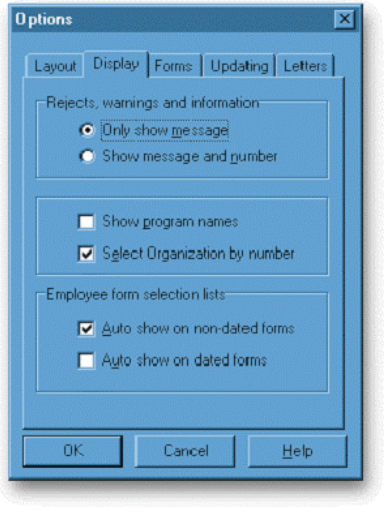
Access this dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Change Options

2. Click Display

Click the Display tab.

An Options dialog box similar to the following example will display:



3. Select Rejects, warnings and information

Select 'Only show message' to not show message numbers with reject, warning, and information messages, or select 'Show message and number' to display message numbers.

4. Select Show program names

Select 'Show program names' to display the six-character program name along with the task name on menus. When unchecked, only the task name is displayed.

5. Select Select Organization by number

Select 'Select Organization by number' to present the organization as a six-character alphanumeric entry text box on all dialogs except the command dialog. When unchecked, a list box is presented with only the organization name.

6. Select Auto show on non-dated forms

Select 'Auto show on non-dated forms' to show selection lists in the Message area when there are multiple occurrences for a form that is not keyed on a date.

7. Select Auto show on dated forms

Select 'Auto show on dated forms' to show selection lists in the Message area when there are multiple occurrences for a form that is keyed on a date.

8. Click OK

The Options dialog box closes and any changes will take effect immediately.

Note: You can also resize the Navigator and Message areas using standard Windows techniques.

See also:

- Display options ***(on page 86)***

For more information on setting display options.

Setting form options

To set or change form options, complete the following steps:

1. Access the Options dialog box

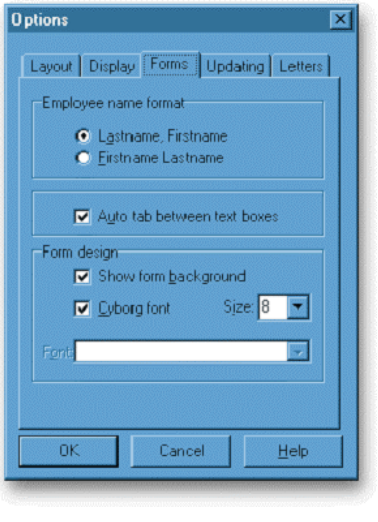
Access this dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Change Options

2. Click Forms

Click the Forms tab.

An Options dialog box similar to the following example will display:



3. Select Employee name format

Select 'Lastname, Firstname' to display the employee's surname first, or select 'Firstname Lastname' to display the employee's surname last.

4. Select Auto tab between text boxes

Select 'Auto tab between text boxes' to have the system automatically tab to the next text box when the last character of a text box is entered. When unchecked, you must press Tab to move to the next text box.

Form Design

5. Select Show form background

Select 'Show form background' to display the background with the Cyborg watermark. When unchecked, the Cyborg watermark is not displayed.

6. Select Cyborg font

Select 'Cyborg font' to display text box labels and data in the Cyborg font embedded in the product. When unchecked, the Font option list will become enabled, and you can select any fixed-width font currently defined in Windows.

7. Select Size

When 'Cyborg font' is unchecked and you have selected a font from the Font option list, you can select the size of the selected font.

Note: Depending on your screen resolution and font selection, selecting a large font size may expand the Form area beyond the viewable area of your screen.

8. Select Font

When 'Cyborg font' is unchecked, you can select any fixed-width font currently defined in Windows.

9. Click OK

The Options dialog box closes and any changes will take effect immediately.

See also:

- Forms options ***(on page 88)***

For more information on setting forms options.

Setting updating options

To update local tables or specify when they are to be updated, complete the following steps:

1. Access the Options dialog box

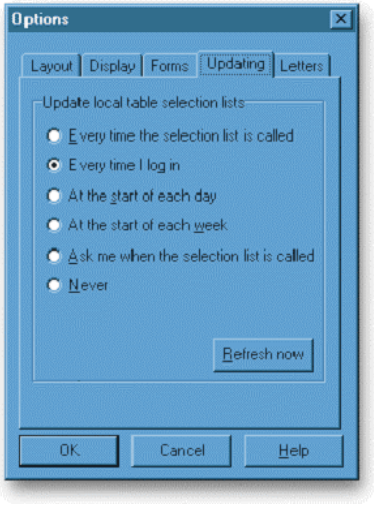
Access this dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Change Options

2. Click Updating

Click the Updating tab.

An Options dialog box similar to the following example will display:



3. Select Update local tables

When local tables are used, you can select when they are updated. Click 'Refresh now' to update local tables immediately.

Select one of the options to set when local tables are updated:

- **E**very time the selection list is called—local tables are read from the server when used
- Every time I log in—local tables are updated after each sign on
- At the start of each day—local tables are updated after the first sign on of the day
- At the start of each week—local tables are updated on the first sign on, on a Monday
- Ask me when the selection list is called—when a local table is used, prompt for updating
- Never—do not update local tables

4. Click OK

The Options dialog box closes.

See also:

- Updating options ***(on page 90)***

For more information on setting updating options.

Setting letters options

To set or change when and how communication event letters are printed, complete the following steps:

1. Access the Options dialog box

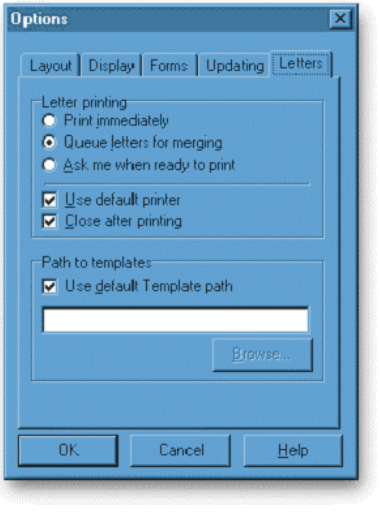
Access this dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Change Options

2. Click Letters

Click the Letters tab.

An Options dialog box similar to the one shown below will display:



3. Select a Letter printing option

Communication event letters can be generated manually or automatically based on a task that you perform. You can specify when these letters print.

Select one of the options:

- Print immediately—letters print as soon as they are generated.
- Queue letters for merging—letters will be placed in a queue for printing. You can access the queue from the Office Integration toolbar.
- Ask me when ready to print—you will be prompted when a letter has been generated and is ready for printing.

4. Select Use default printer

Select the Use default printer check box to print letters on the default printer.

5. Select Close after printing

Select the Close after printing check box to close the word-processing application after the letter has been printed.

6. Specify the Path to templates

Templates are used for the communication event letters. You can use the default location, which is entered on the System Options form (SCOPTS), or specify another location for where created templates are located. The path entered here only overrides the default location for communication event letters that have already been created.

Select the Use default Template path check box to use the default location.

Clear the Use default Template path check box to specify a location other than the default. After you have cleared the check box, you can enter a location in the text box or select one using the Browse button.

7. Click OK

The Options dialog box closes.

See also:

- Letters options ***(on page 91)***

For more information on setting letters options.

Showing/hiding a toolbar

You use the same procedure to hide a toolbar as you do to show a toolbar. To show or hide a toolbar, complete the following steps:

1. Point to a toolbar and right-click

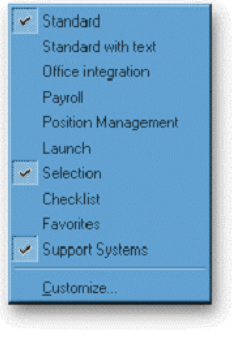
Move the pointer over any toolbar and right-click to display the shortcut menu.

Note: You can also use the View menu to display the toolbar shortcut menu.

A shortcut menu of toolbars displays.

Note: If you move the pointer over an active icon and keep it there before right-clicking, the title of that icon will appear.

If you completed the previous step, a shortcut menu of toolbars similar to the following example will display. The toolbars that are checked on your shortcut menu may be different than those shown here:



2. Select a toolbar

Select the toolbar that you want to hide or show.

If you completed the previous step, the Support Systems toolbar will close if it was showing before you started the Detailed Directions, otherwise the toolbar will be displayed if it was not already showing.

See also:

- Showing and hiding toolbars ***(on page 94)***

For a further explanation of showing and hiding toolbars.

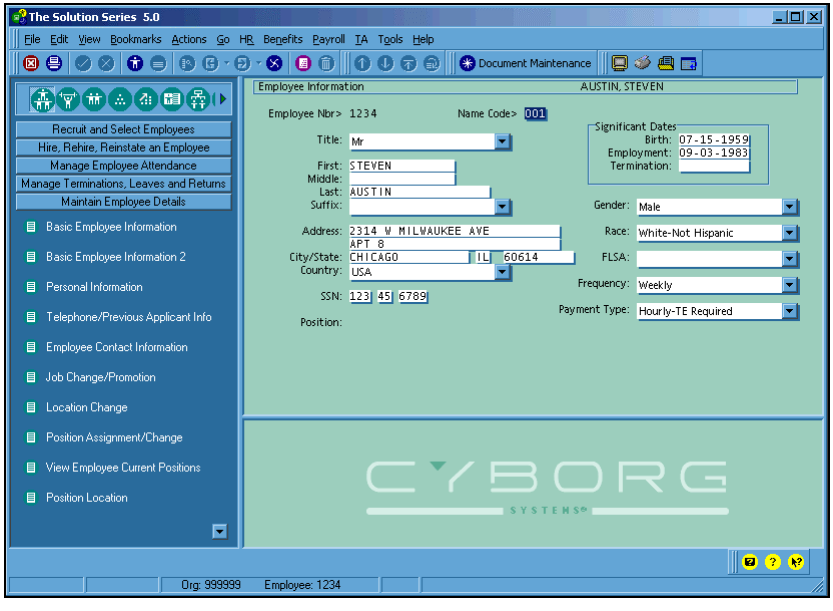
Changing the location of a toolbar

To change the location of a toolbar, complete the following:

Point to the toolbar move handle or title bar and drag the toolbar to a new location

If the toolbar is docked (in a toolbar area), position the pointer over the toolbar's move handle and drag it to the new location. If the toolbar is not docked ('floating'), position the pointer over the toolbar's title bar and drag it to the new location.

If you completed the previous step, the Support Systems toolbar should be positioned in the lower right corner:



See also:

- Moving toolbars ***(on page 95)***

For an explanation of moving toolbars.

Adding buttons to a toolbar

To add a button to a toolbar, complete the following steps:

Note: Before you can add buttons to a toolbar, the toolbar must be showing on the Work Area.

1. Point to a toolbar and right-click

Move the pointer over any toolbar and right-click to display the shortcut menu.

Note: You can also use the View menu to display the toolbar shortcut menu.

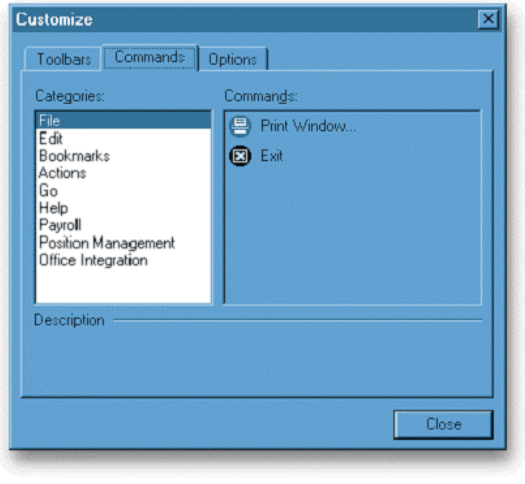
A shortcut menu of toolbars displays.

2. Select 'Customize...'

The Customize dialog box displays.

3. Click Commands

The Commands tab is displayed.



4. Select Categories

Select the category from which you want to add a button to the toolbar.

After you have selected a category, the category name is highlighted and the list of buttons for the selected category displays in the Commands area of the Customize dialog box. The following is a summary of what each category contains:

- File—print and exit commands
- Edit—commands used while editing such as cut, copy, and paste
- Bookmarks—add bookmark and customize bookmark buttons
- Actions—functions such as save, cancel, clear, change employee, and query
- Go—navigational commands such as back, forward, up, down, and refresh
- Help—support buttons such as form help and what's this
- Payroll—what-if and update mode, restore data
- Position Management—choose a job, organization, position, or an incumbent
- Office Integration—select a letter or email, show queued letters list, Import Manager

5. Drag a button to the toolbar

When you drag a button to the toolbar, an I-beam (insertion point) indicates where the button you are dragging will be placed in relation to existing buttons.

To place the button you are dragging last on the toolbar, drag the button near the lower right corner so that the insertion point is displaying to the right of the last button already on the toolbar.

To place the button you are dragging before another button, drag the button over the left side of the existing button so that the insertion point is displaying to the left of the existing button. The button is placed on the toolbar after the mouse button is released.

Repeat Steps 4 and 5 until you are finished adding buttons to the toolbar.

6. Click Close

The Customize dialog box closes.

See also:

- Modifying toolbars ***(on page 97)***

For an explanation of adding buttons to an existing toolbar.

Deleting buttons from a toolbar

To delete a button from a toolbar, complete the following steps:

Note: Before you can delete buttons from a toolbar, the toolbar must be showing on the program window.

1. Point to a toolbar and right-click

Move the pointer over any toolbar and right-click to display the shortcut menu.

Note: You can also use the View menu to display the toolbar shortcut menu.

A shortcut menu of toolbars displays.

2. Select 'Customize...'

The Customize dialog box displays.

3. Drag the button off of the toolbar

Drag the button completely off the toolbar and release the mouse button. The button is deleted from the toolbar.

Repeat this step for any other buttons that you want deleted from the toolbar.

4. Click Close

The Customize dialog box closes.

See also:

- Modifying toolbars ***(on page 97)***

For an explanation of deleting buttons from a toolbar.

Moving buttons on a toolbar

To move a button on a toolbar, complete the following steps:

Note: Before you can move a button, the toolbar must be showing on the program window.

1. Point to a toolbar and right-click

Move the pointer over any toolbar and right-click to display the shortcut menu.

Note: You can also use the View menu to display the toolbar shortcut menu.

A shortcut menu of toolbars displays.

2. Select 'Customize...'

The Customize dialog box displays.

3. Drag the button to its new location on the toolbar

An I-beam (insertion point) indicates where the button you are dragging will be placed in relation to existing buttons.

To place the button you are dragging before another button, drag the button over the left side of the existing button so that the insertion point is displaying to the left of the existing button.

To place the button you are dragging last on the toolbar, drag the button near the lower right corner so that the insertion point is displaying to the right of the last button already on the toolbar. The button is placed on the toolbar after the mouse button is released.

Note: *Make sure the button you are moving is over the toolbar—and the insertion point is displaying—before releasing the mouse button.*

Repeat this step for any other buttons that you want to move.

4. Click Close

The Customize dialog box closes.

See also:

- Modifying toolbars ***(on page 97)***

For an explanation of moving buttons on a toolbar.

Creating a custom toolbar

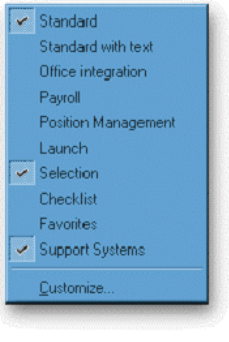
To create a custom toolbar, complete the following steps:

1. Point to a toolbar and right-click

Move the pointer over any toolbar and right-click to display the shortcut menu.

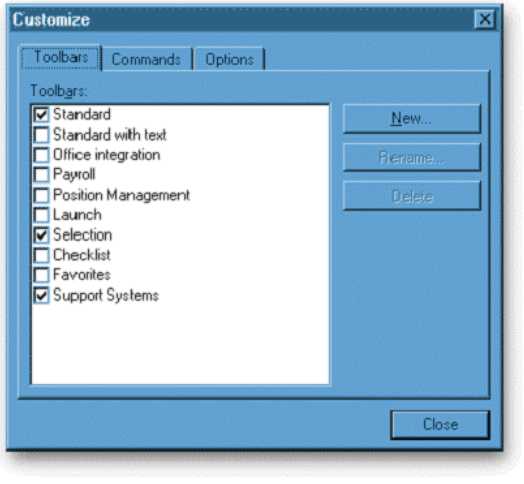
Note: *You can also use the View menu to display the toolbar shortcut menu.*

A shortcut menu of toolbars similar to the following example displays:



2. Select 'Customize...'

The Customize dialog box displays. Your display may look a different than the following example:



3. Click New

The New Toolbar dialog box displays. A default name is displayed in the Toolbar Name text box.

4. Enter the new toolbar name

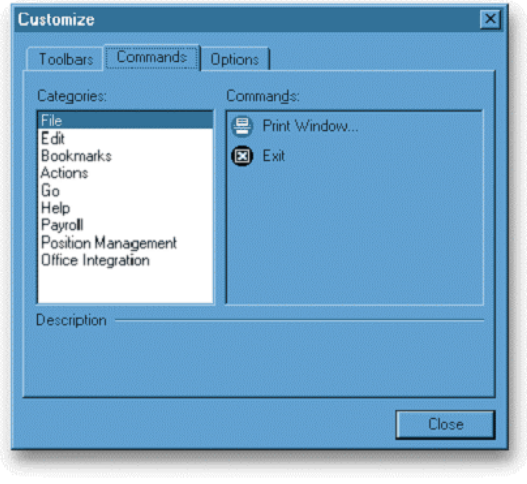
Enter a name for the custom toolbar.

5. Click OK

The toolbar name is added to the Customize dialog box and the toolbar displays in the program window.

6. Click Commands

The Commands tab is displayed.



7. Select Categories

Select a category from which you will select one or more buttons to add to the newly created custom toolbar.

After you have selected a category, the category name is highlighted and the list of buttons for the selected category displays in the Commands area of the Customize dialog box.

8. Drag a button to the custom toolbar

Drag the desired button from the Commands area of the Customize dialog box to the newly created custom toolbar. If you are adding the first button to the newly created custom toolbar, an I-beam (insertion point) will display on the left side of the custom toolbar when you are positioned over the custom toolbar. The button is added to the custom toolbar after you release the mouse button.

When you are adding subsequent buttons to the custom toolbar, the insertion point indicates where the button you are dragging will be placed in relation to the other button(s). To place the button you are dragging last on the custom toolbar, drag the button near the lower right corner so that the insertion point is displaying to the right of the last button already on the toolbar. To place the button you are dragging before another button, drag the button over the left side of the existing button so that the insertion point is displaying to the left of the existing button.

Repeat Steps 7 and 8 until you are finished adding buttons to the custom toolbar.

9. Click Close

The Customize dialog box closes.

See also:

- Custom toolbars ***(on page 102)***

For an explanation of custom toolbars.

Renaming a custom toolbar

To rename a custom toolbar, complete the following steps:

1. Point to a toolbar and right-click

Move the pointer over any toolbar and right-click to display the shortcut menu.

Note: You can also use the View menu to display the toolbar shortcut menu.

A shortcut menu of toolbars displays.

2. Select 'Customize...'

The Customize dialog box displays.

3. Select the custom toolbar

Select the custom toolbar to be renamed. The toolbar name is highlighted and the Rename and Delete buttons become active.

4. Click Rename

The Rename Toolbar dialog box displays.

5. Enter a name

Enter the new name for the custom toolbar.

6. Click OK

The custom toolbar is renamed.

Repeat Steps 3 through 6 to rename other toolbars.

7. Click Close

The Customize dialog box closes.

See also:

- Custom toolbars ***(on page 102)***

For an explanation of custom toolbars.

Deleting a custom toolbar

To delete a custom toolbar, complete the following steps:

1. Point to a toolbar and right-click

Move the pointer over any toolbar and right-click to display the shortcut menu.

Note: You can also use the View menu to display the toolbar shortcut menu.

A shortcut menu of toolbars displays.

2. Select 'Customize...'

The Customize dialog box displays.

3. Select a custom toolbar

Select the custom toolbar to be deleted. The custom toolbar name is highlighted and the Rename and Delete buttons become active.

4. Click Delete

Click the Delete button and the system displays a warning message, prompting you to confirm the deletion.

5. Click OK

The custom toolbar is deleted.

6. Click Close

The Customize dialog box closes.

See also:

- Custom toolbars ***(on page 102)***

For an explanation of custom toolbars.

Adding buttons to the Launch toolbar

To add an application to the Launch toolbar after installation, complete the following steps:

1. Access Customize Launch Bar dialog box

Access this dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Customize Launch Bar

2. Click Add

The Add Launch Bar Item dialog box displays.

3. Enter the Title

Enter the title for the button to be added to the Launch toolbar. The title will display as a ToolTip.

4. Enter the Program

Enter the executable path and program name for the button to be added to the Launch toolbar.

Note: You can use the standard Windows browsing technique to enter the program by clicking the Browse button directly to the right of the Program text box.

5. Enter the Working Dir

Enter the working directory path for the application.

Note: You can use the standard Windows browsing technique to enter the working directory by clicking the Browse button directly to the right of the Working Dir text box.

6. Enter Parameters

Enter any application parameters.

7. Click OK

The Add Launch Bar Item dialog box closes and the button is added to the Customize Launch Bar dialog box Applications section.

Repeat Steps 2 through 7 to add additional buttons.

8. Click Done

The Customize Launch Bar dialog box closes. If the toolbar is showing, the button is added to the Launch toolbar.

See also:

- The Launch toolbar ***(on page 105)***

For an explanation of modifying the Launch toolbar.

Editing buttons on the Launch toolbar

To edit an application on the Launch toolbar after installation, complete the following steps:

1. Access Customize Launch Bar dialog box

Access this dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Customize Launch Bar

2. Select an application

Select the application to be edited.

The Edit and Remove buttons become active and the icon for the selected application is displayed below the Help button.

3. Click Edit

The Edit Launch Bar Item dialog box displays with information about the application.

4. Enter the Title

Enter the title for the selected button.

5. Enter the Program

Enter the executable path and program name for the selected button.

Note: You can use the standard Windows browsing technique to change the program by clicking the Browse button directly to the right of the Program text box.

6. Enter the Working Dir

Enter the working directory path for the application.

Note: You can use the standard Windows browsing technique to change the working directory by clicking the Browse button directly to the right of the Working Dir text box.

7. Enter Parameters

Enter any application parameters.

8. Click OK

The Edit Launch Bar Item dialog box closes.

Repeat Steps 3 through 8 to edit additional buttons.

9. Click Done

The Customize Launch Bar dialog box closes.

See also:

- The Launch toolbar ***(on page 105)***

For an explanation of modifying the Launch toolbar.

Removing buttons from the Launch toolbar

To remove an application from the Launch toolbar after installation, complete the following steps:

1. Access Customize Launch Bar dialog box

Access this dialog box by making the following selections from the Navigator:

Component:	User Tools
Process:	User Tools
Task:	Customize Launch Bar

2. Select an application

Select the application to be edited.

The Edit and Remove buttons become active and the icon for the selected application is displayed below the Help button.

3. Click Remove

Click the Remove button and the system displays a warning message, prompting you to confirm removal.

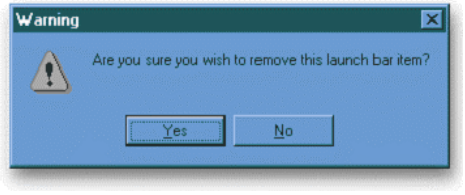
4. Click Yes

Click Yes to confirm removal of the selected application from the Launch toolbar.

The Warning dialog box closes and the application is removed from the list of Applications in the Customize Launch Bar dialog box.

Note: The application icon is not visually removed from the Launch toolbar until the Customize Launch Bar dialog box is closed.

Repeat Steps 2 through 4 to remove additional applications.



5. Click Done

The Customize Launch Bar dialog box closes.

See also:

- The Launch toolbar ***(on page 105)***

For an explanation of modifying the Launch toolbar.

Setting personal log on options

To specify personal log on options, complete the following steps:

1. Access the Operator Options form

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

Component: Administrator Tools
Process: Administrator Tools
Task: Specify Defaults

The existing log on defaults are displayed.

2. Enter an Organization

Enter the six-character Organization (Control 1-2) you want as the default the next time you log on.

3. Enter Second Language

Enter 'N' to use the primary language, 'Y' to use the secondary language.

4. Save the form

Press Enter or click the Save button to save the form. The operator log on options are saved.

Note: Changes will become effective the next time you log on.

See also:

- Log on options ***(on page 106)***

For an explanation of the Operator Options form (MYOPTS) and default log on options.

Review of Questions Answered

1. What areas of the Status bar can you control?

2. What two areas of the Work Area can you show or hide?

3. How can you personalize the way forms look?

4. Where can you move toolbars?

5. What is the Launch toolbar?

CHAPTER 6

Navigating the System

In This Chapter

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Introduction

The Work Area is where you begin to interact with The Solution Series. Your personal preferences determine how you navigate around the Work Area and the rest of the system. This section introduces you to the different navigation methods and tools designed to help you gain the most from The Solution Series.

Tasks

This section explains the following tasks:

- Using the Navigator
- Switching between forms
- Accessing a bookmark
- Accessing a checklist
- Pausing a checklist
- Resuming a paused checklist
- Changing to a different employee or organization
- Displaying a list of organizations
- Triggering a letter communication event
- Triggering an email communication event
- Viewing and editing queued letters
- Printing a queued letter

Prerequisites

Before you can complete the tasks in this section, you must log on to The Solution Series.

☞ *Refer to* **Getting Started** *(on page 29) for more information on how to log on to The Solution Series.*

☞ *Refer to* **Exploring the Work Area** *(on page 49) for more information on using the work area.*

Questions answered

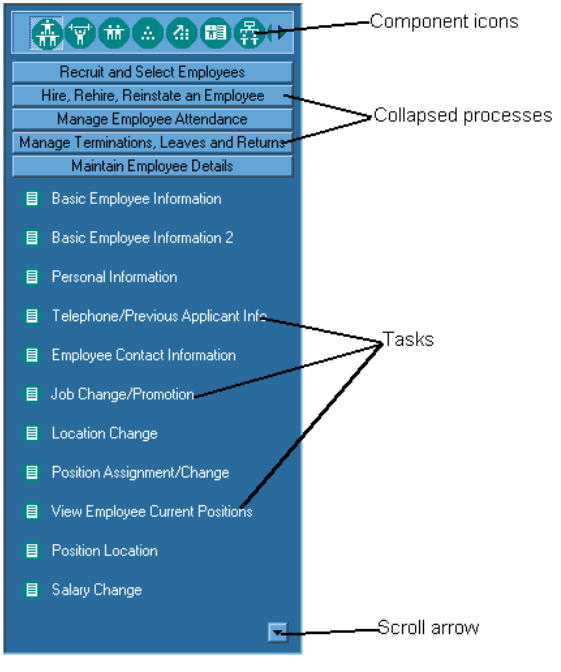
The following questions are answered in this section:

1. How is the Navigator organized?
2. What is the relationship between the Navigator and menus?
3. What effect does your user profile have on information you can access?
4. What method is provided to allow for switching between forms?
5. What are checklists?
6. What method is provided to allow the selection of a different employee?

The Navigator

The Navigator provides the best method for navigating the system. The Navigator is positioned on the left side of the Work Area. The Navigator is made up of these three levels:

- Components
- Processes—each process is associated with a component
- Tasks—each task is associated with a process



By selecting the different items on these levels, you navigate to the item (form, dialog box, checklist, and so forth) that you need.

Note: *The Navigator may only be controlled with the mouse.*

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more information on how to hide and show the Navigator.*

Components

To navigate the system using the Navigator, you must first select the correct component. Each component in the system is represented by an icon.

Your user profile will determine the components to which you have access. The component bar can display a limited number of component icons. If you have access to more components than can be displayed, you will need to use the arrows on the Component bar to navigate to them. Click the arrow at either end of the Component bar to navigate to the different components.

When the component you are looking for is displayed, you must click its icon to display the processes associated with that component.

☞ *Refer to* **Working with Data** *(on page 219) for more information on how to select components using the Navigator.*

Note: Your user profile determines which components you can access—you may not have access to all of the components shown here.

Note: The Solution Series Development Tools, Security Tools, Administrator Tools, and User Tools are also represented by a component icon.

See also:

- Relationship between components and menus ***(on page 132)***

For more information on components, including a list of components.

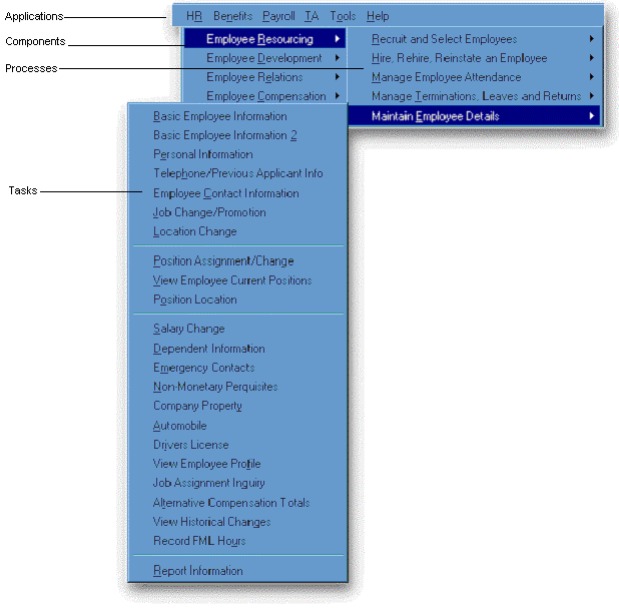
Relationship between components and menus

Each component on the Navigator has an equivalent menu option. These menu options represent the different administration solutions:

- HR
- Benefits
- Payroll
- Time and Attendance (TA)
- Tools

For example, the component 'Employee Resourcing' is part of the HR application. To access the different processes in this component using the menu, you would select:

HR ▶ Employee Resourcing



Note: To identify the different applications on the Component bar, each application's icons are displayed using a different color.

The HR application

The HR application consists of the following components that can be accessed from the Navigator or the menus:

Component on the Navigator	Equivalent description on the menus
	Employee Resourcing
	Employee Development
	Employee Relations
	Employee Compensation
	Salary Administration
	HR Setup
	Position Administration
	Requisition Tracking
	Training Administration

The Benefits application

The Benefits application consists of the following components that can be accessed from the Navigator or the menus:

Component on the Navigator	Equivalent description on the menus
	Health Welfare Plan Enrollment/Maint
	Deferred Plan Enrollment/Maintenance
	Flex Plan Enrollment/Processing
	Benefit Plan Setup and Maintenance

The Payroll application

The Payroll application consists of the following components that can be accessed from the Navigator or the menus:

Component on the Navigator	Equivalent description on the menus
	Employee Payroll
	Payroll Setup Processing
	Payroll Year end

The Time and Attendance application

The Time and Attendance application consists of the following component that can be accessed from the Navigator or the menus:

Component on the Navigator	Equivalent description on the menus
	Time and Attendance

The Tools application

The different tools that are available with The Solution Series can be accessed from the Navigator or the menus:

Component on the Navigator	Equivalent description on the menus
	Reporting
	User Tools
	Administrator Tools

Component on the Navigator	Equivalent description on the menus
	Security
	Development Tools

Your user profile and Navigator components

A user profile is created and maintained for you by a Security Officer. Each user of The Solution Series will have a user profile. Your user profile determines what you can and cannot do, and which parts of the system you can access.

For example, your user profile determines which components you can access. Confidential information such as an employee's bank account details are usually only accessible to users in your organization's payroll department. Users of The Solution Series who do not work in the payroll department would not be given access to the Employee Payroll component.

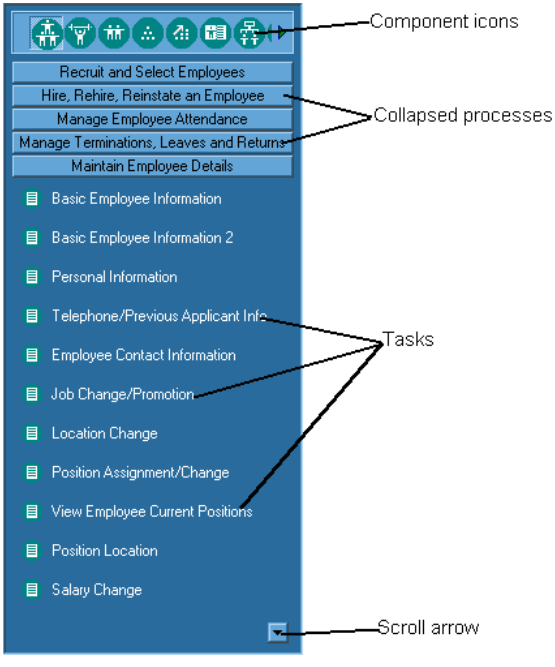
Process bars

After you select a component, you must then select a Process bar. A Process bar is used to categorize the different tasks within a component. When you first sign on to The Solution Series the Process bars are displayed at the top of the Navigator. When you click a collapsed Process bar, it expands to reveal its tasks.

As you move from component to component, the system remembers the Process bars you have selected, and displays the same Process bars when you navigate back to those Components. This means that you do not have to repeat the navigation process each time you return to a component you have previously accessed.

Note: *The structure of a Component will be refreshed the next time you log on.*

Note: *Some components have only one Process bar.*



☞ *Refer to* **Working with Data** *(on page 219) for more information on how to select and use Process bars.*

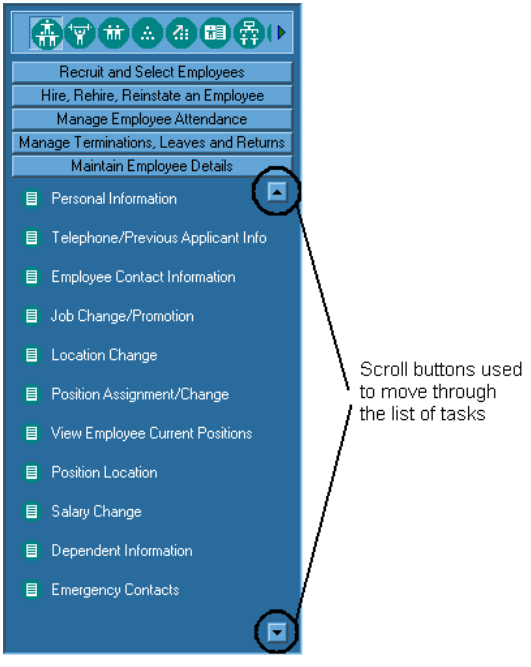
Tasks

Each task is represented by an icon and a description of the task. The icon associated with each task indicates the type of task. The task icons include the following:

Icon	Description
	Checklist
	Dialog Box
	Form
	Report
	Wizard

When you select a task, the associated item is displayed in the Form area.

If all of the tasks associated with a process cannot be displayed at once, a scroll button is displayed at the bottom of the list. Click the scroll button to see the hidden tasks. When you click the scroll button at the bottom of the list, a scroll button will appear at the top of the visible list. Use these scroll buttons to view the different tasks in a Process bar.



☞ *Refer to* **Working with Data** *(on page 219) for more information on how to select a task.*

See also:

- Using the Navigator ***(on page 156)***

For detailed directions on using the Navigator.

Back and Forward buttons

The Solution Series records a list of the forms that you have accessed in a session. The Back and Forward buttons are a quick way to switch between these forms.

After you have accessed two or more forms, the Back button is enabled.

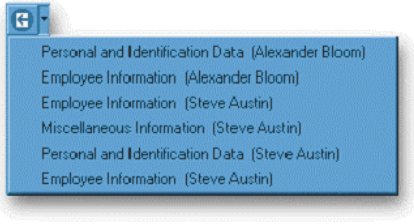
The Back button provides a quick way to switch to an earlier form in the list for a specific employee. Once you click the Back button, the Forward button is enabled.

You can use the Forward button to move forward through the list. When you reach the end of the list, the appropriate button will be disabled.

You can also use the Back and Forward drop-down buttons to recall forms that you have used.

Clicking one of the drop-down buttons will display a list of up to nine forms. The form and employee name is displayed on the list. You can directly select the form you want to recall rather than paging through the forms one-by-one.

Following is an example of the list displayed from the Back drop-down button:



See also:

- Switching between forms one-by-one ***(on page 159)***
- Switching between forms by selection ***(on page 161)***

For detailed directions on using the Back and Forward buttons.

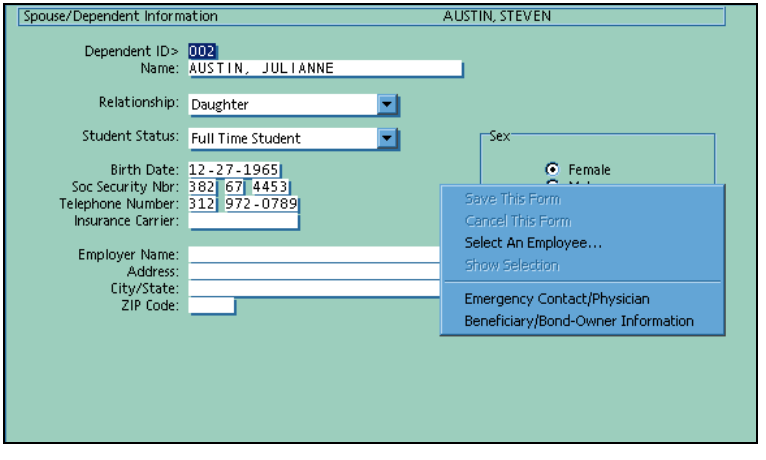
Form shortcut menus

When you right-click a blank area of a form, you access a shortcut menu that has the following options displayed:

- Save This Form
- Cancel This Form
- Select An Employee
- Show Selection (if available)

If there are any additional options available for the particular form, they are displayed at the end of the shortcut menu. Typically, these additional options are the names of related forms to which you may want to navigate. In the following example, you could navigate to the following forms:

- Emergency Contact/Physician (16-SCR)
- Beneficiary/Bond Owner Information (58-SCR)

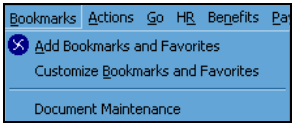


Bookmarks

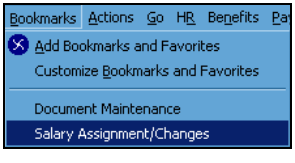
You use forms and checklists to perform various tasks when using the administrative solutions. Each task, such as updating an employee's address, uses a specific form. You can easily access all of the various forms using the Navigator or related menus. Bookmarks give you quick access to the forms and checklists that you use most often.

Bookmarks show up as menu items on the Bookmarks menu.

When you first begin using The Solution Series, the Bookmarks menu contains the functions for adding and customizing bookmarks. If the Document Launcher is installed at your site, the Set Launch Employee utility may be added to the menu as shown below:



When you create a bookmark, it is immediately added to the Bookmarks menu. In the example below, the Salary Assignment/Changes form (40-SCR) has been added to the Bookmarks menu:



You can access a form or checklist using a bookmark by selecting it directly from the Bookmarks menu or pressing a function key if you have assigned one.

☞ *Refer to* **Personalizing Navigation Options** *(on page 177) for more information on adding and customizing Bookmarks, and assigning function keys to bookmarks.*

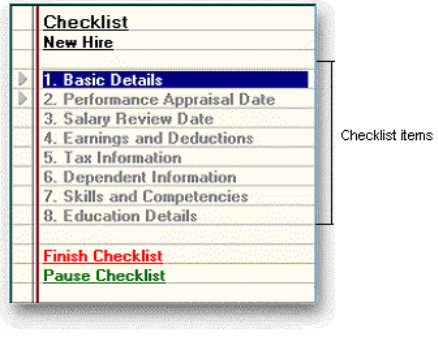
See also:

- Accessing a bookmark ***(on page 163)***

For detailed directions on accessing bookmarks.

Understanding checklists

A checklist provides a way to link different items (forms, dialog boxes, checklists, and report groups) to create a workflow. Each of these items can then be completed consecutively, using the checklist to navigate them. For example, The Solution Series is delivered with a checklist called 'New Hire'. This checklist contains all the items that need to be completed in order to add a new employee to the system, and optional information you might want to add.



Checklists eliminate the need to navigate to individual items. They also ensure that all the items that are part of a workflow are presented for completion. When you access a checklist, you are presented with a list of items in the sequence in which they should be completed.

☞ *Refer to the Optimizing System Features documentation for more detailed information on using checklists to design a business process.*

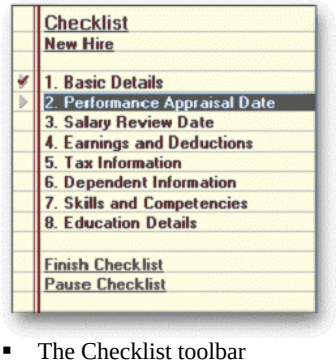
See also:

■ Accessing a checklist ***(on page 164)***
For detailed directions on accessing a checklist.

You can navigate through a checklist using any one of the following four methods:

- The checklist displayed in the Navigator
  When you complete an item in a checklist, you can click the next item in the checklist. When you click the next item, The Solution Series will check the record and save it. If the record cannot be saved, the appropriate message (Reject, Warning, Information) will display in the Message area.

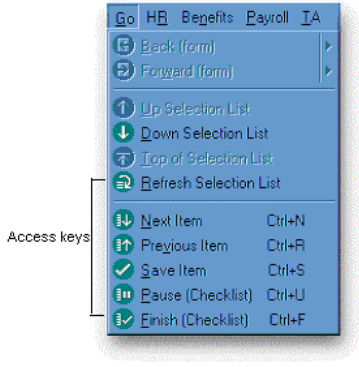
  When you complete the mandatory items in a checklist, you can click Finish Checklist or Pause Checklist.



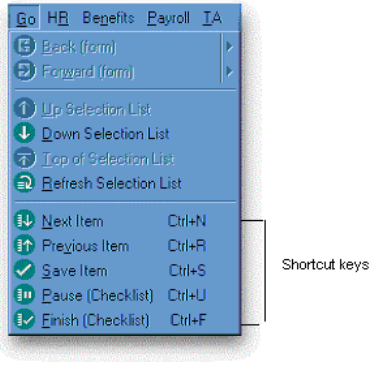
- The Checklist toolbar
  The buttons in the Checklist toolbar are used to perform the actions described next. If the Checklist toolbar is not displayed, use either the View menu or the toolbar shortcut menu to access it.

Button	Description
	Save—saves the form
	Next—moves to the next form in the checklist
	Previous—moves to the previous form in the checklist
	Pause—pauses the checklist
	Finish—finishes the checklist

- Access keys
  An access key is indicated by an underlined letter in a menu option. To use the checklist access keys, you must perform two actions. You must first access the Go menu by pressing 'ALT+G'. You can then select an access key for one of the five checklist actions. For example, you would press 'N' to access the Next Item.



- Shortcut keys
  To use the checklist shortcut keys, you must perform one action. For example, to move to the next form in a checklist, you would press 'CTRL+N'. The shortcut keys are displayed on the Go menu.



See also:

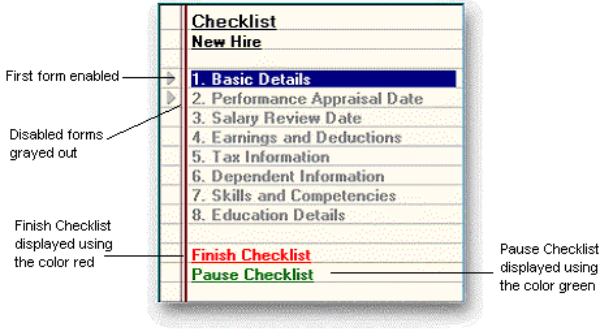
- Accessing a checklist ***(on page 164)***

For detailed directions on accessing a checklist.

Checklist symbols

When you use a checklist, you need to be aware of what the symbol next to each item on the checklist means.

Items in a checklist can be mandatory or optional. A mandatory item must be completed before the next checklist item can be accessed. A mandatory item is displayed with a gray triangle next to it. In the New Hire checklist shown next, the first two items are mandatory:



Until the mandatory items are completed, optional items are displayed in gray and are not accessible. After the mandatory items are completed, the optional items will be enabled. Their color will be changed to black.

Until the mandatory steps are complete, the Finish Checklist control will be displayed in red or not available, depending on checklist options. The Finish Checklist control is displayed in green when all mandatory steps have been completed. The 'Pause Checklist' item is displayed in green.

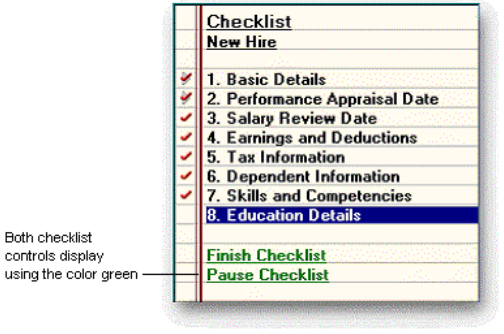
Note: *If the Finish Checklist control is available (displayed in red), the checklist can be stopped even though all mandatory steps have not been completed. Stopping a checklist, however, cancels all further processing.*

The next example shows the 'New Hire' checklist after the first three items have been completed. When an item is completed, a red check or tick is displayed next to it.

When you complete the mandatory items in a checklist, you can click one of the following checklist controls:

- Pause Checklist—to pause the checklist and return to it at a later date.
- Finish Checklist—to finish the checklist and complete the process.

The next example shows the 'New Hire' checklist with all the items completed:



Resuming paused checklists

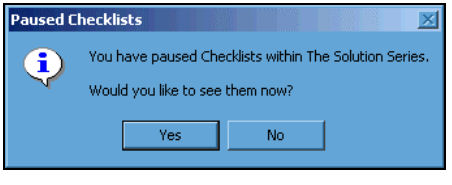
You can pause a checklist for a number of reasons. For example, if you are using the New Hire checklist and you do not have the employee's birth date, you could pause the checklist and complete it at a later date when you have the information.

A paused checklist can be accessed in the following three ways:

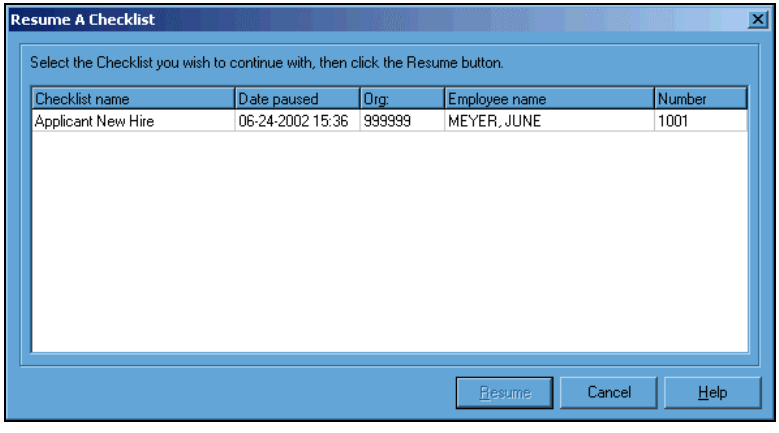
- When you log on
- From the Actions Menu
- From the Standard toolbar

When you log on

If you have paused checklists on the system, the Paused Checklists dialog box will be displayed the next time you sign on:

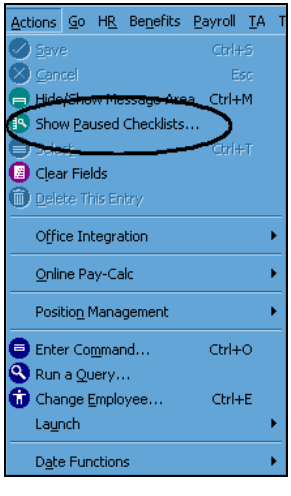


To resume a checklist, select it and click Resume.



From the Actions menu

You can also access a paused checklist from the Actions menu. If you select 'Show Paused Checklists', you access the Resume A Checklist dialog box.



From the toolbar

Another way to access a paused checklist is to click the Show Paused Checklists button to access the Resume A Checklist dialog box.

See also:

- Pausing a checklist ***(on page 167)***

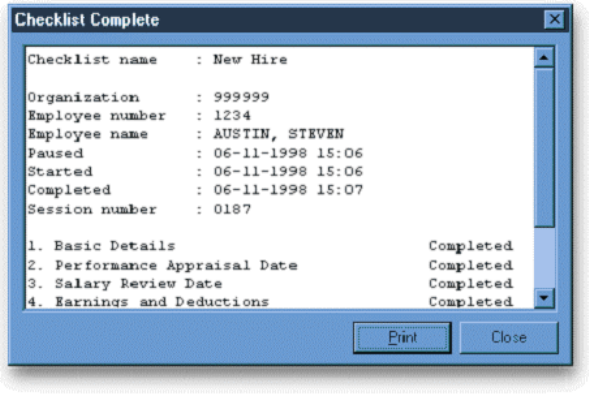
For detailed directions on pausing a checklist.

- Resuming a paused checklist ***(on page 168)***

For detailed directions on resuming a paused checklist.

Finishing a checklist

When you complete a checklist and click Finish Checklist, the Checklist Complete dialog box is displayed. This dialog contains a summary of the information entered into the checklist. For example, if you complete the New Hire checklist, the dialog box will contain information such as the Employee Name and Number. You can also print the contents of this dialog box by clicking the Print button.



Types of checklists

There are two types of checklists:

- Universal—available to everyone who is logged on to The Solution Series
- Personal—only available on the PC where they were defined

Universal checklists

Universal checklists are available to all users of The Solution Series. One universal checklist is delivered with The Solution Series--The New Hire checklist. Additional universal checklists can be created by anyone with the appropriate security profile, and then added to the system using the Menu Editor.

☞ *Refer to the Optimizing System Features documentation for more information on the Menu Editor.*

Universal checklists can be accessed using the Navigator or the corresponding menu. For example, the delivered universal checklist can be accessed by the following methods.

Using the Navigator:

Component: Employee Resourcing
Process: Hire, Rehire, Reinstate an Employee
Task: Hire a New Employee

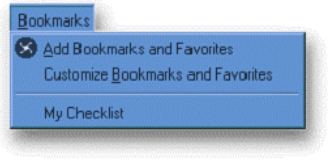
Using the following menus:

HR ▶ Employee Resourcing ▶ Hire, Rehire Reinstate an Employee ▶ Hire a New Employee

Personal checklists

Personal checklists are available only on the PC where they were created. Personal checklists give you the opportunity to personalize the way you work and create checklists that improve your efficiency. For example, a user typically completes six forms for an employee. To complete these forms, the user normally would have to use the Navigator to access each form. If they created a checklist, they would only need to access the checklist.

By default, all personal checklists appear on the Bookmarks menu.



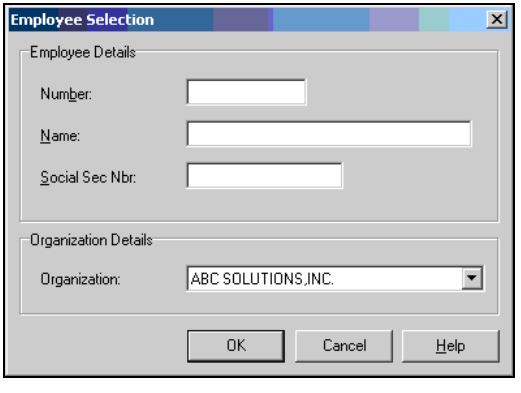
They can also be added to the Favorites toolbar.

Switching between different employees and organizations

If you have more than one organization established on The Solution Series, you will need to be able to switch between these organizations easily and quickly. Within these organizations, you will also need to switch between different employees just as easily.

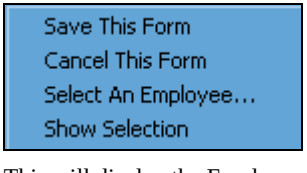
For example, if you need to enter salary information for a number of employees, you will want to be able to switch employees after you complete a Salary Assignment/Changes form (40-SCR) for each of them.

To switch between organizations and employees, you use the Employee Selection dialog box:

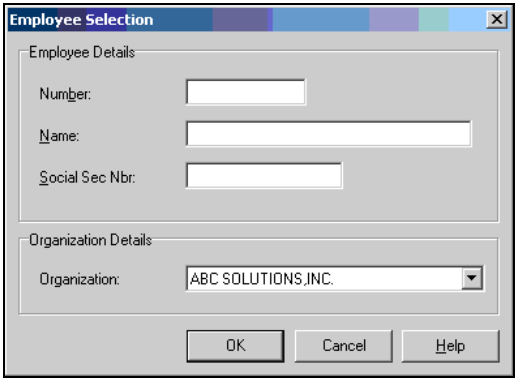


To access this dialog box, click the Change Employee button on the toolbar.

Alternatively, use the shortcut menu and choose the menu option Select An Employee.



This will display the Employee Selection dialog box.



You can also access the Employee Selection dialog box by using the shortcut key CTRL+E.

See also:

- Changing to a different employee or organization ***(on page 169)***

For detailed directions on selecting a different employee or organization.

- Displaying a list of organizations ***(on page 170)***

For detailed directions on displaying a list of organizations.

Communication events

Communication events are letters or emails that can be triggered automatically or manually within The Solution Series. Communication events include data from the current form or record. For example, your manager may set up a communication event that automatically generates a Salary Increase confirmation letter to an employee when his or her salary is changed on the Salary Assignment/Changes form (40-SCR).

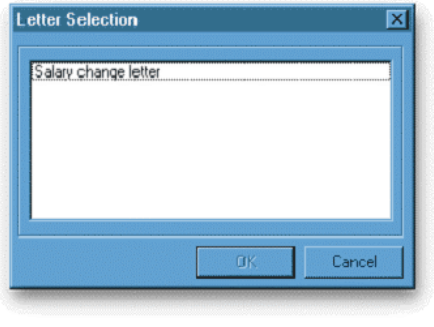
Communication events are triggered by the forms and checklists with which you work. How much interaction you will have with communication events depends on the options selected during setup.

Manually triggering a communication event

You may have the option to manually generate a letter or email while working with a specific form, depending on the user options selected. The Select a Letter or Select an Email button on the Office integration toolbar will become available if there is a communication event associated with the form and it can be manually triggered.

The buttons will display the Letter Selection or Email Selection dialog box respectively, from which you can trigger a communication event.

The following is an example of the Letter Selection dialog box with one communication event:

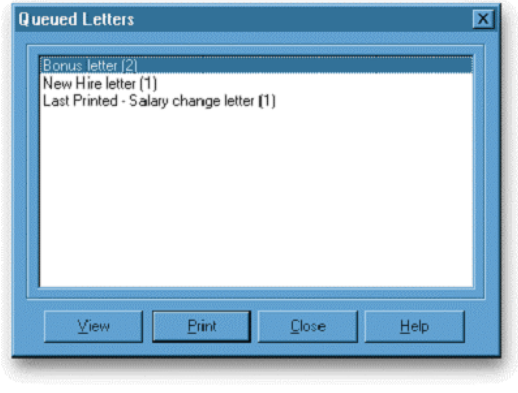


Queued letters dialog

Communication event letters, whether generated automatically or manually, can be printed immediately or queued for printing later. You determine when letters are printed through your user options.

If you decide to queue the letters for printing, you use the Queued Letters dialog to view and print them. You use the Show Queued Letters List button on the Office integration toolbar to display this dialog.

Following is an example of the Queued Letters dialog box:

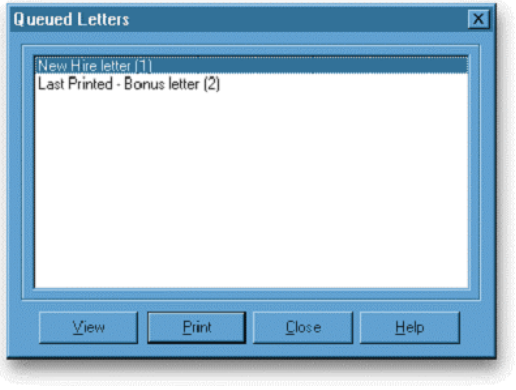


The Queued Letters dialog box lists all of the letters queued for printing. The letters are grouped by communication event title. The number in parentheses following the title indicates how many occurrences of the same type of letter are queued for printing.

You can print queued letters directly or view them in Microsoft Word from the Queued Letters dialog box. Viewing the letters gives you the capability of editing and printing them using the functions and tools in Microsoft Word.

Note: *If the communication event letter that was selected contained more than one generated occurrence, as indicated by a number greater than one in parentheses, all occurrences will be printed or viewed in one document.*

When you view or print a letter, it becomes the 'Last Printed' letter and in effect deletes the previous Last Printed letter. For example, if you viewed the two Bonus letters in the Queued Letters dialog box just shown, they become the 'Last Printed' and the Salary bonus letter is deleted as shown in the Queued Letters dialog box that follows:



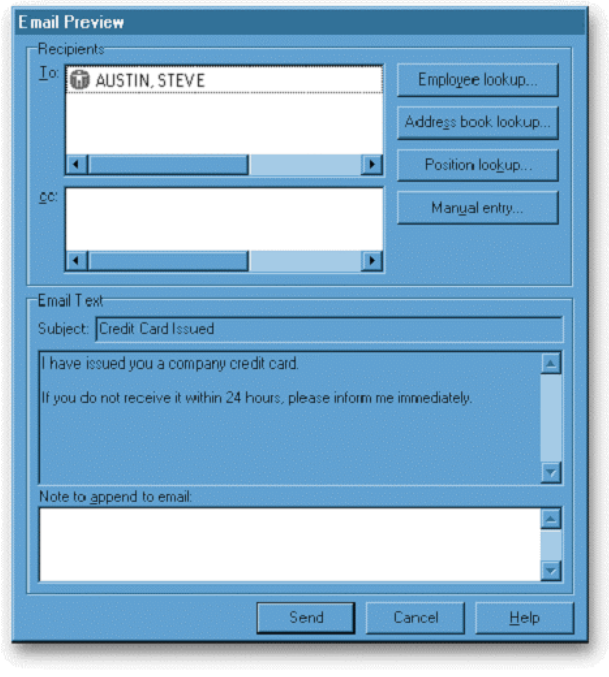
See also

- Triggering a letter communication event ***(on page 172)***

For detailed directions on manually triggering a letter communication event.

Email preview dialog

Email communication events can be set up to trigger automatically when you work with a form or checklist. As you work, you may see a preview of an email communication event before it is sent, depending on the options selected when the event was set up. The email will be displayed in the Email Preview dialog box as shown in the next example:



The Email Preview dialog box shows you the recipients and the text of the email. Depending on the options set for the email, you may be able to modify the recipients of the email and append a note.

If you are able to modify the recipients, you can remove a recipient by selecting it and pressing the Delete key on your keyboard, or you can add a recipient by using one of the buttons in the Recipients group box.

See also:

- Triggering an email communication event ***(on page 172)***

For detailed directions on manually triggering an email communication event.

- Viewing and editing a queued letter ***(on page 173)***

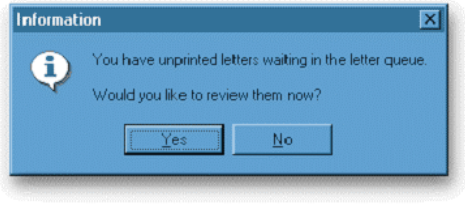
For detailed directions on viewing or editing a communication event letter.

- Printing a queued letter ***(on page 173)***

For detailed directions on printing a communication event letter.

Exiting before printing queued letters

If you exit The Solution Series before printing communication event letters that have been queued, the system will remind you that you have not printed them with the following Information dialog box:



If you click Yes, the Queued Letters dialog box is displayed, giving you the option of viewing or printing them. If you click No, the letters remain in the queue, and The Solution Series is closed.

☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more information on setting letters printing options.*

☞ *Refer to the Optimizing System Features documentation for more information on using checklists for designing a business process.*

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Using the Navigator 156
Switching between forms one-by-one 159
Switching between forms by selection 161
Accessing a bookmark 163
Accessing a checklist 164
Pausing a checklist 167
Resuming a paused checklist 168
Changing to a different employee or organization 169
Displaying a list of organizations 170
Triggering a letter communication event 172
Triggering an email communication event 172
Viewing and editing a queued letter 173
Printing a queued letter 173

Using the Navigator

The Navigator is made up of these three levels:

- Components
- Processes—each process is associated with a component
- Tasks—each task is associated with a process

To use the Navigator to access a Task, complete the following steps:

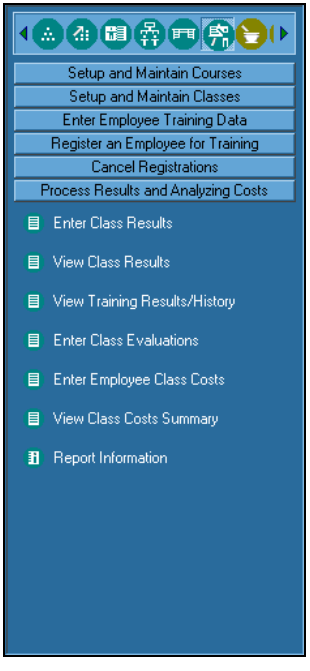
1. **Access a Component icon**

   To display a Component icon, you must navigate to it by clicking the arrows on the Component bar.

2. **Click the Component icon**

   To access the Process bars, click the Component icon.

If you completed the previous steps, the results should look similar to the example that follows:

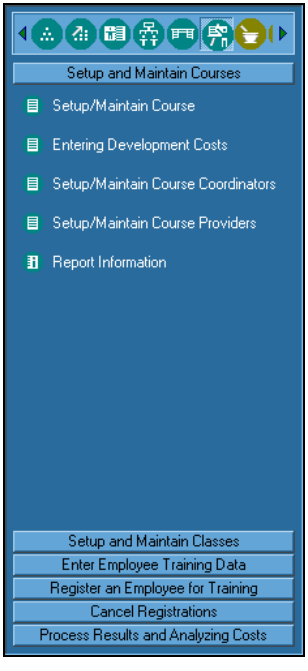


Note: When you first Navigate to a Component, the Process bar that has been identified as being the most frequently used will always be open.

3. Click a closed Process bar

To view the tasks associated with a closed Process bar, click it. The Process bar will expand to display the tasks associated with it.

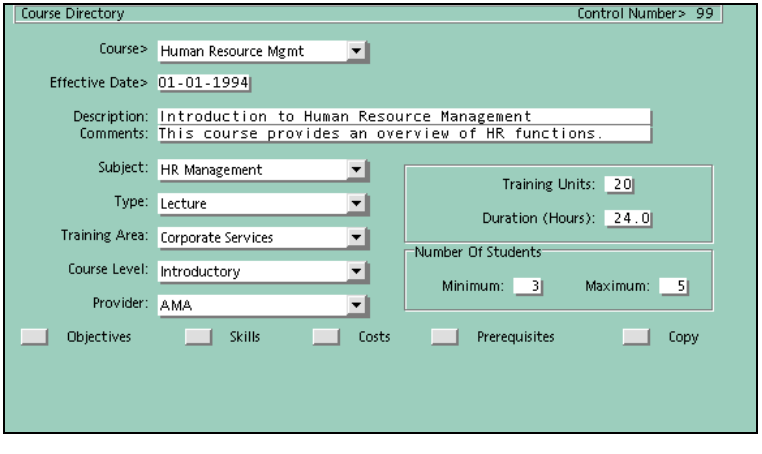
If you completed the previous steps, the results should look similar to the example that follows:



4. Click a task

To access a task, click the task icon.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- The Navigator ***(on page 131)***

For more information on using the Navigator.

- Components ***(on page 131)***

For more information on Components.

- Tasks ***(on page 136)***

For more information on Tasks.

Switching between forms one-by-one

The Back and Forward buttons enable you to switch between forms that you have accessed previously in a session. This means that you can use the Back and Forward buttons to move quickly between forms and tables that you use repeatedly.

For example, you may want to copy information such as address details from one form to another. The Back and Forward buttons are a quicker way of moving between these two forms.

Note: The Back and Forward buttons are enabled only when you have accessed two or more forms.

There are two ways that you can switch back and forth between forms:

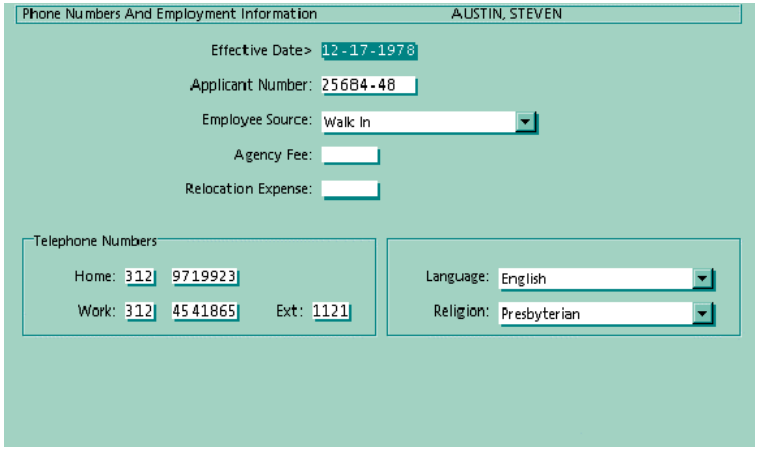
- Switching between forms one-by-one (this task)
- ***Switching between forms by selection*** (on page 161).

This task explains how to switch between forms one-by-one. To do this, complete these steps:

1. Click Back

Click the Back button on the Standard toolbar to access a form you have previously accessed.

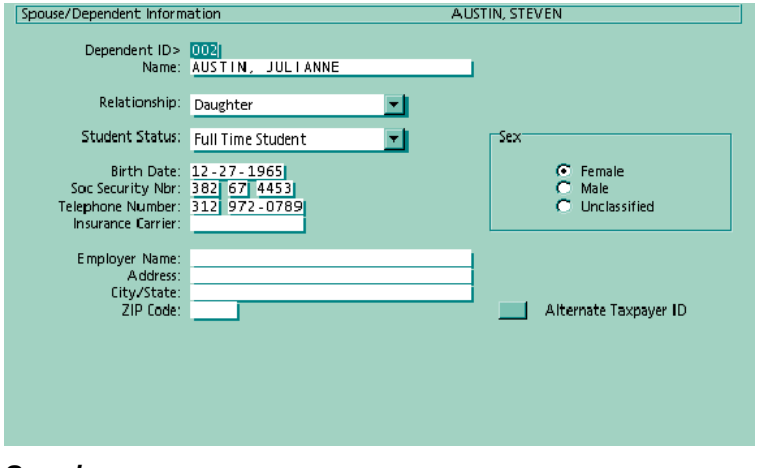
The Back button will be disabled when you reach the first form you accessed in a session.



2. **Click Forward**

To move forward one-by-one through the forms you have accessed, use the Forward button on the Standard toolbar.

The Forward button will be disabled when you reach the last form you accessed in a session.



See also:

- Back and Forward buttons ***(on page 138)***

For more information on switching between forms.

Switching between forms by selection

The Back and Forward buttons enable you to switch between forms that you have accessed previously in a session. This means that you can use the Back and Forward buttons to move quickly between forms and tables that you use repeatedly.

For example, you may want to copy information such as address details from one form to another. The Back and Forward buttons are a quicker way of moving between these two forms.

Note: The Back and Forward buttons are enabled only when you have accessed two or more forms.

There are two ways that you can switch back and forth between forms:

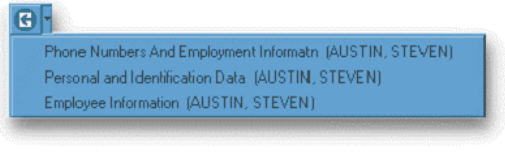
- ***Switching between forms one-by-one*** (on page 159)
- Switching between forms by selection (this task)

This task explains how to switch between forms by selection. To switch between forms by selecting the form follow these steps:

1. Click the Back drop-down

Click the Back drop-down button on the Standard toolbar to access the list of forms you have previously accessed.

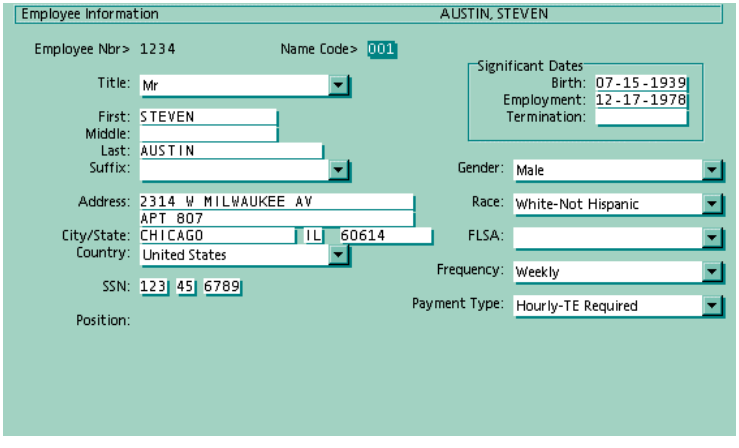
The list will display up to nine forms.



2. Select a form

Select a form from the list by clicking on it.

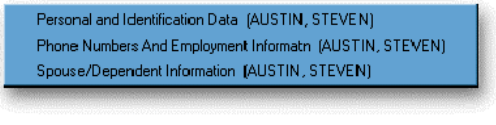
Note: Up to nine forms will be displayed on the list. After you select one of the forms from the list, the list will be refreshed.



3. Click the Forward drop-down

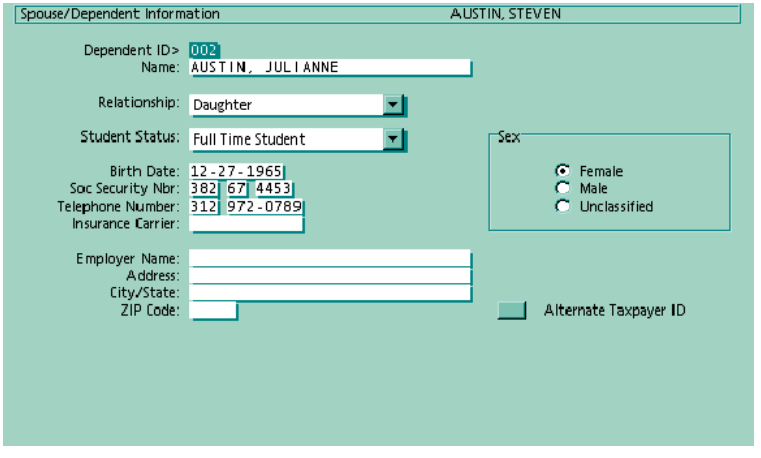
Click the Forward drop-down button on the Standard toolbar to access the list of forms you have accessed.

The list will display up to nine forms.



4. **Select a form**

Select a form from the list by clicking it.



See also:

- Back and Forward buttons ***(on page 138)***

For more information on switching between forms.

Accessing a bookmark

To complete this task, you must first add a bookmark that you can access. Access the Employee Information form (EF-SCR) for Employee Number '1234', and add it to your Bookmark menu.

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

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

Add this form to the Bookmark menu by making the following selecting on the menu:

Bookmarks ▶ Add Bookmarks and Favorites

Click Done.

☞ *Refer to* **Personalizing Navigation Options** *(on page 177) for more information on how to add a bookmark.*

Bookmarks show up as menu items on the Bookmarks menu. They give you quick access to the forms and checklists that you use most often.

Note: *You need to have previously added a bookmark to the menu before you can access it.*

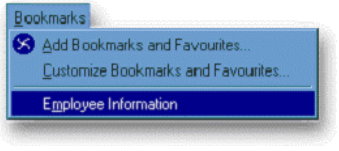
Access a Bookmark

Access a bookmark, that you have previously added to the Bookmark menu.

To access a bookmark make the following selections on the menu:

Bookmark ▶ (Your bookmark)

Note: *You can also access a bookmark by pressing a function key if you have assigned one.*



See also:

- Bookmarks ***(on page 140)***

For more information on bookmarks.

Accessing a checklist

Checklists provide a way to link multiple items that you can access and work through using a list displayed in the Navigator. There are two types of checklists—universal and personal. Universal checklists are available to all users of The Solution Series, while personal checklists are available only on the PC where they were created. In this example you are going to access a checklist that is delivered with The Solution Series.

1. Access a checklist

Access a checklist you want to use.

Access this checklist by making the following selections from the Navigator:

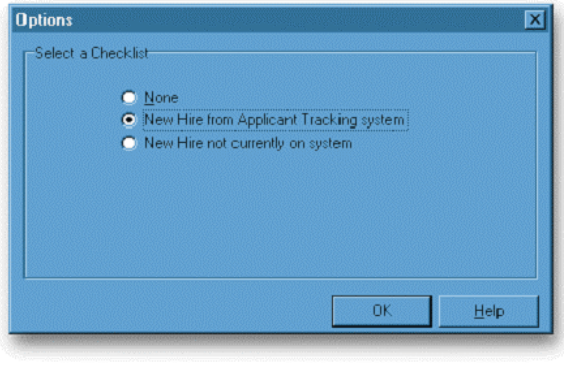
Component:	Employee Resourcing
Process:	Hire, Rehire, Reinstate an Employee
Task:	Hire a New Employee

2. Select which checklist you want to use (optional)

In the Hire a New Employee checklist, there are two types of employees that you can hire. To proceed, you must select which type of employee you want to use. Skip this step if your checklist does not offer a similar option.

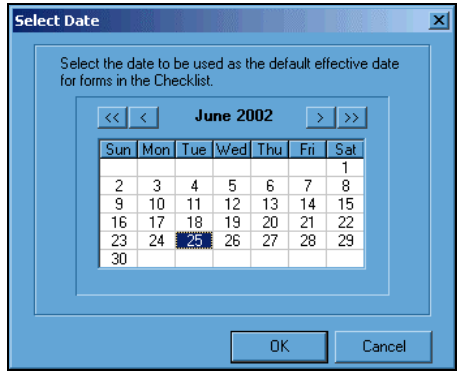
Select which type of employee you want to use:

- New Hire from Applicant Tracking system—if the employee's record has already been entered on The Solution Series.
- New Hire not currently on the system—if there is no existing record of the new employee.



3. Select a date

On the Select Date dialog box, select a default effective date for the forms in this checklist.

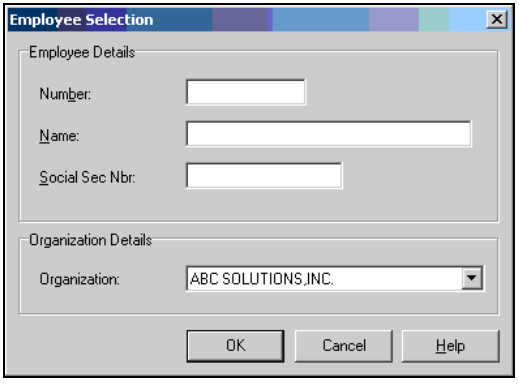


4. Enter a Number, Name or Social Sec Nbr

Enter the employee number, name, or Social Sec Nbr of the applicant you want to create as a new employee.

5. Select an Organization

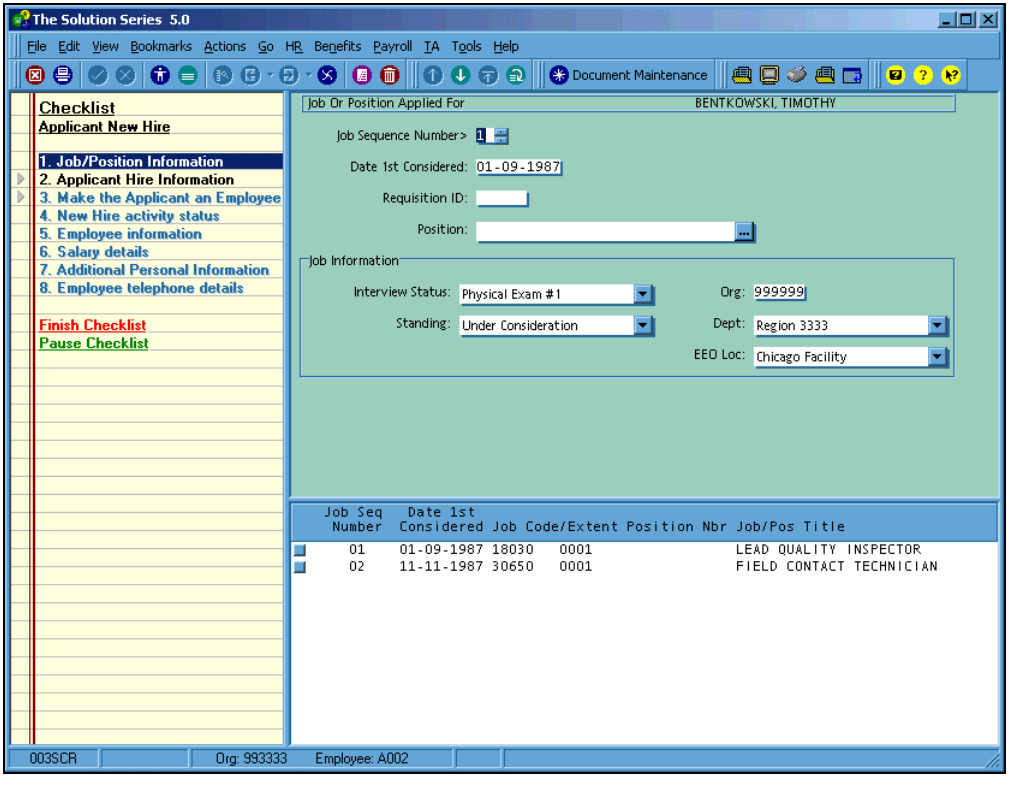
In the Organization option list, select the organization in which you want to create the new employee.



6. Click OK or press Enter

Click OK to access the checklist.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Understanding checklists ***(on page 141)***

For more information on checklists.

Pausing a checklist

When you have accessed a checklist, you can pause it at any time. You may need to do this if you discover that you do not have the necessary information to complete the checklist items.

Click the Pause Checklist control

To pause the checklist, click the Pause Checklist control on the toolbar or on the Navigator.

On the toolbar, click:

Or, on the Navigator, click:

Resuming a paused checklist

To resume a paused checklist, you use the Resume A Checklist dialog box. This dialog box can be accessed in three ways:

- When you sign on to The Solution Series
- From the toolbar
- From the Actions menu

In this example, you access the Resume A Checklist dialog box from the toolbar.

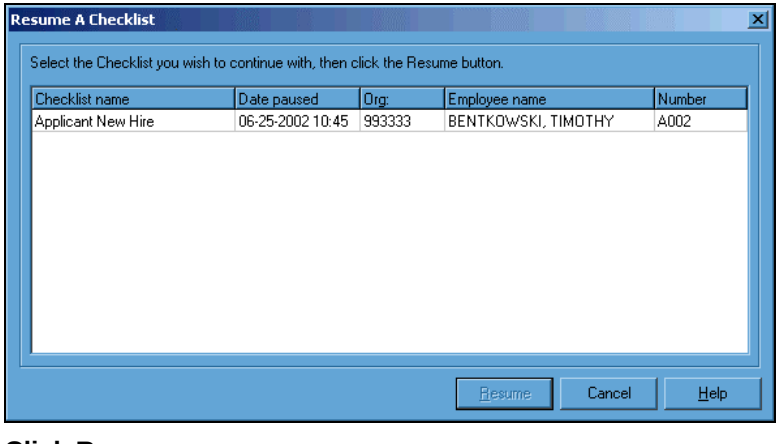
1. Access the Resume A Checklist dialog box

Click the Paused Lists button on the Standard toolbar to access the Resume A Checklist dialog box.

Note: The Resume A Checklist dialog box can also be accessed from the Actions menu and when you log on to The Solution Series.

2. Select a paused checklist

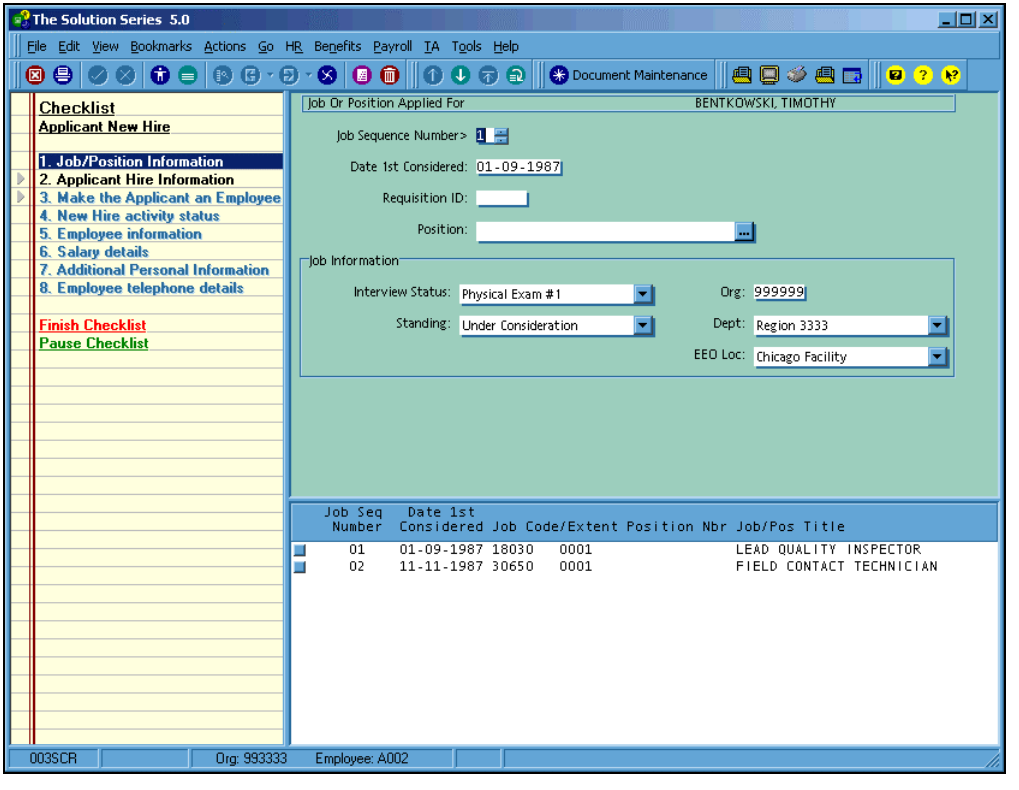
Select the paused checklist you want to resume.



3. Click Resume

To resume the checklist, click the Resume button.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Resuming paused checklists ***(on page 145)***

For more information on paused checklists.

Changing to a different employee or organization

The Employee Selection dialog box can be used to select a different employee or organization.

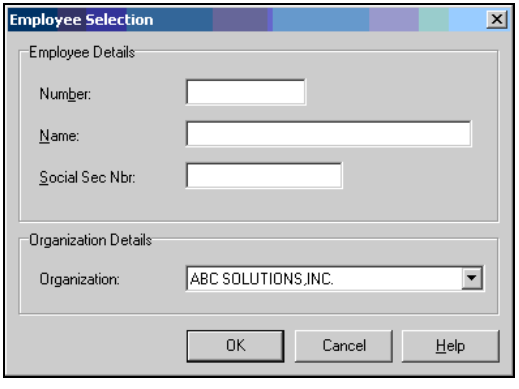
In this example, you are going to select a different Employee Number and Organization.

Before you can complete the steps in this example, you need to have selected a form, an employee, and an organization. Access the Employee Information form (EF-SCR) for Employee Number '1234', in Organization 'Acme Manufacturing'.

1. Access the Employee Selection dialog box

Click the Employee button to access the Employee Selection dialog box.

Note: Before you can change to a different employee or organization, you must access a form.



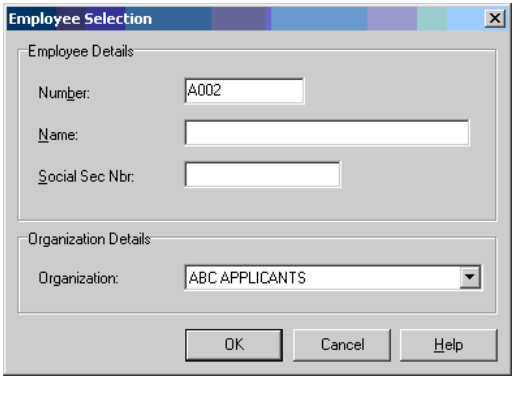
2. Enter a Number, Name, or Social Sec Nbr

Enter a number, name, or Social Sec Number of the employee you want to use.

3. Select an Organization

Select the Organization that you want to use.

If you completed the previous steps, the results should look similar to the example that follows:



4. Click OK

When you click OK, the form will display the record for Employee Number. The Organization and Employee number on the Status bar will change.

See also:

- Switching between different employees and organizations ***(on page 149)***

For more information on how you switch between different employees and organizations.

Displaying a list of organizations

To display a list of the organizations that have been established on The Solution Series, use the Organization Listing form (COLIST).

1. Access the Organization Listing form

Access this form by making the following selections on the Navigator:

Component: Development Tools
Process: Employee Database Utilities
Task: List all Organizations

If you completed the previous step, the results should look similar to the example that follows:

```
Organization Listing

                    Organization Name
Org        Org Name                        OL2 Name/Category

991111     ABC ACCUMLATORS                 ACCUMLATOR ORGANIZATION
                                           Unpaid-CE/H Accum
993333     ABC APPLICANTS                  APPLICANT ORGANIZATION
                                           Unpaid-Appl File
995555     ABC RETIREE AND TERM            RETIREE ORGANIZATION
                                           Pay-Retiree Master
996666     ABC SOLUTIONS,HOSPITALS         PRODUCTION HOSPITAL
                                           Pay-Normal Master
999999     ABC SOLUTIONS,INC.              PRODUCTION ORGANIZATION
                                           Pay-Normal Master
AB1000     ABC Solutions, Inc.             Midwest Division
                                           Pay-Normal Master
```

2. Press Enter

The Organization Listing form (COLIST) can have multiple pages. To view the next page of records, press Enter.

The following message will appear when all the records on file have been viewed.

'----Complete----'

If you completed the previous step, the results should look similar to the example that follows:

```
Organization Listing

                    Organization Name
Org        Org Name                        OL2 Name/Category


----Complete----
```

Triggering a letter communication event

To manually trigger a letter communication event, complete these steps:

Note: *You can manually trigger a letter communication event only if an event has been set up for the current form with the 'Trigger when selected from toolbar' option.*

1. Click the Select a Letter button

Click the Select a Letter button on the Office integration toolbar.

The Letter Selection dialog box displays.

2. Select a letter communication event

Select the letter communication event by clicking on it.

The event is highlighted.

3. Click OK

Click the OK button to generate the selected event.

The Letter Selection dialog box is closed and the letter communication event is generated. The letter will either print or be queued for printing, depending on the user options settings.

See also:

- Communication events ***(on page 151)***

For information on manually triggering a letter communication event.

Triggering an email communication event

To manually trigger an email communication event, complete these steps:

Note: *You can manually trigger an email communication event only if an event has been set up for the current form with the 'Trigger when selected from toolbar' option.*

1. Click the Select an Email button

Click the Select an Email button on the Office integration toolbar.

The Email Selection dialog box displays.

2. Select an email communication event

Select the email to print by clicking on it.

The event is highlighted.

3. Click OK

Click the OK button to generate the selected event.

The Email Selection dialog box is closed and the email communication event is generated. If the email communication event was set up with the Display email preview option, a preview of the email will display.

See also:

- Communication events ***(on page 151)***

For information on manually triggering an email communication event.

Viewing and editing a queued letter

To view or edit a communication event letter that has been queued for printing, complete these steps:

1. Access the Queued Letters dialog box

Click the Show Queued Letters List button on the Office integration toolbar to access the Queued Letters dialog box.

Note: The Show Queued Letters List button will be grayed out if there are no letters in the queue.

2. Select a letter

Select the letter to view or edit by clicking on it.

The letter is highlighted.

3. Click View

Click the View button to view or edit the selected letter.

Microsoft Word is started, data from The Solution Series is merged, and the letter is displayed in the word-processing application.

Note: If the communication event letter that was selected contained more than one generated occurrence, as indicated by the number in parentheses following the letter event title, all occurrences will be displayed in one document.

4. Edit and print the letter (optional)

If desired, you can edit and print the letter using the word-processor's functions.

5. Exit the application

Click the Exit button to close the word-processing application.

The word-processing application is closed. The letter that was viewed becomes the Last Printed letter in the Queued Letters dialog.

6. Click Close

Click the Close button to close the Queued Letters dialog box.

See also:

- Communication events ***(on page 151)***

For information on viewing queued letters.

Printing a queued letter

To print a communication event letter that has been queued for printing, complete these steps:

1. Access the Queued Letters dialog box

Click the Show Queued Letters List button on the Office integration toolbar to access the Queued Letters dialog box.

Note: The Show Queued Letters List button will be grayed out if there are no letters in the queue.

2. Select a letter

Select the letter to print by clicking on it.

The letter is highlighted.

3. Click Print

Click the Print button to print the selected letter.

The letter is sent to the printer.

Note: If the communication event letter selected contained more than one generated occurrence, as indicated by the number in parentheses following the letter event title, all occurrences will be printed in one document.

4. Click Close

Click the Close button to close the Queued Letters dialog box.

See also:

- Communication events ***(on page 151)***

For information on printing queued letters.

Review of Questions Answered

1. How is the Navigator organized?

2. What is the relationship between the Navigator and menus?

3. What effect does your user profile have on information you can access?

4. What method is provided to allow for switching between forms?

5. What are checklists?

6. What method is provided to allow the selection of a different employee?

CHAPTER 7

Personalizing Navigation Options

In This Chapter

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Detailed Directions 185
Review of Questions Answered.....195

Introduction

The Solution Series gives you easy access to all information through the Navigator and menus. However, the tasks you perform most often will probably require access to only a limited set of information. By using two navigation tools, bookmarks and favorites, you can access the information that you need most often more quickly. This section describes how you can personalize these navigation options to make accessing the information you need as quick as possible.

Tasks

The following tasks are discussed in this section:

- Adding a bookmark
- Customizing a bookmark
- Customizing the order of the Bookmarks menu
- Removing a bookmark
- Adding a favorite
- Removing a favorite

Prerequisites

Before you can begin personalizing navigation options, you must have signed on to The Solution Series.

☞ *Refer to* **Getting Started** *(on page 29) for information on how to sign on to The Solution Series.*

Questions answered

The following questions are answered in this section:

1. What is a bookmark?
2. What is a favorite?
3. How can you customize bookmarks and favorites?

Bookmarks

You use forms and checklists to perform various tasks within The Solution Series. Each task, such as updating an employee's address, uses a specific form. You can easily access all of the various forms using the Navigator or related menus. Bookmarks give you quick access to the forms and checklists that you use most often.

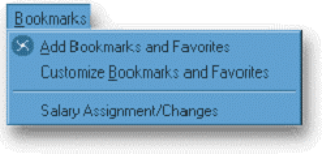
Bookmarks show up as menu items on the Bookmarks menu.

When you first begin using The Solution Series, the Bookmarks menu contains only the functions for adding and customizing bookmarks.

An example of the Bookmarks manual follows:

When you create a bookmark, it is immediately added to the Bookmarks menu.

In the example below, the Salary Assignment/Changes form (40-SCR) has been added to the Bookmarks menu:



You can access a form or checklist using a bookmark by selecting it directly from the Bookmarks menu or by pressing a function key if you have assigned one.

Adding bookmarks

Since bookmarks give you quick access to forms and checklists, you should consider adding bookmarks for the forms and checklists that you use often. This will increase your efficiency by giving you quick access to the forms and checklists you use most in performing your day-to-day tasks.

Bookmarks are listed in the order that they are added. However, you can change the order.

Note: *When you create a personal checklist, it is automatically added to the Bookmarks menu.*

☞ *Refer to the Optimizing System Features documentation for more information on creating checklists.*

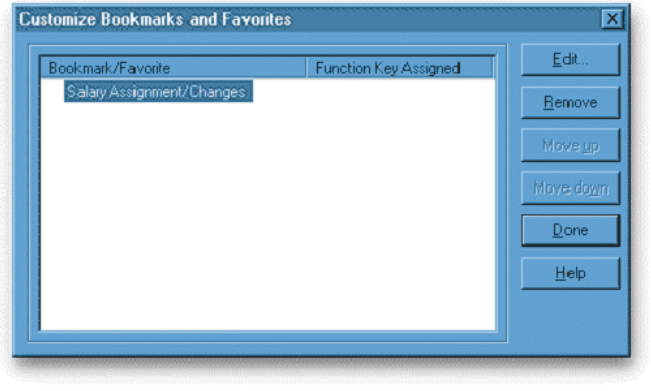
When you add a bookmark, you must first access the form or checklist using the Navigator or menus. Then, use one of the following methods to add the form you accessed as a bookmark:

- Add Bookmarks and Favorites button on the Standard toolbar

- Bookmarks menu

The form or checklist is then added and displayed in the Customize Bookmarks and Favorites dialog box.

The example below shows the Salary Assignment/Changes form (40-SCR) added to the Bookmarks list:



From the Customize Bookmarks and Favorites dialog box, you can edit, remove, change the order by moving the bookmark up and down, or simply finish the task of adding the bookmark.

See also:

- Adding a bookmark using the Add Bookmarks and Favorites button ***(on page 185)***
- Adding a bookmark using the menus ***(on page 186)***

For detailed directions on adding a bookmark.

Customizing bookmarks

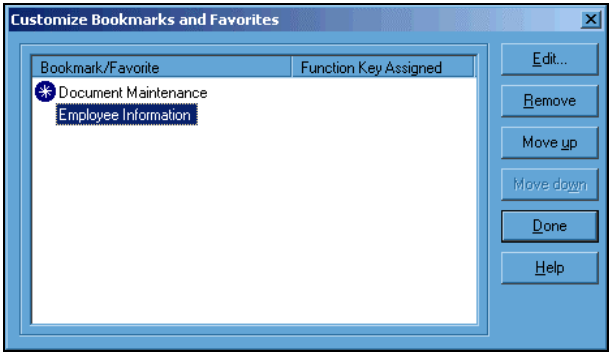
When you add a bookmark, the name that is added to the Bookmarks menu is that of the form or checklist. You can change the title to something that is more meaningful to you. For example, if you are converting from another system, you might customize the title of a bookmark to use a title that combines a name from your old system with the form name from The Solution Series.

You may also want to change the title to allow you to get more items on the Favorites toolbar. Decreasing the length of the title will decrease the size of the button.

In addition, you can assign a function key to a bookmark. Assigning a function key allows you to display the form or checklist by pressing the key.

You use the Customize Bookmarks and Favorites dialog box to select the bookmark to customize.

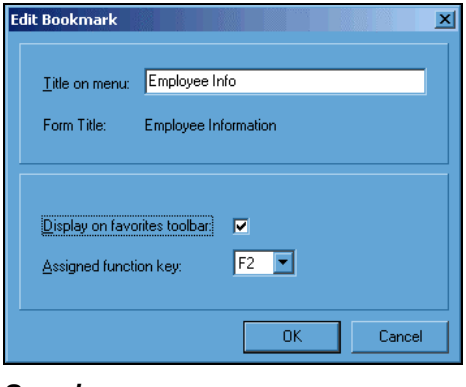
The example below shows the Employee Information bookmark selected:



Selecting a bookmark enables the Edit and Remove buttons. If there is more than one bookmark, selecting a bookmark will also enable the Move up and Move down buttons, allowing you to change the selected bookmark's position relative to others on the menu. If you select the first or last bookmark, only one of these buttons will be available. You can also drag and drop a bookmark to change its position.

When you customize a bookmark, you will use the Edit Bookmark dialog box. From this dialog box you can customize the bookmark by changing the title, adding it to the Favorites toolbar, or assigning a function key.

You can customize the title using any alphanumeric name up to 30 characters. You can assign the bookmark to any of the function keys in the drop-down list.



See also:

- Customizing a bookmark ***(on page 188)***

For detailed directions on customizing a bookmark or favorite.

- Customizing the order of the Bookmarks menu ***(on page 189)***

For detailed directions on customizing the order of the Bookmarks menu.

Removing bookmarks

If your job responsibilities or day-to-day tasks change, you may want to remove a bookmark that accesses a form or checklist that you no longer use.

When you remove a bookmark, the system will display a warning message, prompting you to confirm the removal.

Note: *If a bookmark is selected as a favorite, removing the bookmark will also remove it from the Favorites toolbar.*

See also:

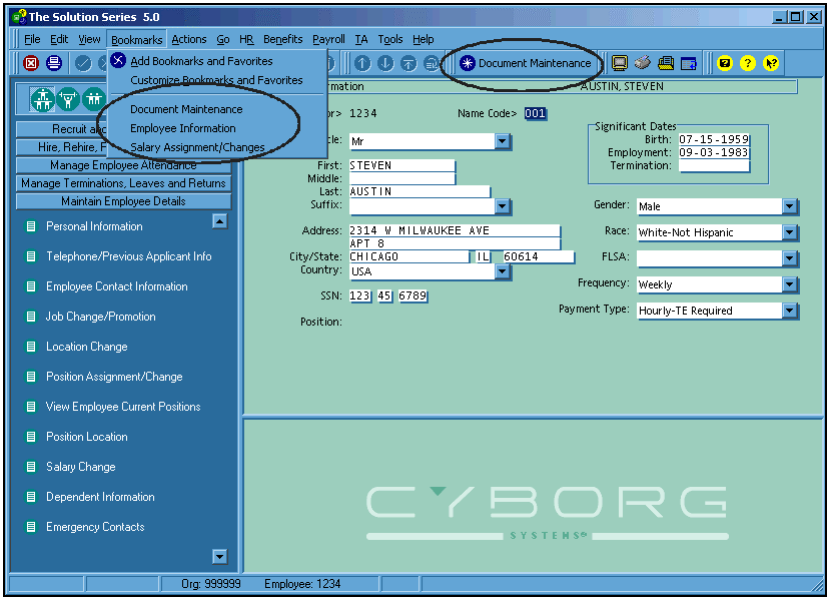
- Removing a bookmark ***(on page 191)***

For detailed directions on removing a bookmark.

Favorites

Favorites are a subset of bookmarks; they are bookmarks that you select to display on the Favorites toolbar. Favorites give you even quicker access to forms and checklists than bookmarks on the Bookmarks menu. Because favorites become buttons on the Favorites toolbar, you can access a form or checklist with just one mouse click.

The following example shows three bookmarks on the Bookmarks menu—Document Maintenance, Employee Information, and Salary Assignment/Changes. Document Maintenance has been selected as a favorite and displays as a button on the Favorites toolbar:



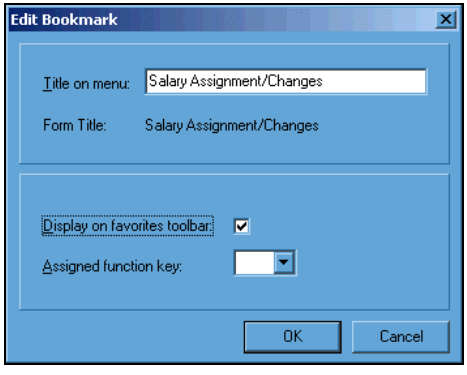
Adding favorites

Favorites give you the quickest access to forms and checklists. You may want to consider adding the two or three bookmarks that you use most often to the Favorites toolbar.

Note: *Before you can add a favorite, you must first add it as a bookmark.*

You use the Customize Bookmarks and Favorites and Edit Bookmark dialog boxes to add a favorite. A check in the Display on favorites toolbar check box indicates a favorite.

The following example shows the Salary Assignment/Changes bookmark selected as a favorite:



After you close the Edit Bookmark and Customize Bookmarks and Favorites dialog boxes, any bookmark that you have selected as a favorite will be added as a button to the Favorites toolbar.

The icon associated with the form and the bookmark title displayed in the Customize Bookmarks and Favorites dialog box are used to create the button that displays on the Favorites toolbar. If the bookmark title is long, you may want to consider customizing it to reduce the size of the button.

Note: *The Favorites toolbar must be showing in order for you to see any bookmark that you added as a favorite.*

☞ *Refer to* **Personalizing the Work Area** *(on page 81), for information on how to show toolbars.*

See also:

- Adding a favorite ***(on page 192)***

For detailed directions on adding a favorite.

Removing favorites

If your responsibilities change or you do not use a favorite as often as you used to, you can remove it.

You use the Customize Bookmarks and Favorites and Edit Bookmark dialog boxes to remove a favorite. To remove a favorite, you clear its Display on favorites toolbar check box. Clearing the check box only removes the bookmark from the Favorites toolbar; it does not remove the bookmark from the Bookmarks menu.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Adding a bookmark using the Add Bookmarks and Favorites button

There are two ways that you can add a bookmark—using the Add Bookmarks and Favorites button or using the menus.

To add a bookmark using the menus, follow the steps for the task ***Adding a bookmark using the menus*** (on page 186).

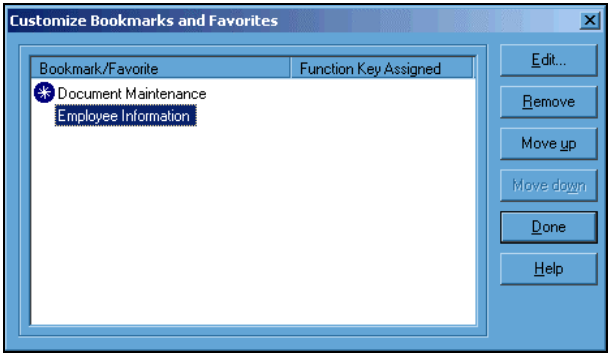
To add a bookmark using the Add Bookmarks and Favorites button, complete the following steps:

1. **Access the form or checklist that you want to bookmark**
   Use the Navigator or menus to access the form or checklist that you want to bookmark.

2. **Click Add Bookmarks and Favorites**
   Click the Add Bookmarks and Favorites button on the Standard toolbar to add the displayed form as a bookmark.

   The Customize Bookmarks and Favorites dialog box is displayed with the form added.

If you completed the previous steps, the results should look similar to the example that follows:



3. Click Done

The Customize Bookmarks and Favorites dialog box is closed. The form or checklist is added to the Bookmarks menu.

See also:

- Adding bookmarks ***(on page 179)***

For more information on adding bookmarks.

Adding a bookmark using the menus

There are two ways that you can add a bookmark—using the Add Bookmarks and Favorites button or using the menus.

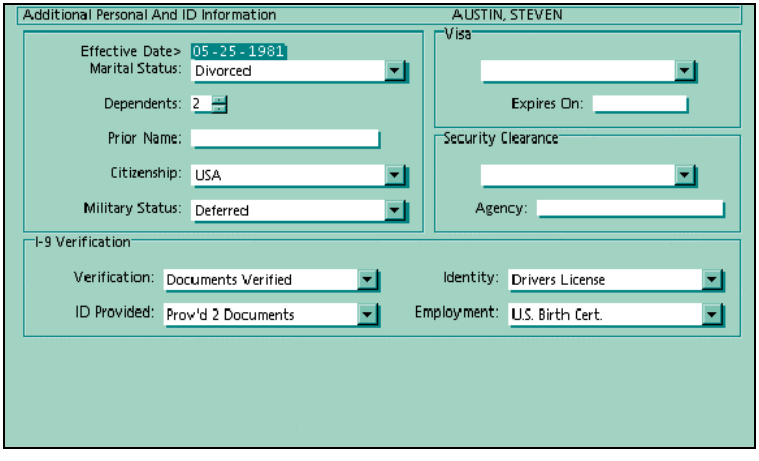
To add a bookmark using the menus, follow the steps for the task ***Adding a bookmark using the Add Bookmarks and Favorites button*** (on page 185).

To add a bookmark using the menus, complete the following steps:

1. Access the form or checklist that you want to bookmark

Use the Navigator or menus to access the form or checklist that you want to bookmark.

If you completed the previous steps, the results should look similar to the example that follows:



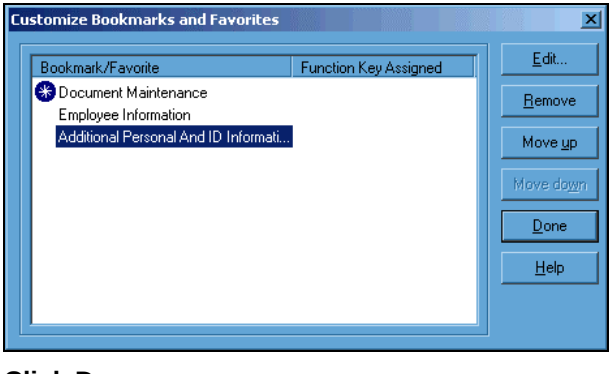
2. Access the Customize Bookmarks and Favorites dialog box

Access this dialog box by making the following selections from the menus:

Bookmarks Add Bookmarks and Favorites

The form or checklist is added to the Customize Bookmarks and Favorites dialog box.

If you completed the previous steps, the results should look similar to the example that follows:



3. Click Done

The Customize Bookmarks and Favorites dialog box is closed. The form or checklist is added to the Bookmarks menu.

See also:

- Adding bookmarks ***(on page 179)***

For more information on adding bookmarks.

Customizing a bookmark

To customize a bookmark or favorite, complete the following steps:

1. Access the Customize Bookmarks and Favorites dialog box

Access this dialog box by making the following menu selections:

Bookmarks ▶ Customize Bookmarks and Favorites

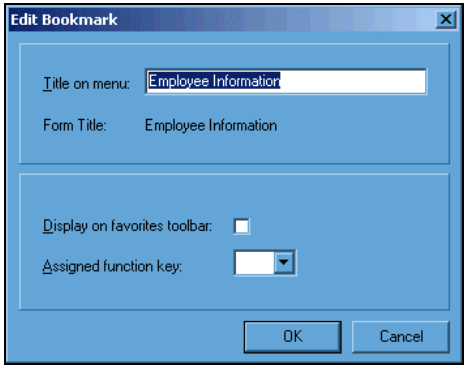
2. Select the bookmark

Select the bookmark to be customized. The Edit and Remove buttons are enabled. The Move up and Move down buttons may also be enabled depending on how many bookmarks there are and which bookmark is selected.

3. Click Edit

The Edit Bookmark dialog box is displayed. The current menu title, favorites check box, and assigned function key are displayed for editing.

If you completed the previous steps, the results should look similar to the example that follows:



4. Enter a Title

Enter the new menu title, up to 30 characters. The title you enter will display on the Bookmarks menu and on the Customize Bookmarks and Favorites dialog box.

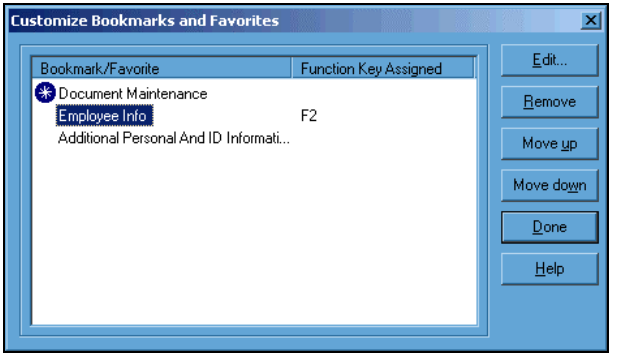
5. Assign a function key (optional)

You can assign a function key to the bookmark by clicking the **A**ssigned function key drop-down button and selecting a function key from the list.

6. Click OK

The Edit Bookmark dialog box is closed.

If you completed the previous steps, the results should look similar to the example that follows:



Repeat Steps 2 through 6 to customize other bookmarks.

7. Click Done

The Customize Bookmarks and Favorites dialog box is closed. The title is changed on the Bookmarks menu and on the Favorites toolbar if the bookmark was a favorite.

See also:

- Customizing bookmarks ***(on page 180)***

For more information on customizing bookmarks and favorites.

Customizing the order of the Bookmarks menu

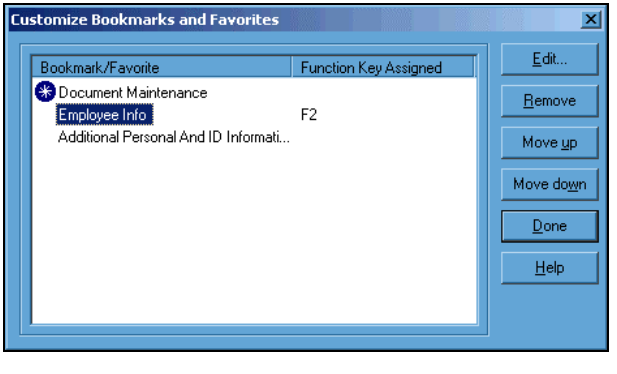
To customize the order of the Bookmarks menu, complete the following steps:

1. Access the Customize Bookmarks and Favorites dialog box

Access this dialog box by making the following menu selections:

Bookmarks ▶ Customize Bookmarks and Favorites

If you completed the previous step, the results should look similar to the example that follows:



2. Select a bookmark to move

Select the bookmark whose position on the Bookmarks menu you want changed. The Edit and Remove buttons are enabled. The Move up and Move down buttons may also be enabled depending on how many bookmarks there are and which bookmark is selected.

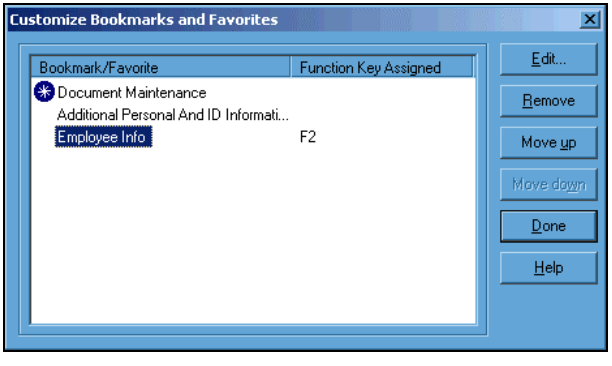
The Customize Bookmarks and Favorites dialog box displays the bookmarks in the same order as the Bookmarks menu. Any changes you make to the Customize Bookmarks and Favorites dialog will be reflected on the Bookmarks menu.

3. Click Move up or Move down

If you want to move the selected bookmark towards the top of the list, click the Move **u**p button. If you want to move the selected bookmark towards the bottom of the list, click the Move do**w**n button.

Note: You can also drag and drop a bookmark to change its position in the menu.

If you completed the previous steps, the results should look similar to the example that follows:

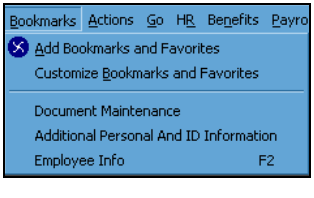


Repeat this step until the selected bookmark is in the desired menu position. Repeat Steps 2 and 3 to customize the order of other bookmarks.

4. Click Done

The Customize Bookmarks and Favorites dialog box is closed. The new order will be reflected on the Bookmarks menu.

If you completed the previous steps, the results should look similar to the sample that follows:



See also:

- Customizing bookmarks ***(on page 180)***

For more information on customizing bookmarks and favorites.

Removing a bookmark

To remove a bookmark, complete the following steps:

1. Access the Customize Bookmarks and Favorites dialog box

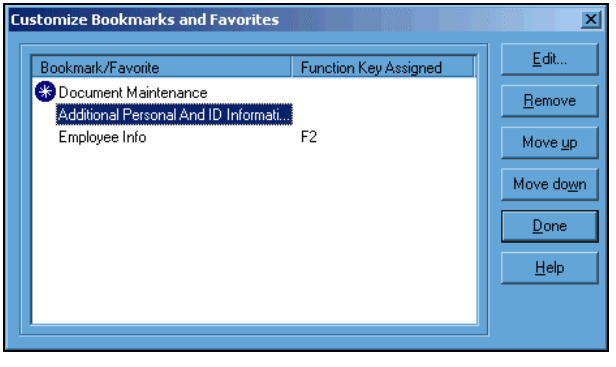
Access this dialog box by making the following menu selections:

Bookmarks ▶ Customize Bookmarks and Favorites

2. Select the bookmark

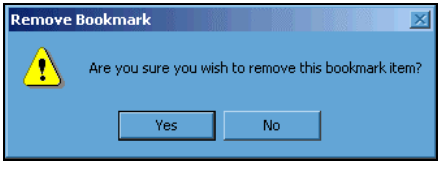
Select the bookmark to be removed. The Edit and Remove buttons are enabled. The Move up and Move down buttons may also be enabled depending on how many bookmarks there are and which bookmark is selected.

If you completed the previous steps, the results should look similar to the example that follows:



3. Click Remove

Click the Remove button, and the system displays a warning message prompting you to confirm removal.



4. Click Yes

Click Yes to remove the bookmark and the bookmark is removed from the Customize Bookmarks and Favorites dialog box.

Repeat Steps 2 through 4 to remove other bookmarks.

5. Click Done

The Customize Bookmarks and Favorites dialog box is closed. The bookmark is removed from the Bookmarks menu.

See also:

- Removing bookmarks ***(on page 181)***

For more information on removing bookmarks.

Adding a favorite

To add a favorite, complete the following steps:

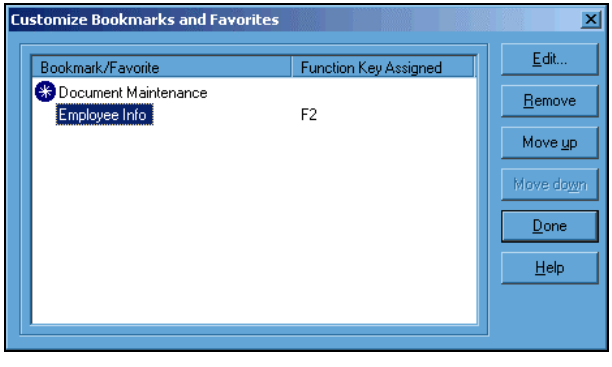
Note: To add a favorite, you must have already added it as a bookmark.

1. Access the Customize Bookmarks and Favorites dialog box

Access this dialog box by making the following menu selections:

Bookmarks ▶ Customize Bookmarks and Favorites

If you completed the previous steps, the results should look similar to the example that follows:



2. Select the bookmark

Select the bookmark to be customized. The Edit and Remove buttons are enabled. The Move up and Move down buttons may also be enabled depending on how many bookmarks there are and which bookmark is selected.

3. Click Edit

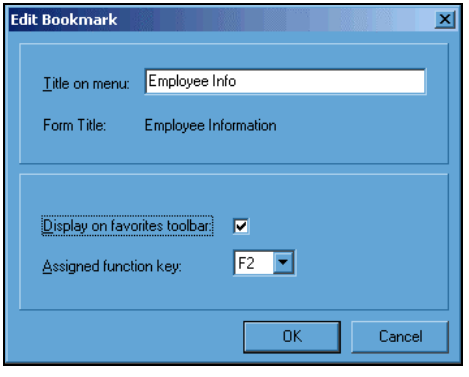
The Edit Bookmark dialog box is displayed. The current menu title, favorites check box, and assigned function key are displayed for editing.

4. Click the Display on favorites toolbar check box

Click the Display on favorites toolbar check box to display the selected bookmark on the Favorites toolbar.

The check box is checked. The bookmark will display on the Favorites toolbar when this check box is checked.

If you completed the previous steps, the results should look similar to the example that follows:



5. Click OK

The Edit Bookmark dialog box is closed.

Repeat Steps 2 through 5 to add other bookmarks to the Favorites toolbar.

6. Click Done

The Customize Bookmarks and Favorites dialog box is closed and the bookmark is added to the Favorites toolbar.

If you completed the previous steps, the results should look similar to the example that follows:

See also:

- Adding favorites ***(on page 183)***

For more information on adding favorites.

Removing a favorite

To remove a favorite, complete the following steps:

1. Access the Customize Bookmarks and Favorites dialog box

Access this dialog box by making the following menu selections:

Bookmarks ▶ Customize Bookmarks and Favorites

2. Select the bookmark

Select the bookmark to be customized. The Edit and Remove buttons are enabled. The Move up and Move down buttons may also be enabled depending on how many bookmarks there are and which bookmark is selected.

3. Click Edit

The Edit Bookmark dialog box is displayed. The current menu title, favorites check box, and assigned function key are displayed for editing.

4. Clear the Display on favorites toolbar check box

Click the Display on favorites toolbar check box to clear it and remove the bookmark from the Favorites toolbar.

5. Click OK

The Edit Bookmark dialog box is closed.

Repeat Steps 2 through 5 to remove other bookmarks from the Favorites toolbar.

6. Click Done

The Customize Bookmarks and Favorites dialog box is closed and the bookmark is removed from the Favorites toolbar.

Note: Clearing the Display on favorites toolbar check box only removes the bookmark from the Favorites toolbar; it does not remove the bookmark from the Bookmarks menu.

See also:

- Removing favorites ***(on page 184)***

For more information on removing favorites.

Review of Questions Answered

1. What is a bookmark?

2. What is a favorite?

3. How can you customize bookmarks and favorites?

CHAPTER 8

Using the Support Tools

In This Chapter

Introduction 198
The Help system 199
Report information.....205
Context-sensitive help 207
Electronic documentation 211
Detailed Directions 213
Review of Questions Answered.....218

Introduction

The Solution Series support tools provide point-and-click access to a comprehensive set of product information. Whether you are looking for directions for completing a task, an example of a report, or context-sensitive help the information is available to you. This section explains the purpose of the delivered support tools and how to use them.

Tasks

This section explains the following:

- Accessing the Help menu
- Accessing help for all of The Solution Series
- Accessing help for a component
- Accessing context-sensitive help for a form
- Accessing context-sensitive help for text and list boxes

Prerequisites

You should be familiar with using standard Windows help.

Questions answered

The following questions are answered in this section:

1. What types of online help are provided?
2. How do you access help on all of The Solution Series?

The Help system

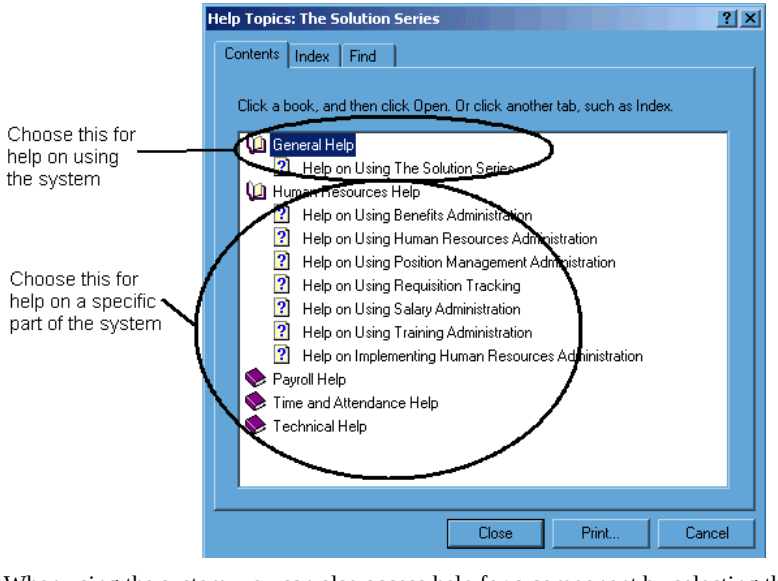
To effectively use the Help system, you should understand how it is organized and what types of help are available. There are several ways in which you can get help online with The Solution Series:

- Modular help
- Standard online help
- Step-by-step directions
- Conceptual information
- Quick reference information
- Full text search

Modular help files

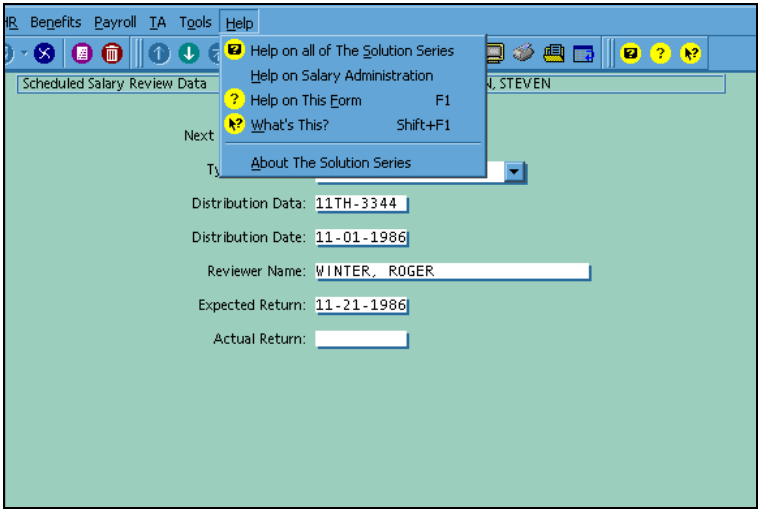
The system is delivered with a number of help files, allowing you to install and view only the help for the components of the system that you use. Using modular help files means that you have two ways of looking at help:

- Help on all of The Solution Series—displays help on the entire system, allowing you to search for information even if you are not sure of its location in the system.
- Help on a specific part of the system—allows you to search for and display help relating only to the component of the system in which you are interested.



When using the system, you can also access help for a component by selecting the Help menu—the help for the component option changes dynamically depending on which form you are currently accessing.

In the following example you can access the help file for Salary Administration while the Scheduled Salary Review Data form (43-SCR) is current:



Both help for all of The Solution Series and help for a specific component use standard Windows help.

See also:

- Accessing help for all of The Solution Series from the menus ***(on page 213)***

For detailed directions on accessing help for all of The Solution Series.

- Accessing help for a component from the menus ***(on page 214)***

For detailed directions on accessing help for a component.

Standard Windows help

Extensive standard Windows help is provided with The Solution Series, including the following:

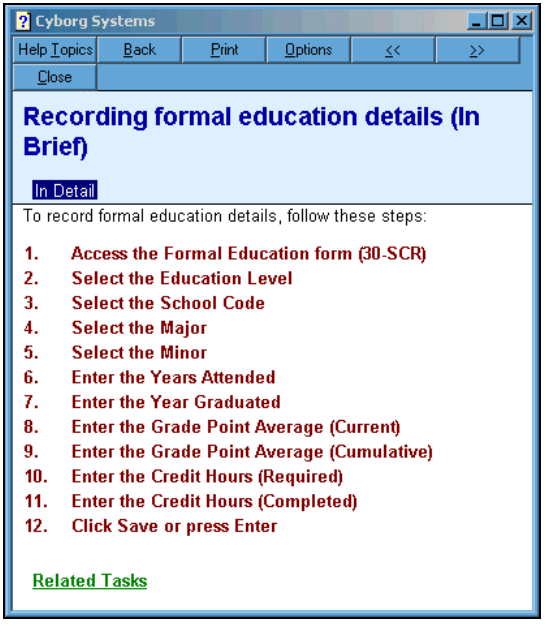
- Step-by-step directions (cue cards)
- Related topic information
- Conceptual information
- Quick reference information
- Full text search

Step-by-step directions (cue cards)

Step-by-step directions are provided for tasks and displayed in cue cards. Cue cards stay open until you explicitly close them, providing an ongoing source of support while you complete a task.

You can display two levels of information in cue cards—in detail and in brief. 'In detail' lists the steps and provides additional rationale and tips. 'In brief' lists only the steps.

The following figure shows the 'In brief' display for the task 'Recording formal education details':

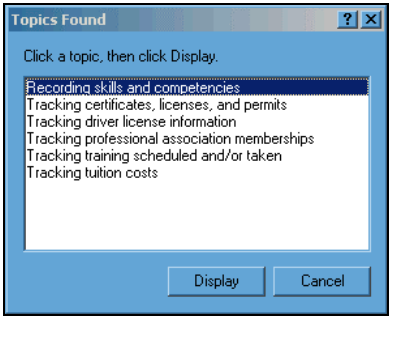


If enabled, the Previous and Next arrow buttons will take you to other tasks you might complete in a series.

To access step-by-step directions for a task, you access the help for a form and then select the particular task from the 'See also' list.

Related topic information

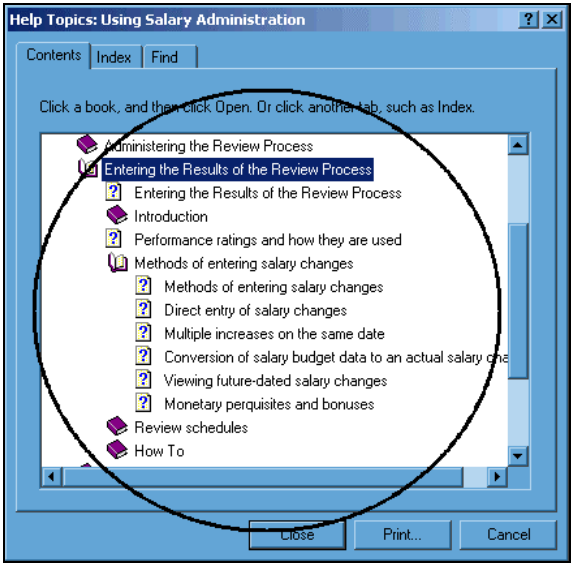
Each task provides links to related tasks. For example, the task for 'Recording formal education details' contains the following links to related tasks:



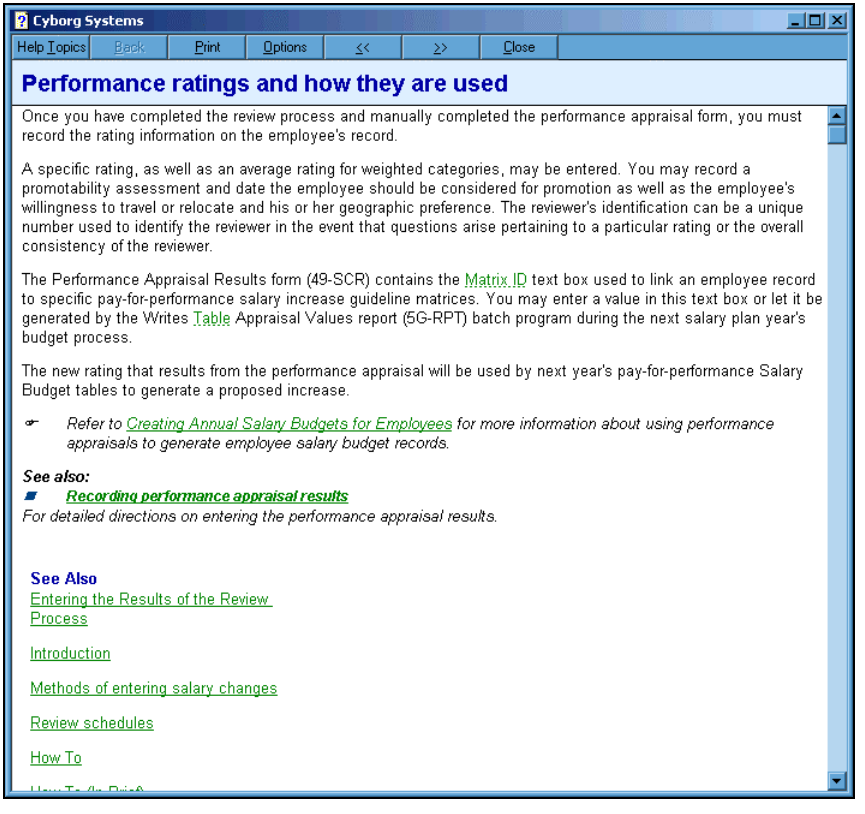
Conceptual information

Supporting conceptual information is provided for all tasks in the help. You can access these by looking in the help for a component.

For example, the Salary Administration component offers the following conceptual help on entering the results of a performance appraisal:



If you select the concept 'Performance ratings and how they are used', the following information will be displayed:

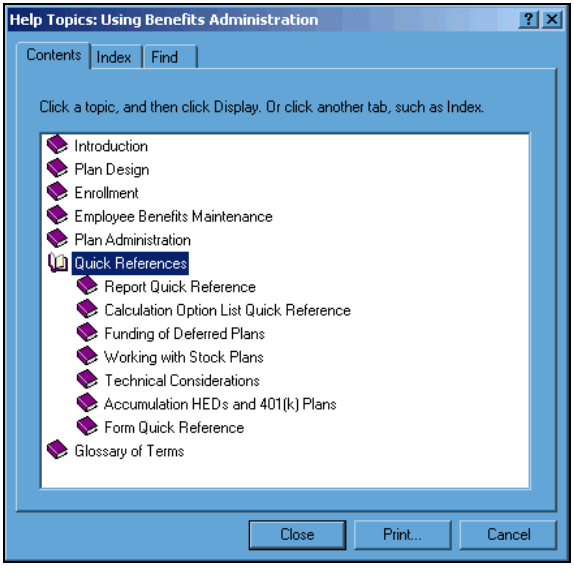


Quick reference information

Quick reference information is provided for a variety of information, including the following:

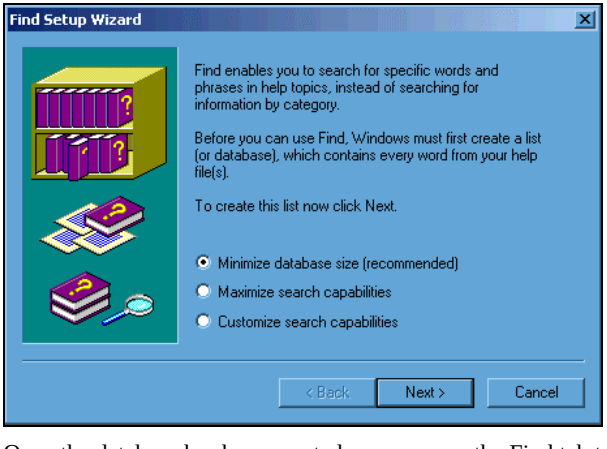
- Reports
- Forms
- Option lists
- Dialog boxes

This information is accessed from the Quick References section of the help:



Full text search

The Find tab offers the standard Windows full-text search facility. The first time that you access this, the Find Setup Wizard will display so that you can build the search database.

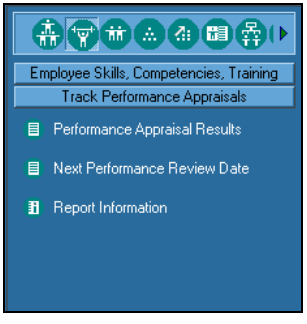


Once the database has been created, you can use the Find tab to search the help files using a word or phrase.

Report information

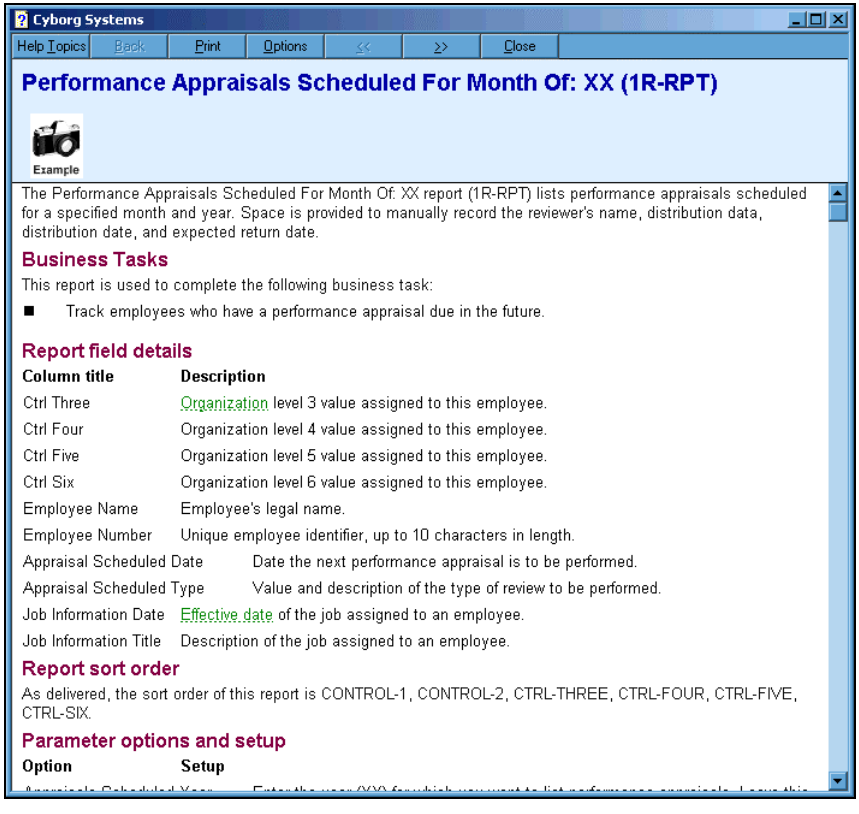
You can access report information directly from the Navigator. Most processes contains a Report Information item; this item is always the bottom item in the list.

The following figure shows the tasks and Report Information item for the process Track Performance Appraisals. To view report information, click the button to the left of the Report Information entry.



The report topic lists all of the reports associated with a component. You can then choose a specific report for more detailed information.

If you selected quick reference help on the 'Performance Appraisals Schedules for Month of XX (1R-RPT)', the following information would be displayed. Click the small picture of the camera to see an example of the report.



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Help Topics | Back | Print | Options | << | >> | Close

Performance Appraisals Scheduled For Month Of: XX (1R-RPT)

Example

The Performance Appraisals Scheduled For Month Of: XX report (1R-RPT) lists performance appraisals scheduled for a specified month and year. Space is provided to manually record the reviewer's name, distribution data, distribution date, and expected return date.

Business Tasks

This report is used to complete the following business task:

- Track employees who have a performance appraisal due in the future.

Report field details

Column title	Description
Ctrl Three	Organization level 3 value assigned to this employee.
Ctrl Four	Organization level 4 value assigned to this employee.
Ctrl Five	Organization level 5 value assigned to this employee.
Ctrl Six	Organization level 6 value assigned to this employee.
Employee Name	Employee's legal name.
Employee Number	Unique employee identifier, up to 10 characters in length.
Appraisal Scheduled Date	Date the next performance appraisal is to be performed.
Appraisal Scheduled Type	Value and description of the type of review to be performed.
Job Information Date	Effective date of the job assigned to an employee.
Job Information Title	Description of the job assigned to an employee.

Report sort order

As delivered, the sort order of this report is CONTROL-1, CONTROL-2, CTRL-THREE, CTRL-FOUR, CTRL-FIVE, CTRL-SIX.

Parameter options and setup

Option	Setup

Context-sensitive help

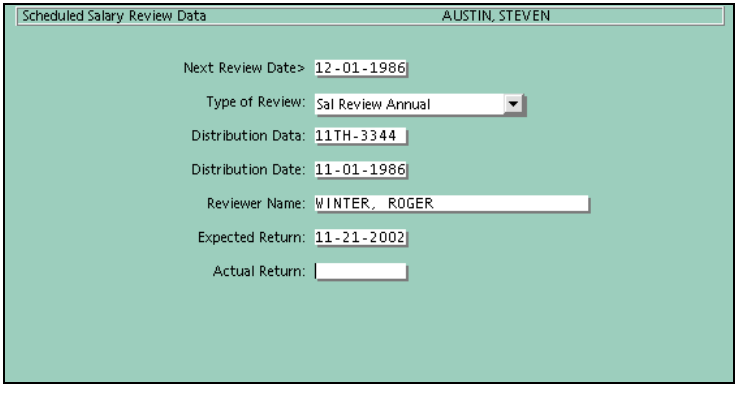
Several levels of context-sensitive help are available:

- Form-level
- Text or list box level
- Dialog level

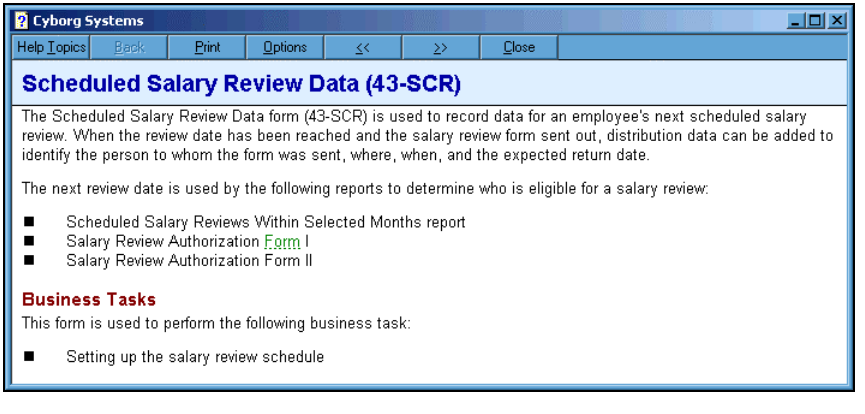
Help on forms

To learn the purpose of a form, use the form-level help. To access form-level help, access a form and click the Help on This Form button on the toolbar.

For example, if you click the form-level help button on this form:



…you will see this:



The Business Tasks section in the help provides links to detailed directions for business tasks associated with this form.

See also:

- Accessing context-sensitive help for a form ***(on page 216)***

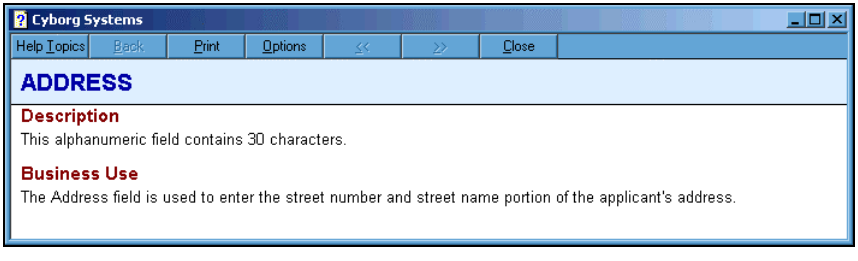
For detailed directions on accessing context-sensitive help for a form.

Help on text and list boxes

To access help on text and list boxes on a form, use the 'What's this?' help. To access 'What's this?' help, click the 'What's this?' button from the Support Systems toolbar, and then click in the box you want to know about.

For example, if you wanted to know about the Address text box on the Employee Information form (EF-SCR), you would drag the help icon to 'Address' and click.

The following figure shows the help for the Address text box:



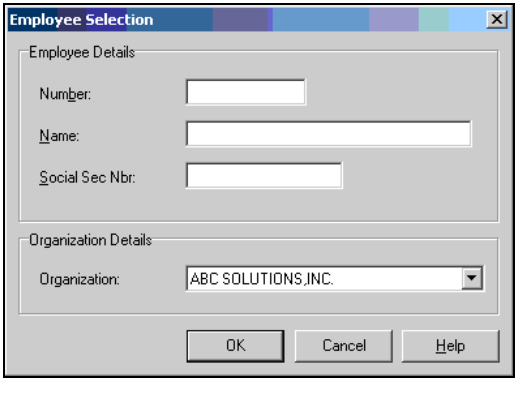
See also:

- Accessing context-sensitive help for text and list boxes ***(on page 216)***

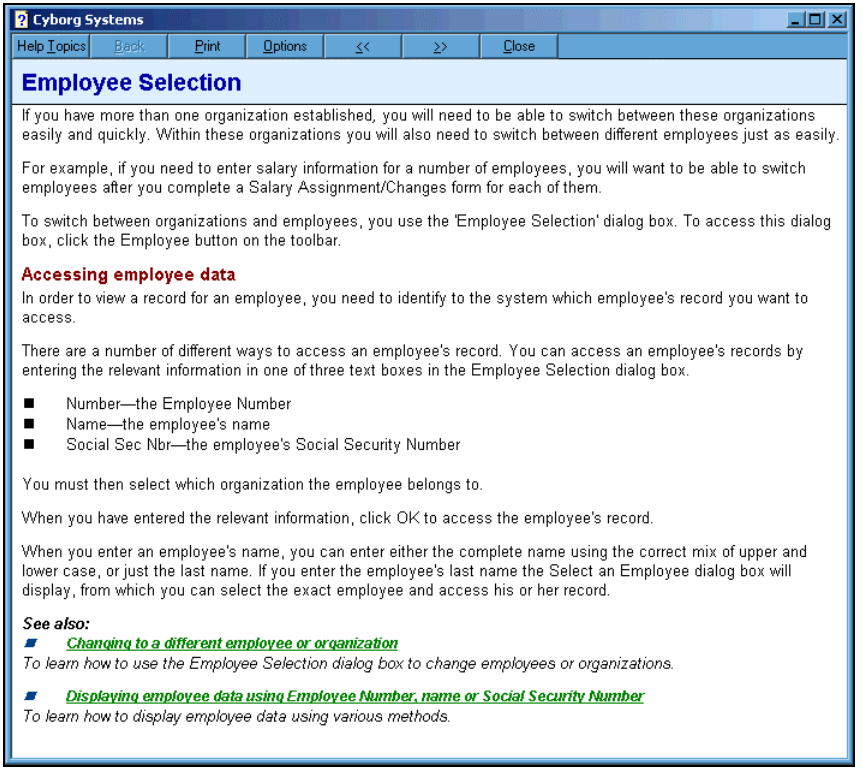
For detailed directions on accessing context-sensitive help for a box or list.

Help on dialog boxes

Clicking the Help button on a dialog box will display the help associated with that dialog.



For example, if you click the Help button on the Employee Selection dialog you will see this: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Help Topics | Back | Print | Options | << | >> | Close

Employee Selection

If you have more than one organization established, you will need to be able to switch between these organizations easily and quickly. Within these organizations you will also need to switch between different employees just as easily.

For example, if you need to enter salary information for a number of employees, you will want to be able to switch employees after you complete a Salary Assignment/Changes form for each of them.

To switch between organizations and employees, you use the 'Employee Selection' dialog box. To access this dialog box, click the Employee button on the toolbar.

Accessing employee data

In order to view a record for an employee, you need to identify to the system which employee's record you want to access.

There are a number of different ways to access an employee's record. You can access an employee's records by entering the relevant information in one of three text boxes in the Employee Selection dialog box.

- Number—the Employee Number
- Name—the employee's name
- Social Sec Nbr—the employee's Social Security Number

You must then select which organization the employee belongs to.

When you have entered the relevant information, click OK to access the employee's record.

When you enter an employee's name, you can enter either the complete name using the correct mix of upper and lower case, or just the last name. If you enter the employee's last name the Select an Employee dialog box will display, from which you can select the exact employee and access his or her record.

See also:

- ***Changing to a different employee or organization***

To learn how to use the Employee Selection dialog box to change employees or organizations.

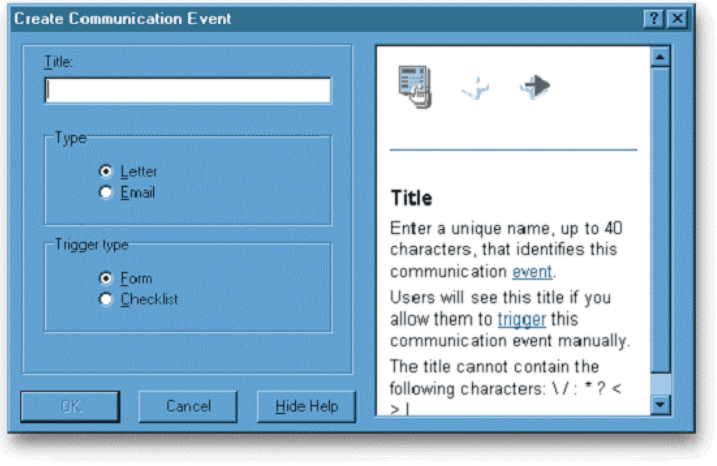
- ***Displaying employee data using Employee Number, name or Social Security Number***

To learn how to display employee data using various methods.

Communication event dialogs

Help is displayed in a separate window on the right of the dialog boxes that help you create and maintain letter and email communication events. This help automatically changes as you work through the various text boxes and options on the dialog boxes. Using the navigation and dialog buttons, you can access help for specific text boxes and options or hide the help window.

The following example shows the help displayed as a part of the Create Communication Event dialog box:



Electronic documentation

We host a full set of One-Stop Documentation on the Hewitt eCyborg Customer Center Documentation pages.

Each of these electronic manuals is a complete One-Stop Document; it includes all of the appendices, glossary, index, and the training exercises you would find in a printed manual. You can access and view this set of One-Stop Documentation user manuals, allowing you to print an entire manual or sections of a manual.

Note: *If you do not have access to the Customer Center, speak to your Administrator, who should be able to access the documentation for you.*

Note: *These manuals may be stored locally on a network server. Consult your System Administrator for specific instructions on how to access the electronic documentation at your site.*

The electronic documents are saved in the Portable Document Format (PDF) from Adobe Systems, Inc. You cannot view these documents in your word processor, rather you would use the Adobe Acrobat Reader (available as a free download from Adobe Systems, Inc.).

Adobe Acrobat Reader

The Adobe Acrobat Reader is a tool produced by Adobe Systems, Inc. The Acrobat Reader allows you to access Acrobat documents we have produced. These documents can be used online, or printed out for an exact replica of the documentation. The Adobe Acrobat Reader will help you to:

- Access and read all electronic documentation
- Search for any word or phrase within a document
- Search for any word or phrase across all electronic documents
- Print out a hard copy of any document precisely as it would have been produced

☞ *Refer to the Adobe Acrobat Online Guide for further information on how to use the Adobe Acrobat Reader. You can access the Adobe Acrobat Online Guide by starting the Acrobat Reader and selecting the Help menu and then the Reader Online Guide option.*

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Accessing help for all of The Solution Series from the menus 213
Accessing help for all of The Solution Series from the Support Systems toolbar 213
Accessing help for a component from the menus 214
Accessing help for a component from the Solution Series help file 214
Accessing context-sensitive help for a form 216
Accessing context-sensitive help for text and list boxes 216

Accessing help for all of The Solution Series from the menus

You can access help for all of The Solution Series from:

- The menus (this task)
- ***The Support Systems toolbar*** (see "Accessing help for all of The Solution Series from the Support Systems toolbar" on page 213)

To access help for all of The Solution Series from the menus, make the following selections:

Help ▶ Help on all of The Solution Series

See also:

- **The Help system** ***(on page 199)***

For more information about help on The Solution Series.

Accessing help for all of The Solution Series from the Support Systems toolbar

You can access help for all of The Solution Series from:

- ***The menus*** (see "Accessing help for all of The Solution Series from the menus" on page 213)
- The Support Systems toolbar (this task)

To access help for all of The Solution Series, follow this step:

Click Help for all of The Solution Series

Click the Help for all of The Solution Series button on the Support Systems toolbar.

See also:

- **The Help system** ***(on page 199)***

For more information about help on The Solution Series.

Accessing help for a component from the menus

You can access help for a component from:

- The menus (this task)
- ***The Support System toolbar*** (see "Accessing help for a component from the Solution Series help file" on page 214)

To access help for a component, make the following selections:

Help ▶ Help on *component_name*

The component name shown reflects the component associated with the form currently displayed in the Form area. If no form is displayed in the Form area, then access will be to all of the help.

See also:

- **The Help system** ***(on page 199)***

For more information about help on The Solution Series.

Accessing help for a component from the Solution Series help file

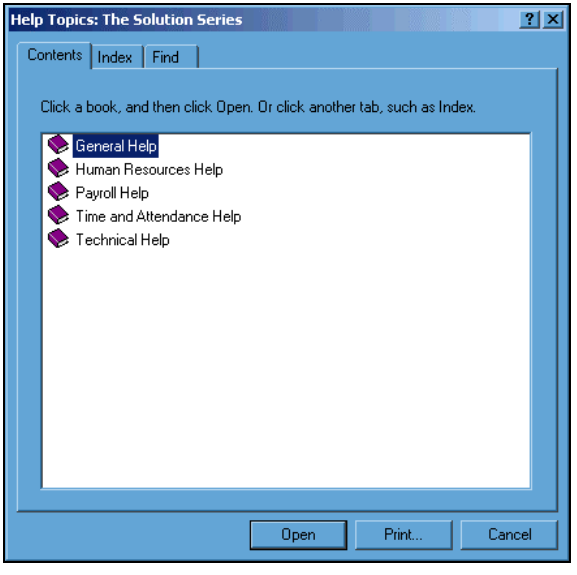
To access help for a particular component of the system, follow these steps:

1. Access Help for all of The Solution Series

Access help for all of The Solution Series, by clicking the Help on all of The Solution Series icon on the Support Systems toolbar.

Alternatively, make the following menu selection:

Help ▶ Help on all of The Solution Series

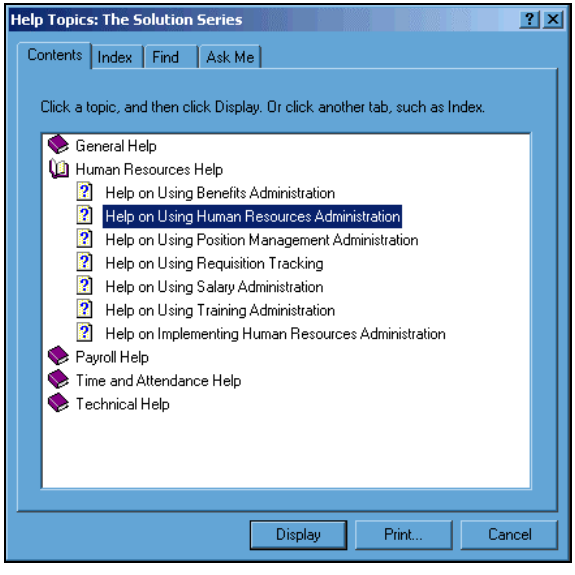


2. Double-click an item containing a component or the Technical Documentation

Double-click the item in which you are interested.

3. Double-click the item in which you are interested

Double-click an item and the help file will be opened.



See also:

- **The Help system** ***(on page 199)***

For more information about help on The Solution Series.

Accessing context-sensitive help for a form

To access context-sensitive help for a form, access a form and follow these steps:

1. Access a form

Access the form for which you want to see help.

2. Click the Help for this Form button

Click the Help for this Form button on the toolbar.

Note: You can also access form-level help by pressing F1.

See also:

- Help on forms ***(on page 207)***

For more information about help on forms.

Accessing context-sensitive help for text and list boxes

To access context-sensitive help for a box or list, access a form and follow these steps:

1. **Access a form and position the pointer**
   Access the desired form and then position the pointer in the text or list box for which you want to see help.

2. **Click the 'What's This?' button**
   Click the 'What's This?' button on the Support Systems toolbar. The pointer will now have a question mark associated with it.

3. **Drag the help pointer to the box or list**
   Drag the help pointer to the box or list about which you want help.

4. **Click the box or list**
   Click to display the context-sensitive help.

See also:

- Help on text and list boxes ***(on page 208)***

For more information about field-level help.

Review of Questions Answered

1. What types of online help are provided?

2. How do you access help on all of The Solution Series?

CHAPTER 9

Working with Data

In This Chapter

Introduction 220
Viewing data.....221
Adding and modifying data 227
Option lists.....233
Form actions 238
Record deletion.....241
System messages 242
Detailed Directions 244
Review of Questions Answered.....268

Introduction

When you begin to enter data into The Solution Series, you need to know how to select different employees, as well as the different formats that the system will accept when you enter different types of data. This section tells you how to access a different employee and explains the different data formats.

Tasks

This section explains the following:

- Displaying employee data using Employee Number, name, or Social Security Number
- Displaying employee data using phonetic search
- Displaying a selection list in the message area
- Choosing a record from a selection list
- Displaying an employee profile
- Clearing all boxes on a form
- Entering dates
- Entering numeric data
- Using option lists
- Saving changes to a form
- Canceling changes to a form
- Adding a record
- Modifying a record
- Deleting a record
- Responding to reject messages
- Responding to warning messages

Prerequisites

Before you can complete the tasks in this section you need to have completed the following:

- Logged on to The Solution Series.
- Read ***Exploring the Work Area*** (on page 49) that introduces you to The Solution Series interface.
- Read ***Navigating the System*** (on page 129) that explains how you navigate The Solution Series.

Questions answered

The following questions are answered in this section:

1. What methods are available for viewing employee and organizational data?
2. What types of numeric data are used?
3. What are option lists and how are they used?
4. What actions can be performed when working with forms?
5. How are employee and organizational data deleted?
6. What types of system messages are provided?

Viewing data

When using The Solution Series, you work with both employee and organizational data. This section explains how to access employee data.

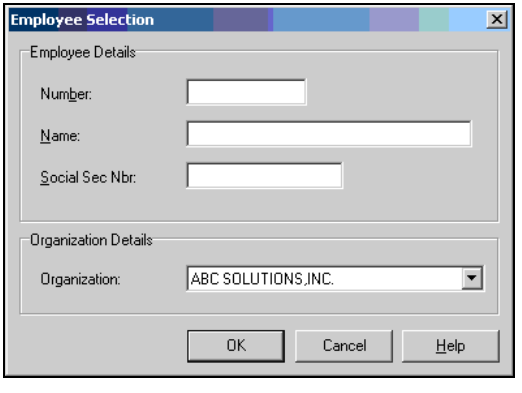
Accessing employee data

Employee data is stored in records that contain information that is specific to an employee.

In order to view a record for an employee, you need to identify to the system which employee's record you want to access.

You can access an employee's record by entering the relevant information in one of three text boxes in the Employee Selection dialog box.

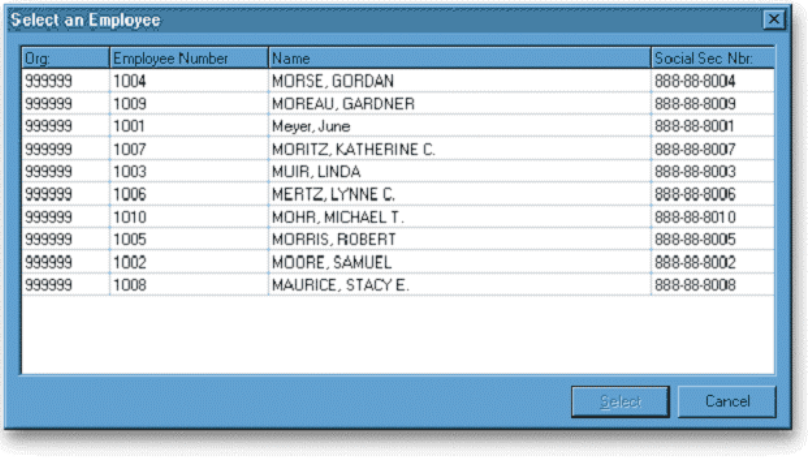
- Number—Employee Number
- Name—Employee Name
- Social Sec Nbr—Employee Social Security Number



You must then select the organization to which the employee belongs.

When you have entered the relevant information, click OK to access the employee's record.

When you enter an employee's name, you can enter either the complete name using the correct mix of upper and lower case, or just the last name. If you enter the last name, the Select an Employee dialog box will be shown, from which you can select the exact employee and access his or her record.



Org:	Employee Number	Name	Social Sec Nbr:
999999	1004	MORSE, GORDAN	888-88-8004
999999	1009	MOREAU, GARDNER	888-88-8009
999999	1001	Meyer, June	888-88-8001
999999	1007	MORITZ, KATHERINE C.	888-88-8007
999999	1003	MUIR, LINDA	888-88-8003
999999	1006	MERTZ, LYNNE C.	888-88-8006
999999	1010	MOHR, MICHAEL T.	888-88-8010
999999	1005	MORRIS, ROBERT	888-88-8005
999999	1002	MOORE, SAMUEL	888-88-8002
999999	1008	MAURICE, STACY E.	888-88-8008

See also:

- Displaying employee data using Employee Number, name or Social Security Number ***(on page 244)***

For detailed directions on viewing employee data.

Accessing an employee using phonetics

There may be occasions when you are provided with an employee's name, and you need to check the system to ensure that you have the correct spelling and that there are not several employees with a similar name.

When you enter a name on the Employee Phonetic Name Lookup form (PHONET), any name that sounds close to your guessed spelling is displayed, so that you can find the correct spelling.

```
                    Phonetic Name Search

                Name:  Mor

                 Sex:

Name field examples:

 Search on last name only: Morris
Last name & first initial: Morris, J
     Last and first names: Morris, James

You may optionally enter M or F in the Sex field to limit the search.
```

When the results of the search are displayed, you can find out:

- Which organization he or she is in
- The Employee Number
- The correct spelling of the employee's name
- The Social Security Number
- The Sex of the employee

```
Search Name:Mor

   Org     Empl #     Employee Name                    SSN       Sex

   999999 1004        MORSE, GORDAN                 888-88-8004    M
   999999 1009        MOREAU, GARDNER               888-88-8009    M
   999999 1001        Meyer, June                   888-88-8001    F
   999999 1007        MORITZ, KATHERINE C.          888-88-8007    F
   999999 1003        MUIR, LINDA                   888-88-8003    F
   999999 1006        MERTZ, LYNNE C.               888-88-8006    F
   999999 1010        MOHR, MICHAEL T.              888-88-8010    M
   999999 1005        MORRIS, ROBERT                888-88-8005    M
   999999 1002        MOORE, SAMUEL                 888-88-8002    M
   999999 1008        MAURICE, STACY E.             888-88-8008    F
```

When you have this information, you can use the Employee Selection dialog box to access the employee's record.

See also:

- Displaying employee data using phonetic search ***(on page 246)***

For detailed directions on using the Employee Phonetic Lookup form.

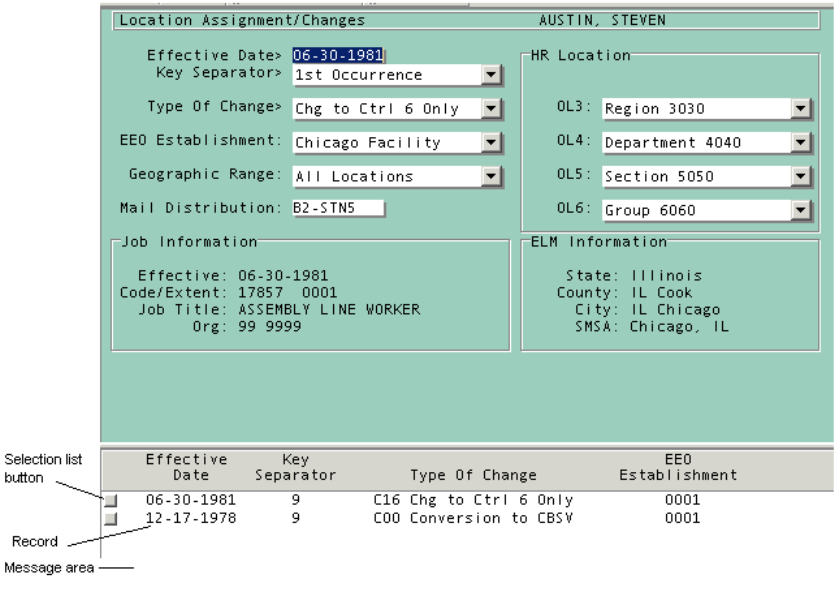
Viewing multiple occurrences of data on a form

When you access a form that contains historical or multiple occurrences of data, the most current data will be displayed. If a form has multiple or historical records, you can access these records through the Selection list. For example, from the Location Assignment/Changes form (05CSCR) you can access the history of an employee's location and assignment changes. The Selection list is displayed in the Message area.

You can display the Selection list manually using the Selections button on the Standard toolbar. The Selections button is only enabled when there are multiple or historical records.

The Selection list can be displayed automatically when there are multiple or historical records by setting your user options. You can elect to display records automatically, if the form does not have a date as its first key field, if the form does have a date as its first key field, or both.

The following example shows the history of Steve Austin's location and assignment changes:



You can select a record from this list and display it in the Form area by doing one of the following:

- Double-clicking anywhere on an item in the list
- Clicking the button
- Using the up and down arrows on the Selection toolbar to display in the Form area the different records listed on the Selection list

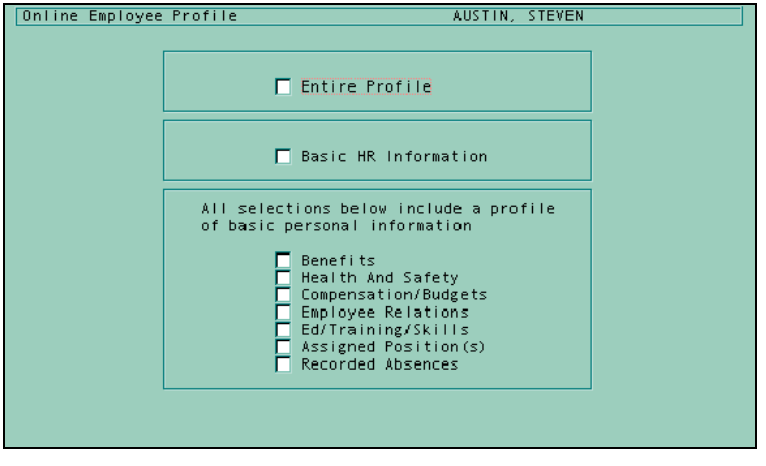
See also:

■ Displaying a selection list in the Message area ***(on page 250)***
For detailed directions on accessing multiple occurrences of a form.

■ Choosing a record from a selection list ***(on page 248)***
For detailed directions on selecting a record from the selection list.

Employee Profiles

You can use an employee profile to view a summary listing of all or part of an employee's data. The Online Employee Profile form (PROFIL) displays data from different parts of an employee's master record. An employee profile can be used to view data on an employee's benefits, training, or absences.



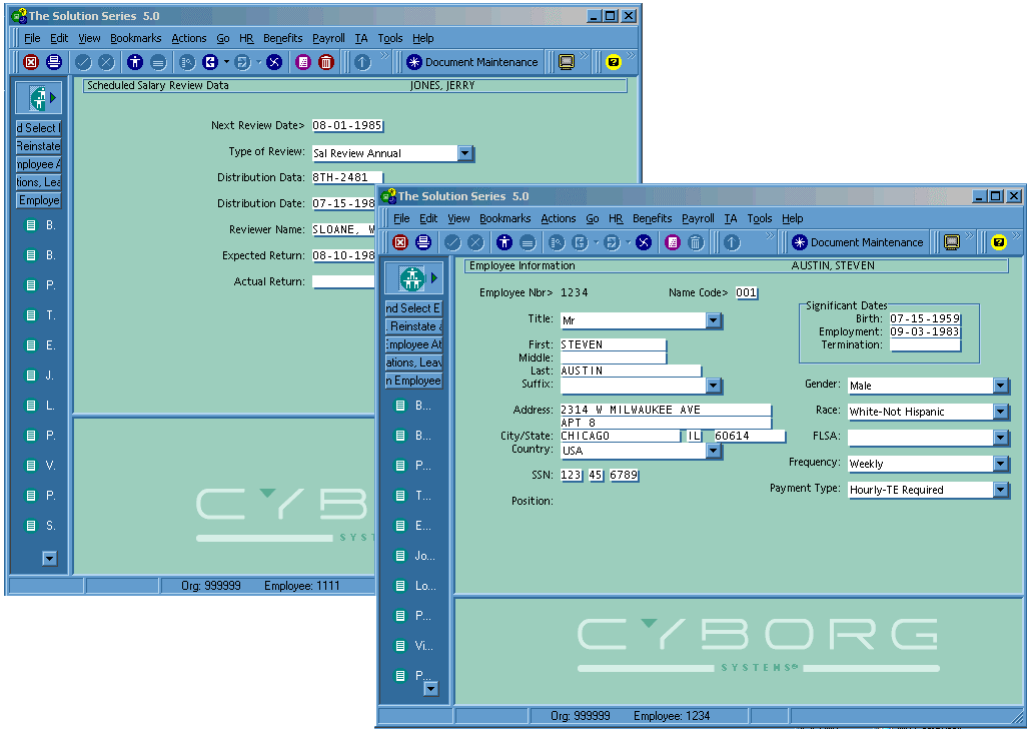
Note: This feature is typically used by experienced users who are very familiar with employee data.

See also:

■ Displaying an employee profile ***(on page 248)***
For detailed directions on displaying an employee profile.

Using multiple sessions to view additional data

If you need to view two forms at once, you can run multiple sessions of The Solution Series and either toggle between the two sessions, or adjust the size of the Work Area so that you can see two forms simultaneously.



Adding and modifying data

There are different types of text box in The Solution Series:

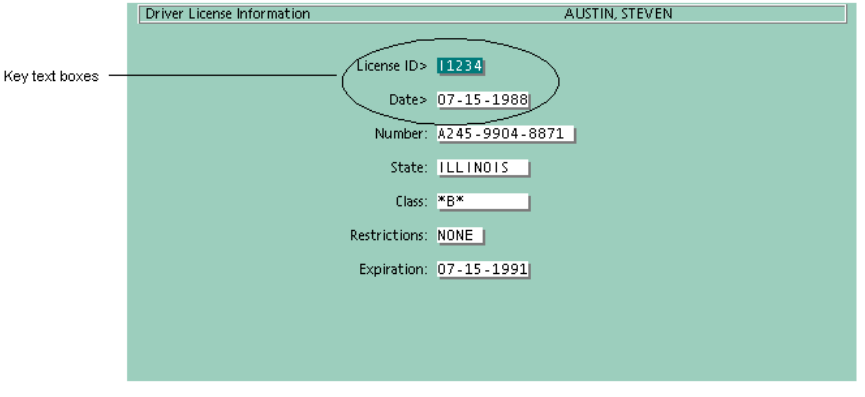
- Key
- Character
- Date
- Numeric

In order to enter data correctly, you need to know what types of data can be entered into the different types of text boxes.

Key text boxes

Every form will have at least one key item (text box, option list, and so forth). The Solution Series uses key items as the means of making each record unique. A key item is identified by a > (greater than) symbol next to the text box or display on a form.

For example, there are two unique items on the Driver License Information form (25-SCR), License ID and Date. These items are needed in order to make the record unique:



Character text boxes

Character text boxes are alphanumeric text boxes. They can contain text or numeric characters. Two types of character text boxes are used in The Solution Series:

- Unformatted character text boxes—contain 1 to 60 characters that can be entered in any order or format.
- Formatted character text boxes—contain 1 to 30 characters that must be entered in a specific format.

Date text boxes

Date information is presented in the following formats:

- MM-DD-CCYY (US and Canada, excluding Quebec)
- DD-MM-CCYY (elsewhere)
  - MM—Month (01 for January, 12 for December)
  - DD—Day (01 for the first of the month, 10 for the tenth of the month)
  - CC—Century (19 for the twentieth century, 20 for the twenty-first century)
  - YY—Year (02 for the second year of the century)

For example 12-31-2002 represents December 31, 2002 in the MM-DD-CCYY format. 31-12-2002 represents December 31, 2002 in the DD-MM-CCYY format.

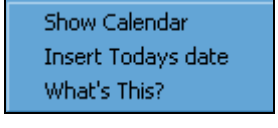
Dates can be entered by doing one of the following:

- Manually entering the date in the correct format
- Using an action to insert today's date
- Using the Calendar dialog box to insert any date

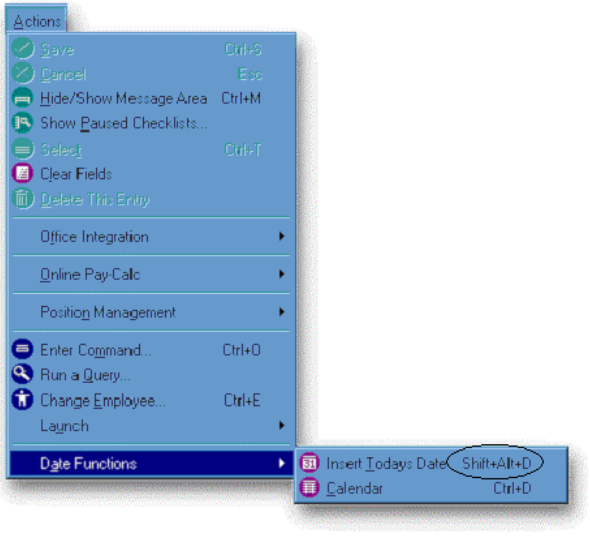
Inserting today's date

You can insert today's date into a date text box either by manually typing it, or by using one of the following methods:

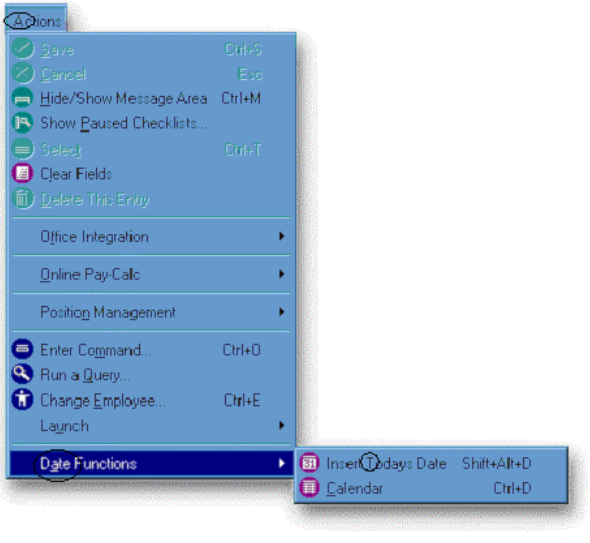
- Shortcut menu—position the pointer over a date text box and right-click. Then select Insert today's date.



- Shortcut key—SHIFT+ALT+D

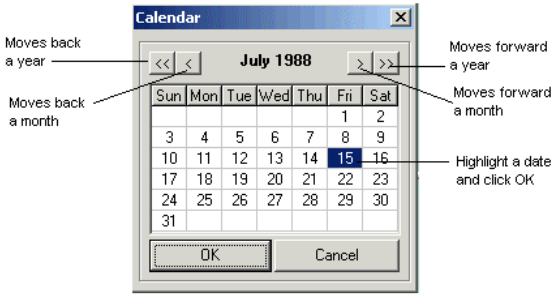


- Access key—ALT+A, A, T



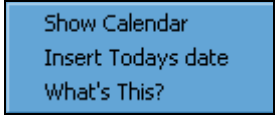
Inserting any date

You can use the Calendar dialog box to insert a date into a date text box. When you access this dialog box, you can navigate to a specific date.

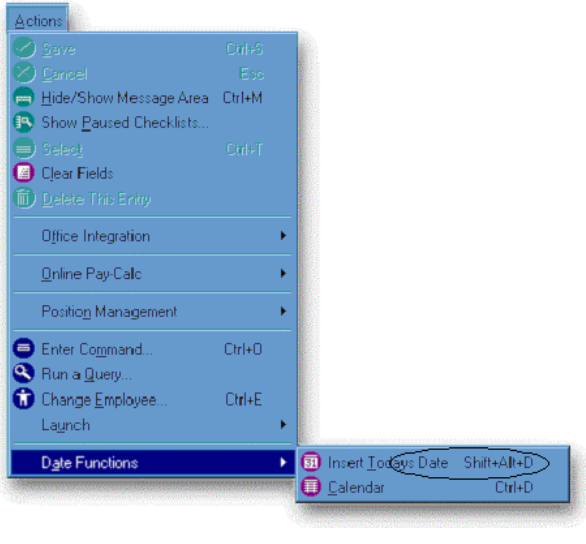


To access the Calendar dialog box, select one of the following:

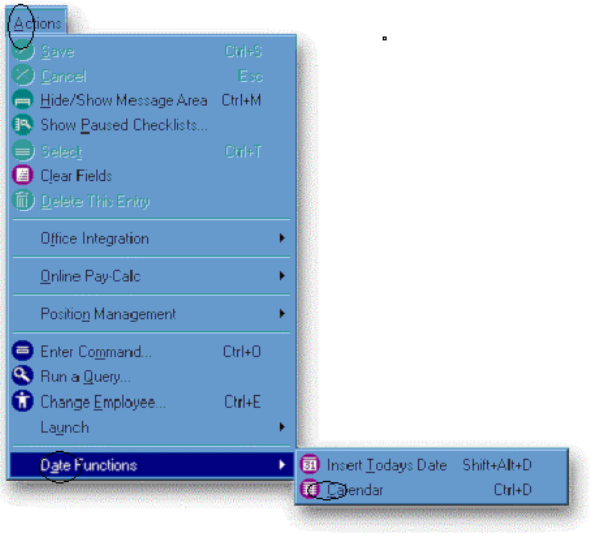
- Shortcut menu
  Position the pointer over the date text box and right-click. Then select Show Calendar.



- Shortcut key—CTRL+D



- Access key—ALT+A, A, C
  You can use the different controls to select a different year and month, and then select the date you require by clicking OK.



See also:

- Entering dates ***(on page 252)***

For detailed directions on entering dates.

Numeric text boxes

The Solution Series is delivered with several types of numeric text boxes. When you enter numerical data that contains decimals into these text boxes, you must follow certain formats. The numeric text boxes include the following:

- Rates
- Hours
- Percentages
- Amount/Salary

See also:

- Entering numeric data ***(on page 254)***

For detailed directions on entering numeric data.

Numeric text boxes and decimals

Most of the numeric text boxes use decimal places.

When you enter numeric data that contains decimal places, you can either enter the decimal place manually, or let the system enter the decimal for you.

The following formats must be used when entering numeric data that contains decimals.

Rate text boxes

A rate text box uses four decimal places. For example, 12.40 can be entered as:

- 12.40
- 12.4000
- 124000

Hour text boxes

An hour text box uses two decimal places. For example, 40 hours can be entered as:

- 40.
- 4000

Percentage text boxes

A percentage text box uses two decimal places. For example, 33.3% can be entered as:

- 33.3
- 3330

Amount and Salary text boxes

An amount or salary text box uses two decimal places. For example, 1,000.00 can be entered as:

- 1000.
- 100000

See also:

- Entering numeric data ***(on page 254)***

For detailed directions on entering numeric data

Option lists

An option list contains a list of predefined options from which you may choose. You must choose one of the predefined options as your selection. In contrast to a character text box, you can not key your own data into an option list.

For example, the Frequency option list (PP29) on the Employee Information form (EF-SCR) has the following options:

- None
- Bi Weekly
- Monthly
- Semi Monthly
- Weekly

The Solution Series is delivered with default options for the different option lists. These options can be amended to add or remove items to meet the requirements of your organization.

For example, you could amend the list in the above example to include Quarterly as a frequency type.

☞ *Refer to the Optimizing System Features documentation for more information on how to edit option lists.*

See also

- Entering numeric data ***(on page 254)***

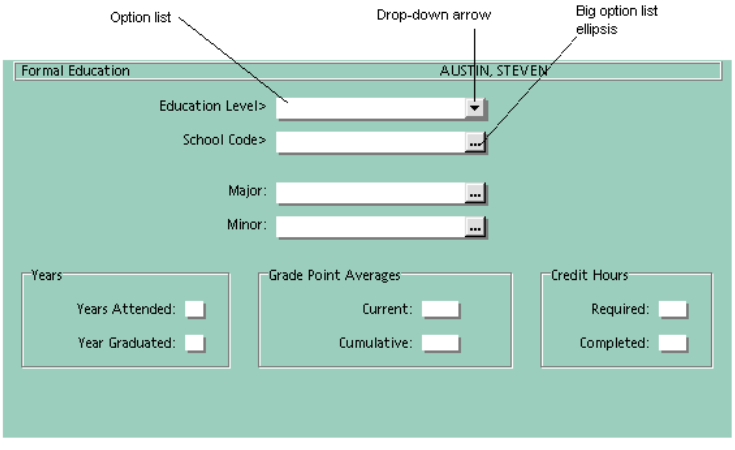
For detailed directions on using option lists.

Types of option lists

There are two types of option lists:

- Standard option lists—identified by a drop-down arrow

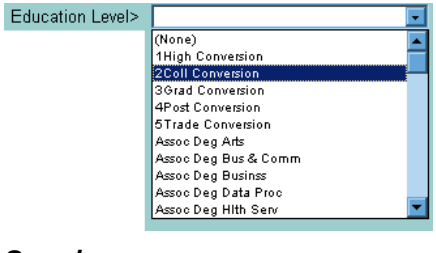
- Big option lists—identified by an ellipsis



Standard option list

You can use one of the following methods to select an option in the option list:

- Click the drop-down arrow to display the option list. Select an option by clicking it. When you select an option, the list collapses and your selection is displayed.
- Use the access key ALT+DOWN ARROW to select the option list. Then use the UP ARROW and DOWN ARROW to select an option. When you have selected an option, press Enter.
- Select an option list and use the UP ARROW and DOWN ARROW to select an option. When you have selected an option, press Enter.
- Use the shortcut menu and select the Search Option List menu option.



See also:

- Selecting an option from an option list ***(on page 255)***

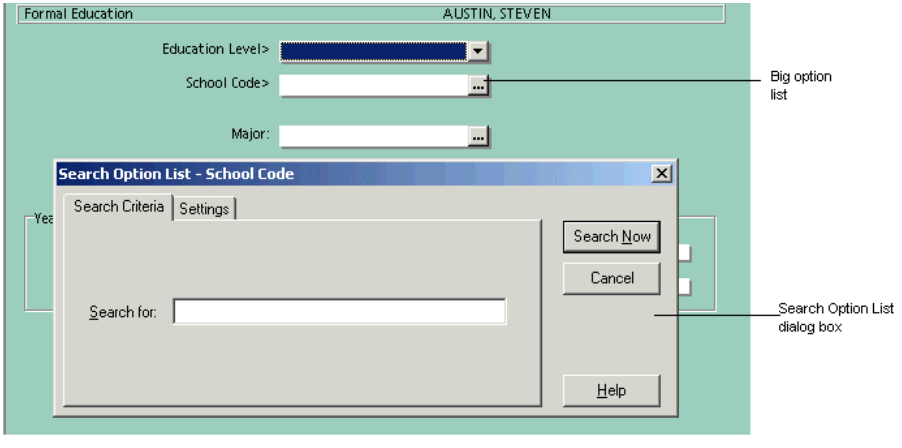
For detailed directions on using an option list.

Big option list

A big option list is indicated by an ellipsis (three dots where the drop-down arrow would normally be displayed):

A big option list is used to help you narrow the selections from a large list. For example, on the Formal Education form (30-SCR) the School Code option list (HR32) contains too many education establishments to be displayed in a standard drop-down list box.

When you access a big option list, the Search Option List dialog box is shown:



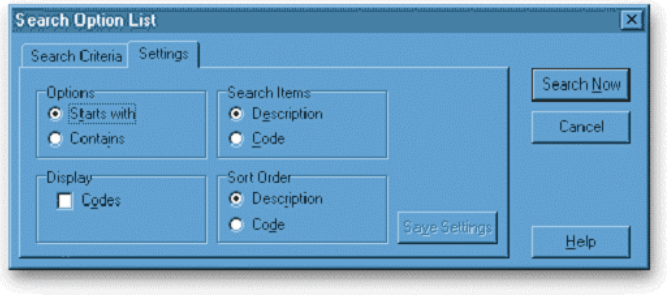
The Search Option List dialog box contains two tabs—Search Criteria and Settings.

Search Criteria tab

The Search Criteria tab contains the Search for text box. To search for an option, enter either its complete name or part of its name. For example, you could enter all or part of the name of the educational establishment you want to select.

Settings tab

When you have entered an option, you can click the Search Now button, or you can refine your search using the options on the Settings tab.



- Options group box
  Choose to search for an option that either Starts with or Contains your choice.

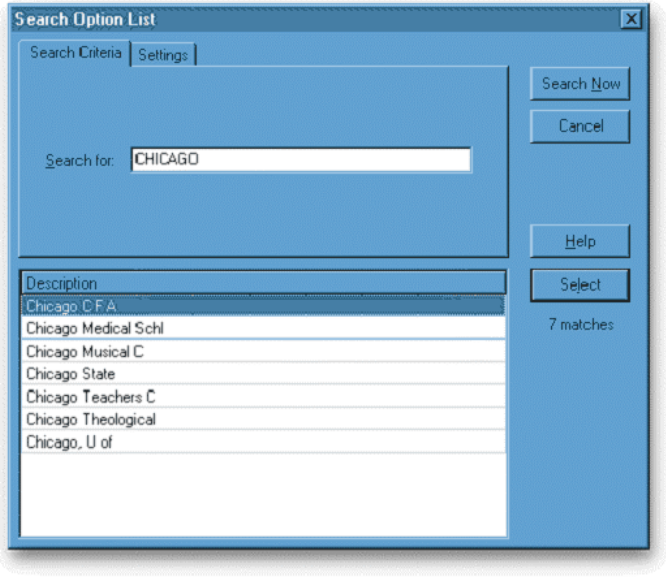
- Search Items group box
  Choose to search for a Description of the educational establishment or its Code.

- Display group box
  Choose the Codes check box to display the code for each educational establishment.

- Sort Order group box
  Choose to sort the educational establishments alphabetically by Description or Code.

If you have used the Settings tab to refine your search, click the Search Now button to begin the search.

If the system finds an option(s) that matches your selection, the Search Option List dialog box expands to reveal the results:



If your option is displayed, you can select it and click the Select button.

If your selection is not displayed, you can try again by entering a new option in the Search for text box.

See also:

- Selecting an option from a big option list ***(on page 256)***

For detailed directions on using a big option list.

Form actions

When you access a form, The Solution Series provides you with a range of options.

Note: *You can not close a form on the Form area. In order to protect confidential information from being observed on your screen, you should either log out of The Solution Series or minimize it when you are not using it.*

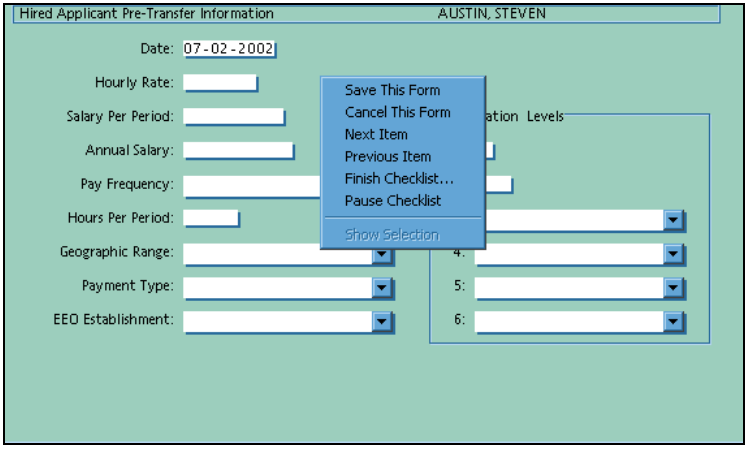
The following table contains the options that are available:

Button	Name	Description
	Print the current window	Prints the current Work Area.
	Save	Saves the current data. This button is enabled when you have entered new data or amended existing data.
	Cancel	Cancels changes made to the current data. This button is enabled when you have entered new data or amended existing data.
	Change Employee	Accesses the Employee Selection dialog box.
	Select	Displays the Selection List in the Message area. This button is enabled when there are multiple records for the form you have accessed.
	Back (form)	Displays the previous record or records (form, table and so forth). This button is enabled when you have accessed two or more forms in the current session.
	Forward (form)	Displays the next record or records (form, table and so forth). This button is enabled when you have accessed two or more forms in the current session.
	Add Bookmarks and Favorites	Adds the current form to the Bookmarks menu.
	Clear Fields	Clear the data in the current record (form, table and so forth).
	Delete This Entry	Deletes the current selected record (form, table and so forth).

Shortcut menu

There are a number of shortcut menus available on a form. The one you access is determined by the location of your pointer when you right-click. A shortcut menu is accessed by right-clicking on one of the following:

- Blank area on the form
- Text box
- Option list
- Date text box
- Time text box
- Form when used in a checklist



☞ *Refer to* **Exploring the Work Area** *(on page 49) for more information on shortcut menus.*

Options for updating data

When you access a form it will generally be populated with the most recently entered data. When you are entering new data on a form that already has data displayed on it, you have three choices:

- Clear all the data
- Clear existing data for specific text boxes
- Key over the existing data

Clearing all data boxes on a form

When entering new data, we recommend that you first clear the form to remove all the data from the text boxes. Clearing the form does not delete the existing information.

To clear a form, you can use one of the following:

- Clear Fields button on the Standard toolbar

- Clear Fields menu option on the Actions menu
- Access key ALT+A, L

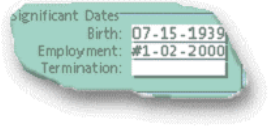
See also:

- Clearing all boxes on a form ***(on page 251)***

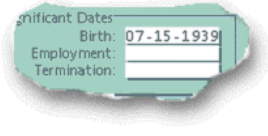
For detailed directions on clearing text boxes on a form.

Clearing existing data from alphanumeric text boxes

To clear existing data from a field, type a pound or hash sign (#) in the first position of the text box.



When you press Enter, the existing data will be cleared.



This method of clearing data is useful when you want to keep some of the existing data, and only need to change data such as dates.

Keying over existing data

You can enter new data on a form by keying over the existing data. However, if you do this, you run the risk of mixing up the existing data with the new data and saving the wrong data.

See also:

- Modifying a record ***(on page 262)***

For detailed directions on modifying information on a form.

Record deletion

If a record is no longer required or an error was made when the data was originally entered, it is possible to delete the record. If an error was made on the original record, it should be possible to amend the record and then save the correct data. This is the recommended way of dealing with data errors.

A record can be deleted from the system by doing one of the following:

- Clicking the Delete button on the Standard toolbar.
- Selecting the Delete This Entry menu option on the Actions menu.

Note: *The first non-key field must have an entry in order to delete a record.*

Note: *Caution should be taken when you delete information from The Solution Series.*

See also:

■ Clearing existing data from alphanumeric text boxes ***(on page 240)***
For more information on how to clear existing data from an alphanumeric text box.

■ Keying over existing data ***(on page 240)***
For more information on how to amend data on a record.

■ Deleting a record ***(on page 263)***
For detailed directions on deleting a record.

System messages

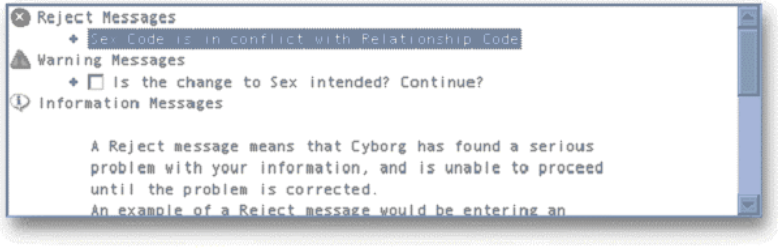
Three types of system messages can be displayed in the Message area:

- Reject
- Warning
- Information

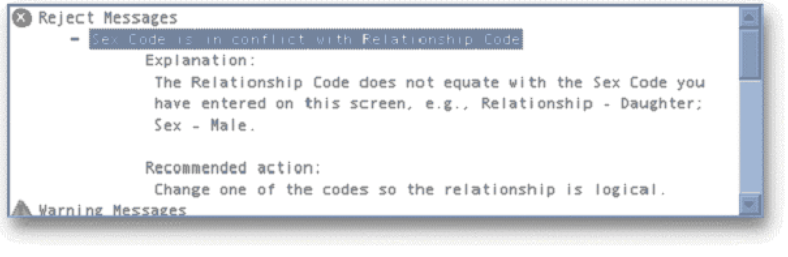
Note: *This is the order in which the system will display the messages.*

Overview of reject and warning messages

The system validates any data you enter into The Solution Series. If there is a problem with the data, a warning or reject message will be displayed in the Message area:



A brief explanation of the warning or reject message is displayed. If the reason for the warning or reject requires a more detailed explanation, you can click the plus sign (+) next to it. This expands the message to reveal a more detailed explanation.



Reject messages

A reject message occurs when data you have entered can not be accepted and is rejected. A reject message will also be displayed if you have not entered data in a required field. A reject message must be corrected before you can save the form.

There are two ways to deal with a reject message:

- Correct the data.
- Cancel the form. If you cancel the form you return it to its original condition. The data will not be saved.

See also:

■ Responding to reject messages ***(on page 263)***

For detailed directions on responding to a reject message.

Warning messages

A warning message informs you that illogical data has been entered, that may or may not be correct.

There are three ways to deal with a warning message:

- Correct the data—Re-enter the correct data.
- Override the warning message—Override the warning message and accept the data by selecting the check box.
- Cancel the form—If you cancel the form, you return it to its original condition. The data will not be saved.

See also:

■ Responding to warning messages ***(on page 265)***

For detailed directions on responding to a warning message.

Information messages

An information message is displayed when the system determines that an action you have performed should be brought to your attention. An information message is also used when a reject or warning message is displayed. The information message displays a generic explanation of these message types.

See also:

■ Responding to reject messages ***(on page 263)***
■ Responding to warning messages ***(on page 265)***

For detailed directions on displaying the additional information about the reject or warning message.

Detailed Directions

This section provides detailed directions on completing a business task.

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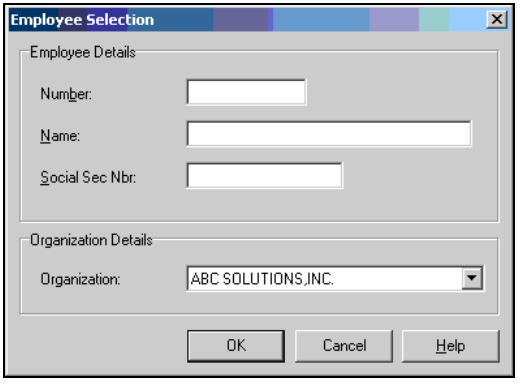
Displaying employee data using Employee Number, name or Social Security Number

To view data on a form for a different employee, follow these steps:

1. Click Change Employee

Click the Change Employee button to access the Employee Selection dialog box.



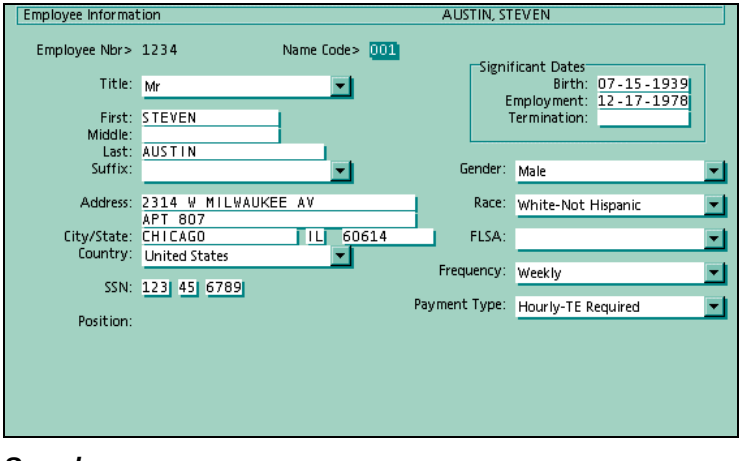
2. Enter a Number, Name, or Social Sec Nbr

Enter an employee Number, Name, or Social Security Number.

3. Click OK

To select the new employee, click OK.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Viewing data ***(on page 221)***

For more information on how to view employee data.

Displaying employee data using phonetic search

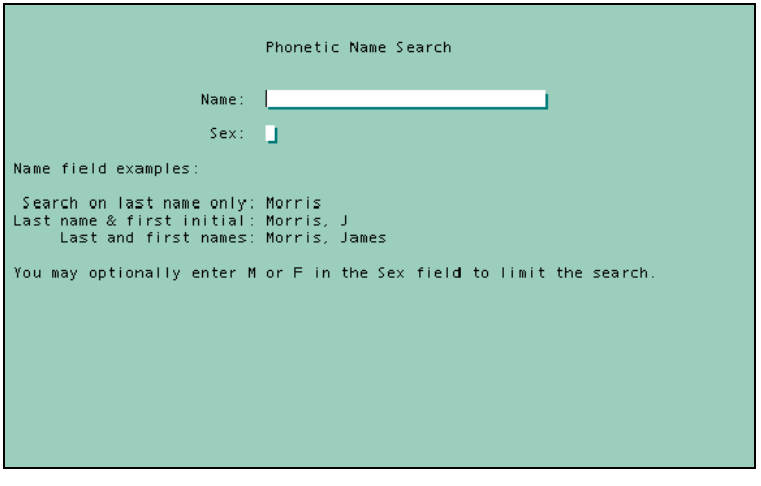
In this task, you are unsure of the correct spelling of an employee's last name and do not know the Employee Number. You will use the Employee Phonetic Name Lookup form (PHONET) to find out the employee's name and Employee Number. You are looking for an employee called either More or Moore.

The Employee Phonetic Name Lookup form (PHONET) is useful if you are unsure of the spelling of an employee's last name. Any name that sounds close to your guessed spelling is displayed, so that you can find the correct spelling. This form is also useful if you have several employees with the same last name.

1. Access the Employee Phonetic Name Lookup form

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

Component: User Tools
Process: User Tools
Task: Employee Phonetic Name Lookup



2. Enter the Name

For the employee's name, you can enter one of the following:

- All of the employee's last name (Moore)
- Last name and first initial (Moore, S)
- Last and first names (Moore, Samuel)

Note: If you are using the employee's last name with either the first initial or first name, you must separate them with a comma.

Note: You must use the correct case (upper and lower) when entering employee names.

3. Enter the sex of the employee (optional)

To limit the search to one particular gender, enter one of the following:

- M for male
- F for female

```
                    Phonetic Name Search

                Name:  Mor

                 Sex:

Name field examples:

 Search on last name only: Morris
Last name & first initial: Morris, J
     Last and first names: Morris, James

You may optionally enter M or F in the Sex field to limit the search.
```

4. Click Save or press Enter

To search for the employee, click Save or press Enter. The results of your selection will be displayed

If you completed the previous steps, the results should look similar to the example that follows:

```
Search Name:Mor

   Org     Empl #     Employee Name                    SSN       Sex

   999999 1004        MORSE, GORDAN                 888-88-8004    M
   999999 1009        MOREAU, GARDNER               888-88-8009    M
   999999 1001        Meyer, June                   888-88-8001    F
   999999 1007        MORITZ, KATHERINE C.          888-88-8007    F
   999999 1003        MUIR, LINDA                   888-88-8003    F
   999999 1006        MERTZ, LYNNE C.               888-88-8006    F
   999999 1010        MOHR, MICHAEL T.              888-88-8010    M
   999999 1005        MORRIS, ROBERT                888-88-8005    M
   999999 1002        MOORE, SAMUEL                 888-88-8002    M
   999999 1008        MAURICE, STACY E.             888-88-8008    F
```

See also:

- Viewing data ***(on page 221)***

For more information on how to view employee data.

Choosing a record from a selection list

To select a record in a Selection list, complete the steps in this task. You can use the pointer to select a record, or you can use the Selection toolbar.

Select a record on the Selection list

Select a record on the Selection list by doing one of the following:

- Click the button next to the record
- Double-click anywhere on the record
- Use the Down button on the Selection toolbar to navigate to the record

See also:

- Viewing multiple occurrences of data on a form ***(on page 224)***

For more information on Selection lists.

Displaying an employee profile

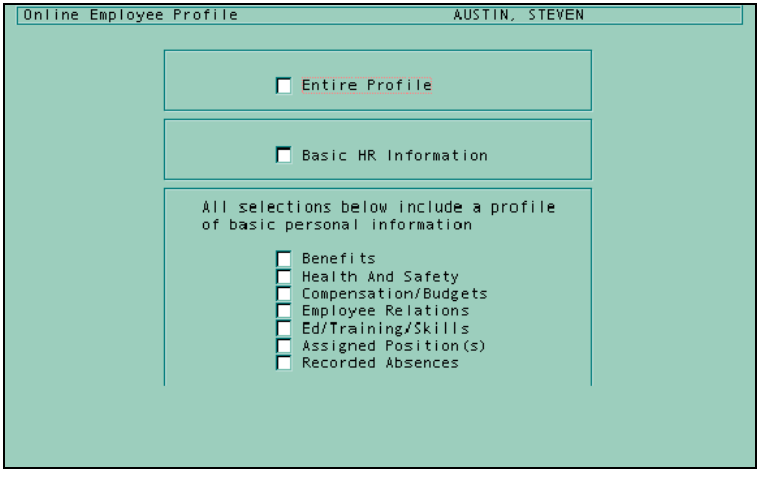
You can use the Online Employee Profile form (PROFIL) to display a specific employee's master record from the Employee Database. You can choose to display the entire record or specific information such as Employee Relations.

To display the employee profile, complete these steps:

1. **Access the Online Employee Profile form**

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

   Component: Employee Resourcing
   Process: Maintain Basic Employee Details
   Task: View Employee Profile



2. Select Entire Profile (optional)

If you want to display the entire profile for the employee, select this check box. If you select this option, you do not need to select any of the other check boxes.

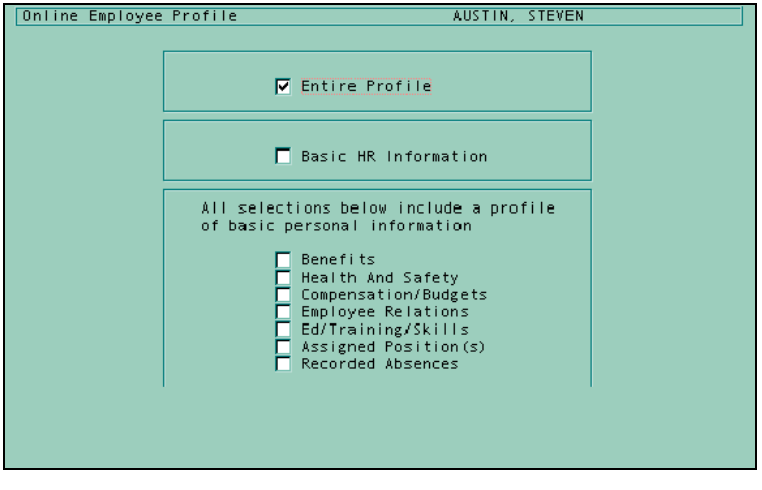
3. Select Basic HR Information (optional)

If you want to display basic HR information for the employee, select this check box. In addition to basic HR information, you also have the option to select information from other categories by selecting the relevant check boxes.

4. Select the type of information you want to display

Select the appropriate check box(es) for the type of information you want to display.

Note: If you have selected the Entire Profile option, you do not need to select these options.



5. Click Save or press Enter

To display the employee profile using your selection criteria, click Save.

If you completed the previous steps, the results should look similar to the example that follows:

```
Online Employee Profile                                  AUSTIN, STEVEN

     Social      Pay    Pay                                        Workers     Birth
SC   Security    Freq   Code  Status   Sex   Race   Union    Comp        Date
-- ------------   -      -      --      -     --    -----    -----    ----------
E  123-45-6789    1      1              M     01    629      CODE3    07-15-1939

   Employment       Termination             Spl Job   User  Fair    Per    Key
SC Code   Date      Code   Date      Shf    Cd  Cat   Field Labor   Over  Fields
--  --  ----------   --  ----------   -     -   ----    -     -     --    ----
E       12-17-1978       03-01-1983   2     1                      00    9999

SC   Key    Name / Address - Line 2           Address / City / State / Zip Code
--   ---    -------------------------------   ---------------------------------
F    001    AUSTIN, STEVEN                    2314 W MILWAUKEE AV
F    001    APT 8                             CHICAGO, IL             6   0614


                                                      S                      S
       Rel                                     Social    e  Birth             t
SC Key Cd  Dependent Name                     Security  x   Date   Area/Phone u
-- --- --  ---------------------------- ----------- - -------- --- -------- -
```

6. Press Enter

The Online Employee Profile is a multi-page form. Press Enter to view the next page.

When you reach the end of the Online Employee Profile, the following message is displayed:

'----Complete----'

See also:

- Employee Profiles ***(on page 225)***

For more information about employee profiles.

Displaying a selection list in the Message area

If a form has multiple occurrences or historical records, they can be accessed using a Selection list.

Note: In order to access a Selection list, the Select button must be enabled.

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

Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Location Change

Click Select

Click the Select button to display the selection list in the Message area.

Effective Date	Key Separator	Type Of Change	EEO Establishment
06-30-1981	9	C16 Chg to Ctrl 6 Only	0001
12-17-1978	9	C00 Conversion to CBSV	0001

.

See also:

- Viewing multiple occurrences of data on a form ***(on page 224)***

For more information on Selection lists.

Clearing all boxes on a form

Access the Spouse/Dependent Information form (10-SCR) for Employee Number 1234.

It is good practice to clear existing data from a form before you enter new data. To clear a form use the Clear button.

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

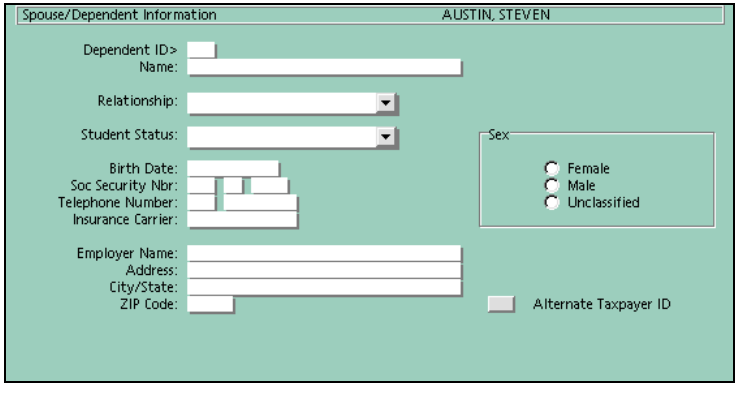
Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Dependent Information

Click Clear Fields

Click the Clear Fields button to clear the data from the form.

Note: *This button is enabled only when a form is selected.*

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Options for updating data ***(on page 239)***

For more information about clearing data from a form.

- System messages ***(on page 242)***

For information on messages that could be displayed when you try to save a record.

Entering dates

In this task, you are going to enter the following information in the Additional Personal and ID Information form (02-SCR) for Employee Number 1234.

Enter today's date in the 'Expires On' date text box.

You will be required to enter dates throughout The Solution Series. The date you enter will be determined by the date text box. For example, you may need to enter a past date, today's date, or a future date. To enter a date, follow these steps:

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

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

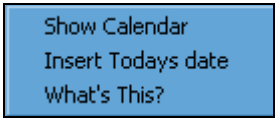
1. Select a date text box

Select a text box that requires a date entry.

2. Enter a date

To insert today's date use one of the following:

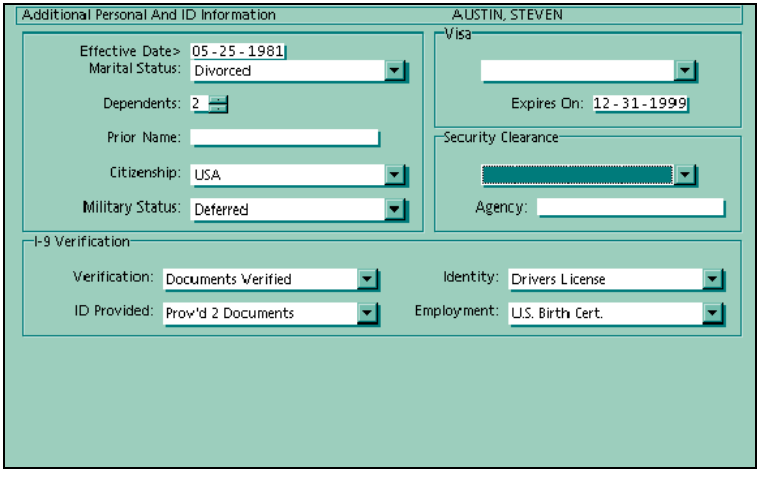
- Shortcut key—ALT+SHIFT+D
- Shortcut menu—position the pointer over the date text box and right-click. Then select Insert today's date.



To insert a different date, first access the Calendar dialog box using one of the following:

- Shortcut key—CTRL+D
- Shortcut menu—position the pointer over the date text box and right-click. Then select Show Calendar.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Date text boxes ***(on page 227)***

For more information on how to enter a date.

- System messages ***(on page 242)***

For information on messages that could be displayed when you try to save a record.

Entering numeric data

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234.

Change the Soc Security (SSN) text box to 987-65-4321.

To enter numeric data, complete the following steps:

Note: *This example does not contain decimals. When you enter data into a field that uses decimal places, you must enter it using the correct format.*

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

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

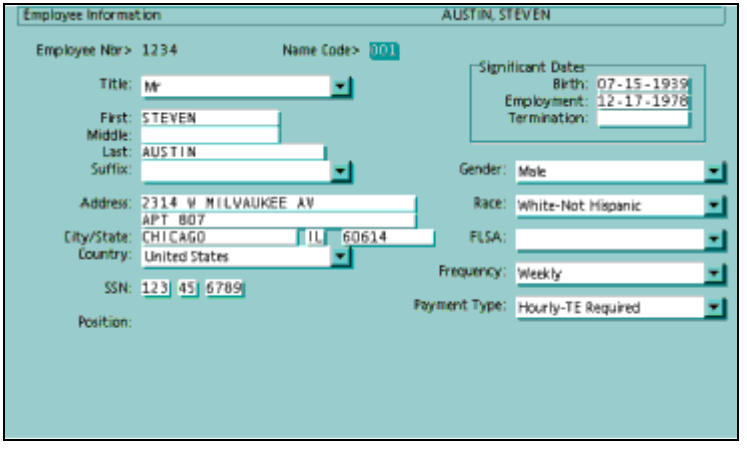
1. Select a numeric text box

Select a numeric text box that requires a numeric entry.

2. Enter the numeric data

Enter the numeric data in the correct format. If the numeric text box uses decimal places, you must use the correct format to enter the data. Different types of numeric data include rates, hours, percentages, and salaries. Each of these types of numeric data have specific formats when decimals are used.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Numeric text boxes ***(on page 231)***

For more information on entering numeric data.

- System messages ***(on page 242)***

For information on messages that could be displayed when you try to save a record.

Selecting an option from an option list

An option list contains a list of predefined options from which to choose. You must select one of the predefined options. There are two types of option lists:

- Option lists (this task)
- ***Big option lists*** (see "Selecting an option from a big option list" on page 256)

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234.

Change the Frequency option list (PP29) to Monthly.

To select an option from an option list, complete the following steps:

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

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

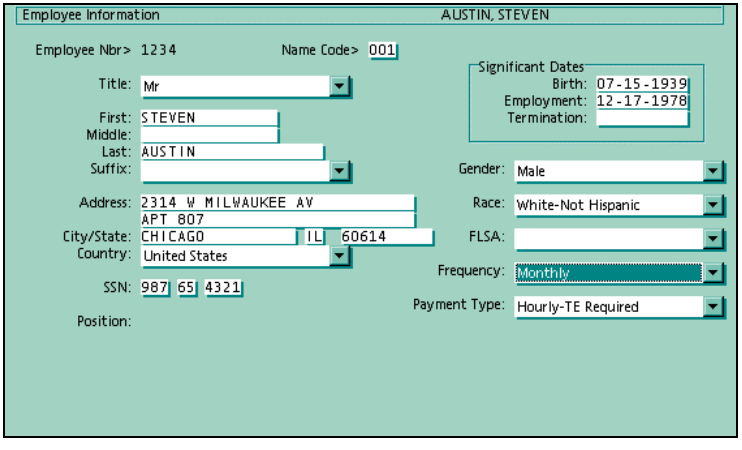
1. Select an option list

Select an option list from which you want to select an option.

2. Click the drop-down arrow and select an option

Click the drop-down arrow to display the option list and select an option.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Option lists ***(on page 233)***
- Standard option list ***(on page 234)***

For more information on option lists.

Selecting an option from a big option list

In this task, you are going to change the following information in the Certificates, Licenses and Permits form (28-SCR) for Employee Number 1234.

- Change the Type of CLP option list (HR59) to Physical Therapist.

An option list contains a list of predefined options from which to choose. You must select one of the predefined options. There are two types of option lists:

- ***Option lists*** (see "Selecting an option from an option list" on page 255)
- Big option lists (this task)

To select an option from a big option list, complete the following steps:

Access the Certificates, Licenses and Permits form (28-SCR) by making the following selections from the Navigator:

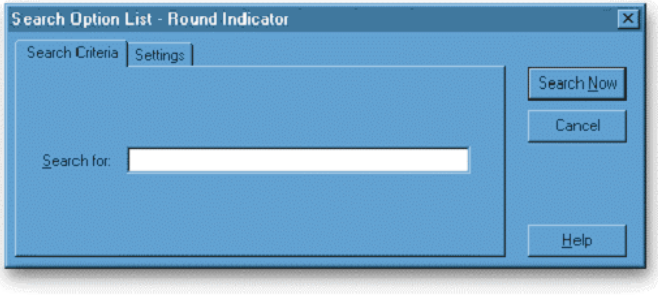
Component:	Employee Development
Process:	Employee Skills, Competencies, Training
Task:	Certificates, Licenses and Permits

1. Select an option list

Select an option list from which you want to select an option.

2. Click the ellipsis

Click the ellipsis to select the Search Option List dialog box.



3. Enter an option

Enter the name of the option you want to select. You can enter the entire name of the option or just the first few characters.

4. Click the Settings tab (optional)

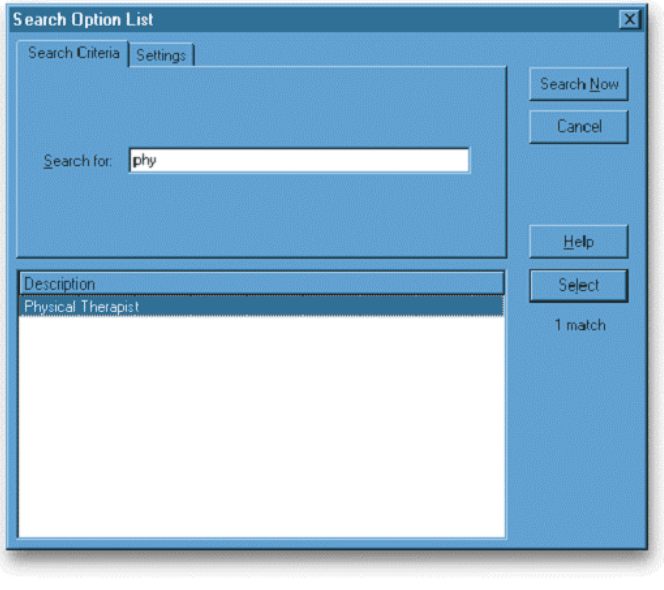
Click the Settings tab. Select the appropriate options on this tab to refine your search.

5. Click Search Now

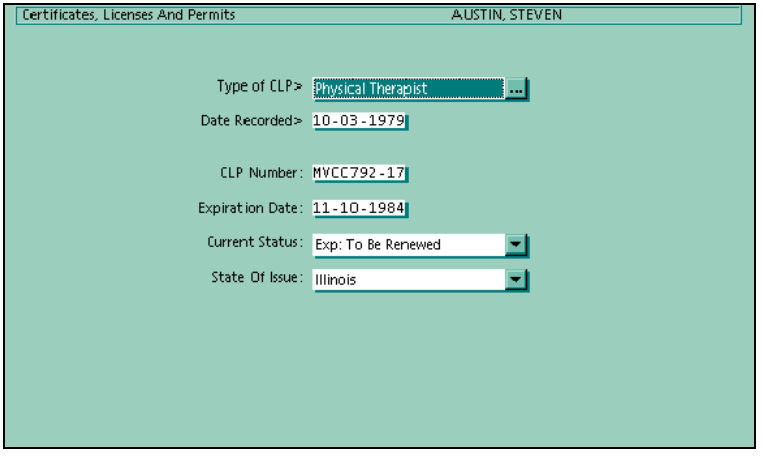
Click the Search Now button to find the option you entered.

6. Select your option

Select the option for which you were searching and click the Select button. The option will be displayed in the big option list.



If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Option lists ***(on page 233)***
- Big option list ***(on page 235)***

For more information on option lists.

Saving changes to a form

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234. You will then save the form.

Change the Zip Code to 60606.

When you have entered data on a form you will need to save it. To save a form complete the following steps.

Access the Employee Information form (EF-SCR) by making the following selections from the Navigator:

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

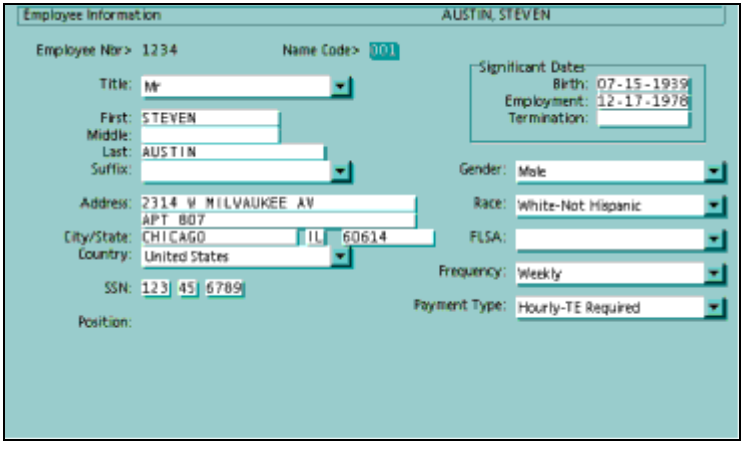
1. **Enter new data or amend existing data on a form**

   When you enter new data or amend existing data on a form, the Save button will be enabled.

2. **Click Save**

   Click the Save button to save the changes you have made to a form.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- System messages ***(on page 242)***

For information on messages that could be displayed when you try to save a record.

Canceling changes to a form

If you enter data on a form and then decide that you do not want to save the data, you need to click the Cancel button to discard the data.

The Cancel button is enabled when you enter new data or amend existing data.

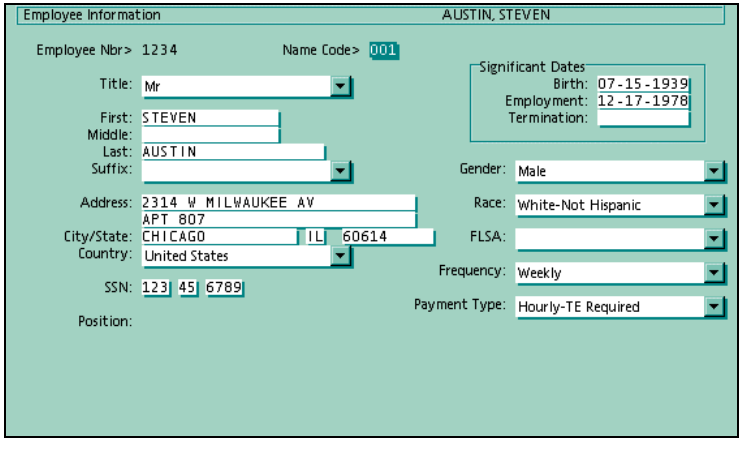
To use the Cancel button, complete the following steps.

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234.

Change the Payment Type to Salary-Auto Paid.

Access the Employee Information form (EF-SCR) by making the following selections from the Navigator:

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

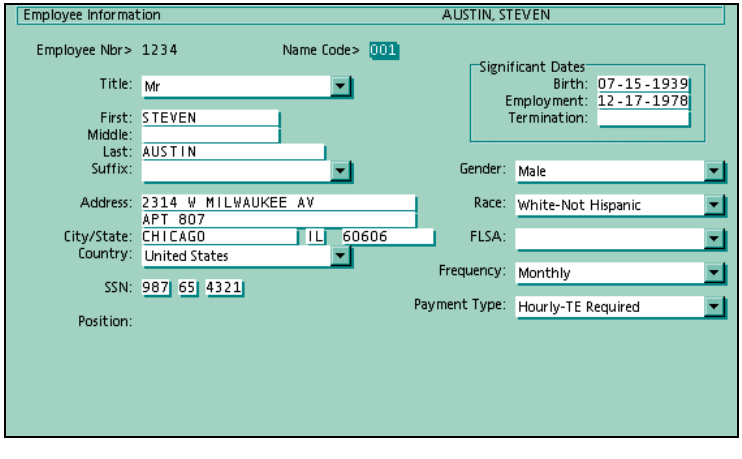


Click Cancel

If you enter new data on a form and want to discard the data, click the Cancel button.

If you amend existing data on a form and want to return to the original settings, click the Cancel button.

If you completed the previous steps, the results should look similar to the example that follows:



Adding a record

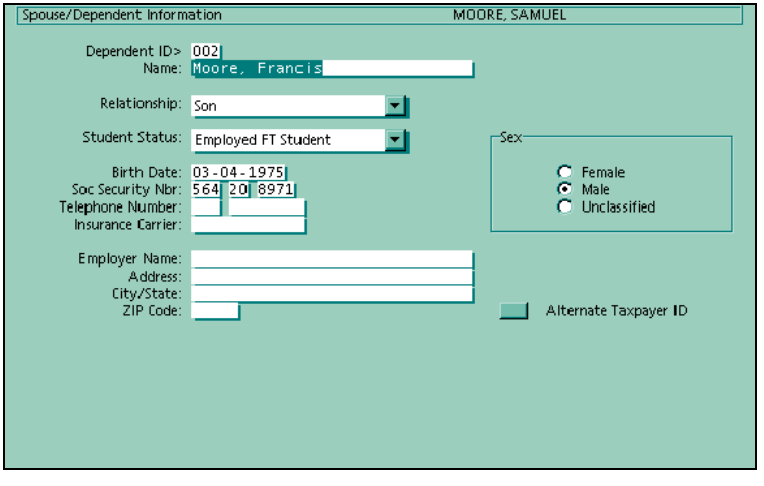
In this task, you are going to add a new record to the Spouse/Dependent Information form (10-SCR) for Employee Number 1002. Complete this form as shown. Before you enter this data, use the Clear button to start with a blank form.

To add a new record to The Solution Series, complete these steps:

1. Access a form

Access the form to which you want to add a new record by using the Navigator.

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



2. Enter the new data

Enter the new data on the form.

3. Click Save

Click the Save button to save the information.

See also:

- Adding and modifying data ***(on page 227)***

For more information on entering data.

- System messages ***(on page 242)***

For information on messages that could be displayed when you try to save a record.

Modifying a record

In this task, you are going to modify the Spouse/Dependent Information form (10-SCR) for Employee Number 1002.

After you have created a form, you can modify the information on it at any time.

1. Access the form you want to modify

Access the form you want to modify by using the Navigator.

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

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

2. Modify the information

Modify the information on the form. You can:

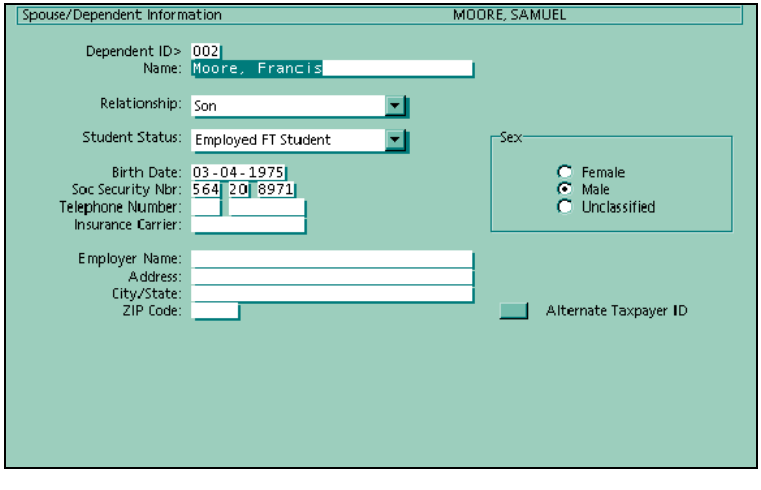
- Type over all the existing data.
- Type over data in specific fields.

If necessary, you can clear all the data and start with a blank form.

3. Click Save

Click the Save button to save the information.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Adding and modifying data ***(on page 227)***

For more information on modifying data.

- System messages ***(on page 242)***

For information on messages that could be displayed when you try to save a record.

Deleting a record

In this task, you are going to delete the Spouse/Dependent Information form (10-SCR) for Employee Number 1002.

If you need to delete a record, complete the following steps:

Note: *Caution should be taken when you delete information from The Solution Series.*

1. Access the form you want to delete

Access the form you want to delete by using the Navigator.

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

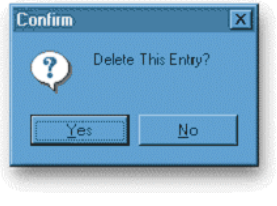
Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Dependent Information

2. Click Delete This Entry

To delete the form, click the Delete This Entry button.

3. Click Yes

To confirm that you want to delete the form, click the Yes button.



See also:

- Record deletion ***(on page 241)***

For more information about deleting a record.

Responding to reject messages

A reject message displays in the Message area in response to incorrect information you enter on a form. To respond to a reject message, complete the steps in this task.

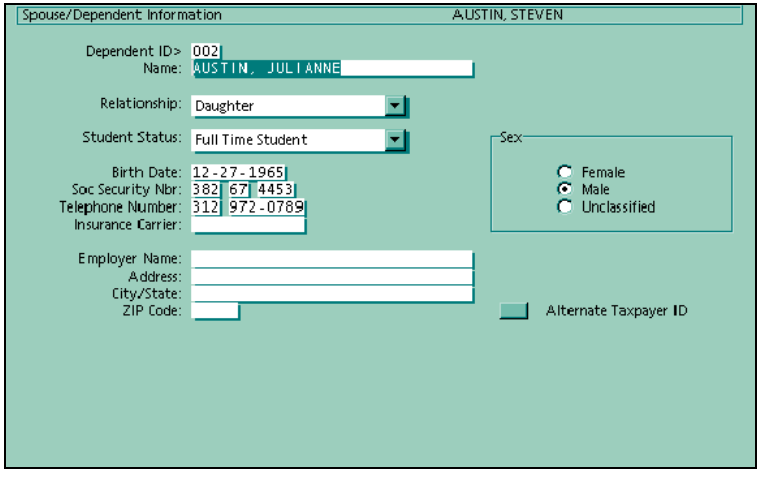
In this task, you are going to modify the Spouse/Dependent Information form (10-SCR) for Employee Number 1234.

In order to see an example of a reject message, you are going to change the gender status for Julianne Austin from Female to Male.

Access the Spouse/Dependent Information form (10-SCR) by making the following selections from the Navigator:

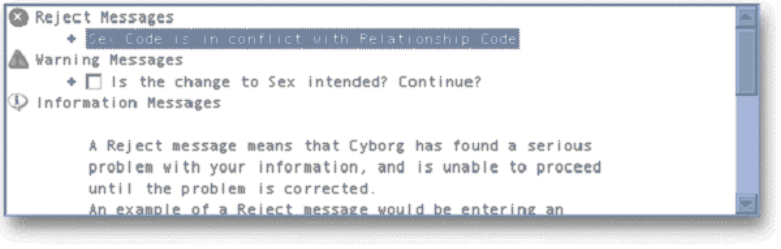
Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Dependent Information

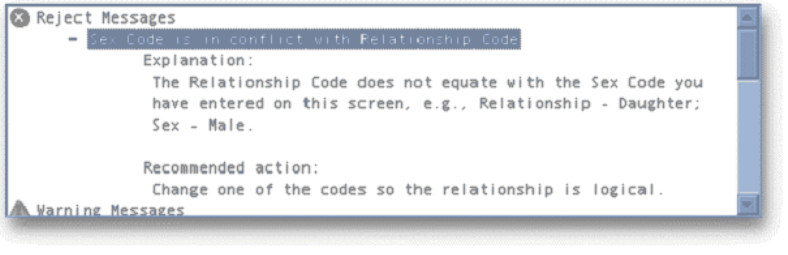
Change the dependent's gender to Male, and click Save.



1. **Click the plus sign (+) to reveal additional information about the reject message**

   Additional information about reject message can be displayed by clicking the plus sign (+).





2. **Read the reject message**

   Read the reject message and take the appropriate action. You can do one of the following:

   - Correct the error(s)
   - Click Cancel to cancel the form

   See also:

   ■ System messages ***(on page 242)***

   For more information on system messages.

Responding to warning messages

A warning message displays in the Message area in response to information you enter on a form. To respond to a warning message, complete the steps in this task.

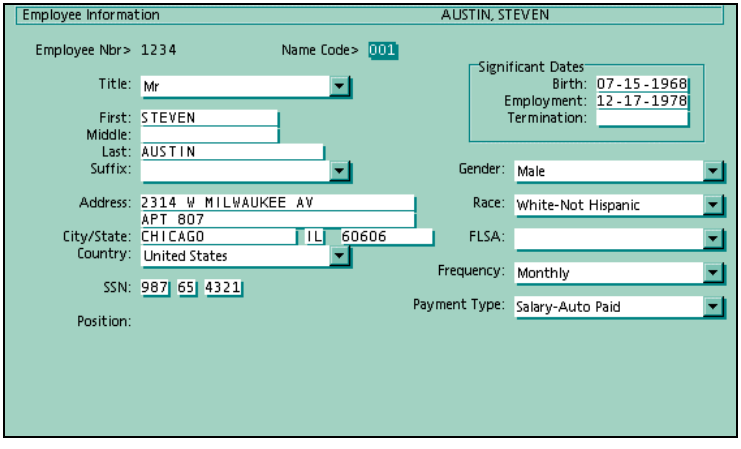
In this task, you are going to modify the Employee Information form (EF-SCR) for Employee Number 1234.

In order to see an example of a warning message, you are going to change the age of the employee so that the employee was under 13 when they started employment.

Access the Employee Information form (EF-SCR) by making the following selections from the Navigator:

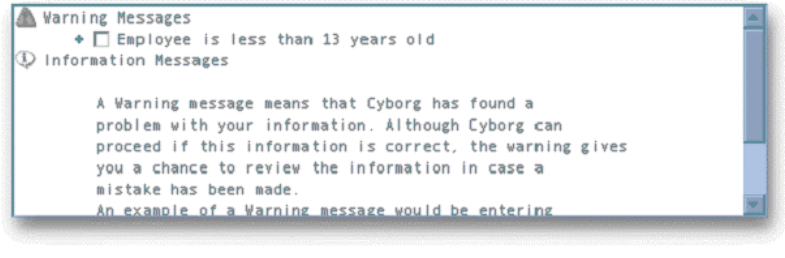
Component:	Employee Resourcing
Process:	Maintain Basic Employee Details
Task:	Basic Employee Information

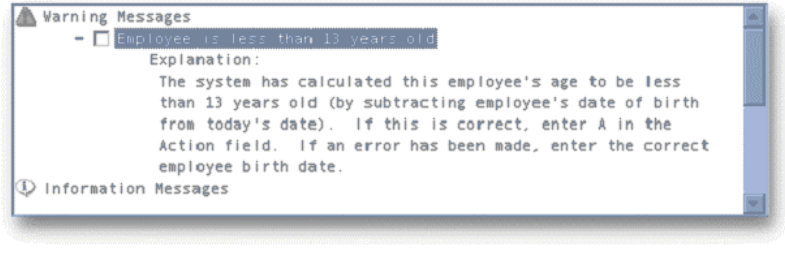
Change the employee's date of birth to 07-15-1968 (US and Canada, excluding Quebec) or 15-07-1968 (elsewhere) and click Save.



1. **Click the plus sign (+) to reveal additional information about the warning message**

   Additional information on the warning message can be displayed by clicking the plus sign (+).





2. **Read the warning message**

   Read the warning message and take the appropriate action. You can do one of the following:

- Correct the warning(s) and save the form
- Click Cancel to cancel the form
- Select the check box and click Save to accept the warning

See also:

- System messages ***(on page 242)***

For more information on system messages.

Review of Questions Answered

1. What methods are available for viewing employee and organizational data?

2. What types of numeric data are used?

3. What are option lists and how are they used?

4. What actions can be performed when working with forms?

5. How are employee and organizational data deleted?

6. What types of system messages are provided?

PART 3

Reporting

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CHAPTER 10

Reporting Administration

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Introduction

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

Features of Reporting Administration include:

- Extraction routines
- The data model
- Cognos reporting tools
- As-of reporting
- Pre-defined Impromptu catalogs
- Delivered PowerPlay models
- Enhanced data

This section provides an overview of reporting options available and focuses on Reporting Administration.

Tasks

The following tasks are covered in this section:

- Using delivered catalogs to produce custom reports
- Building a report across catalogs

Prerequisites

To use Reporting Administration, the following is required:

- Reporting Administration installed
- Cognos Impromptu installed
- Cognos PowerPlay installed
- Access to the relational tables (data mart) resulting from the extraction process

☞ *Refer to the Reporting Administration Release Guide for detailed information about these prerequisites.*

Questions answered

The following questions are answered in this section:

1. What are the two main types of extracts, and what are the differences between them?
2. If Position Administration is being used, how can a report be sorted by department?
3. Why are as-of dates important for Reporting Administration?
4. What is the high-level structure of the General catalog?
5. Which catalog folder would you look in to add an employee's nickname to your report?

Reporting options available

Several tools are provided with Reporting Administration 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.

Options for reporting on information in The Solution Series include:

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

Packaged reports

We deliver hundreds of packaged reports developed using fourth generation Cyborg Scripting Language (CSL). You can schedule the reports to be run using the Report Group Activities form (RGMSTR). 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 delivered reports by launching the Report Group Activities form and adding a report group.

☞ *Refer to* **Using Packaged Reports** *(on page 295) for more information on Packaged Reports.*

☞ *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* **Using Query** *(on page 369) for more information on using this reporting tool.*

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

Reporting Administration

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

- Additional functionality enabling you to launch the Cognos reporting tools directly from the Launch toolbar.
- Solution Series Impromptu catalogs for the delivered data mart, which promote intuitive user access to the extracted data.
- 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 makes on-request reporting for data extracted from The Solution Series easy.

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.

PowerPlay

The PowerPlay tool 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 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. Two PowerPlay models are delivered: 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 you would typically use which reporting tool:

Type of report	Packaged Reports	Solution View	Impromptu	PowerPlay
Monthly summary report of current data in The Solution Series	X			
Quick query for current data in The Solution Series		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			
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		

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

Reporting Administration process

Reporting Administration consists of three general processes:

- Extracting data from The Solution Series
- Loading the extracted (and enhanced) data into the data mart
- Reporting against the data mart using Impromptu or PowerPlay

To perform the extract process, Reporting Administration includes the extract routines that pull the data from The Solution Series. Generally, your system administrator will perform the extracts. Once the data has been successfully extracted, the system administrator makes the data mart available for you to create reports against.

Four Impromptu catalogs are provided, so you can easily access and report on the information in the data mart.

Enhanced data

Reporting Administration is more than just a reporting tool—it offers enhanced data that makes relational reporting much more powerful. Some of the data enhancements include:

- Derived data
- Effective date stamping and as-of reporting
- Prompts
- Data filtering

Derived data

Reporting Administration allows you to report on derived data. A straight extract from The Solution Series does not give you easy access to all the employee information you may need for reporting. Derived data is created as part of the extract from other data 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 The Solution Series. A derived data field avoids repeated calculations and simplifies reporting, giving you direct and easy access to employee information.

Position Administration and Employee Locations

If you are using the Human Resources module without Position Administration, your employees will have an Organization (Control) Level 3 to 6 location present on the Location Assignment/Changes form (05CSCR). The Organization Level 3 information is used by the delivered General reports for reporting and sorting purposes. Generally, Organization Level 3 designates 'Department'.

If you use Position Administration, your employees generally will not have Organization Level 3 to 6 information; instead, they are assigned to an organization unit. Because of this, Position Administration employees will not have a populated Location Assignment/Changes form (05CSCR). To compensate for this, the data extraction process is enhanced to derive the Org Unit location for Position Administration employees and store it at the end of the Employee Location table in the data mart. This is derived data, so the employee's Location Assignment/Changes form (05CSCR) in The Solution Series is never really updated.

The extraction process works as follows:

- If the employee has Organization Level 3 to 6 information, it is passed onto the Employee Location table in the data mart. The delivered General reports sort these records by Organization Level 3.
- If the employee does not have Organization Level 3 to 6 information, the extract will find the employee's 'reports to' organization unit, then writes that Org Unit ID and description to the end of the Employee Location table in the data mart. The delivered General reports will sort these records by Org Unit ID.

Effective date stamping and as-of reporting

Two features of Reporting Administration are:

- Effective date stamping
- As-of reporting

Effective dating

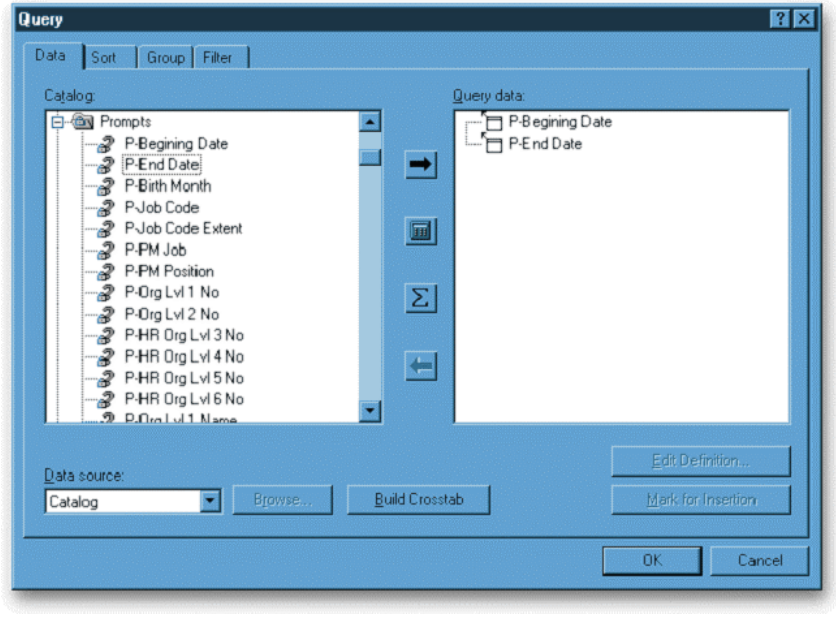
In order to perform as-of reporting on your data, the database must know the time period when the data in a table was effective (or if it still is effective). Each dated data record in The Solution Series is extracted into the data mart with an effective begin date and an effective end date. The effective begin date is the effective date of the record in The Solution Series 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.*

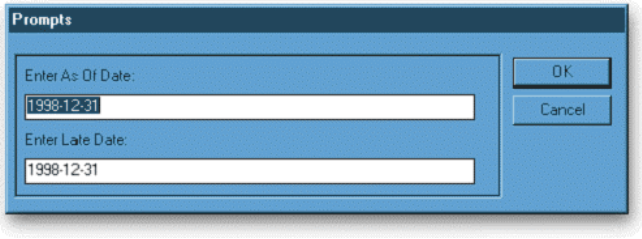
As-of reporting

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 information extracted from The Solution Series. For instance, you can generate reports on last year's total salary increase amounts, this year's salary totals, and the salary amounts your organization paid five years ago.

In order to present the appropriate data for the report you wish to execute, prompts reside in each catalog. The following graphic shows an example from the General catalog:



If the P-Beginning Date and P-End Date prompts are used in a report, a Prompts dialog box will be displayed when the report is opened:



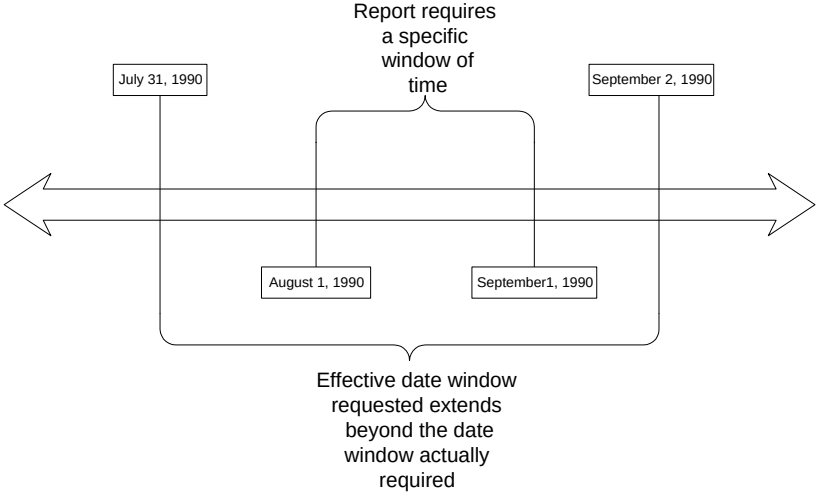
This prompt can be activated in one of two ways:

- Log in and run a report that contains data with effective date.
- You may initiate the prompt again for a report by selecting Report ▶ Prompt.

It is important to activate the prompt every time you run a report that requests a different type of dated material. For example, you would enter dates differently for a report displaying information for a specific date than for a report displaying information for a range of dates.

For the best results, enter the same date for both fields, thus requesting information as of a specific date. Entering a range of dates can result in either a blank report or multiple entries in a given field. For example, if an employee's mail distribution changes in the course of a month and you request information about that employee's mail distribution during a date range, the result will be two mail distribution sites for that employee.

If the report you launch requires a date range, be sure to either enter the exact date range you require or dates that reflect a date range extending beyond just the date window you require for your report. If the date range entered when the Effective Dating prompt is launched (when the macro is run) is not adequate for the report requirements, a blank report will be displayed. For example, if the report requires data from August 1, 1990 through September 1, 1990, ensure that you will be able to view all the data you will need for your report by requesting an effective date window from July 31, 1990 through September 2, 1990.



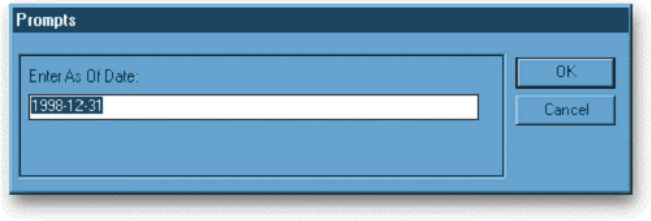
Note: *As-of reporting is based on information entered into The Solution Series. For instance, if you entered a future effective date for an employee's salary increase in The Solution Series, then extract the data from the system before that effective date, the employee's current salary on your report does not reflect the increase. This is because the salary increase is not in effect yet, even though it has been planned for and entered into the system.*

Prompts

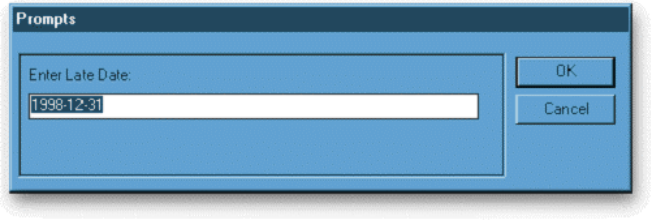
A prompt is an expression that is set up to enable you to filter data by typing or picking a value or a series of values when the report opens. Prompts help you quickly find the information you need from a report. There are several prompts included in the catalogs. You can use one or more of these prompts when creating your reports. When you open a report which uses these prompts, one or a series of dialogs display asking you to enter any parameters, such as specific organizations, for the information you want displayed in the report.

Examples of delivered prompts in the General catalog include:

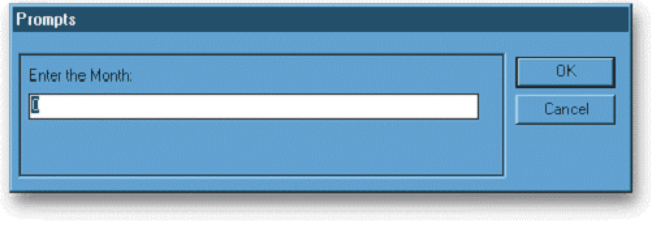
- P-Beginning Date—this prompt allows you to add the beginning date for data on a report.



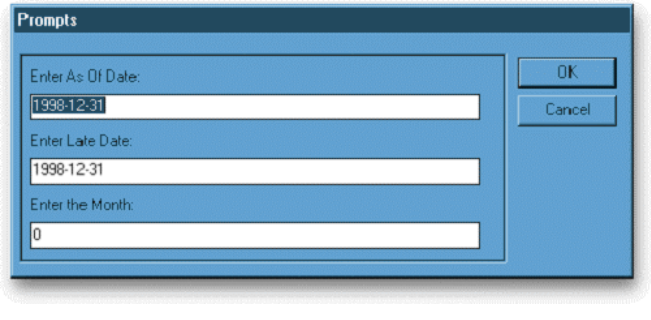
- P-End Date—this prompt allows you to add the end date for data on a report.



- P-Birth Month—this prompt allows you to add an employee's birth month details in a report.



- Prompts can be combined together to produce a single 'form' which is displayed when creating or opening the report.



☞ *Refer to the Cognos Impromptu documentation for instructions on filtering and sorting data within a report, as well as creating conditions for and editing conditions in your custom reports.*

Data filtering

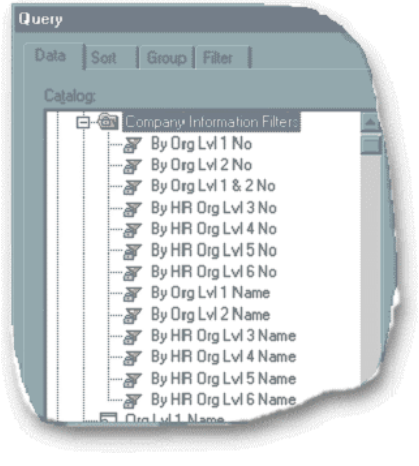
The catalogs delivered as part of Reporting Administration contain predefined data filters. These filters act to display the information you request in a logical fashion. For instance, if you want to display a list of active employees, you want to enter a condition statement in a filter to more specifically request employees with an active status.

What makes an employee an 'active' employee?

Useful selection criteria has been defined, then placed throughout the catalogs so you can use it again and again when you are creating your own reports. This selection criteria can be included in your own report filters as components of those filters. Some of the selection criteria include:

- All Males [Sex Code = 'M']
- All Females [Sex Code = 'F']
- All Active Employees [Res Emp Status Code starts with '0' and Employee Number not starts with 'L']
- All Employees Except Terminated [substring (Res Emp Status Code, 1, 1) <> '1' and Employee Number not starts with 'L']

By providing these filters in the catalog, we hope to reduce the effort you need to expend creating and recreating these filters for your reports. The following sample shows the filters available to you from the General catalog:



☞ *Refer to the Cognos Impromptu documentation to learn how to enter a filter condition.*

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)

Impromptu

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

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.

PowerPlay

This tool provides a means to view data in terms of business trends, allowing a multidimensional view of a business. You can automatically build structures that summarize data for use in PowerPlay. The delivered data mart can be accessed and utilized by this tool.

Solution Series Impromptu catalogs

The Solution Series catalogs are required before reports can be written. A catalog presents a filtering of the raw database organization that allows easy, quick report generation.

The delivered catalogs 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 you 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, you do 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, we eliminated the time-consuming task of interpreting and organizing the vast amount of data extracted from The Solution Series.

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 the user 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 in The Solution Series; 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 catalog consists of one file that contains several folders, within which the fields reside. Each of these folders may also have additional folders nested within it.

The Impromptu catalogs provide:

- the Impromptu administrator (database administrator) with an easy way to organize and secure data.
- the Impromptu user with an easy way to locate and select information to include in reports.
- the Impromptu software with the necessary information to locate the data in the database, and thus pull it and display it in user reports.

The catalogs are a representation of the database structure. When you view a catalog, you see the structure of the database, much like you can see the structure of a file directory within Windows Explorer.

The catalogs present the database visually as a directory folder with subdirectory folders. Within the final subdirectory folder lie the fields, known by Impromptu as 'columns' (representing the data in the data mart) that you can select to include in your report. The following sample shows the top level folders for the General catalog, by way of example. The padlock pictures on the directory icons indicate that the data is read-only.

Catalog data

The delivered catalogs reflect the data that has been extracted from The Solution Series as part of the default data extraction. The information is organized logically into folders and subfolders.

General catalog

Top level folders in the General catalog include:

Folder Name	Contains these fields used in your reports
Company Information	Organization information fields
Job Table Information	Job-level and salary-level fields
Employee Personal Information	Personal employee-level fields
Employment Information	Employment-level fields
Compensation & Salary Administration	Compensation and salary administration fields
Employee Attendance Information	Employee attendance fields
Employee Skills and Training	Employee skills and training fields
PM-Org Unit Information	Position Administration organization unit information fields

Folder Name	Contains these fields used in your reports
PM-Job Information	Position Administration job information fields
PM Position Information	Position Administration position information fields
PM Incumbencies	Position Administration incumbency-level fields
Requisition/Applicant Tracking	Requisition and applicant tracking fields
EEO/AAP Reporting Data	Equal Employment Opportunity and Affirmative Action Program reporting data fields

☞ *Refer to the Using Reporting Administration documentation for more detailed information about catalog structure and content.*

Payroll catalog

Top level folders in the Payroll catalog include:

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

☞ *Refer to the Using Reporting Administration documentation for more detailed information about catalog structure and content.*

Training Administration catalog

Top level folders in the Training Administration catalog include:

Folder Name	Contains
Course Administration	Course administration-level fields
Class Administration	Class administration-level fields
Program Administration	Program administration-level fields
Employee Personal Information	Personal employee-level fields
Employment Information	Employment-level fields
Employee Training Administration	Employee training administration fields
Employee Skills, Education and Certs	Employee skills, education and certification fields

☞ *Refer to the Using Reporting Administration documentation for more detailed information about catalog structure and content.*

Benefits Administration catalog

Top level folders in the Benefits Administration catalog include:

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

☞ *Refer to the Using Reporting Administration documentation for more detailed information about catalog structure and content.*

The actual data you want for your report must be manipulated at the field level. For instance, if you know you want to include a company's address in your report, you can simply open the Company Information folder, and select the appropriate address field (such as Complete Address-Company).

See also:

■ Using delivered catalogs to produce custom reports ***(on page 291)***
For detailed directions on producing custom reports.

■ Building a report across catalogs ***(on page 292)***
For detailed directions on using 'hot files'.

Delivered PowerPlay models

Using PowerPlay, you examine compiled data in PowerPlay cubes that have been 'transformed' using a PowerPlay model (template). Two models are delivered, the Workforce Planning Model with Position Administration and the Workforce Planning Model without Position Administration. You can use PowerPlay tools (such as Transformer) to generate cubes that can be used to do Online Analytical Processing (OLAP).

What is a model?

A model is a data structure within PowerPlay Transformer that contains dimensions and measurements. You can think of a model as a blueprint.

A dimension represents a part of the organization that you wish to explore. For example, in the Non-Position Administration Workforce Planning model, the dimensions are as follows:

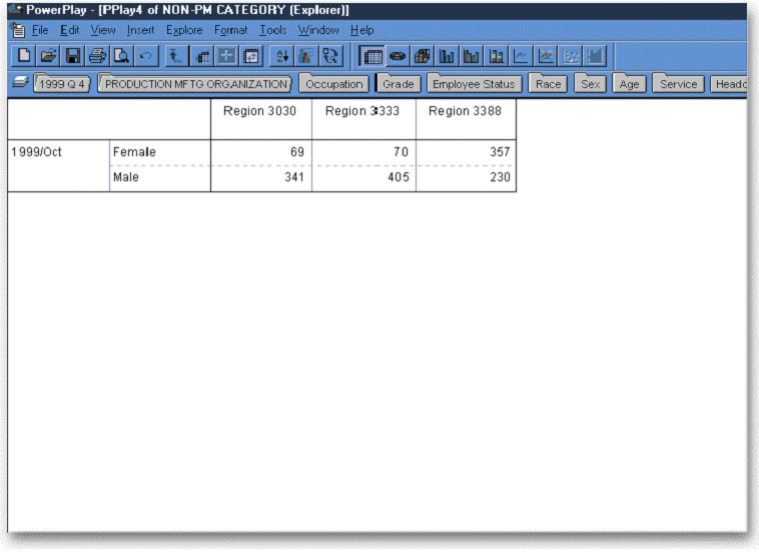
- All Dates
- Organization Levels
- Occupation
- Grade
- Employee Status
- Race
- Sex
- Age
- Service

A measure is a key performance indicator. Both of the delivered models use the measure headcount; the Position Administration model also uses the measure Incumbency FTE Hours.

What are cubes?

You see the data for the model when you work with a PowerCube. A PowerCube provides multi-dimensional presentations of a subset of data provided by a model. You can build more than one cube from a model.

Here is an example of a report that uses a cube built for the Non-Position Administration Workforce Planning model. It shows the headcount and gender by Organization Level 3 for the month of October, 1999.



		Region 3030	Region 3333	Region 3388
1999/Oct	Female	69	70	357
	Male	341	405	230

Detailed Directions

This section provides detailed directions on completing a business task.

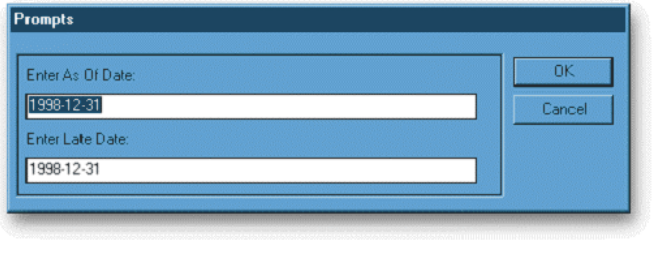
Tasks

Using delivered catalogs to produce custom reports 291
Building a report across catalogs..... 292

Using delivered catalogs to produce custom reports

To produce a custom report using the delivered catalogs, perform the following steps:

1. **Launch Cognos Impromptu**
   Launch Impromptu from the Launch toolbar.
2. **Open a catalog**
   The delivered catalogs (*.CAT) are located in the Catalogs directory.
3. **Enter an effective date in the Effective Dating prompt**
   If prompted, enter today's date in both date fields. This ensures that only the current information will be displayed in your report. Alternatively, you may enter a range of dates, but if the report you open requires an effective date, the report will either not display data or may display field data for each occurrence of the information in the field.



4. **Click OK**
   Click OK.
5. **Save the report with a new name in the CUSTREPS subdirectory**
   If you plan to customize this report, be sure to save and maintain it in the CUSTREPS subdirectory to keep it separate from the delivered reports.
6. **Alter the new report according to Impromptu instructions**
7. **Alter the filter according to Impromptu instructions**
   Use standard Impromptu functionality to filter out any unwanted details.

8. Save your custom report

See also:

- Solution Series Impromptu catalogs ***(on page 284)***

For a general description of the delivered catalogs.

Building a report across catalogs

To create a report using data from more than one catalog, perform the following steps:

1. Create a report

Create a report, selecting the data fields you wish to combine with the other catalog.

2. Save the report as a hot file

Ask your administrator to save your report as a Cognos 'hot file' in the report directory.

3. Add hot file to database

Ask your administrator to then add the hot file back into the database.

4. Access hot file

Access the hot file to create your report.

☞ *Refer to the Cognos online help files for more detailed instructions on the use of hot files.*

Note: The hot file needs to be refreshed each time the database is updated.

Review of Questions Answered

1. What are the two main types of extracts, and what are the differences between them?

2. If Position Administration is being used, how can a report be sorted by department?

3. Why are as-of dates important for Reporting Administration?

4. What is the high-level structure of the catalog?

5. Which catalog folder would you look in to add an employee's nickname to your report?

CHAPTER 11

Using Packaged Reports

In This Chapter

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Introduction

The Solution Series provides you with several tools to help you analyze and report on information about your organization, employees, benefits, and payroll. This section explains how to use one of these tools—packaged reports. Included in this section are step-by-step procedures on how to create, edit, and delete a report group and enter report parameters for packaged reporting. You will learn how a report group is used to launch reports, the other methods used to launch a report online, and the facilities that allow you to monitor the progress of a report and view the report online.

Tasks

The following tasks are discussed in this section:

- Adding a report group
- Adding a report group to the menu
- Editing a report group
- Adding a report to a report group
- Removing a report from a report group
- Limiting companies included in report processing
- Setting report parameters
- Launching a report from the Report Group Activities form
- Launching a report group from the Navigator
- Viewing report progress of a report that is launched online
- Viewing a detailed log file of a report that is launched online
- Viewing a completed report that is launched online
  - Using the Process Monitor
  - Using the Report Viewer
- Archiving a report that is launched online
- Initiating scheduled reports for batch processing
- Viewing held reports
- Printing held reports
- Deleting a held report group
- Restricting reports for an organization
- Deleting a report group

Prerequisites

Before you can begin using packaged reports, you must have logged on to The Solution Series.

☞ *Refer to* **Getting Started** *(on page 29) for information on how to log on to The Solution Series.*

Questions answered

The following questions are answered in this section:

1. What is packaged reporting?
2. What is a report group?
3. What is the required naming convention for report groups that are launched from the menu?
4. What three methods can be used to launch a report online?
5. What is the Process Monitor and how is it used?
6. What is the Report Viewer and how is it used?
7. How are log files used?
8. How are reports archived?
9. How can you make packaged report processing more efficient?

Packaged reporting

Packaged reports are traditional reports produced to assist in the management of information within The Solution Series. These types of reports can be launched online to run as a background process or scheduled to run on a regular basis.

Packaged report features

The following are some of the features that packaged reporting offers:

- 132 character output
- Special print options for control breaking at levels other than the Grand Total
- The capability to have multiple sort levels
- Formula calculations

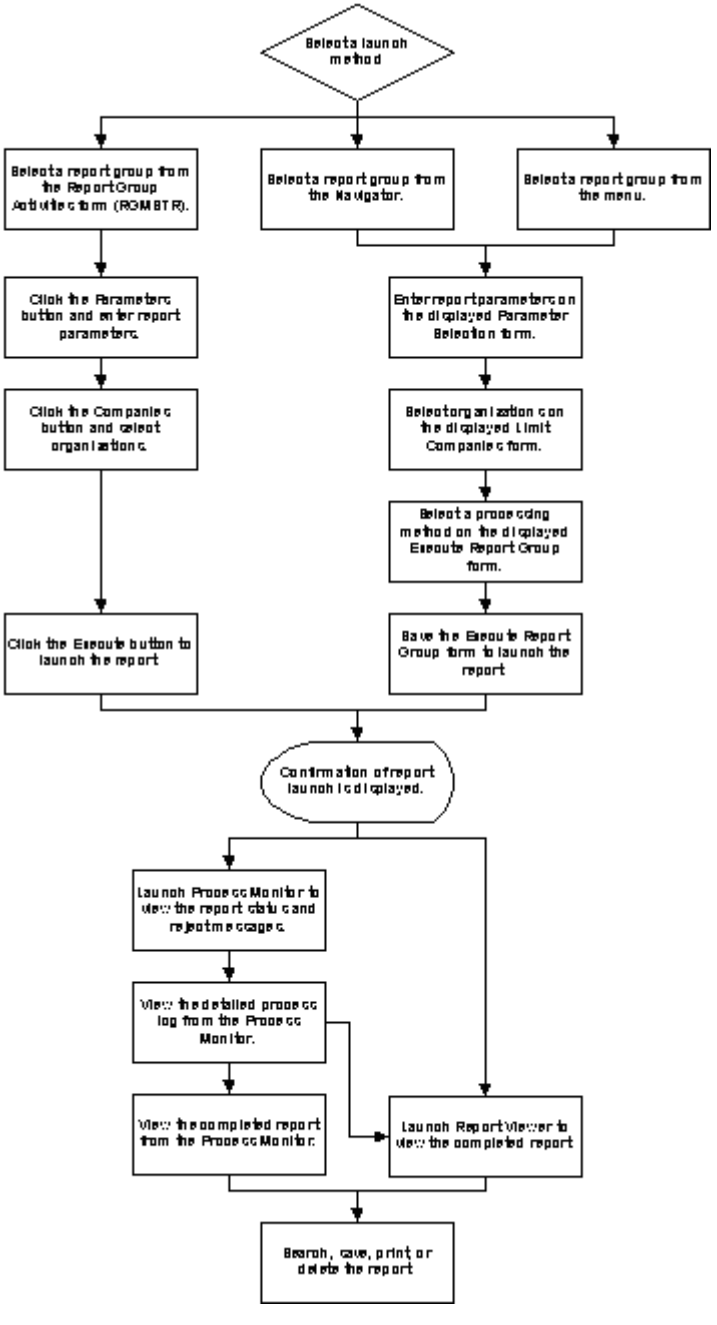
Packaged report processing

Packaged reports can be processed online or scheduled prior to their execution. To help you identify reports that your organization may wish to run, you can view the details and an example of each delivered report by using the Report Information icon in the Navigator.

Running reports online

When running reports online, you have a choice of running these reports directly from the Report Group Activities form (RGMSTR), from the menus and Navigator, or from checklists.

The following chart shows the steps used in the online reporting process.


Select a launch method
Select a report group from the Report Group Activities form (RGMBTR).
Select a report group from the Navigator.
Select a report group from the menu.
Click the Parameters button and enter report parameters.
Enter report parameters on the displayed Parameter Selection form.
Click the Companies button and select organizations.
Select organization s on the displayed Limit Companies form.
Select a processing method on the displayed Execute Report Group form.
Click the Execute button to launch the report
Save the Execute Report Group form to launch the report
Confirmation of report launch is displayed.
Launch Process Monitor to view the report status and reject messages.
View the detailed process log from the Process Monitor.
View the completed report from the Process Monitor.
Launch Report Viewer to view the completed report
Search, save, print or delete the report

Scheduling reports

There are three major steps to scheduling packaged reporting:

- Create a report group
- Submit the packaged report job to run the report group
- View the results of the report(s)

Report groups

When you use packaged reporting, you can run one or several reports at the same time. A report group allows you to specify what reports should be run together.

Custom report groups

You can add your own report groups using combinations of delivered reports and reports that your organization has customized. You can define both public and private report groups. Public report groups can be scheduled and run by anyone using the system, while private report groups are only for your personal use.

After you have set up a report group, you can specify any parameters for the reports and indicate what companies are included in the report processing.

After a new report group is added, you can create a menu item for it by using the Menu Editor. This will allow you to launch the report from the Navigator or menu. The menu structure is mirrored in the Navigator. Because of this relationship between the menus and the Navigator, any changes made to the menus are automatically reflected in the Navigator. There is no additional work required.

☞ *Refer to the Implementing Optimizing System Features documentation for more information about the Menu Editor.*

You can add a report group to a user-defined checklist, so that launching the report is part of a business task accomplished online. Report groups that are added to a user-defined checklist must already exist on the menu.

See also:

■ Adding a report group ***(on page 331)***
For detailed directions on adding a report group.

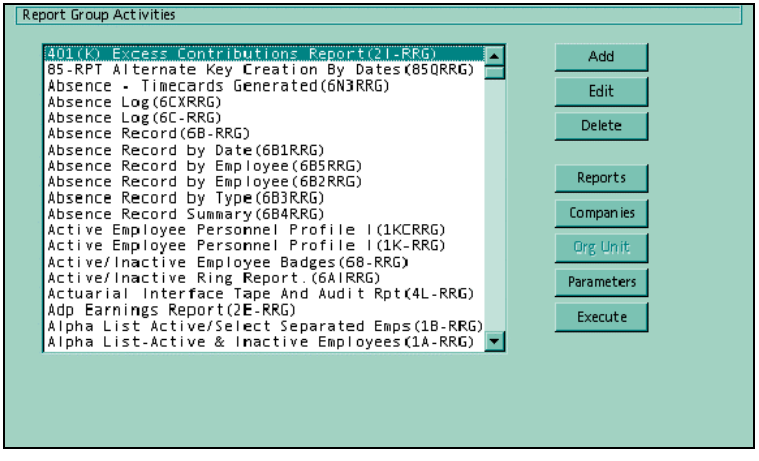
■ Deleting a report group ***(on page 364)***
For detailed directions on deleting a report group.

Report group requirements

Report groups require the following information:

- Name and record source
- Reports to be included in the report group
- The companies to be included in report processing
- Report parameters

You will use the Report Group Activities form (RGMSTR) as a starting point to define the information required for report groups. The following is an example of the Report Group Activities form (RGMSTR):

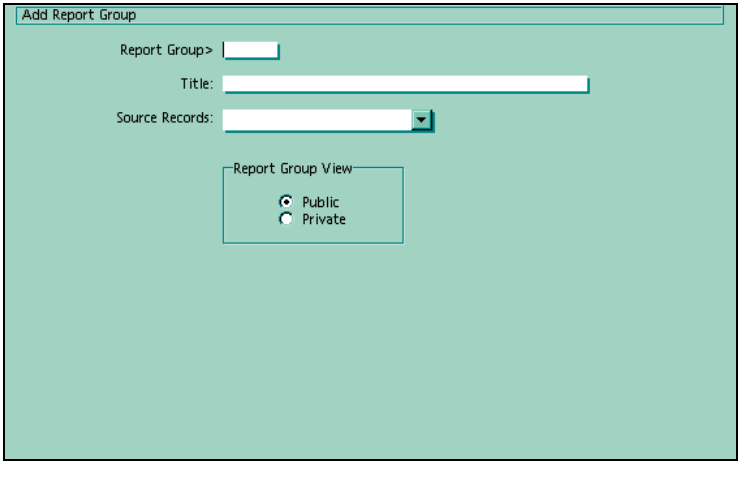


From this form you can add, edit, and delete report groups. You can also add reports, limit the companies or organization units included in reports, specify report parameters, and launch reports.

Name and record source

You use the Add Report Group form (RGADD) to specify the name, title, records, and view for a report group. From the Report Group Activities form (RGMSTR), you use the Add button to access the Add Report Group form (RGADD).

The following is an example of the Add Report Group form (RGADD):



See also:

- Adding a report group ***(on page 331)***

For detailed directions on adding a report group.

Report group naming conventions

All delivered report groups end in RG to distinguish them from regular programs. These report groups can be launched from the Report Group Activities form (RGMSTR), and from the Navigator or menu.

If you add a report group that will be launched from the menu or Navigator, the report group name must end in RG. For example, the Birthday Listing report group name is 1G-RRG and it contains one report, the Birthday Listing report (1G-RPT).

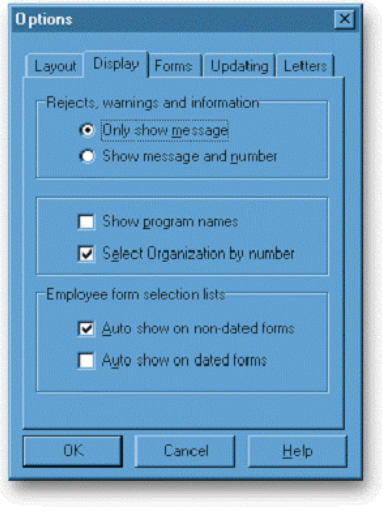
Note: *The programs RPTARG and PAYMRG are exempted from this rule. If you have customized programs that end in RG, consult your technical staff to have them renamed.*

Because report groups embedded in a user-defined checklist must already exist on the menu, this naming convention also applies to checklist-launched report groups.

If you add a report group that will be launched only from the Report Group Activities form (RGMSTR), the report group name can end in any characters. There is no restriction.

When adding a report group, you must enter a unique name in the Report Group text box. The name can be up to six characters in length. You will refer to this name later when you submit the report group for processing and view the results.

Note: *The report group name will display on the Report Group Activities form (RGMSTR) if the Display Details of your user options are set to 'Show program names', as shown in the following example:*

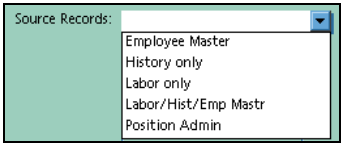


☞ *Refer to* **Personalizing the Work Area** *(on page 81) for more information on changing your user options.*

What you enter in the Title text box displays on the Report Group Activities form (RGMSTR).

When you select the Source Records, consider that report processing will be more efficient if you use separate report groups for those reports that use different source records. For example, separate reports that process employee Master Records from reports that process History and Labor Records.

The following are the choices for the Source Records option list (SC39), which you can use to make report processing more efficient. The default is Employee Master.



See also:

- Adding a report group ***(on page 331)***

For detailed directions on adding a report group.

Position Administration reports

If you want to add a report group that uses Position Administration reports, you must identify the Source Records as 'Position Administration'. Position Administration reports require the completion of additional information. This is necessary because these reports are processed by organization unit level rather than by organization.

When you select 'Position Administration' from the Source Records option list (SC39), you will use the Position Administration Report Group Parameters form (RUN-PM) to enter the additional information required for Position Administration reports.

Note: *Position Administration reports are not delivered in report groups.*

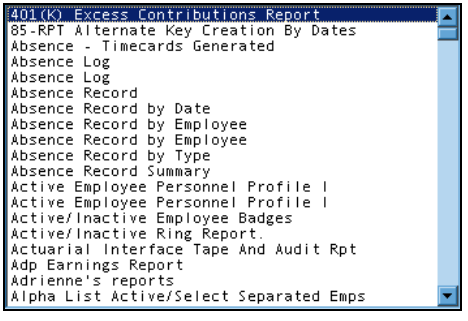
Delivered report groups

Virtually all of the reports used by The Solution Series are delivered in report groups. A report group consists of one or more reports that are run together as a group. Each of these report groups is available on the Report Group Activities form (RGMSTR) and on the menus and Navigator, so that you can easily launch a report online.

Note: *Position Administration reports are not delivered as report groups.*

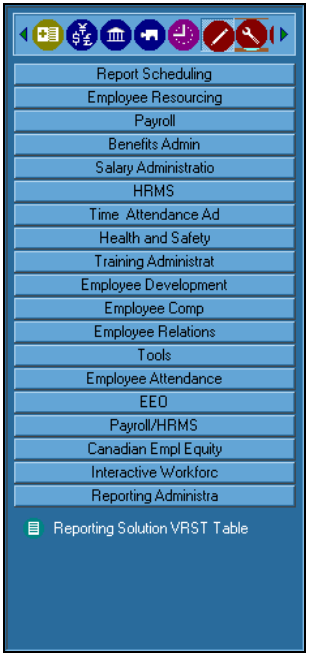
Functional organization of report groups

Report groups displayed on the Report Group Activities form (RGMSTR) are listed alphabetically by report title, as shown in the following sample:



Report groups are listed functionally on the Navigator and menus. Both use the same report categories:

Navigator processes



Tools menu

See also:

- Adding a report group to the menu ***(on page 335)***

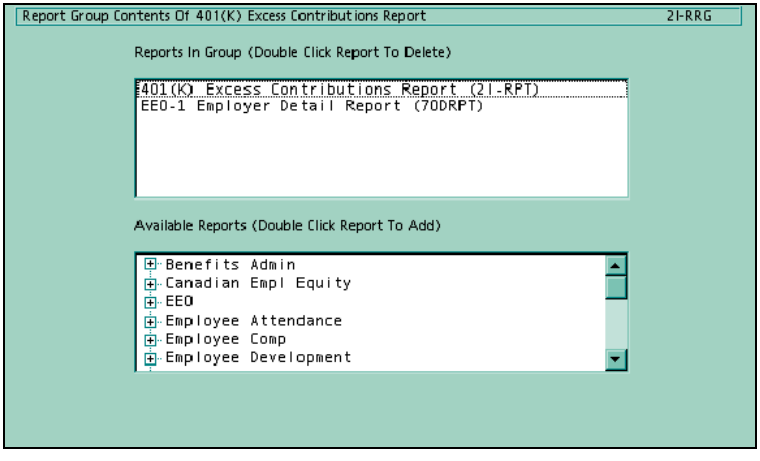
For detailed directions on adding a report group to the menu and Navigator.

Reports in the report group

Reports within a report group are identified using the Report Group Contents form (RPTGRP). When you are adding a report group and save the Add Report Group form (RGADD) (or Position Management Report Group Parameters form if 'Position

Management' was selected as the Source Records), the Report Group Contents form (RPTGRP) will be displayed automatically. You can also access the Report Group Contents form (RPTGRP) from the Report Group Activities form (RGMSTR) by clicking the Reports button.

The following is an example of the Report Group Contents form (RPTGRP):

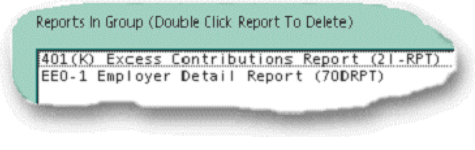


You select the reports to add from the Available Reports list box. The list box at first displays categories of reports. To expand the list of those reports related to a category, click the '+' sign. Then double-click a report to add it.

Note: *You can have a maximum of 20 reports in a report group.*

The reports selected for a report group are displayed in the Reports In Group box.

The following sample shows two reports selected:



You can remove a report from the Reports In Group box by double-clicking it.

See also:

- Adding a report group ***(on page 331)***

For detailed directions on adding a report group.

- Adding a report to a report group ***(on page 341)***

For detailed directions on adding a report to a report group.

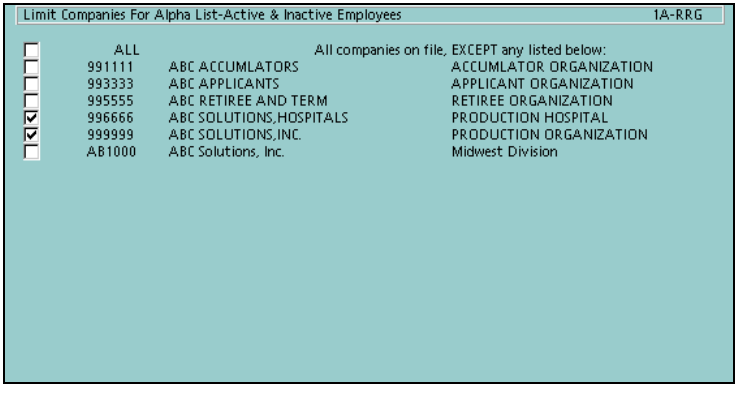
- Removing a report from a report group ***(on page 342)***

For detailed directions on removing a report from a report group.

Companies included in report processing

By default, when you create a report group, all of the companies within your organization will be included in the report processing. You can, however, exclude some by selecting only those companies that are to be included in report processing using the Limit Companies form (RGLC12). You access this form from the Report Group Activities form (RGMSTR) by clicking the Companies button.

The following example shows that only two companies are included. This means only data associated with those two companies are used in the report processing:



If you launch a report by clicking the Execute button on the Report Group Activities form (RGMSTR), the system assumes you have already entered this information. However, if you launch a report from the menu or Navigator, this form will automatically display and allow you to select the organizations to be included in the report run.

Apply the Concept

Based on your understanding of this concept, which method of launching online reports assumes that you have already entered the report parameters and companies to be included in the report?

See also:

- Limiting companies included in report processing ***(on page 342)***

For detailed directions on limiting companies in report processing.

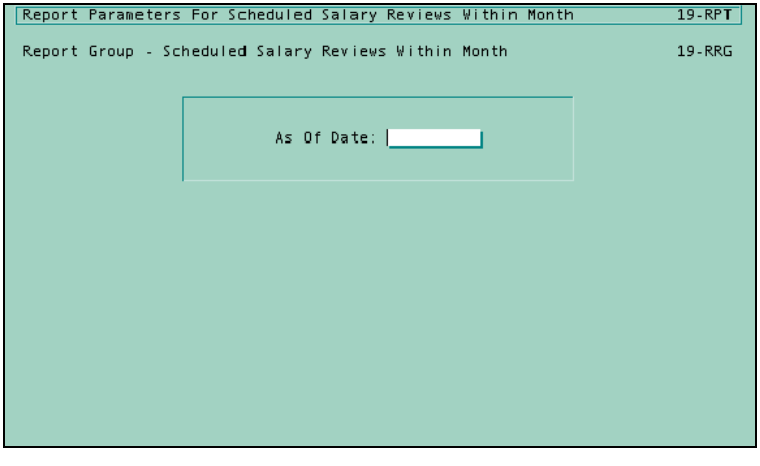
Report parameters

A report may require that you specify parameters, such as an effective date, in order to properly process information. Reports that require parameters have parameter forms specifically designed for them. You access these forms by clicking the Parameters button on the Report Group Activities form (RGMSTR).

The Parameters button displays the Parameter Selection form (RPARMS). The Parameter Selection form (RPARMS) will list all the reports in the report group, including those that do not require parameters.

A 'Set Parameters' button will display next to any report that has parameters. You may use this button to display the parameter form specific to the report, such as in the following example:

The following example shows the Report Parameters For Scheduled Salary Reviews Within Month form. In order to schedule this report, you would enter an 'as of' date:



If you launch a report by clicking the Execute button on the Report Group Activities form (RGMSTR), the system assumes you have already entered this information. However, if you launch a report from the menu or Navigator, this form will automatically display and allow you to enter the parameter information.

See also:

- Setting report parameters ***(on page 344)***

For detailed directions on setting report parameters.

Methods for launching reports online

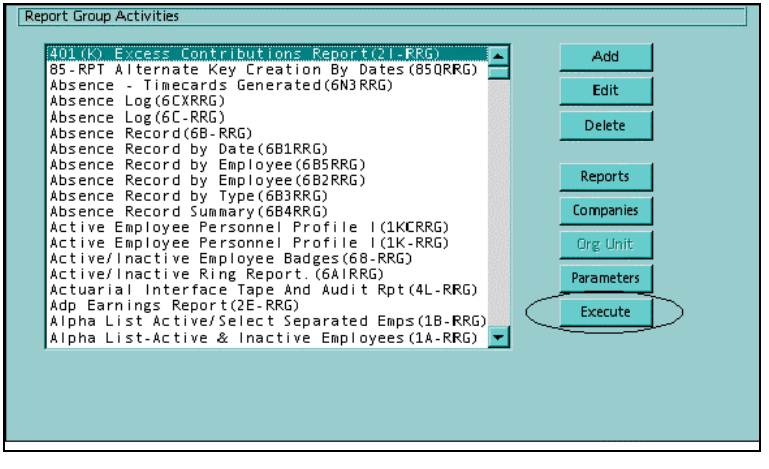
You may launch a report group online from:

- The Report Group Activities form
- The Navigator
- The menu
- A checklist

Launching a report from the Report Group Activities form

The Execute button on the Report Group Activities form (RGMSTR) allows you to launch a report online. The system will launch the report immediately, so the Parameter Selection form and Limit Companies form must be completed before launching a report in this manner.

The following example shows the location of the Execute button:



Note: *If you run the same report twice, the new report will replace the old one. Be sure to save files to a different name if you want to archive them.*

See also:

- Launching a report from the Report Group Activities form ***(on page 345)***

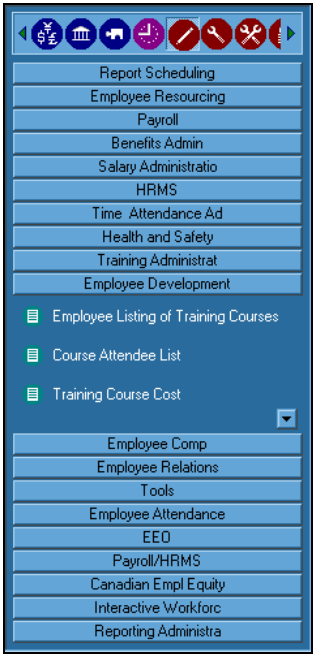
For detailed directions for launching a report from this form.

Using the Navigator or menu to launch a report

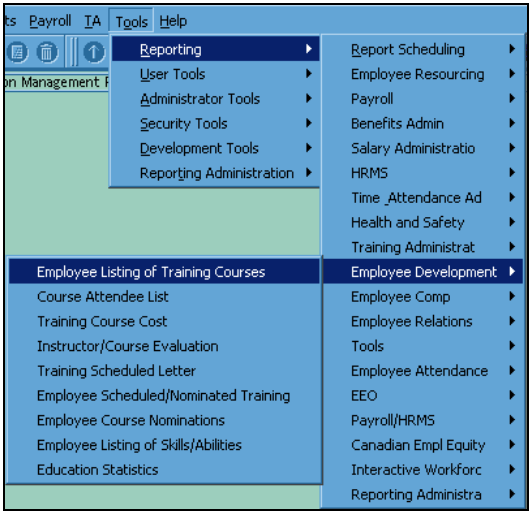
All delivered report groups are available by clicking the Reporting component of the Navigator. You may access the same options on the menu by selecting:

Tools ▶ Reporting

Navigator



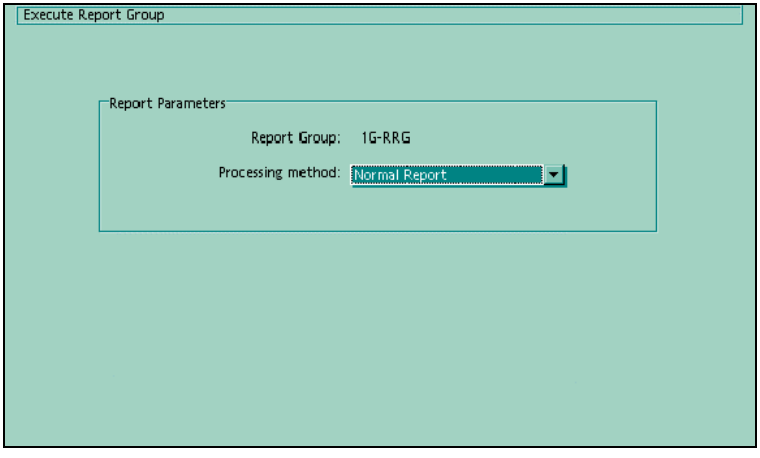
Menu



When you select a report group from the Navigator or menu, the Parameter Selection form is displayed first. If a report does not have any parameters, you may bypass the form by pressing Enter. As each form is saved, the form for the next report is displayed automatically.

The Limit Companies form is displayed next, so you can select the organizations to be included in the report.

The last form to be displayed is the Execute Report Group form, as shown in the following example:



You must select an option from the Processing Method option list (SC57) and save the form to launch the report.

Apply the Concept
What advantage is there to launching a report group from the Navigator?

See also:

- Launching a report group from the Navigator ***(on page 348)***

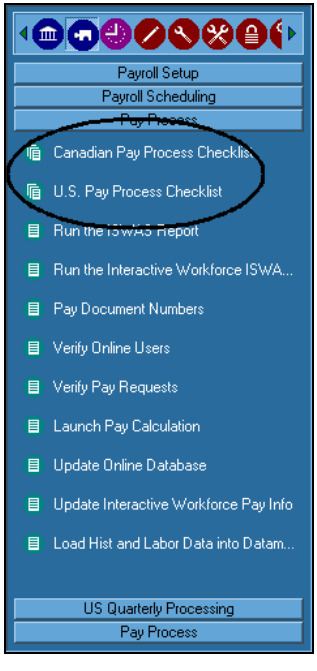
For detailed directions for launching a report from the Navigator.

Using checklists to launch a report

Checklists can link report groups, as well as forms, dialogs, and other checklists within The Solution Series to guide you through a business process. Checklists can be added to and accessed from the Bookmarks menu, Favorites toolbar, or the menus and Navigator.

Only report groups that are defined on the menus can be included in a checklist.

Two examples of checklists that include report groups are the payroll checklists that are delivered in The Solution Series, one for the United States and one for Canada:



☞ *Refer to the Payroll documentation for more information about the Pay Process checklists.*

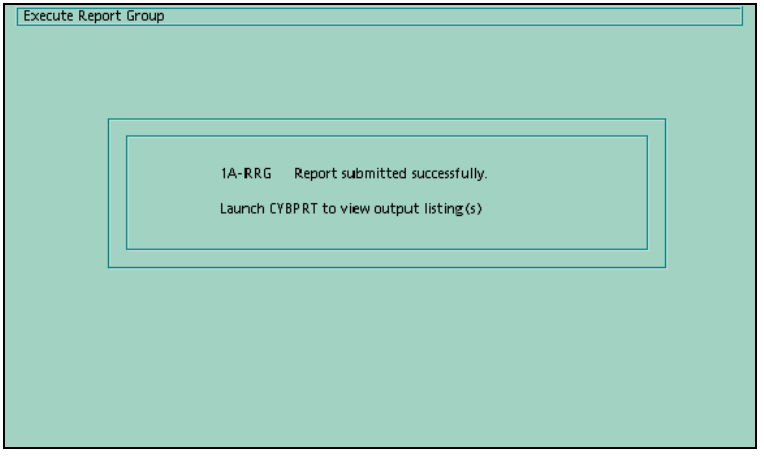
If you wish to add a checklist, you can do so by using the Checklist wizard. The Checklist wizard is a tool that creates checklists. You may access the Checklist wizard by making the following selections from the Navigator:

Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Create/Modify a Checklist

☞ *Refer to the Optimizing System Features documentation for more information about checklists and the Checklist wizard.*

Report confirmation

Regardless of the launch method you choose, once a report is launched, you will receive a confirmation message, as shown in the following example:



Online process monitoring

You may find it helpful to monitor the progress of a report run. If a report is expected to produce a very large output file, you may be able to determine and resolve significant errors before the report process ends.

Using the Process Monitor utility, you will be able to determine which processes and reports have been completed. You can also view and print the completed reports from the Process Monitor.

See also:

- Viewing report progress of a report that is launched online ***(on page 351)***

For detailed directions on viewing the progress of a report launched online.

Launch toolbar access

You can access the Process Monitor from the Launch toolbar. If the Launch toolbar is not displayed, you may view it by selecting from the menus:

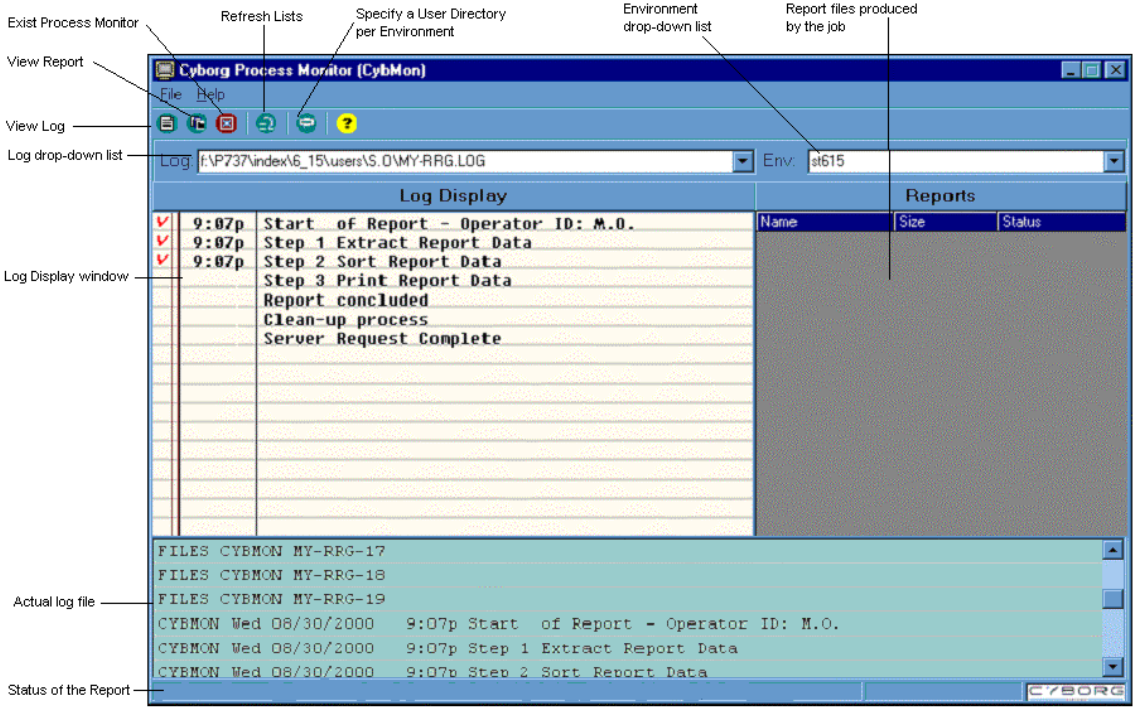
View ▶ Customize Toolbars

You may then select Launch from the list. The following toolbar will be displayed on your desktop:

Note: *Your Launch toolbar may also display other applications that you use with The Solution Series.*

The Process Monitor utility

The Process Monitor utility allows you to view the progress of a report while it is running. It also stores logs of previously run reports. Using this utility, you can set up and select processes by 'environment', or by user.



As delivered, the Process Monitor will refresh every five seconds. If you want to manually refresh the display, you may click the Refresh Lists button on the toolbar.

If you want to change environments, you may select the Specify a User Directory per Environment button on the toolbar. The Specify User Folder dialog will be displayed.

Note: *If you have restricted access to the server, you may need to contact your technical staff to change environments.*

Note: *The Specify Environment Folder and Specify User Folder dialogs will display the first time the Process Monitor utility is run. Consult your technical staff if you do not know the correct locations.*

The Log option list contains a list of all report logs that are located in your user folder. The log display is similar in appearance to a Solution Series checklist. The scrolling window displays the latest events in the log. You may select any log from this list to view it.

The Env option list is used to select which environment the Process Monitor uses. This field is populated automatically.

The Log Display window is used to display all the steps within that batch job, as well as the status and completed time of each step. A checkmark appears beside completed steps. These steps are pre-defined within the batch job.

The Reports area displays the log (LIS) files that were produced by the job. The files are predefined by the report and its associated batch jobs. The size and the status of the log files are also shown here. This list can be sorted by clicking any of the title columns. For example, you may click the Name title bar to sort the files alphabetically by name. You may double-click the report, or click the View Report button on the toolbar, to view the report with the Report Viewer utility. Only files with a Complete status can be accessed using the Report Viewer utility.

Active logs, or logs for reports that are still running, are automatically assigned an LIW extension. The LIW extension denotes a report that is still in progress, or incomplete. Only completed reports can be viewed. When completed, the report will be automatically renamed with an LIS extension. These extensions help the Process Monitor determine which reports are complete and which ones are still in progress.

The bottom part of the Process Monitor window displays the actual log file. You may scroll through the log using the scroll bar, or you may view the log in its own window by clicking the View Log button on the toolbar. Clicking this button accesses a separate window that can be resized, refreshed, and printed.

If the Process Monitor finds a ***REJECT*** message anywhere in the log file, it will assume there is an error and display the reject message and its following line in red. There will also be a blinking warning message in the status bar.

The status bar at the bottom of the Process Monitor displays the status of the report and whether there were any error messages. The status bar displays 'In Progress' while the job is running and 'Completed' when the job finishes. The date, time, and elapsed time of the completed job are displayed. If there were any errors, a flashing warning message will appear in red.

Apply the Concept
Based on your understanding of this concept, which of the following launched reports is active and still running?
1G-RRG.LIW
1G-RRG.LIS

Apply the Concept
Can you view a report while it is active?

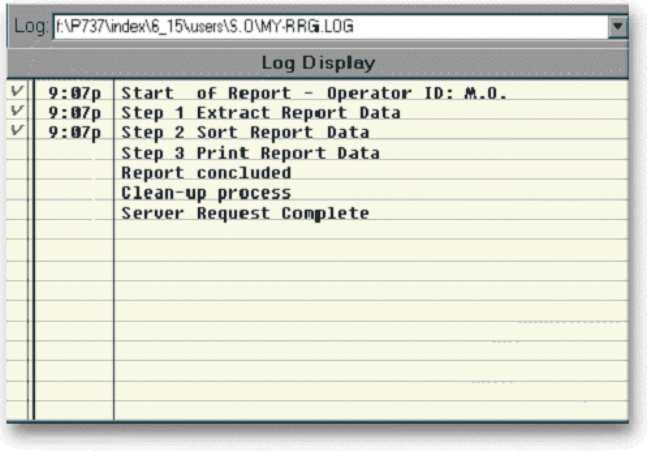
See also:

- Viewing report progress of a report that is launched online ***(on page 351)***

For detailed directions for accessing a log file using the Process Monitor.

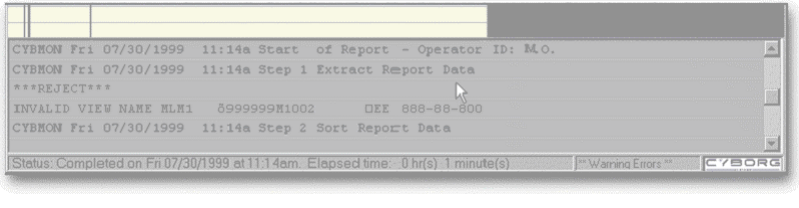
View the process log

You can view the process log in three different ways. First, the checklist in the Log Display window is a display of the log by steps. A checkmark and time stamp will signal the completion of the step.



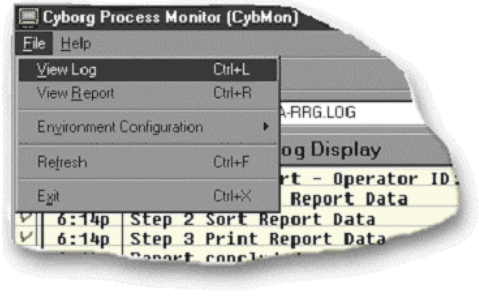
After all the steps have been completed, the status bar at the bottom of the process log will display 'Completed'.

The second method to view the process log is the scroll window on the bottom section of the Process Monitor. This window will permit you to scroll through the file looking for messages or errors. Errors will be displayed in red. There will also be a red error message flashing ** Warning Errors ** on the status bar located at the bottom of the Process Monitor.

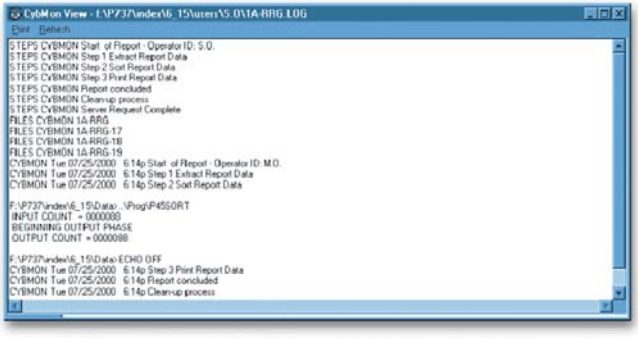


The third method to view the process log is to display it in a separate window. Display the entire log by using the View Log button or by selecting from the menu:

File ▶ View Log



The log can be viewed or printed from the resulting window:



Note: *If the process log is not complete, this window will not refresh automatically. Use the Refresh button to manually invoke the refresh function.*

Apply the Concept
Based on your understanding of this concept, how would you use the process log?

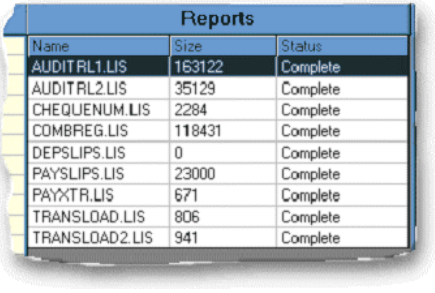
See also:

- Viewing a detailed log file of a report that is launched online ***(on page 351)***

For detailed directions for viewing a log file.

View a report

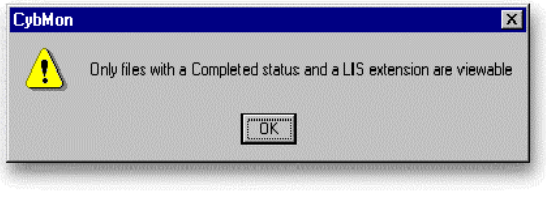
You may select a report to view by double-clicking on the report in the Reports window in the Process Monitor dialog. The Report Viewer utility is launched in a separate dialog and the selected report is displayed. Only reports that have an extension of LIS are viewable. LIW files are reports that are in progress.



Reports

Name	Size	Status
AUDITRL1.LIS	163122	Complete
AUDITRL2.LIS	35129	Complete
CHEQUENUM.LIS	2284	Complete
COMBREG.LIS	118431	Complete
DEPSLIPS.LIS	0	Complete
PAYSLIPS.LIS	23000	Complete
PAYXTR.LIS	671	Complete
TRANSLOAD.LIS	806	Complete
TRANSLOAD2.LIS	941	Complete

An error message is displayed if a file with an extension of LIW is selected:



See also:

- Archiving a report that is launched online ***(on page 355)***

For detailed directions for accessing the Report Viewer from the Process Monitor.

Online viewing of completed reports

After a report has been initiated online, you may want to review it prior to making the decision to save or print it. Viewing the report online provides you with an opportunity to review any errors and verify the report content and totals.

The Report Viewer is a utility that provides a quick and intuitive method to manage, view, print, save, and delete selected reports.

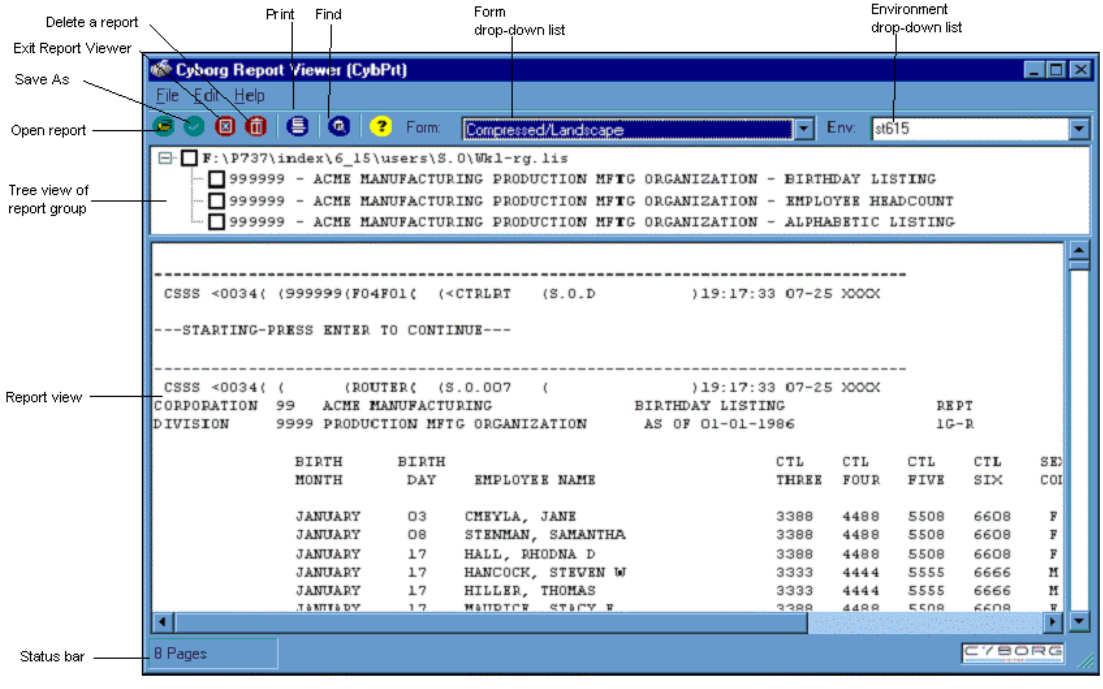
You may access the Report Viewer directly from the Launch toolbar. If the Launch toolbar is not displayed, you may view it by selecting from the menus:

View ► Customize Toolbars

You may then select Launch from the list. The following toolbar will be displayed on your desktop:

Note: *Your Launch toolbar may also display other applications that you use with The Solution Series.*

The Report Viewer displays the completed report in a customizable window. The reports are stored in your own user folder, and you can customize your viewing and printing preferences. You can print all or selected portions of a report, and you can search and jump within reports. You can also save and delete reports.

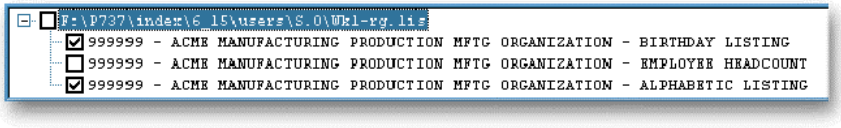


From the Report Viewer, you may select a report to view by clicking the Open Report button on the toolbar. The Open dialog will display all the output (LIS) files available in the specified User directory. You may select a report (LIS file) from the list to view it.

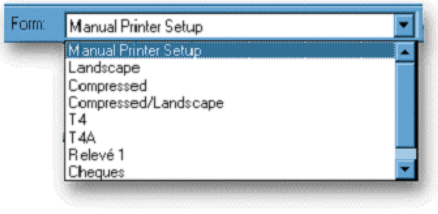
The top portion of the Report Viewer provides a tree view of the selected report group and all of its components. If you highlight an individual report in the tree view, the beginning of that report will automatically display. You can print, rename, and delete reports by selecting the appropriate check box.

If you select the root entry, or the entire report, all of its components will be automatically selected.

If you want to select one or more of the reports in the report group, clear the root entry check box and each appropriate report check box.



The Form option list is used to select a print format to produce the report. Your organization can customize these form entries, which can be used to handle any type of printer. Use the Manual Printer Setup entry to pass no control codes to the printer. This option is used when the printer is manually configured.



The Env option list is used to select the environment used by the Report Viewer utility. This field is populated automatically from the Environments folder.

Note: The Specify Environment Folder and Specify User dialogs will automatically display the first time the Report Viewer utility is run. Consult your technical staff if you do not know the correct Environment or User folder.

The middle of the form displays the report detail. The scroll bars below and to the right of the report can be used to position the page for viewing or to scroll to other pages.

The status bar at the bottom of the Report Viewer window displays the total number of pages in the report.

Apply the Concept
What steps would you perform in the Report Viewer tree view to include all but one report?

Apply the Concept
What steps would you perform in the Report Viewer tree view to include all reports?

See also:

- Archiving a report that is launched online ***(on page 355)***

For detailed directions for the two methods of viewing a completed report.

Report disposition

After the report is completed and you have viewed it to determine its accuracy, you may rerun the report, search it, print it, or delete it. Keep in mind that storage space could be an issue on your organization's server, so reports that are no longer needed should be deleted or moved to another storage location.

If you run the same report twice, the new report will replace the old one. Be sure to save files to a different name if you want to archive them. To save a report to a different name, you must select the report and click the Save As button on the toolbar.

To search a report, you must click the Find button on the toolbar. The Find dialog will be displayed. This tool is especially useful when searching for error or warning messages. The Find tool searches across entire files, not just selected reports. It finds the first occurrence of the specified string. Any subsequent search starts wherever the last search finished, unless you select the Start from Top check box. You can also perform case-sensitive searches.

To print a report, you must select the report and then click the Print button on the toolbar. When you select a report to be printed, the Print dialog will be displayed.

To delete a report group, you must click the Delete a Report button on the toolbar. Accept the warning message to delete the report. You must be assigned the appropriate security to delete report files. Contact your technical staff for more information.

See also:

- Archiving a report that is launched online ***(on page 355)***

For detailed directions for archiving a report.

Initiate scheduled reports for batch processing

The Solution Series allows you to initiate packaged reports for batch processing during your online session. When you initiate or submit packaged reports for processing, you provide the information for the control record required for execution.

First, you use the Batch Job Initiation Menu form (SUBMIT) to indicate you are initiating a packaged report.

```
SELECT OPTION ===>

                    BATCH JOB INITIATION MENU

                     1  Reports
                     2  Query
```

Then you use the Report Batch Job Initiator form (SUMBIT) to create the batch control record and determine the report routing and reporting type.

```
                    REPORT BATCH JOB INITIATOR

          Enter Report Group name:

          Hold output for online review?  (Enter Y or N)

          Normal, roll-up, or consolidate?  (Enter space, R, or C)
```

After you have saved the Report Batch Job Initiator form (SUBMIT), the system displays a message indicating the batch control record has been created.

Note: This method is used if you are running on a platform other than NT or Unix.

See also:

- Initiating scheduled reports for batch processing ***(on page 356)***

For detailed directions on initiating a scheduled report.

Held reports

Any reports in a report group that you initiated and specified that the output should be held for online review can be viewed online. Held reports can also be printed and deleted. To view, print, or delete a held report, you use the View Held Report form (VIEW).

See also:

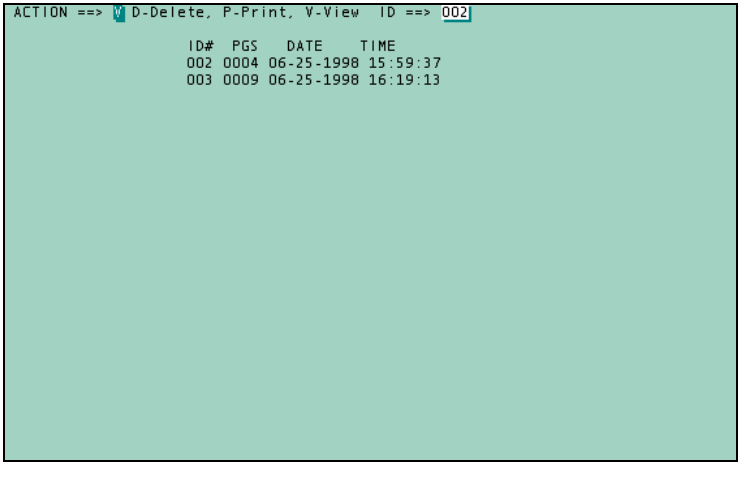
- Viewing held reports ***(on page 358)***
- Printing held reports ***(on page 359)***
- Deleting a held report group ***(on page 361)***

For detailed directions on viewing, printing, and deleting held reports.

Report summary

When you first display the View Held Report form (VIEW), a summary of all the report groups that have been routed for online viewing based on your user code is displayed.

The following example shows two report groups have been held for online viewing:



The summary information includes the following:

- ID#—number you use to identify which report group to view, print, or delete
- PGS—the number of pages for all reports in the report group
- DATE—the date the report group was processed
- TIME—the time the report group was processed

From the summary screen, you can view (V), print (P), or delete (D) a report group using the Action and ID text boxes. The action letter must be entered in uppercase.

If there are no held report groups, the message 'YOU DO NOT HAVE ANY HELD PRINT FILES' is displayed on the View Held Report form (VIEW).

See also:

- Viewing held reports ***(on page 358)***

For detailed directions on viewing held reports.

Report navigation

The first panel of information that you see after selecting a report group for viewing will be system information.

The following is an example of what you might see first when viewing a held report group. You can press Enter to move forward through the report group:

```
SIDE ==> L-Left, R-Right  PAGE ==> 0001 LINE ==> 01   Pages=0004

--------------------------------------------------------------------------------
CSSS <0268( (      (ROUTER(  (S.O.002Z  (               )15:59:37 06-25 XXXX
```

Packaged reports can produce up to 132 characters wide and 60 lines long of output. The View Held Report form (VIEW) is set up for less than this, so you will have to use the Enter key along with the following text boxes to view the report in its entirety:

- Side—used to view the left side (80 characters) or right side (80 characters) of the report
- Page—used to display a specific page of the report
- Line—used to display a specific line of a page

The following example shows the result of pressing Enter. It shows the left side of the second page of an employee listing report:

```
 SIDE ==> L L-Left, R-Right  PAGE ==> 0002 LINE ==> 01   Pages=0004

ORGANIZATION 99   ACME MANUFACTURING                ALPHABETIC LISTING OF ACTIVE
DIVISION     9999 PRODUCTION CTL 1-2                   AND INACTIVE EMPLOYEES

                                       EMPLOYEE     CTRL    CTRL    CTRL    CTRL
  EMPLOYEE-NAME                        NUMBER       THREE   FOUR    FIVE    SIX

  ADAMS, RICHARD                       1117         3030    4040    5050    6060
  ALSON, GEOFFERY                      3003         3030    4040    5050    6060
  ANDERSEN, KARI                       6004         3333    4444    5555    6666
  ANDERSON, DANIEL M                   1616         3333    4444    5555    6666
  ANDREWS, HENRY A.                    2013         3388    4488    5555    6666
  AUSTIN, STEVEN                       1234         3030    4040    5050    6060
  Anders, Andrew                       0012         3030    4040    5050    6060
  BALDWIN, ALICE A                     1043         3333    4444    5555    6666
  BARNES, JOHNSON                      2002         3388    4488    5508    6608
  BARTHOLOW III, JONATHAN              1113         3388    MANU    5555    6060
  BEACHEM, JUDITH                      6009         3030    4040    5050    6060
  BETTS, J.T.                          6003         3030    4040    5050    6060
  BISHOP, MARIA                        3021         3388    4488    5508    6608
  BROWN, WILLIAM R                     2005         3388    4488    5508    6608
```

The following example shows the right side of the employee listing report:

```
 SIDE ==> R L-Left, R-Right  PAGE ==> 0002 LINE ==> 01   Pages=0004

PHABETIC LISTING OF ACTIVE    REPT                                    PAGE     1
 AND INACTIVE EMPLOYEES       1A-R                     TIME 15:59 DATE 06-25-1998

L    CTRL    CTRL    CTRL       MAIL        HIRE    EMPLOYEE
EE   FOUR    FIVE    SIX    DISTRIBUTION    DATE    STATUS

0    4040    5050    6060    2FLR-22W    02-19-1984 01 Active-Salrd Reg FT
0    4040    5050    6060    2FLR-22W    02-19-1984 01 Active-Salrd Reg FT
3    4444    5555    6666    CORP-STENO  05-16-1974 01 Active-Salrd Reg FT
3    4444    5555    6666    CORP-STE3   04-24-1984 01 Active-Salrd Reg FT
8    4488    5555    6666    RC-212      03-09-1986 01 Active-Salrd Reg FT
0    4040    5050    6060    B2-STN5     12-17-1978 01 Active-Salrd Reg FT
0    4040    5050    6060                01-08-1998 01 Active-Salrd Reg FT
3    4444    5555    6666    5FLR-12W    08-20-1983 03 Active-Hrly Reg FT
8    4488    5508    6608                05-01-1985 01 Active-Salrd Reg FT
8    MANU    5555    6060    6FLR-8E     03-12-1982 01 Active-Salrd Reg FT
0    4040    5050    6060    B2-STN10    09-26-1983 01 Active-Salrd Reg FT
0    4040    5050    6060    2FLR-22W    03-11-1985 01 Active-Salrd Reg FT
8    4488    5508    6608    11TH-4000   07-07-1976 01 Active-Salrd Reg FT
8    4488    5508    6608    PLANT-24    07-01-1985 01 Active-Salrd Reg FT
```

See also:

- Printing held reports ***(on page 359)***
- Deleting a held report group ***(on page 361)***

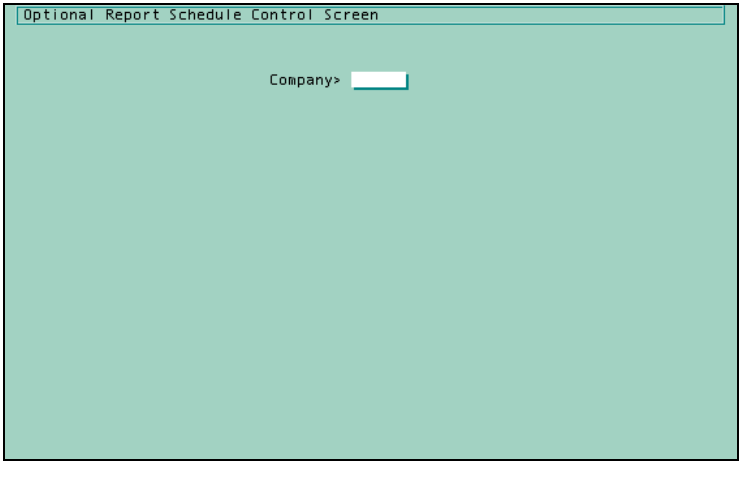
For detailed directions on viewing, printing, and deleting held reports.

Organization report restrictions

By default, the system assumes that all reports are valid for an organization; any report can report on an organization's data. You can override this default using the Optional Report Schedule Control form (C12RPT). You can use this form to provide additional security in packaged reporting by limiting the reports that can be processed.

You use the Optional Report Schedule Control form (C12RPT) to specify only those reports that are valid for a company. For example, maybe you have a corporate organization for which you want to limit access to certain salary reports. When a report is executed, the system verifies that the report is a valid report for the company being processed. If it is a valid report, processing continues. If it is not a valid report, no output is produced.

The Optional Report Schedule Control form (C12RPT) has two panels. On the first panel, shown below, you specify the company for which you want to restrict reports:



You use the second panel of the Optional Report Schedule Control form (C12RPT) to specify which reports can be processed for a company. You can add or delete reports using this form. After you have added at least one report, any other report that is not listed on the form will not be processed for the company.

```
Optional Report Schedule Control Screen

Define Batch Reports That May Be Produced For Company 999999

A
D  Report  Title

                          Return To 1st Screen
```

The following example shows the Alpha List-Active & Inactive Employees report (1A-RPT) is the only valid report for company 999999:

```
Optional Report Schedule Control Screen

Define Batch Reports That May Be Produced For Company 999999

A
D  Report  Title

   1A-RPT  Alpha List-Active & Inactive Employees

                          Return To 1st Screen
```

See also:

- Restricting reports for an organization ***(on page 362)***

For detailed direction on restricting reports for an organization.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Adding a report group to the menu 335
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Adding a report group

The Solution Series is delivered with many different report groups set up for you, but you may wish to add your own groups using combinations of delivered reports and reports that your organization has customized. To create a report group, complete the following steps:

1. Access the Report Group Activities form

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

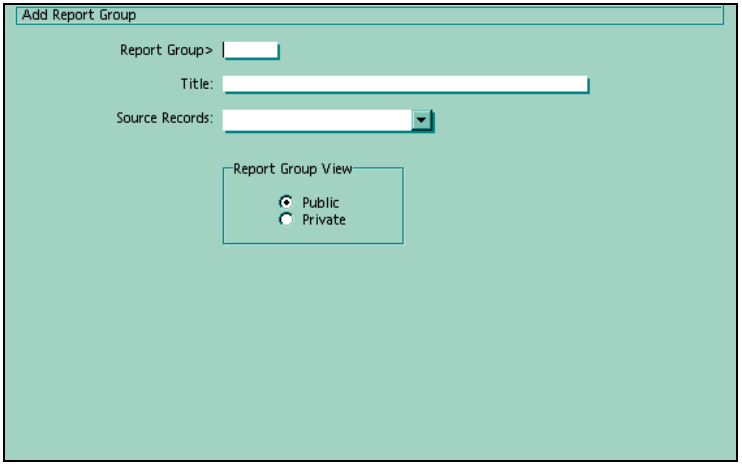
Component: Reporting
Process: Report Scheduling
Task: Schedule Report Groups

2. Click Add

Click the Add button to create a new report group.

The Add Report Group form (RGADD) is displayed.

If you completed the previous steps, the results should look similar to the example that follows:



3. Enter the Report Group name

Enter the name of the report group you are adding. You can enter up to six alphanumeric characters. This name will be the report group identifier you will use to initiate the report run or to view reports in the report group online.

Note: The report name must end in 'RG' if you plan to launch it from the Navigator or menu.

4. Enter the report group Title

You can enter up to 40 alphanumeric characters, so be descriptive. The title will be used to identify the report group whenever you are using the Report Group Activities form (RGMSTR).

5. Select Source Records

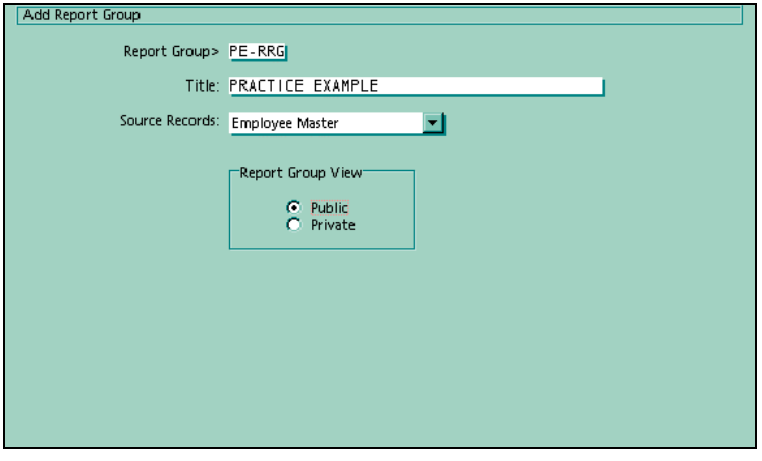
Select the type of information you want to process from the Source Records option list (SC39). What you select is used to identify the type of information this group of reports will provide. The default is 'Employee Master'.

Note: Processing is more efficient if you separate reports that process employee Master Records from reports that process History and Labor Records into separate report groups.

6. Select Report Group View

If you are setting up a report group that may be shared with others using the system, click 'Public'. If you do not want to share the new report group with anyone with a user code different from your own, click 'Private'. The default is 'Public'.

If you completed the previous steps, the results should look similar to the example that follows:



7. Save the form

Press Enter or click the Save button.

Your next action depends on whether you selected 'Position Management' as the source records.

If you selected 'Position Management' source records, the Position Management Report Group Parameters form (RUN-PM) is displayed. Continue with Step 8.

If you did not select 'Position Management' as the source records, the report group is added and the Report Group Contents form (RPTGRP) is displayed. Continue with Step 12.

8. Enter the P.M. Control Number

Enter the Position Management Control Number as it is identified on the Company-To-Rules Cross-Reference for HR form (AX-SCR).

9. Enter the As of Date (optional)

Enter the 'as of' date for which you want to start reporting in MM-DD-CCYY (US and Canada, excluding Quebec) or DD-MM-CCYY format (elsewhere). Leave this text box blank if you want to use the current date.

Note: You can right click in this text box to display the Calendar or insert today's date.

10. Select the Starting Org Unit

Select the Organization Unit code with which you want to start reporting. All Organization Units below this selection will be reported.

11. Save the form

Press Enter or click the Save button to save the form.

The Report Group Contents form (RPTGRP) is displayed.

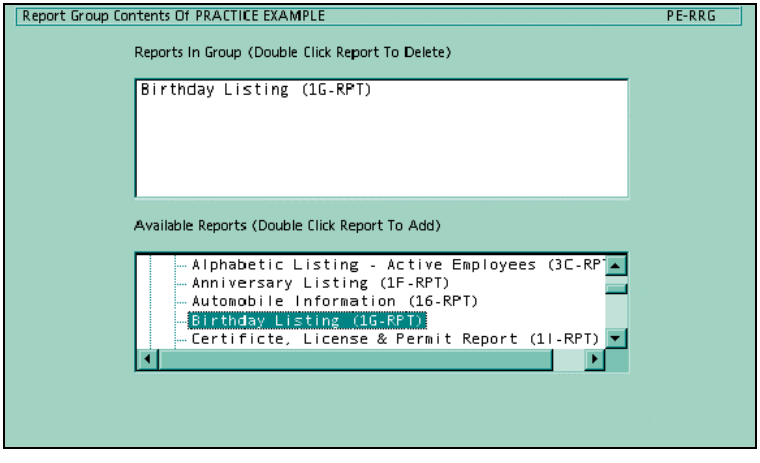
12. Select reports to include in your new report group

Expand any of the report categories and double-click a report title in the Available Reports tree view to add it to the report group.

The report is added to the Reports In Group box of the form. Repeat this step to add other reports. You can have a maximum of 20 reports in a report group.

Note: The bottom list box first displays categories of reports. To expand the list of those reports related to a category, click the '+' sign. Then double-click a report to add it.

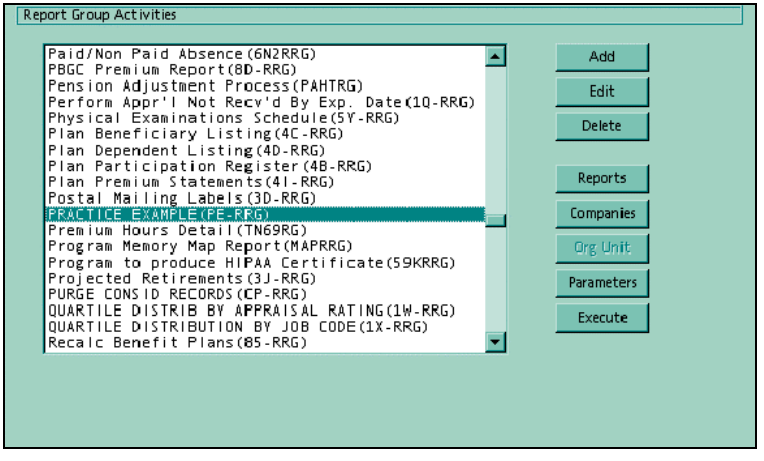
If you completed the previous steps, the results should look similar to the example that follows:



13. Press Enter

The form is saved and the report group is added to the Report Group Activities form (RGMSTR).

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Report groups ***(on page 301)***

For more information on adding report groups.

Adding a report group to the menu

To add a report group to the menu, follow these steps:

Note: *You must have authority to maintain menus prior to starting this task.*

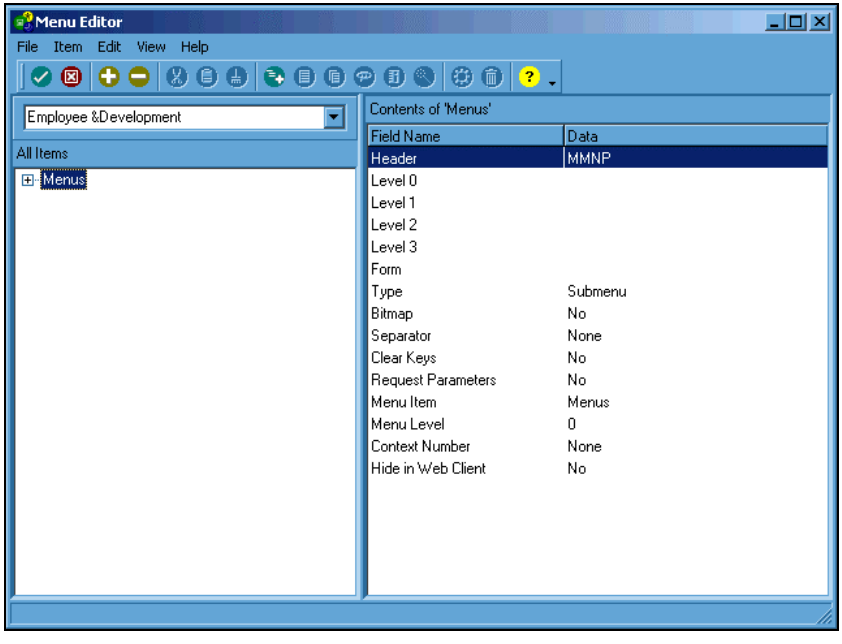
Note: *Prior to launching a report group from the Navigator or menus, you must add the report group to The Solution Series using the Report Group Activities form (RGMSTR).*

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Customize Menus

If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



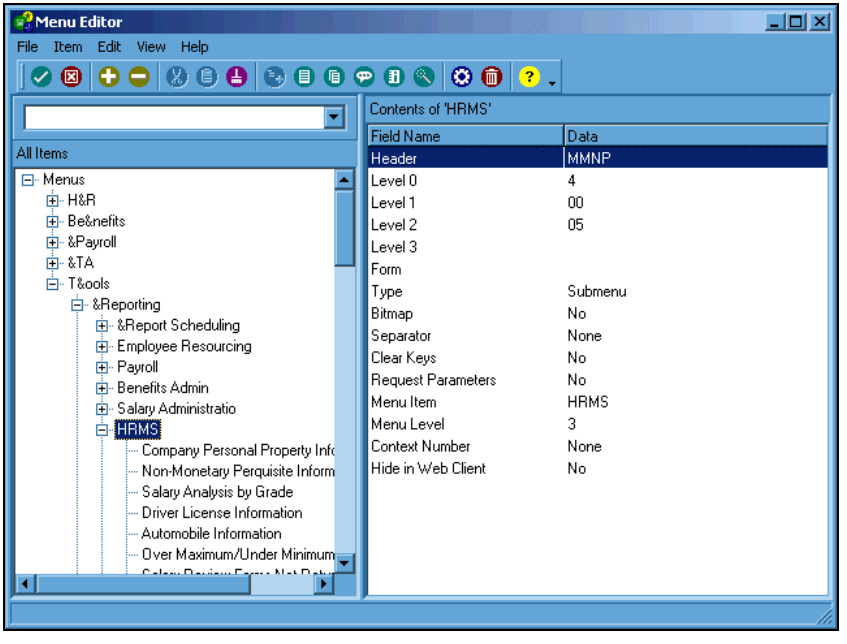
2. **Expand the 'Menus' item**
   Click the plus sign (+) to the left of the 'Menus' item in the tree view in the left pane.

3. **Expand the 'T&ools' parent item**
   Click the plus sign (+) to the left of the 'T&ools' parent item in the tree view in the left pane.

4. **Expand the '&Reporting' submenu**
   Click the plus sign (+) to the left of the '&Reporting' submenu in the tree view in the left pane.

5. **Select the report category to receive the new item**
   Click the report category below the Reporting submenu in the tree view in the left pane.

If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



6. Click the New Form icon

Select the type of item to add by clicking the New Form icon on the toolbar. The Add New Form dialog appears.

7. Enter the Item Title

Type the report group title that should appear on the menu. This name can be up to 38 alphanumeric characters. This must match the title that was entered on the Add Report Group form (RGADD).

8. Enter the Name

Type the name of the report group. This must be the report group name that was entered on the Add Report Group form (RGADD).

9. Enter the Context number (optional)

Type the four-position context number for the help topic. Values must be numeric and within the range 8000–8999.

This option is only available for components.

10. Select Options (optional)

If you are adding a form item, these options will be active. By default, 'Neither' is selected. No selection is required for a report group item.

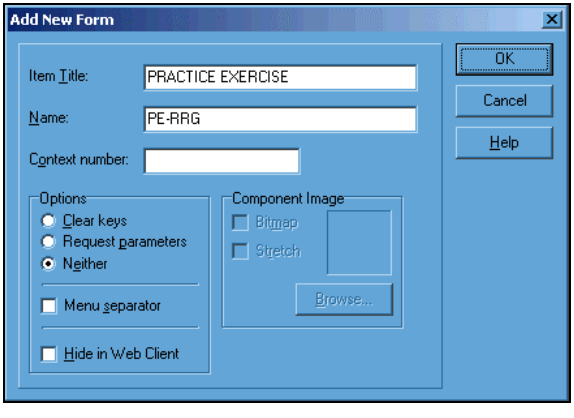
11. Select Menu separator (optional)

Select this check box if you want a line to be drawn above the menu item's position in the menu list. Separators logically group related items. No entry is required for a report group item.

12. Bypass the Component Image selections

These items are not active for a report group item.

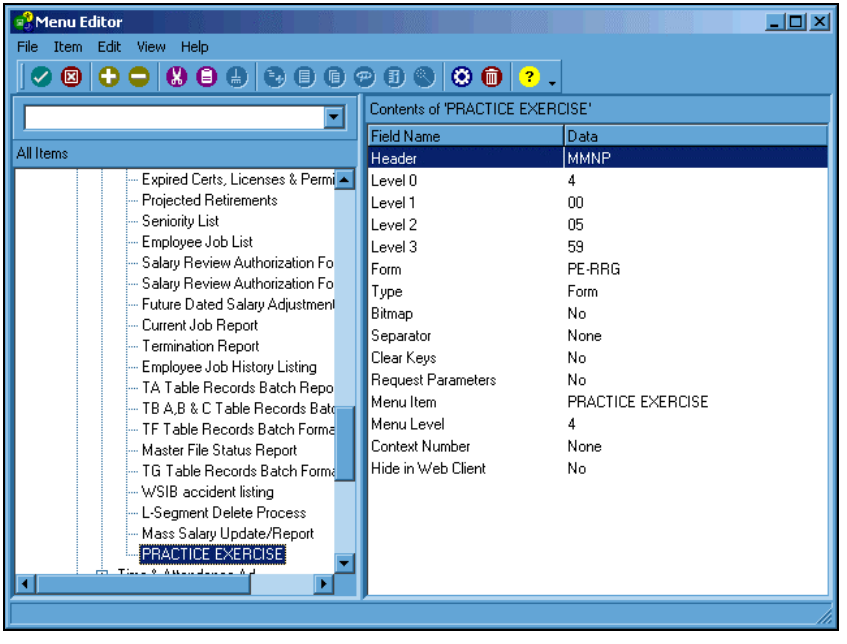
If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



13. Click OK or press Enter

If you are satisfied with your entries, confirm this by clicking OK or pressing Enter.

If you completed the previous step, the dialog that is displayed should look similar to the example that follows:



14. Click Save

Click the Save button on the toolbar to save the new menu record.

15. Click Exit

Click the Exit button on the Menu Editor toolbar. The new report group is now available on the Navigator and the menu.

If you close the dialog without saving, a Save dialog will be displayed, asking you if you want to save your changes to the menu structure.

See also:

- Report groups ***(on page 301)***

For more information about adding a report group to the menu.

Editing a report group

To edit a report group, complete the following steps:

1. Access the Report Group Activities form

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

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

2. Select the report group you want to edit

From the selection list, select the report group you want to edit.

3. Click Edit

The Edit Report Group form (RGCHG) is displayed.

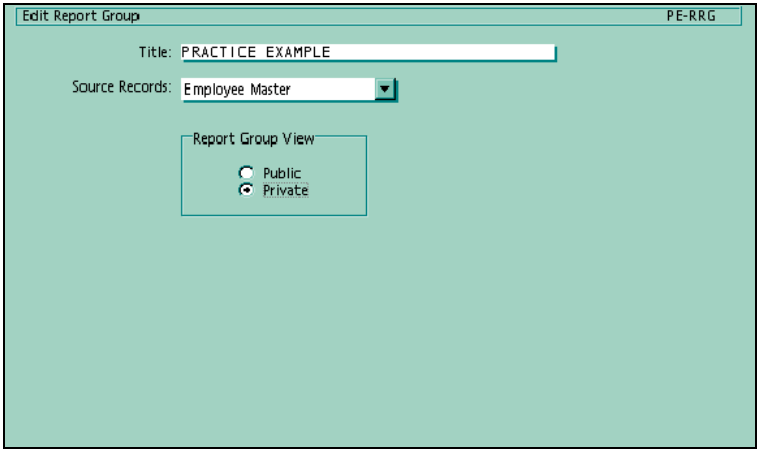
4. Revise the settings you want to change for this report group

Revise the Title, Source Records, and the Report Group View as desired.

Note: *If you are editing a Position Administration report group, you will not be able to change the Source Records.*

If you are editing a non-Position Administration report group, you may revise the Source Records setting, but 'Position Administration' will not be an option.

If you completed the previous steps, the results should look similar to the example that follows:



5. Press Enter

The report group is revised and the Report Group Activities form (RGMSTR) is displayed.

See also:

- Report groups ***(on page 301)***

For more information on editing report groups.

Adding a report to a report group

To add a report to a report group, complete the following steps:

1. Access the Report Group Activities form

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

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

2. Select a report group

From the selection list, select the report group to which you want to add a report.

3. Click Reports

The Report Group Contents form (RPTGRP) is displayed.

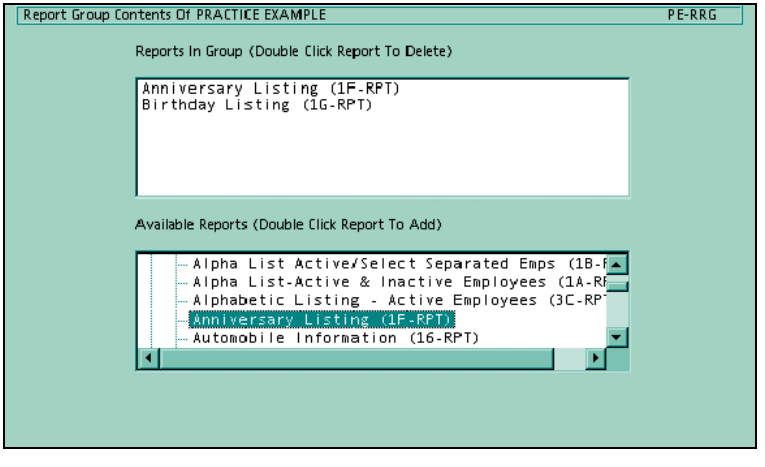
4. Select a report category and report

Double-click a report title in the Available Reports tree view to add it to the report group.

The report is added to the Reports In Group box of the form. Repeat this step to add other reports.

Note: The bottom list box first displays categories of reports. To expand the list of those reports related to a category, click the '+' sign. Then double-click a report to add it.

If you completed the previous steps, the results should look similar to the example that follows:



5. Press Enter

The report is added to the report group and the Report Group Activities form (RGMSTR) is displayed.

See also:

- Reports in the report group ***(on page 305)***

For more information on adding a report to a report group.

Removing a report from a report group

To remove a report from a report group, complete the following steps:

1. Access the Report Group Activities form

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

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

2. Select a report group

From the selection list, select the report group from which you want to remove a report.

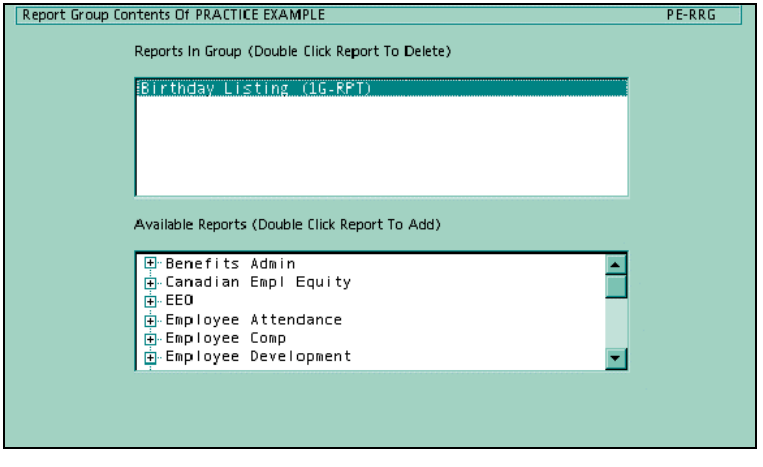
3. Click Reports

The Report Group Contents form (RPTGRP) is displayed. Reports currently in the report group are displayed in the Reports In Group box of the form.

4. Double-click the title of the report you want to remove

The report is removed from the report group.

If you completed the previous steps, the results should look similar to the example that follows:



5. Press Enter

Your changes are saved and the Report Group Activities form (RGMSTR) is displayed.

See also:

- Report groups ***(on page 301)***

For more information on report groups.

Limiting companies included in report processing

To limit the companies to be included in report processing, complete the following steps:

Note: Because Position Administration reports process data based on a defined Organization Unit rather than a company, this configuration option is not available to report groups containing Position Administration reports.

1. Access the Report Group Activities form

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

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

2. Select the report group

From the selection list, select the report group for which you want to limit the companies used during report processing.

3. Click Companies

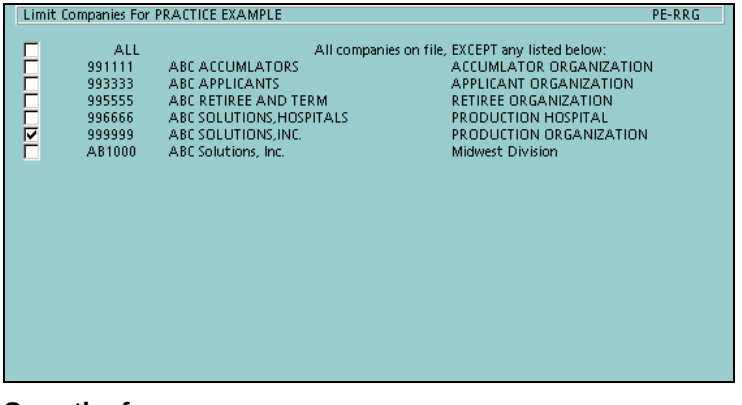
The Limit Companies form (RGLC12) is displayed.

4. Select the companies you want to include in the report run

Click the check box of each company you want to be included in report processing. Companies with a check mark will be included in report processing.

If no companies are checked, all will be included in report processing.

If you completed the previous steps, the results should look similar to the example that follows:



5. Save the form

Press Enter or click the Save button and the Report Group Activities form (RGMSTR) is displayed. The reports in the report group will run only for those companies selected.

The Report Group Activities form (RGMSTR) is displayed.

See also:

- Companies included in report processing ***(on page 307)***

For more information on including companies in report processing.

Setting report parameters

To set parameters for a report in a report group, complete the following steps:

1. Access the Report Group Activities form

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

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

2. Select the report group

From the selection list, select the report group that contains the report for which you want to set parameters.

3. Click Parameters

The Parameter Selection form (RPARMS) is displayed, listing all the reports included in the report group. A Set Parameters button is displayed next to those reports for which you may set parameters.

4. Click Set Parameters for the report you want to set parameters

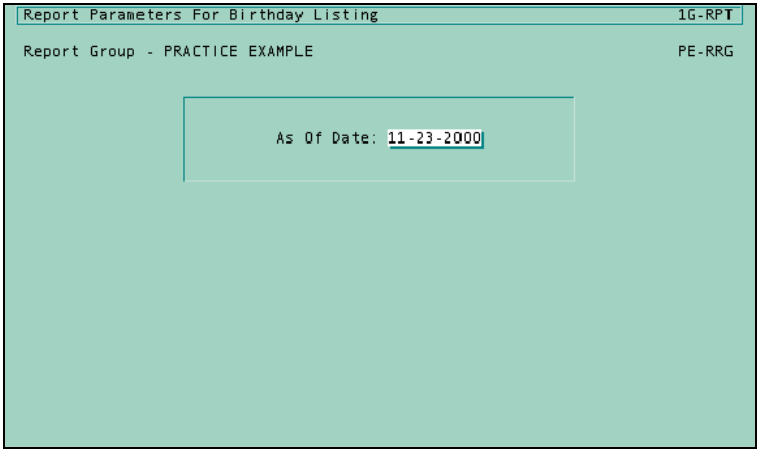
A Report Parameters form specific to the report is displayed.

Note: The Report Parameters form that displays depends on the report for which you are setting parameters.

5. Complete the parameters on the form

Complete the text boxes on the form as necessary.

If you completed the previous steps, the results should look similar to the example that follows:



6. Save the parameters form

Press Enter or click the Save button to save the parameters form.

The Parameter Selection form (RPARMS) is displayed. Repeat Steps 4 through 6 to set parameters for any other reports included in your report group.

7. Save the form

Press Enter or click the Save button to save the form. The Report Group Activities form (RGMSTR) is displayed.

See also:

- Report parameters ***(on page 307)***

For more information on setting parameters for reports.

Launching a report from the Report Group Activities form

To launch a report from the Report Group Activities form (RGMSTR), complete the following steps:

Note: In a classroom setting, each student must have a unique User Code, Password, and Operator ID, and user folder to successfully complete the steps for this task.

1. Access the Report Group Activities form

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

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

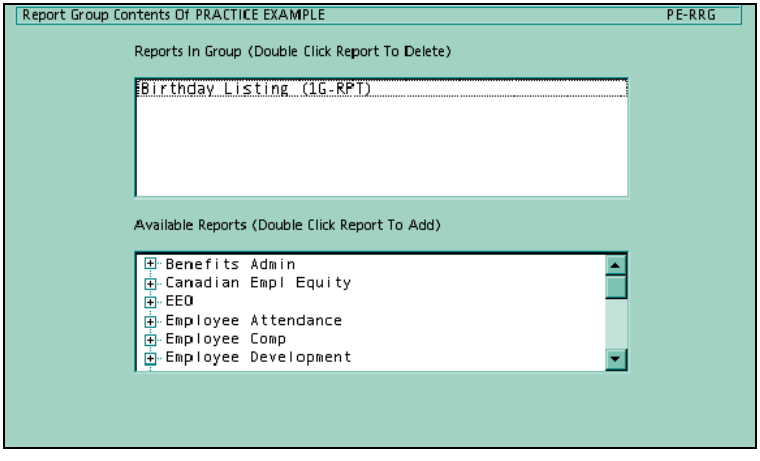
2. Select the report group

Select the report group that contains the report (s) to be run.

3. Click Reports

Click the Reports button to view the reports currently in the report group. Change as necessary.

If you completed the previous steps, the resulting form should look similar to the example that follows:



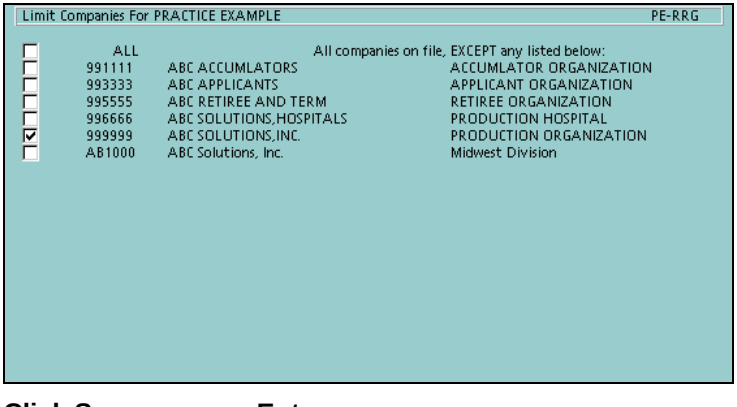
4. Click Save or press Enter

Save the form and return to the Report Group Activities form (RGMSTR).

5. Click Companies

Click the Companies button to view the list of companies to be included in the report. Change as necessary.

If you completed the previous steps, the resulting form should look similar to the example that follows:



6. Click Save or press Enter

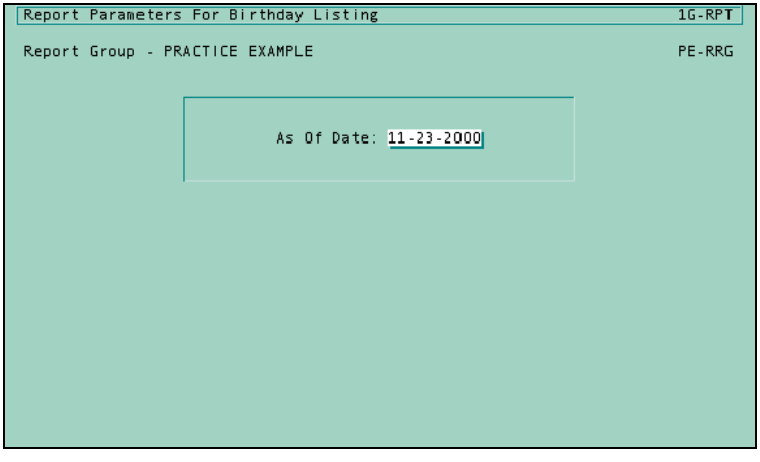
Save the form and return to the Report Group Activities form (RGMSTR).

7. Click Parameters

Click the Parameters button next to each report in the report group and enter the report parameters.

After entering each report's parameters, press Enter to return to the Report Parameters form.

If you completed the previous steps, the resulting form should look similar to the example that follows:



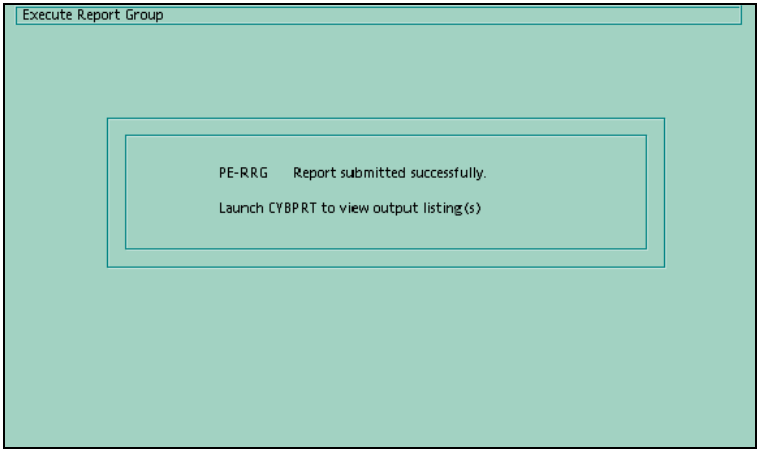
8. Click Save or press Enter

After the last parameter is entered and you have pressed Enter to return to the Report Parameters form, press Enter again to return to the Report Group Activities form (RGMSTR).

9. Click Execute

Click the Execute button to launch the report.

If you completed the previous steps, the resulting confirmation form should look similar to the example that follows:



See also:

- Methods for launching reports online ***(on page 309)***

For more information about launching a report from the Report Group Activities form (RGMSTR).

Launching a report group from the Navigator

To launch a report group from the Navigator, complete the following steps:

Note: Other than Step 1, these detailed directions may also be used to launch a report from the menu.

Note: In a classroom setting, each student must have a unique User Code, Password, and Operator ID, and user folder to successfully complete the steps for this task.

1. Access the report group from the Navigator

Access the report group by making the following selections from the Navigator:

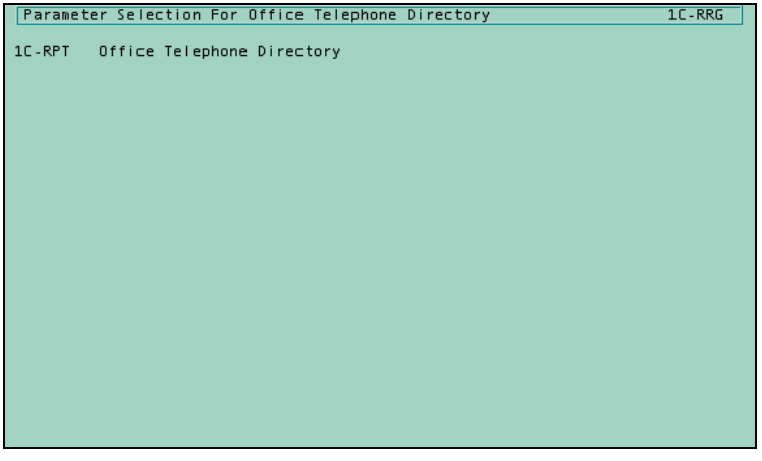
Component: Reporting
Process: any selected report group category
Task: any selected report group

The Parameters Selection form is displayed.

2. Click Parameters

Click the Parameters button next to each report in the report group and enter the report parameters. After entering each report's parameters, press Enter to return to the Report Parameters form.

If you completed the previous steps, the resulting form should look similar to the example that follows:



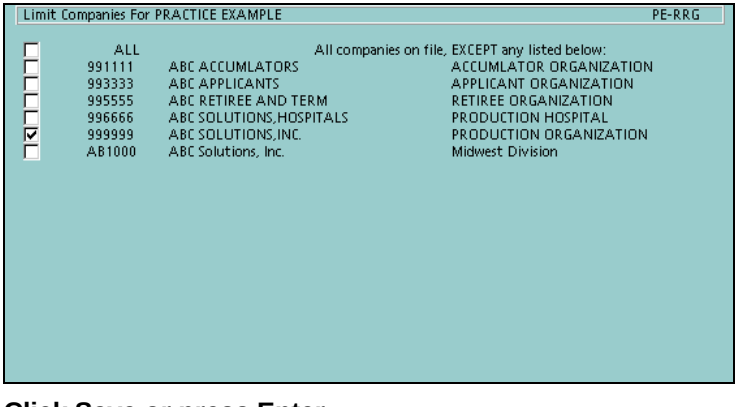
3. Click Save or press Enter

After the last parameter is entered and you are viewing the Report Parameters form, press Enter to save the form and access the Limit Companies form.

4. Select the organizations to be included in the report

The Limit Companies form is automatically displayed. Select the check box next to each organization for which you want to run the report.

If you completed the previous steps, the resulting form should look similar to the example that follows:



5. Click Save or press Enter

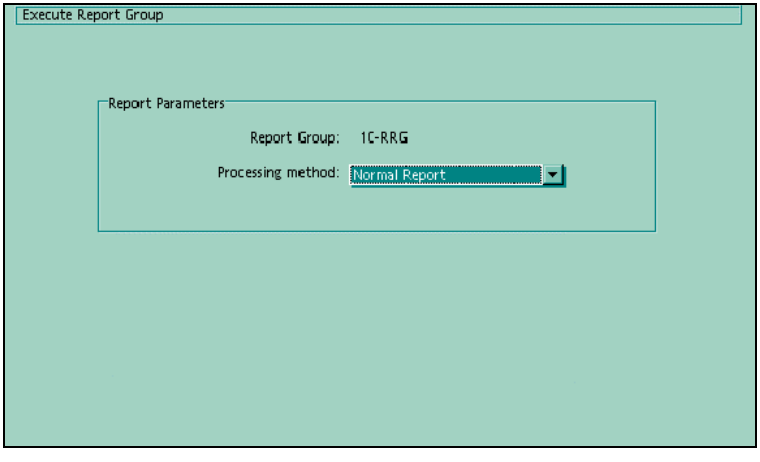
Click Save or press Enter to save the form and access the Execute Report Group form.

6. Execute the report group

The Execute Report Group form is automatically displayed. Select either Normal, Consolidated, or Rollup report processing.

Note: If you are not familiar with consolidated or roll-up reporting, contact your technical staff or refer to the Technical Administration documentation for more information.

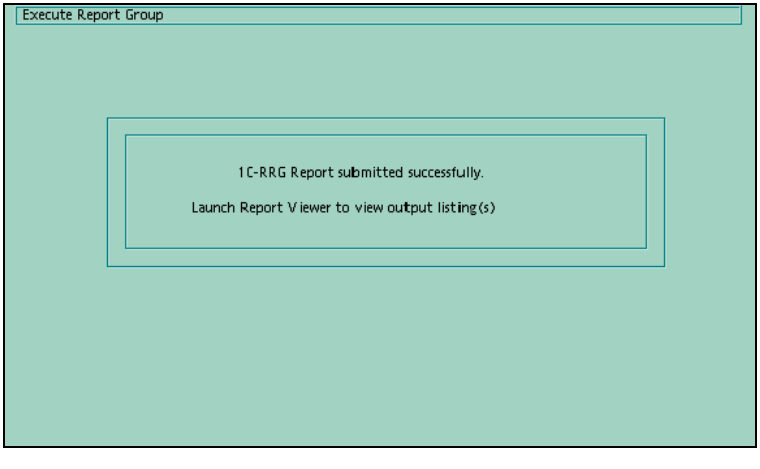
If you completed the previous steps, the resulting form should look similar to the example that follows:



7. Press Enter

Press Enter to launch the report online.

If you completed the previous steps, the resulting confirmation form should look similar to the example that follows:



See also:

- Methods for launching reports online ***(on page 309)***

For more information about launching a report from the Navigator or menu.

Viewing report progress of a report that is launched online

To view report progress using the Process Monitor, complete the following steps:

Note: In a classroom setting, verify the environment selection with your instructor before you begin this task.

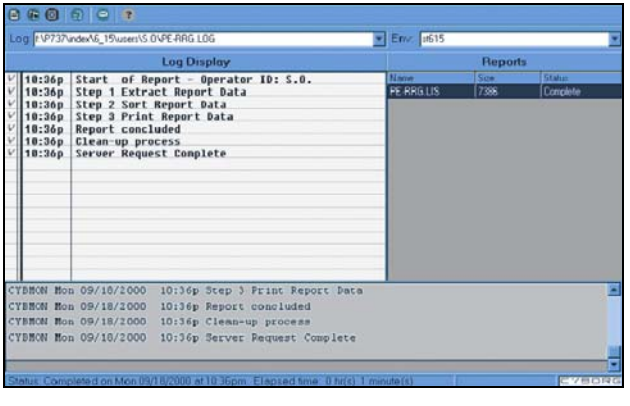
1. Access the Process Monitor

Access the Process Monitor by clicking the Process Monitor button on the Launch toolbar.

2. Select the report log

Select the log file from the Log option list, if it is not already selected.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



See also:

- Online process monitoring ***(on page 314)***

For more information about using the Process Monitor to access a log file.

Viewing a detailed log file of a report that is launched online

To view a log file using the Process Monitor, complete the following steps:

Note: *In a classroom setting, verify the environment selection with your instructor before you begin this task..*

1. Access the Process Monitor

Access the Process Monitor by clicking the Process Monitor button on the Launch toolbar.

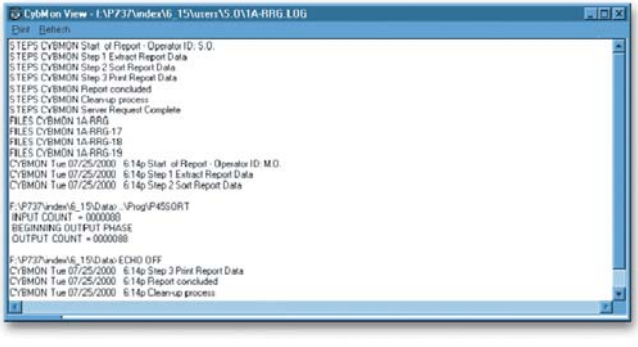
2. Select the report log

Select the log file from the Log option list, if it is not already selected.

3. Open the log file

Open the log file by clicking the View Log button on the toolbar.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



See also:

- Online process monitoring ***(on page 314)***

For more information about using the Process Monitor to view a detailed log file.

Viewing a completed report using the Process Monitor

You can view a completed report from the Process Monitor or the Report Viewer. To use the Process Monitor to display a report, complete the following steps:

Note: *In a classroom setting, verify the environment selection with your instructor before you begin this task.*

1. Access the Process Monitor

Access the Process Monitor by clicking the Process Monitor button on the Launch toolbar.

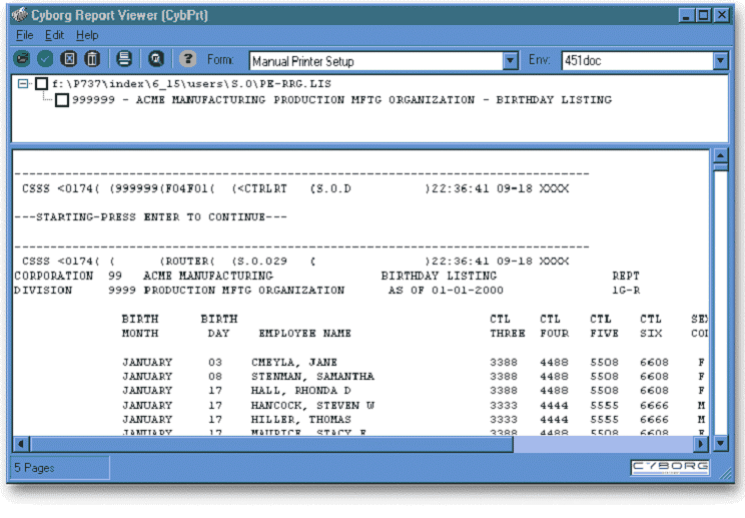
2. Select the report file

Select the report file from the Log option list.

3. View the report

Click the View Report button on the toolbar to open the Report Viewer utility.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



See also:

- Online viewing of completed reports ***(on page 320)***

For more information about accessing the Report viewer from the Process Monitor.

Viewing a completed report using the Report Viewer

You can view a completed report from the Process Monitor or the Report Viewer. To use the Report Viewer to display a report, complete the following steps:

Note: *In a classroom setting, verify the environment selection with your instructor before you begin this task.*

1. Access the Report Viewer

Access the Report Viewer by clicking the Report Viewer button on the Launch toolbar.

2. Open the report

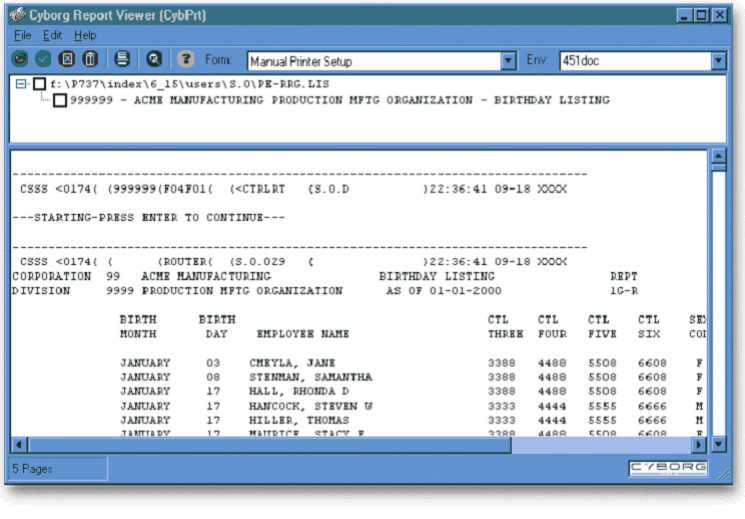
Click the Open Report button on the toolbar.

3. Open the report group output file

Select and open the report group output file (LIS file). The first report in the report group is displayed.

Note: *Depending on your entry in the tree view of the report group, one or all of the reports may be viewed.*

If you completed the previous steps, the resulting form should look similar to the example that follows:



See also:

- Online viewing of completed reports ***(on page 320)***

For more information about viewing a report from the Report Viewer.

Archiving a report that is launched online

To archive a report using the Report Viewer, complete the following steps:

Note: In a classroom setting, verify the environment selection with your instructor before you begin this task.

1. Access the Report Viewer

Access the Report Viewer by clicking the Report Viewer button on the Launch toolbar.

2. Open a report

Open a report by clicking the Open Report button on the toolbar.

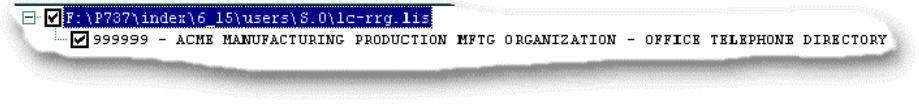
3. Open the report group output file

Select and open the report group output file.

4. Select the report

In the tree view of the report group, select the check box that specifies the root entry (entire report) or select one or more individual reports.

If you completed the previous steps, the resulting form should look similar to the sample that follows:



5. Access the Save dialog box

Click the Save As button on the toolbar to open the Save dialog.

6. Enter the new report name

Type the new name in the File name text box.

7. Save the report

Click the Save button or press Enter to save the report.

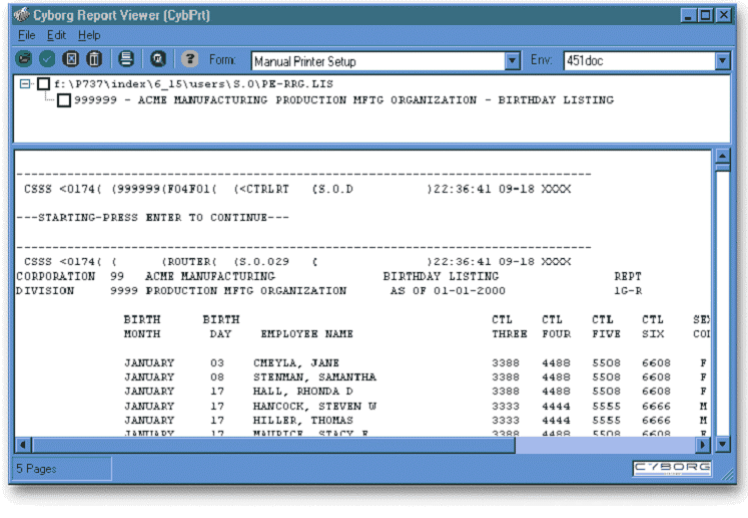
8. Access the archived report

Click the Open Report button on the toolbar to open the archived report.

9. Open the archived report

Select and open the archived .LIS report file.

If you completed the previous steps, the resulting form should look similar to the example that follows:



See also:

- Report disposition ***(on page 323)***

For more information about archiving a report.

Initiating scheduled reports for batch processing

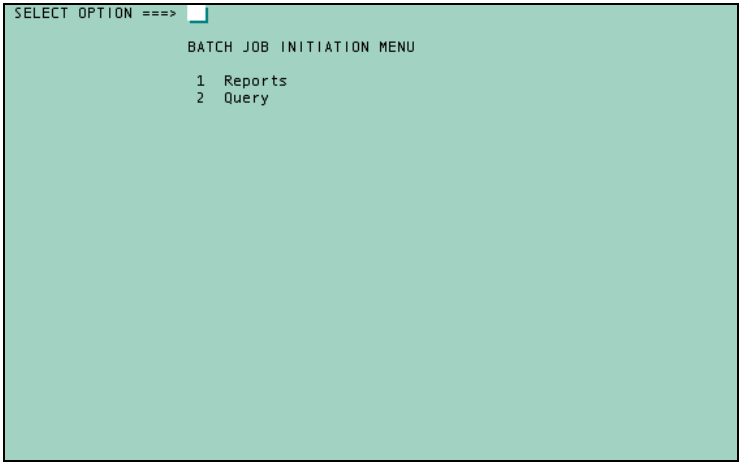
To initiate a report group for batch processing, complete the following steps:

1. Access the Batch Job Initiation Menu form

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

Component: Reporting
Process: Report Scheduling
Task: Initiate Scheduled Reports

If you completed the previous step, the results should look similar to the example that follows:



2. Enter '1'

Enter '1' in the Select Option text box.

3. Save the form

Press Enter or click the Save button to save the form.

The Report Batch Job Initiator form (SUBMIT) is displayed.

4. Enter the report group name

Enter the report group name in the Enter Report Group name text box.

5. Enter 'Y' or 'N'

If you want to view the report output online, enter 'Y' in the Hold output for online review? text box. If you want to send the report output to a print file, enter 'N'.

6. Enter a space, 'R', or 'C'

If you want to process using roll-up reporting, enter 'R' in the Normal, roll-up, or consolidate? text box. If you want to process using consolidated reporting, enter 'C'. If you want normal processing, leave this field blank.

Note: *Your System Administrator must have configured for consolidated or roll-up reporting in order for this option to work.*

If you completed the previous steps, the results should look similar to the example that follows:

```
                    REPORT BATCH JOB INITIATOR

Enter Report Group name: EXAMP

Hold output for online review? Y (Enter Y or N)

Normal, roll-up, or consolidate?  (Enter space, R, or C)
```

7. Save the form

Press Enter or click the Save button to save the form.

The report group is submitted for batch execution and a message similar to the following is displayed:

JOB JRPTXXXX SUBMITTED

See also:

- Initiate scheduled reports for batch processing ***(on page 324)***

For more information on initiating scheduled reports.

Viewing held reports

To preview a held report group online, complete the following steps:

1. Access the View Held Report form

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

Component: Reporting
Process: Report Scheduling
Task: View Held Report

Note: *If there are no held report groups to view, the message 'YOU DO NOT HAVE ANY HELD PRINT FILES' is displayed.*

2. Enter 'V' in the Action text box

Enter 'V' in the Action text box to indicate you want to view a report group.

Note: The letter in the Action text box must be entered in uppercase.

3. Enter the ID of the report group you want to view in the ID text box

Enter the three-character ID of the report group that you want to view in the ID text box. The ID is the sequence number assigned by the system during the report process.

4. Save the form

Press Enter or click the Save button to save the form.

The left side of the first page of the report group is displayed.

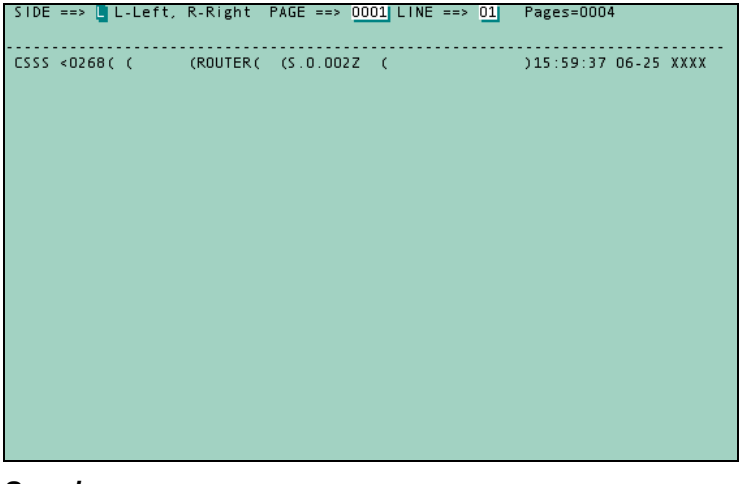
5. Use the Side, Page, and Line text boxes or press Enter to navigate the report group

Press Enter to move sequentially through the report group. Use the following text boxes to display a specific portion of a report:

- Side—enter 'L' to display the left side (first 80 characters), 'R' to display the right side (last 80 characters)
- Page—enter a number to display a specific page
- Line—enter a number to display a specific line

When you reach the bottom of the report, the message '--- End of file ---' is displayed.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Held reports ***(on page 326)***

For more information on held report groups.

Printing held reports

To print a held report group, complete the following steps:

1. Access the View Held Report form

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

Component: Reporting
Process: Report Scheduling
Task: View Held Report

2. Enter 'P' in the Action text box

Enter 'P' in the Action text box to indicate you want to print a report group.

Note: The letter in the Action text box must be entered in uppercase.

3. Enter the ID of the report group you want to print in the ID text box

Enter the three-character ID of the report group that you want to print in the ID text box. The ID is the sequence number assigned by the system during the report process.

If you completed the previous steps, the results should look similar to the example that follows:

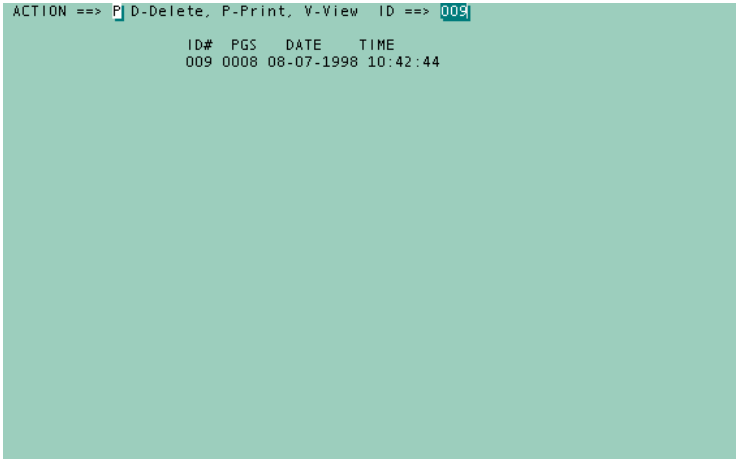
4. Save the form

Press Enter or click the Save button to save the form.

A message similar to the following is displayed:

JOB JRPTXXXX SUBMITTED

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Held reports ***(on page 326)***

For more information on held reports.

Deleting a held report group

To delete a held report group, complete the following steps:

1. Access the View Held Report form

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

Component:	Reporting
Process:	Report Scheduling
Task:	View Held Report

2. Enter 'D' in the Action text box

Enter 'D' in the Action text box to indicate you want to delete a held report group.

Note: The letter in the Action text box must be entered in uppercase.

3. Enter the ID of the report group you want to delete in the ID text box

Enter the three-character ID of the report group that you want to delete in the ID text box. The ID is the sequence number assigned by the system during the report process.

4. Save the form

Press Enter or click the Save button to save the form.

The report group is deleted.

See also:

- Held reports ***(on page 326)***

For more information on held report groups.

Restricting reports for an organization

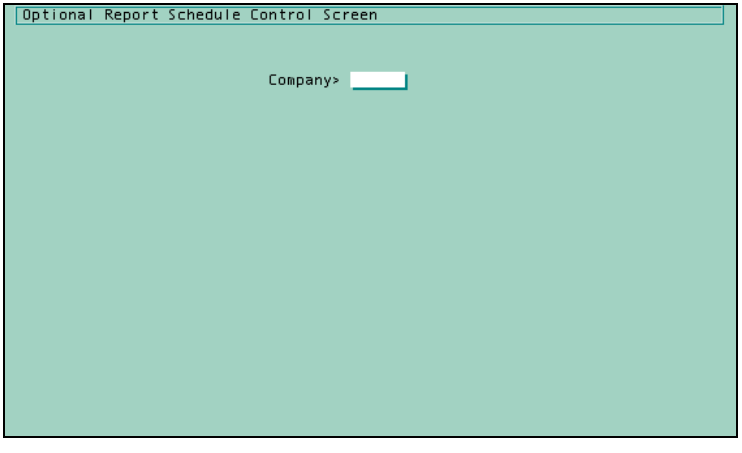
To restrict the reports that can be processed for an organization, complete the following steps:

1. Access the Optional Report Schedule Control form

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

Component: Reporting
Process: Report Scheduling
Task: Specify Reports for Organization

If you completed the previous step, the results should look similar to the example that follows:



2. Enter the Company

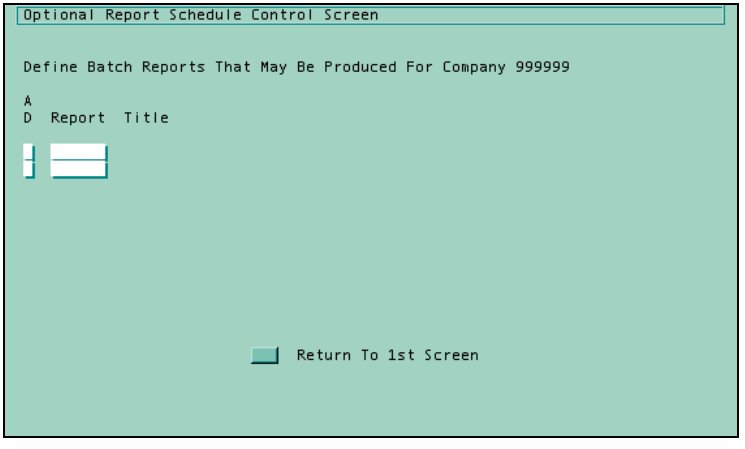
Enter the six-character organization ID for which you want to restrict the reports that can be processed.

3. Save the form

Press Enter or click the Save button to save the form.

The second panel of the Optional Report Schedule Control form (C12RPT) is displayed.

If you completed the previous steps, the results should look similar to the example that follows:



4. Enter 'A' or 'D'

If you want to add a report that can be processed, enter 'A' in the AD text box. If you want to delete a report, enter 'D'.

5. Enter the Report

Enter the name of the report.

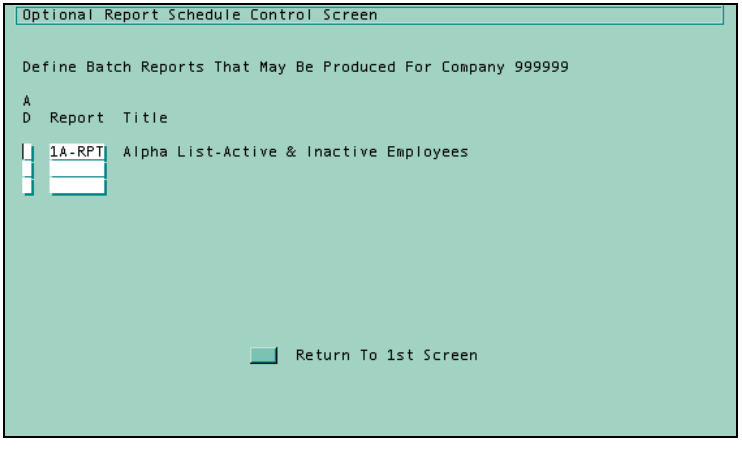
Note: The name that you enter can not be a report group name; it must be the program name of the report.

Repeat Steps 4 and 5 to add or delete additional reports.

6. Save the form

Press Enter or click the Save button to save the form.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Organization report restrictions ***(on page 329)***

For more information on restricting reports that can be run by an organization.

Deleting a report group

To delete a report group using the Report Group Activities form (RGMSTR), complete the following steps:

1. Access the Report Group Activities form

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

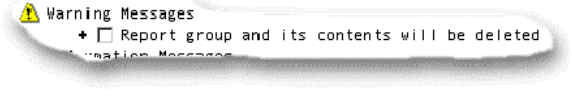
Component:	Reporting
Process:	Report Scheduling
Task:	Schedule Report Groups

2. Select the report group you want to delete

From the selection list, select the report group you want to delete.

3. Click Delete

A warning message displays in the Message area.



4. Check the box and press Enter to confirm your deletion

The report group is deleted. The Report Group Activities form (RGMSTR) is displayed.

See also:

- Report groups ***(on page 301)***

For more information on report groups.

- System messages ***(on page 242)***

For more information on warning messages.

Extended Practice

Note: In a classroom setting, each student must have a unique User Code, Password, Operator ID, and user folder to successfully complete some of the following Extended Practices.

1. Add a test report group named TESTRG. Include the Birthday Listing report (1G-RPT) that is located in the HRMS report category.

2. Add the TESTRG report group to the Tools ► Reporting ► HRMS menu.

3. Launch the TESTRG report group from the menu.

4. View the TESTRG.LOG file using the Process Monitor.

5. View the TESTRG.LIS report output file using the Report Viewer.

Review of Questions Answered

1. What is packaged reporting?

2. What is a report group?

3. What is the required naming convention for report groups that are launched from the menu?

4. What three methods can be used to launch a report online?

5. What is the Process Monitor and how is it used?

6. What is the Report Viewer and how is it used?

7. How are log files used?

8. How are reports archived in The Solution Series?

9. How can you make packaged report processing more efficient?

CHAPTER 12

Using Query

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Introduction

This section introduces you to query tool called Solution View. You can use the Solution View tool to create queries. Queries offer you a way to view data online.

Because Solution View provides a way to create specific queries to meet your requirements, no queries are delivered with The Solution Series.

Note: *This section introduces you to queries and explains how to produce one. To take advantage of the many benefits that this tool offers, we recommend that you refer to the Using Solution View documentation and attend the Using Solution View training course.*

Tasks

This section explains the following:

- Creating a query
- Running a query

Prerequisites

- You must be signed on to The Solution Series.

☞ *Refer to* **Getting Started** *(on page 29) for more information on how to sign on to The Solution Series.*

- You must have read the chapter ***Exploring the Work Area*** (on page 49) which introduces you to The Solution Series interface.

- You must have read the chapter ***Navigating the System*** (on page 129) which explains how you navigate The Solution Series.

Questions answered

The following questions are answered in this section:

1. What is Solution View?
2. What is a query?

Solution View

Solution View is a user friendly solution for producing custom queries, reports, and extract files in an interactive 'question and answer' session. Solution View is delivered with The Solution Series and provides live data access across all system components.

With Solution View, you have the ability to specify data fields to be displayed and utilize a comprehensive range of mathematical operations (for example, total, average, and count). A wide range of data selection criteria can be specified, including point-in-time reporting and literal comparisons.

☞ *Refer to the Using Solution View documentation for additional information on Solution View.*

Queries

Queries offer you an ideal way to find out specific information quickly and easily. Solution View allows you to create a query that generates the specific information you want using live data.

For example, you might want to see a list of all active employees who have an annual salary of more than 60,000 per year. The query results from ACME Manufacturing would look like this:

```
Query XSAL  Key 00 From 8889                    99 To 9999

Salary Survey - Over 60,000

EMPLOYEE                                EMPLOYMENT    ANNUAL
NUMBER     EMPLOYEE-NAME-25                DATE       SALARY

0012       Anders, Andrew               01-08-1998    65,000.00
1112       JOHNSEN, RICH DANIEL         12-19-1979    68,499.96
1975       GRIMES, THEODORE J           06-01-1979    62,999.82
2002       BARNES, JOHNSON              05-01-1985    87,180.84
2006       COSTELLO, SUSANNE            07-10-1985    62,530.00
2008       HALL, RHONDA D.              09-06-1985    62,970.40
2015       MARGOLIS, DAVID              04-01-1986    69,600.00
2016       SHEA, JEFFERY B.             04-11-1986    61,500.00

Totals for QUERY program XSAL   ready to be displayed. Press your ENTER key.
```

```
                      TOTALS FOR QUERY PROGRAM XSAL  :

EMPLOYEE COUNT:                                8

ANNUAL-SALARY:                       540,281.02  AVERAGE:         67,535.13


----Complete----
                  00  Employee Number
                  01  Employee Soc Sec Nbr
                  02  Employee Name
                      See Documentation for Others
```

Note: *The Solution Series is not delivered with any predefined queries.*

Note: *While you can select any data field for a query, the output you will see depends on your user id.*

☞ *Refer to* **Reporting Administration** *(on page 271) and* **Using Packaged Reports** *(on page 295) for more information on reports.*

Launching and viewing Queries

Queries developed with Solution View (WRITER) can be run online or in batch using the Query Facility (QUERY). Additionally if you are running on Windows or Unix, you may launch a query using the Launch Enhanced Query Process form (QUESCR). Running a query this way allows you to use the Process Monitor to view the progress of the process and the Report Viewer to view the results.

See also:

- Running a Query ***(on page 377)***

For detailed directions on running a Query.

- Executing an enhanced query ***(on page 380)***

For detailed directions on running a query using the Launch Enhanced Query Process form (QUESCR).

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Creating a Query 374
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Creating a Query

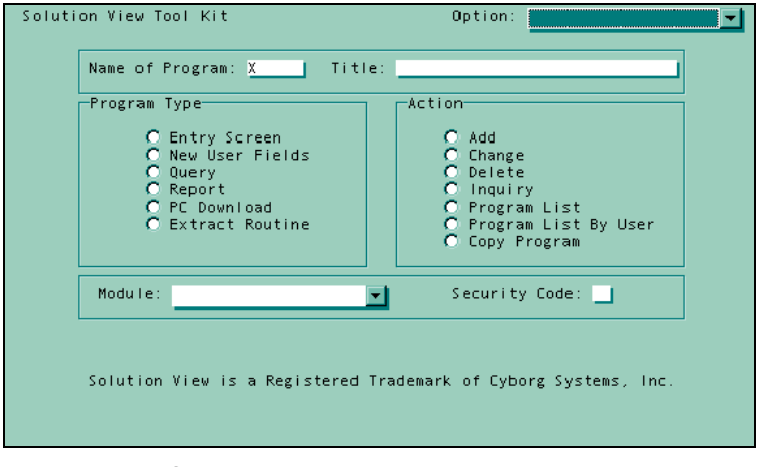
Note: *To take advantage of the many benefits that this tool offers, we recommend that you read the Using Solution View documentation and attend the Using Solution View training course.*

1. Access Solution View

Access the Solution View Tool Kit (WRITER) by making the following selections on the Navigator:

Component: User Tools
Process: User Tools
Task: Solution View

If you completed the previous step, the results should look similar to the example that follows:



2. Enter Name of Program

Enter the name of the query in the Name of Program text box.

3. Enter the Title

Enter a title for the query in the Title text box.

4. Select a Program Type

To create a query, you need to select Query as your program type.

5. Select an Action

To create a new query, you need to select Add as your action.

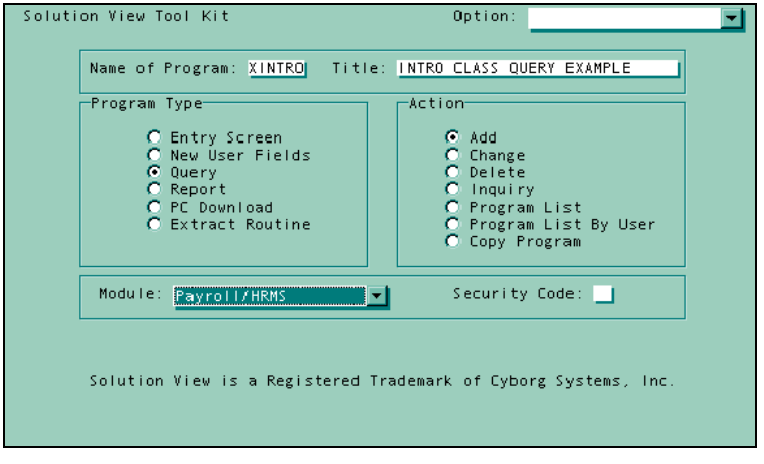
6. Select Module

Select which module you want the query to report from.

7. Click Save or press Enter

To save your settings, press Enter.

If you completed the previous steps, the results should look similar to the example that follows:



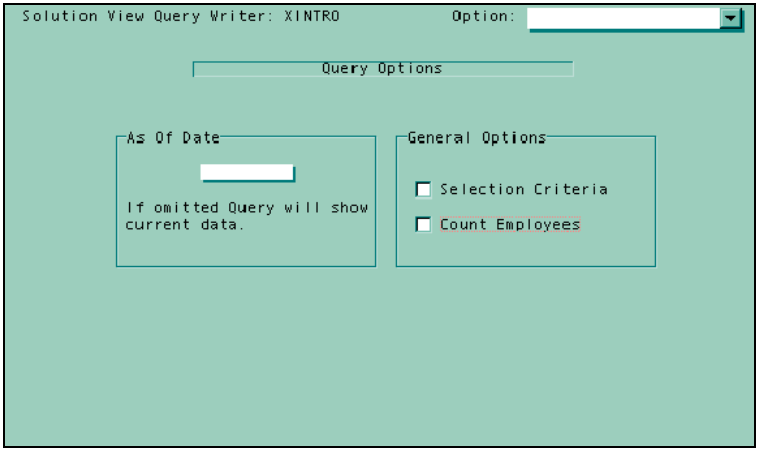
8. Clear Selection Criteria

In the General Options group box of the next panel that displays, the Selection Criteria option is already selected. For the XINTRO query, you do not need a selection criteria. Clear this check box.

9. Clear Count Employees

In the General Options group box, the Count Employees option is already selected. For the XINTRO query, you do not need to count employees. Clear this check box.

If you completed the previous steps, the results should look similar to the example that follows:



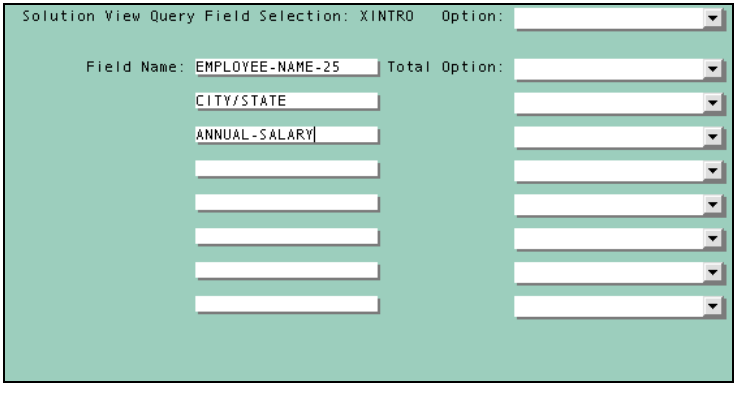
10. Click Save or press Enter

To save your settings, press Enter.

11. Enter the Field Names

Enter the names of the fields on which you want your query to report. Enter the names in the order you want them to appear on your query.

If you completed the previous steps, the results should look similar to the example that follows:



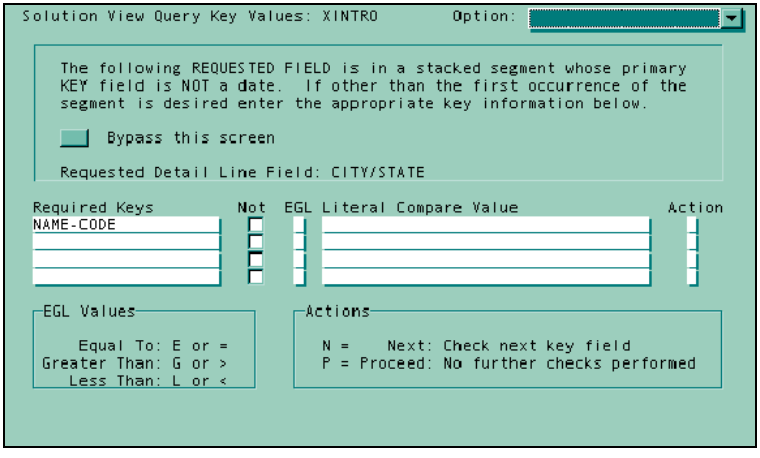
12. Click Save or press Enter

To save your settings, press Enter.

13. Click Bypass this screen

You do not need to use this form.

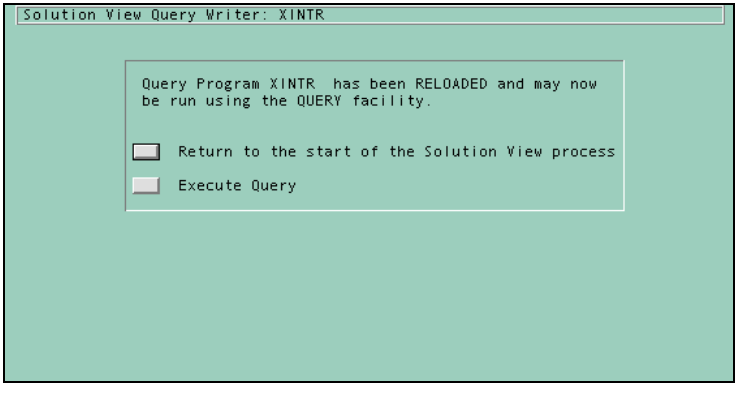
If you completed the previous steps, the results should look similar to the example that follows:



14. Click Return to the start of the Solution View process

Click Return to the start of the Solution View process to save your query.

If you completed the previous step, the results should look similar to the example that follows:



Running a Query

To run a query, complete the following steps.

Note: The Solution Series does not have any delivered queries. To run a query, you will have to do one of the following:

- Create your own query using Solution View
- Use a query that has previously been created

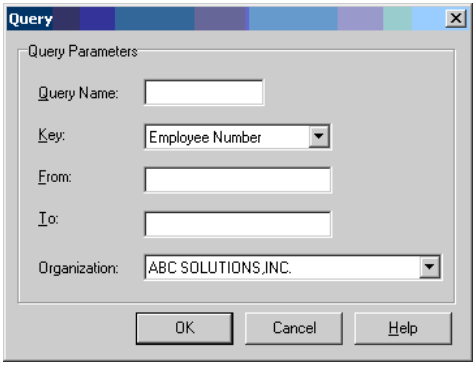
Note: For more detailed information on how to create queries using Solution View, refer to the Using Solution View documentation or attend the Using Solution View training class.

1. Access the Query dialog box

Access the Query dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Run a Query

If you completed the previous steps, the results should look similar to the example that follows:



2. Enter the Query Name

Enter the name of the query you want to use.

3. Select a Key

Select the Key option you want to use. By default, the option in the Key option list will be Employee Number. The options are:

- Employee Number
- Employee Soc Sec Nbr
- Employee Name

Note: If you select Employee number, your query will only use the organization on which you are currently working. If you select Employee Soc Sec Nbr or Employee Name, your query will use all the organizations in The Solution Series.

4. Enter a From and To value

These text boxes allow you to select which employees will be included in the query. The type of data you enter in these text boxes is determined by what you selected in the Key option list.

For example, if you selected 'Employee Number', you can enter either of the following:

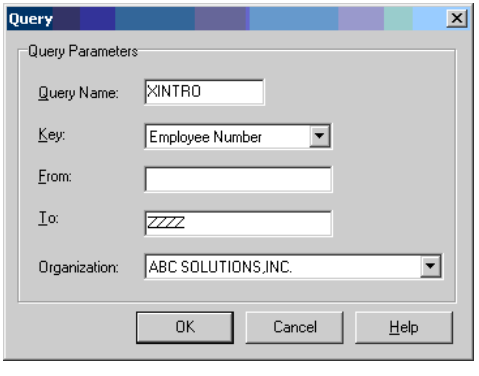
- A range of Employee Numbers—0000–9999, 0000–ZZZZ
- A specific Employee Number—1234–1234

5. Enter an Organization

Enter the Organization to query. How you do this depends on how your user options for selecting Organizations are set. If you have opted to select Organizations by number, type the number in the **O**rganization text box on the dialog. If you have not opted to select Organizations by number, select the Organization by name from the drop-down list.

☞ *Refer to Personalizing the Work Area for more information on setting user options.*

If you completed the previous steps, the results should look similar to the example that follows:



6. Click OK or press Enter

To create the query, click OK. The QUERY form will display.

If you completed the previous step, the results should look similar to the example that follows:

```
Query XINTRO Key 00 From 1114                    99 To ZZZZ

INTRO CLASS QUERY EXAMPLE

                                                          ANNUAL
EMPLOYEE-NAME-25            CITY/STATE                    SALARY

MEYER, JUNE                 EL SEGUNDO, CA                25,000.00
MOORE, SAMUEL               JAMAICA ESTATES, NY           60,000.00
MUIR, LINDA                 CHICAGO, IL                   16,000.00
MORSE, GORDAN               CHICAGO, IL                   20,799.60
MORRIS, ROBERT              JAMAICA ESTATES, NY           11,086.40
MERTZ, LYNNE C.             DES PLAINES, IL               13,832.00
MORITZ, KATHERINE C.        EL SEGUNDO, CA                45,000.00
MAURICE, STACY E.           CHICAGO, IL                   19,240.00
MOREAU, GARDNER             CICERO, IL                    21,450.00
MOHR, MICHAEL T.            CHICAGO, IL                   11,089.52
BALDWIN, ALICE A            PEARL RIVER, NY               17,246.84
JONES, JERRY                CHICAGO, IL                   13,302.64
JOHNSEN, RICH DANIEL        JAMAICA ESTATES, NY           68,499.96
BARTHOLOW III, JONATHAN     GLENVIEW, IL
WELKER, GEORGE W            NEWPORT BEACH, CA             31,831.80
```

See also:

- Queries ***(on page 372)***

For more information on queries.

Executing an enhanced query

The Launch Enhanced Query Process form (QUESCR) is available only if you are running on a Windows or Unix platform. It provides the added ability to view the progress of the process using the Process Monitor and to view the query results using the Report Viewer. To launch an enhanced query, follow these steps:

1. Access the Launch Enhanced Query Process form (QUESCR)

Access this form by selecting:

Component: User Tools
Process: User Tools
Task: Launch Enhanced Query Process

2. Enter the Query/Extract Name

Enter the name of the Query developed under Solution View.

3. Specify a key from the drop-down list

Enter the key information to search the file for entries. Type 01 for Employee Number, 02 for Employee Social Security Number, or 03 for Employee Name.

4. Enter the beginning range parameter

The From text box allows you to select the beginning of the range of employees to include in the query. The type of data you enter is determined by what you entered in the Key text box.

For example, if you entered '01' (Employee Number) in the Key text box, you can enter 0000 in the From text box and 9999 in the To text box to include all employees whose

employee number is within that range. To include a single employee, type the employee number in both text boxes.

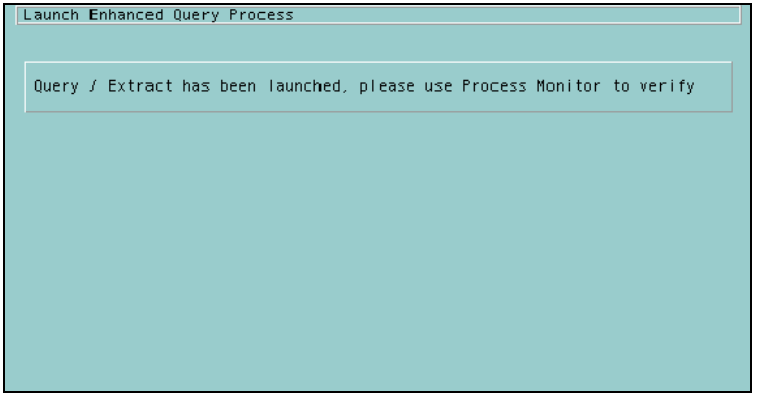
5. Enter the ending range parameter

The To text box allows you to select the ending of the range of employees to include in the query. The type of data you enter is determined by what you entered in the Key text box.

For example, if you entered '01' (Employee Number) in the Key text box, you can enter 0000 in the From text box and 9999 in the To text box to include all employees whose employee number is within that range. To include a single employee, type the employee number in both text boxes.

6. Click Save or press Enter

A confirmation form is displayed indicating that the query has been launched. At this point, you can access the Process Monitor and Report Viewer.



See also:

- Launching and viewing Queries ***(on page 373)***

For more information about launching queries online.

- ***Running a QUERY against a single Org/C12 - online JQUERY (+params)***

To learn how to use a UK administration script to launch a query against a single organisation

Review of Questions Answered

1. What is Solution View?

2. What is a query?

PART 4

Practice and Review Answers to Using the Solution Series Exercises

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APPENDIX A

GUI Controls Quick Reference

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Introduction

This appendix provides a quick reference guide to the Graphical User Interface (GUI) controls covered in this manual.

Toolbars

The Solution Series is delivered with a default set of function toolbars so you can perform various tasks with one click of the mouse. Toolbars make your job easier and help you work more efficiently.

There is one Favorites toolbar and one Launch toolbar.

There are several delivered function toolbars:

- Standard—includes print, exit, save, cancel, save employee, back, and forward
- Standard with text—the Standard toolbar with button descriptions
- Office Integration—select a letter or email communication event, view and print queued letters, Import Manager
- Payroll—restore data, what-if, and update mode
- Position Administration—job, organization unit, position, and incumbent
- Selection—selection list navigation actions
- Checklist—navigation and control actions for the Checklist
- Support Systems—access to the support interface, form help, and What's This? function

The Standard, Selection, and Support Systems toolbars display by default.

You can get the most out of toolbars by personalizing them to meet your own specific needs. You can show and hide toolbars, move toolbars, modify toolbars, and create your own toolbars.

Standard toolbar reference

Button	Caption	Description
	Exit	Exit from The Solution Series
	Print	Print the current window
	Save	Save this Form
	Cancel	Cancel this Form
	Employee	Select an Employee or Organization
	Selections	Show selection list in the message area
	Paused Lists	Display a list of paused Checklists
	Back	Go back to the previous form

Button	Caption	Description
	Back drop-down	Displays a list of up to nine previous forms
	Forward	Go forward to the next form
	Forward drop-down	Displays a list of up to nine next forms
	Add Bookmarks and Favorites	Create Bookmarks and Favorites
	Clear Fields	Clear all the text boxes on this form
	Delete This Entry	Delete the current record from the database

Office Integration

Button	Caption	Description
	Select a Letter	Displays a list of letter communication events that can be generated manually.
	Select an Email	Displays a list of email communication events that can be generated manually.
	Show Queued Letters List	Shows the list of communication event letters queued for printing. Also shows the last letter printed.
	Import Manager	Starts the Import Profile Manager, from which you can set up or start an import.

Selection toolbar

Button	Caption	Description
	Up	Move up to the next selection in the message area
	Down	Move down to the next selection in the message area
	Top	Moves up to the top of the selection list
	Refresh	Refresh the selection list

Payroll toolbar

The options listed below are only available when using online pay calculation:

Button	Caption	Description
	Restore	Restore Data
	What-If	Switch to 'What If?' mode
	Update	Switch to 'Update' mode

Position Administration toolbar

Button	Caption	Description
	Job	Job
	Org Unit	Organization Unit
	Position	Position
	Incumbent	Incumbent

Checklist toolbar

Button	Caption	Description
	Save	Save this Form
	Next	Go to the next item in the Checklist
	Previous	Go to the previous item in the Checklist
	Pause	Pause the Checklist
	Finish	Finish the Checklist

Support Systems toolbar

Button	Caption	Description
	Help on all of The Solution Series	Launch the Help file
	Form Help	Help on This Form
	What's This?	What's This?

Launch toolbar

The Launch toolbar gives you access to other applications installed on your computer. From the Launch toolbar, you can start other applications such as Microsoft Word, Lotus Notes, and Cognos Impromptu.

You can add, edit, and remove Launch toolbar applications using the Customize Launch Bar dialog box.

The following table explains the buttons that could be added to the Launch toolbar for additional functionality:

Button	Caption	Description
	Impromptu	User defined
	PowerPlay	User defined
	Document Explorer	Launch the Document Explorer

Button	Caption	Description
	Launcher	Launch the Document Launcher
	Process Monitor	Launch the Process Monitor
	Report Viewer	Launch the Report Viewer

Favorites toolbar

Favorites are bookmarks that you select to display on the Favorites toolbar. Favorites give you even quicker access to forms and checklists than bookmarks on the Bookmarks menu. Because favorites become buttons on the Favorites toolbar, you can access a form or checklist with just one mouse click or function key press.

Additional toolbar icons

These buttons can be added to customized toolbars:

Button	Caption	Description
	Bookmark	Bookmarked form or checklist
	Customize	Customize the toolbar
	Command	Enter a direct command
	Query	Run a Query
	Undo	Undo the last action
	Cut	Cut the selection
	Copy	Copy the selection
	Paste	Paste the selection
	Delete	Delete the selection
	Select all	Select all of the current text box
	Ins. Date	Insert today's date automatically into the current date text box
	Calendar	Display a calendar to select a date

Button	Caption	Description
	Hide/ Show	Hide or Show the message area

Buttons

Add Bookmark button (Standard toolbar)

Displays the Customize Bookmarks and Favorites dialog.

Back button (Standard toolbar)

Moves back to the previous form.

Displays a list of up to nine previous forms, which you can select to go back to.

Cancel button (Standard toolbar)

Cancels all information that has been entered on the form since the last save and returns form to default settings.

Clear button (Standard toolbar)

Removes values from all the text boxes on the form.

Delete button (Standard toolbar)

Displays a Confirm dialog. If 'Yes' is selected, the current record is deleted.

Employee command (Standard toolbar)

Displays the Employee Selection dialog.

Exit button (Standard toolbar)

Closes all session windows and exits The Solution Series.

Forward button (Standard toolbar)

Moves forward to the next form. This option is only active once the Back button has been used.

Displays a list of up to nine forms, which you can select to go forward to.

Print button (Standard toolbar)

Prints one copy of the active window using the current print settings.

Save button (Standard toolbar)

Saves the form.

Select button (Standard toolbar)

Displays a selection of records in the message area.

Show paused checklists button (Standard toolbar)

Displays a list of paused checklists in the Resume a Checklist dialog.

Copy command (Edit menu)

Copies the selection (text box or partial text box) from the active form and transfers it to the Clipboard.

Cut command (Edit menu)

Removes the selection (text box or partial text box) from the active form and transfers it to the Clipboard.

Delete command (Edit menu)

Deletes the selected contents of a text box.

Paste command (Edit menu)

Inserts the contents of the Clipboard at the insertion point.

Select All command (Edit menu)

Selects the contents of the text box.

Undo command (Edit menu)

Restores the active text box to its previous value before the current change was made.

Customize menus command (View menu)

Displays the Menu Editor.

Calendar command (Actions menu)

Displays the Calendar dialog.

Enter Command (Actions menu)

Displays the Command Entry dialog.

Hide/Show Message area command (Actions menu)

Hides or shows the message area at the bottom of the Work Area.

Insert today's date command (Actions menu)

Inserts today's date into the current date text box.

Query command (Actions menu)

Displays the Query dialog.

Incumbent button (Position Management toolbar)

Selects an Incumbent, which is each Position an employee is associated with.

Job button (Position Management toolbar)

Selects a Job, which is a generic description of the role within the organization (for example, manager).

Organization Unit button (Position Management toolbar)

Selects an Organization Unit, which is a group of Positions (for example, a department).

Position button (Position Administration toolbar)

Selects a Position, which is a specific role in an organization for someone performing a particular Job (for example, a Sales Manager).

Restore Data button (Payroll menu)

Restores data. This option is only active while running online pay calculation.

Update Mode button (Payroll menu)

Displays in Update mode. This option is only active while running online pay calculation.

What-If Mode button (Payroll menu)

Displays in What-If mode. This option is only active while running online pay calculation.

Customize Bookmarks and Favorites command (Bookmarks menu)

Displays the Customize Bookmarks and Favorites dialog.

Down button (Selection toolbar)

Moves down to the next record in the selection list.

Refresh button (Selection toolbar)

Refreshes the selection list.

Top button (Selection toolbar)

Moves to the top record in the selection list. If the list is dated, it will move to the most recent or future dated record.

Up button (Selection toolbar)

Moves up to the next record in the selection list.

Finish button (Checklist toolbar)

Finishes the active checklist.

Next button (Checklist toolbar)

Moves to the next item in the active checklist.

Pause button (Checklist toolbar)

Pauses the active checklist.

Previous button (Checklist toolbar)

Moves to the previous item in the active checklist.

Save button (Checklist toolbar)

Saves the form.

About The Solution Series command (Help menu)

Displays the version number of The Solution Series; copyright and legal notices; certification information, and the user ID and session number.

Help on Component command (Help menu)

Provides help on The Solution Series component associated with the active form.

Help on all of The Solution Series command (Help menu)

Provides help topics for all of The Solution Series components.

Help on this Form (Support Systems toolbar)

Displays help for the active form.

Help on all of The Solution Series button (Support Systems toolbar)

Provides access to all of the online help files provided with The Solution Series.

What's this help button (Support Systems toolbar)

Provides a brief description of a selected area with one mouse click.

Import button (Office Integration toolbar)

Starts the Import Profile Manager, from which you can set up or start an import.

Select an Email button (Office Integration toolbar)

Displays a list of email communication events that can be generated manually.

Select a Letter button (Office Integration toolbar)

Displays a list of letter communication events that can be generated manually.

Show Queued Letters List button (Office Integration toolbar)

Shows the list of communication event letters queued for printing. Also shows the last letter printed.

Components

Absence Management component (Navigator)

The Absence Management component is available to UK customers only.
It covers all tasks relating to the processes of:

- Organisation options
- Employee options
- Absence Recording
- Inquiries and Queries

Access the associated tasks by clicking on the appropriate process bar.

Administrator Tools (Navigator)

The Administrator Tools component includes facilities for system administration. It also includes the User Tools process.

It includes facilities for:

- Data default setup
- Creating and maintaining communication events
- Creating and maintaining checklists
- Employee search facilities (UK only)

Access the associated tasks by clicking on the appropriate process bar.

Benefit Plan Setup and Maintenance component (Navigator)

The Benefit Plan Setup and Maintenance component is used to define the tables for all types of benefit plans.

It contains the following components:

- Welfare Plans
- Deferred Plans
- Flex Plans
- Considered Earnings/Hours Accumulators
- Benefit User Tools

Access the associated tasks by clicking on the appropriate process bar.

Construction Industry Version component (Navigator)

The Construction Industry Version component is available to UK customers only.

It covers all tasks relating to the processes of:

- Maintain Project Information
- Maintain Working Rule Agreements
- Employee Details
- Queries

Access the associated tasks by clicking on the appropriate process bar.

Deferred Plans Enrollment/Maintenance component (Navigator)

The Deferred Plan Enrollment/Maintenance component is used to administer all deferred benefit plans and to view service/retirement/vesting information about employees.

It includes the following processes:

- Service, Vesting and Retirement Info
- Defined Benefit Plan Account Info
- Defined Contribution Plan Account Info
- Thrift/Savings Plan Account Information
- Stock Plans Account Information
- View all Plan Rules
- Eligibility Enrollment

Access the associated tasks by clicking on the appropriate process bar.

Development Tools component (Navigator)

The Development Tools component includes system administration and programming facilities.

It includes:

- Employee Database Utilities
- System Control Repository Utilities
- System Operations
- Option Lists
- Field and Verbs
- Programming Utilities
- Installed software releases (UK only)

Access the associated tasks by clicking on the appropriate process bar.

Only system administrators and programmers should have access to this component.

Employee Compensation component (Navigator)

The Employee Compensation component includes all aspects of an employment including the processes of:

- Tracking employee relocation expenses
- Managing employee compensation

Access the associated tasks by clicking on the appropriate process bar.

In the UK, the Employee Compensation component includes all aspects of an employment including the processes of:

- Managing employee compensation
- Company property

Access the associated tasks by clicking on the appropriate process bar.

Employee Development component (Navigator)

The Employee Development Component covers all aspects of the processes of:

- Employee Skills, competencies, training
- Track performance appraisals

Access the associated tasks by clicking on the appropriate process bar.

On UK systems this component is known as Training and Development. It covers all aspects of the processes of:

- Setting up and maintaining courses
- Setting up and maintaining classes
- Entering employee training data
- Registering an employee for training
- Canceling registrations
- Processing results and analyzing costs
- Employee skills and education
- Performance appraisals.

Access the associated tasks by clicking on the appropriate process bar.

Employee Payroll component (Navigator)

The Employee Payroll component covers all aspects of creating and maintaining an employee's payroll information.

It includes the following processes:

- Hire, rehire, reinstate an employee
- Maintain employee general details
- Maintain employee payroll details
- Manage employee attendance
- Manage terminations, leaves and returns
- Wages and tax adjustments
- Time entry

Access the associated tasks by clicking on the appropriate process bar.

In the UK the following processes are included in the Employee Payroll component:

- Adding and maintaining employee details
- Earnings and deductions
- Input variable data
- Maintaining Multicurrency payroll details
- Multicurrency time entries
- Statutory details
- EDI
- Managing court orders
- Perform reversals and adjustments
- Terminations and maternity leavers
- Viewing payslip and costing history

Access the associated tasks by clicking on the appropriate process bar.

Employee Relations component (Navigator)

The Employee Relations component covers the processes of:

- Tracking discipline and grievances
- Manage employee health and safety

Access the associated tasks by clicking on the appropriate process bar.

Employee Resourcing component (Navigator)

The Employee Resourcing component covers all tasks relating to the processes of:

- Recruiting and selecting employees
- Hiring, rehiring and reinstating employees
- Managing employee attendance
- Managing terminations, leaves and returns
- Maintaining employee details
- Maintaining dependent details (North American system only)

Access the associated tasks by clicking on the appropriate process bar.

In the UK the Employee Resourcing component covers all tasks relating to the above processes, plus the following processes:

- Queries
- Requisition details
- Managing absence
- Working Time

Flex Plans Enrollment/Processing component (Navigator)

The Flex Plan Enrollment/Processing component is used to enroll employees in flex plans, compute flex credits, and view flex plan information.

It contains the following processes:

- View all plan rules
- Flex credits
- Flex enrollment

Access the associated tasks by clicking on the appropriate process bar.

HESA component (Navigator)

The HESA component is available to UK customers only.
It covers all tasks relating to the processes of:

- HESA forms
- Other HESA details

Access the associated tasks by clicking on the appropriate process bar.

HR Setup component (Navigator)

The HR Setup component includes all aspects of organizational setup to use the HRMS application. It includes setting up all organizational rules using tables and linking those rules to organizations.

Health Care Trust (HR) component (Navigator)

The Health Care Trust component is available to UK customers only.

It covers all tasks relating to the process of:

- Health Care details

Access the associated tasks by clicking on the appropriate process bar.

Health Care Trust (Payroll) component (Navigator)

The Health Care Trust component is available to UK customers only.

It covers all tasks relating to the process of:

- Additional Health Care data
- Reportable Pension details

Access the associated tasks by clicking on the appropriate process bar.

Health/Welfare Plan Enrollment/Maintenance component (Navigator)

The Health/Welfare Plan Enrollment/Maintenance component is used to handle enrollments for welfare plans, view plan rules, and administer Flexible Spending Accounts (FSAs).

It contains the following processes:

- FSA plan claims
- View all plan rules
- Eligibility and enrollment

Access the associated tasks by clicking on the appropriate process bar.

Local Government Module component (Navigator)

The Local Government Module component is available to UK customers only.

It covers all tasks relating to the processes of:

- CLASS interface
- Joint Staffing Watch/L42 return
- DFE return
- Compensatory Grant
- UNISON
- LGA Basic Details - Scottish
- SPPA return

Access the associated tasks by clicking on the appropriate process bar.

Payroll Setup Processing component (Navigator)

The Payroll Setup Processing component includes all processes related to setting up an organization's payroll.

It includes the following processes:

- Setting up and maintaining G/L account numbers
- Organization level setup and maintenance
- Setup for payroll processing
- Tax information
- Maintaining organization payroll details

Access the associated tasks by clicking on the appropriate process bar.

In the UK this is known as the Organisation Payroll component. It includes all processes related to setting up an organization's payroll.

It includes the following processes:

- Setting up a new Organisation
- Maintaining Rules, Rates and Limits
- Administering Statutory details
- EDI control
- Setting up payrun parameters
- Setting up Multicurrency
- Setting up new employee options
- Payroll processing

Access the associated tasks by clicking on the appropriate process bar.

Payroll Year End component (Navigator)

The Payroll Year End component includes all tasks relating to setting up and maintaining your organization's year-end processing.

Pension Calculations component (Navigator)

The Pension Calculations component is available to UK customers only.

It covers all tasks relating to the processes of:

- CA forms
- Benefit Statements
- Statutory Factors
- Actuarial Factors
- Perform calculations

Access the associated tasks by clicking on the appropriate process bar.

Pension Scheme Membership component (Navigator)

The Pension Scheme Membership component is available to UK customers only.

It covers all tasks relating to the processes of:

- Queries
- Previous Memberships
- AVC Scheme Membership
- Leaver Record Keeping
- Maintain Member Details

Access the associated tasks by clicking on the appropriate process bar.

Pensioners In Payment component (Navigator)

The Pensioners In Payment component is available to UK customers only.

It covers all tasks relating to the processes of:

- Queries
- Pension increases
- Other useful information
- Setup/Maintain pension details

Access the associated tasks by clicking on the appropriate process bar.

Position Administration component (Navigator)

The Position Administration component contains the functionality to record at position and job levels, as well as organizational requirements, which can be compared with actuals at an employee level. It also includes Complement Control, which is used to control a complement of staff for an organization.

The following processes are included:

- Organization unit details
- Job details
- Position details
- Incumbent details
- Complement/vacancy details

Access the associated tasks by clicking on the appropriate process bar.

Reporting component (Navigator)

The Reporting Component includes all tasks related to scheduling and initiating report processing.

Reporting Administration component (Navigator)

The Reporting Administration component includes all tasks related to Reporting Administration.

Requisition Tracking component (Navigator)

The Requisition Tracking component is used when recruiting employees to track against a staff requisition.

Salary Administration component (Navigator)

The Salary Administration component includes all processes and tasks relating to setting up and maintaining salary plans and budgets.

It includes the following processes:

- Setting up across-the-board salary plans
- Setting up pay-for-performance salary plans
- Producing the annual salary budget
- Performing and processing reviews

Access the associated tasks by clicking on the appropriate process bar.

Scheme Rules component (Navigator)

The Scheme Rules component is available to UK customers only.

It covers all tasks relating to the process of:

- Setup/Maintain rules

Access the associated tasks by clicking on the appropriate process bar.

Security Tools component (Navigator)

The Security Tools component should only be accessible to the Security Officer. This component gives the Security Officer access to all utilities for setting up and maintaining the system security. It also includes the Administrator Tools and User Tools processes. Additionally, in the UK it includes the Employee Search Utilities process.

Structured Payroll component (Navigator)

The Structured Payroll component is available to UK customers only.

It covers all tasks relating to the processes of:

- Maintain Pay Tables
- Employee Payments
- Proration processes
- Retrospection
- OSP system
- OMP system
- Maintain Alternate Keys

Access the associated tasks by clicking on the appropriate process bar.

Time and Attendance component (Navigator)

The Time and Attendance component covers all aspects of setting up, maintaining, and daily use of the Time and Attendance Solution.

It includes the following processes:

- Setting up and maintaining employee details
- Running online queries
- Using utilities
- Setting up T&A rules
- Setting up crew rotations (North America only)
- Viewing crew rotations (North America only)
- Setting up roster patterns (UK only)
- Flexitime rules (UK only)
- Daily processing

Access the associated tasks by clicking on the appropriate process bar.

Training Administration component (Navigator)

The Training Administration component deals with setting up and maintaining training class availability, employee registrations for training, and recording the results of the training.

It includes the following processes:

- Setting up and maintaining courses
- Setting up and maintaining classes
- Entering employee training data
- Registering an employee for training
- Canceling registrations
- Processing results and analyzing costs

Access the associated tasks by clicking on the appropriate process bar.

User Tools component (Navigator)

The User Tools includes utilities for application tools, such as Solution View.

All utilities for customizing the launch toolbar, changing your user code and password, and modifying checklists are included in this component.

Access the associated tasks by clicking on the appropriate process bar.

In the UK the following processes are also available:

- Employee search utilities
- Online queries

Vehicles, Expenses and Benefits component (Navigator)

The Vehicles, Expenses and Benefits component is available to UK customers only.

It covers all tasks relating to the processes of:

- Tables
- Organisation screens
- Employee screens

Access the associated tasks by clicking on the appropriate process bar.

Work Area

Navigator area

Provides an easy way to navigate the system using a three-level navigation format composed of the following: Components, the Processes associated with components, and the Tasks associated with a process.

Process bars

Categorizes the different tasks within a component. Process bars are displayed at the top of the Navigator and expand to reveal tasks when selected.

Tasks

Checklist

A checklist is a list of tasks to be performed in sequence. Checklists allow you to link tasks and even other checklists together to perform work flow functions.

Dialog Box

A dialog box is a secondary window that gathers additional information from a user.

Form

A form is a window of information that appears within the system, including text boxes and other controls. This was formerly known as a Screen.

Report Information

Report Information displays reports associated with the active component.

Wizard

The Checklist wizard is the tool used to create and modify checklists. The Checklist wizard walks through the tasks and options necessary to create and modify a checklist step-by-step.

Form area

Displays form information when a form is selected.

Message area

Displays two types of information—information, warnings, and reject messages in response to information entered on the form, or a selection list for forms that have multiple occurrences of the same type of information.

Status bar

Displays additional information about the data you have selected in the form area. By default, the Status bar will display the following: Current Organization number, for example 'Org 999999', and Current Employee Number, for example 'Employee 1234'.

The Status bar can be customized to display additional information.

Checklists

Checklist area

Displays the checklist items and controls. Used as the preferred method of navigating through the checklist items.

Checklist heading

This indicates that the Message area is now being used to display a checklist.

Checklist subheading

Displays the name of the checklist being used.

Checklist item

A checklist provides a way to link different items (forms, dialog boxes, checklists) to create a workflow. Each of these items can then be completed consecutively, using the checklist to navigate them.

Items in a checklist can be either mandatory or optional. A mandatory item must be completed before the next checklist item can be accessed.

Mandatory item.

Completed mandatory item.

Completed optional item.

3. Salary Review Date

Optional item disabled.

Finish Checklist

Finish checklist control. Displayed in red to indicate that mandatory items have not been completed.

Finish Checklist

Finish checklist control. Displayed in green to indicate that mandatory items have been completed.

Pause Checklist

Pause checklist control.

Pause Checklist

This is a Checklist control. If you do not have the necessary information to complete a checklist, you can click on the Pause Checklist item and return to that checklist at a later date.

Finish Checklist

This is a Checklist control. When you have completed the mandatory checklist items the Finish Checklist control will be displayed in green. This indicates that you can now finish the checklist by clicking on the Finish Checklist item. You can also continue completing the optional checklist items, and then click on the Finish Checklist item.

APPENDIX B

Practice and Review Answers

In This Appendix

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Introduction

This appendix provides answers for the Apply the Concept questions, Review of Questions Answered and Extended Practice questions that are included in each instructional chapter.

Getting Started

Review of Questions Answered

1. What information must you have before you can log on?
   A user code, password and environment.

2. How can user codes and passwords be used as part of your organization's security strategy?
   Each user of The Solution Series should be given an individual user code and password. The system will only allow someone to log on when they have entered the correct user code and password. A user has three attempts to log on to the system. If they do not enter the correct user code or password on the third attempt they will not be allowed to log on. The system can be set up to prompt the user to change their user code on a regular basis. To ensure that only authorized users access The Solution Series a user should not reveal their user code or password to anyone else.

3. What methods are available for logging out of the system?
   In addition to the standard Windows actions for logging out of The Solution Series a user can use the following methods:

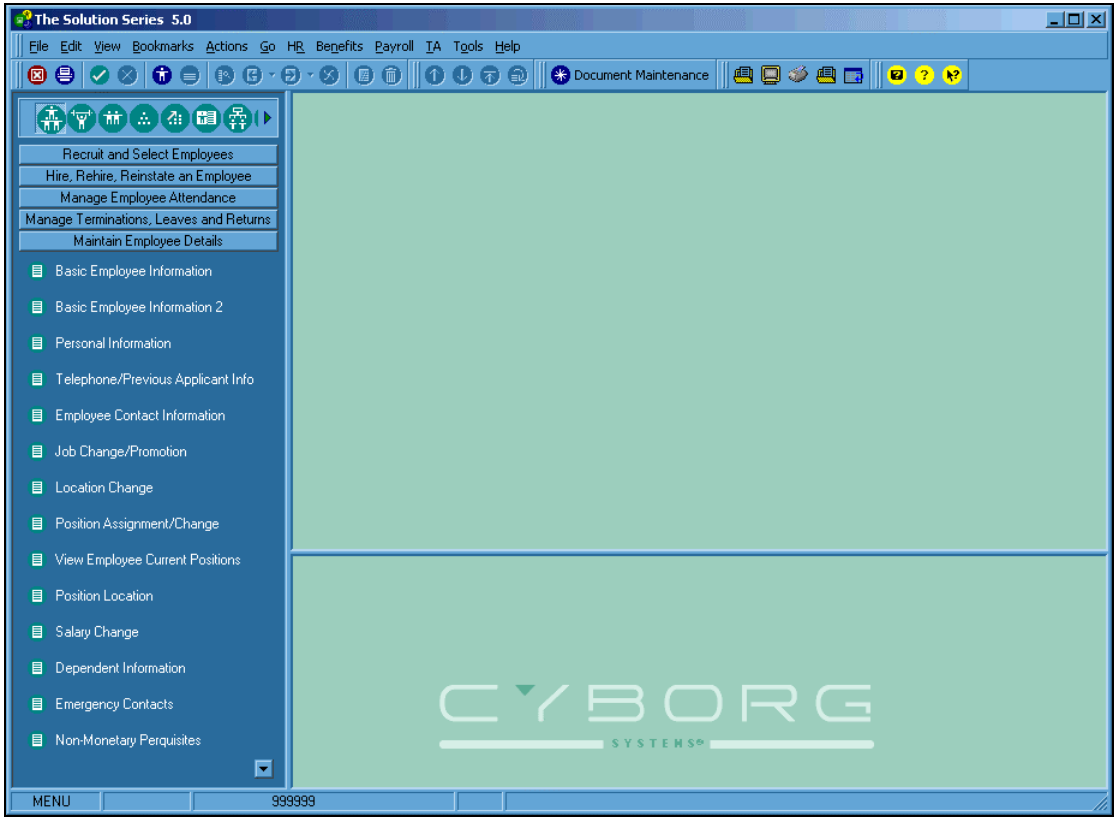
   - *If you usually use the mouse to navigate around the system you can use the Exit button on the Standard toolbar to log out of the system.*

   - *If you use the menus as your navigation method, you can use the Exit option on the File menu to log off the system.*

Exploring the Work Area

Review of Questions Answered

1. What is the Work Area?
   The Work Area describes the entire display area that you see after you log on to The Solution Series.

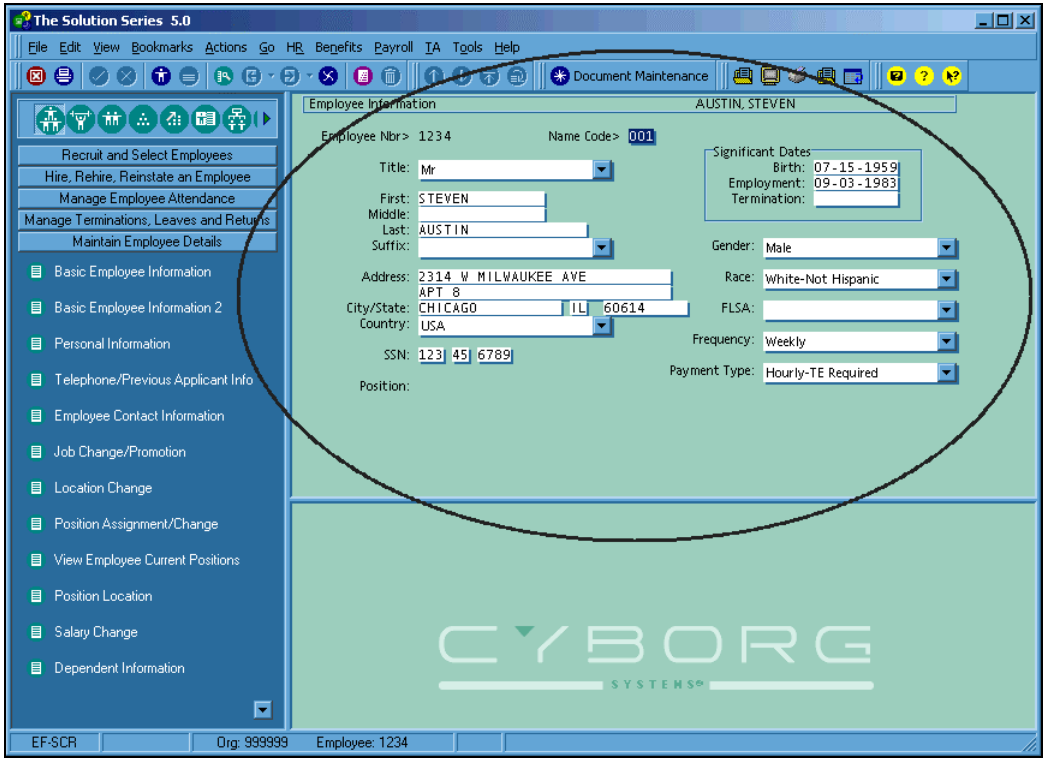


2. What are the different types of menus?
   The menus can be grouped into the following two categories.
   - *The Function menu which consists of File, Edit, View, Bookmarks, Actions, Go and Help.*
   - *The Application menu which consists of (HR, Benefits, Payroll, Time and Attendance (TA), and Tools.*

3. What is the Navigator?

The navigator is the preferred method of accessing different components and forms. It is the pane on the left side of your Work Area.

4. What is the Form Area?
   When you have navigated to a component and selected a form, it will be displayed in the Form area.



5. What is the Message area?
   The Message area is used to display two types of information.

   First, it is used to display information, warnings and reject messages in response to information that you have entered on the form.

   Second, it displays a selection list for forms that have multiple occurrences of the same type of information. You can use a selection list to choose the record that includes the information you want to work with.

6. What is displayed on the Status bar?
   The Status bar is used to display additional information about the data you have selected in the Form area. By default the Status bar will display the following:
   - *Current Organization number, for example 'Org 999999'*
   - *Current Employee Number, for example 'Employee 1234'*
7. What is a user profile?
   A user profile is used for security purposes to determine what you can and can not do while you are using The Solution Series, and which parts of the system you can access.
8. What are the shortcut menus?
   Many of the different parts of the Work Areas and forms have shortcut menus. Shortcut menus are accessed by a right-click. The contents of a shortcut menu is dependent on where you access it from.

Personalizing the Work Area

Review of Questions Answered

1. What areas of the Status bar can you control?
   You can show or hide three areas of the status bar—field descriptions, session number, and technical details.
2. What two areas of the Work Area can you show or hide?
   In the Work Area, you can show or hide the Navigator and Message area.
3. How can you personalize the way forms look?
   You can personalize the way forms look by displaying the employee's surname first or last, changing the font and font size, and changing the background.
4. Where can you move toolbars?
   You can move toolbars to almost anywhere on the Work Area.
5. What is the Launch toolbar?
   The Launch toolbar is a toolbar on which you can add buttons to access other applications installed on your computer.

Navigating the System

Review of Questions Answered

1. How is the Navigator organized?
   The Navigator is made up of these three levels:
   - *Components*
   - *Processes—each process is associated with a component*
   - *Tasks—each task is associated with a process*

2. What effect does your user profile have on information you can access?
   Your user profile determines what you can and can not do while using The Solution Series, and which parts of the system you can access.

3. How would you switch between forms?
   Your browser's Back and Forward buttons are a quick way to switch between forms

4. What are checklists?
   A checklist provides a way to link different items (forms, dialog boxes, checklists) to create a workflow. Each of these items can then be completed consecutively, using the checklist to navigate them.

5. What method is provided to allow the selection of a different employee?
   To switch between organizations and employees, you use the Employee Selection dialog box.

Personalizing Navigation Options

Review of Questions Answered

1. What is a bookmark?
   A bookmark is a menu item that gives you quick access to the forms and checklists you use most often. The forms and checklists that you select as bookmarks are added to the Bookmarks menu.
2. What is a favorite?
   A favorite is a bookmark that you select to display as a button on the Favorites toolbar.
3. How can you customize bookmarks and favorites?
   Bookmarks and favorites are assigned default names. You can customize the names to something more meaningful to you and assign function keys.

Using the Support Tools

Review of Questions Answered

1. What types of online help are provided?
   The Help system contains modular help files that allow you to access help for the entire system and standard Windows help on each component of the system. Standard Windows help contains cue cards, conceptual information, quick reference information, and the Ask Me wizard.

2. How do you access help for all of The Solution Series?
   You access the master help file by selecting the Help on all of The Solution Series option from the Help menu, or by clicking The Solution Series Support System button on the Support System toolbar.

Working with Data

Review of Questions Answered

1. What methods are available for viewing employee and organizational data?
   You can access an employee's records by entering the relevant information in one of three text boxes in the Employee Selection dialog box:
   - *Number—employee's Number*
   - *Name—employee's name*
   - *Social Sec Nbr—employee's Social Security Number*

2. What options are available for entering dates?
   Dates can be entered by doing one of the following:
   - *Manually entering the date in the correct format*
   - *Using an action to insert today's date*
   - *Using the Calendar dialog box to insert any date*

3. What types of numeric data are used?
   - *Rates*
   - *Hours*
   - *Percentages*
   - *Amount/Salary*

4. What are option lists and how are they used?
   An option list contains a list of predefined options for you to choose from. You must select one of the predefined options as your selection. In contrast to a character text box, you can not key your own data into an option list

5. What actions can be performed when working with forms?
   The following actions can be performed when working with forms:

Button	Name	Description
	Print the current window	Prints the current Work Area.
	Save	Saves the current data. This button is enabled when you have entered new data or amended existing data.
	Cancel	Cancels changes made to the current data. This button is enabled when you have entered new data or amended existing data.
	Change Employee	Accesses the Employee Selection dialog box.
	Select	Displays the Selection List in the message area. This button is enabled when there are multiple records for the form you have accessed.

Button	Name	Description
	Back (form)	Displays the previous record or records (form, table and so forth). This button is enabled when you have accessed two or more forms in the current session.
	Forward (form)	Displays the next record or records (form, table and so forth). This button is enabled when you have accessed two or more forms in the current session.
	Add Bookmarks and Favorites	Adds the current form to the Bookmarks menu.
	Clear Fields	Clear the data in the current record (form, table and so forth).
	Delete This Entry	Deletes the current selected record (form, table and so forth).

6. How are employee and organizational data deleted?
   Employee and organizational data can be deleted from The Solution Series *by doing one of the following:*
   - *Clicking the Delete button on the Standard toolbar.*
   - *Selecting the Delete This Entry menu option on the Actions menu.*

7. What types of system messages are provided?
   - *Reject*
   - *Warning*
   - *Information*

Using Reporting Administration

Review of Questions Answered

1. What are the two main types of extracts, and what are the differences between them?
   Data extracted during a full data mart data extraction is automatically inserted in to the data mart, allowing you to immediately run Impromptu reports on the newly extracted data. Subset extractions extract less than the full complement of data available and require additional work on the part of the system and/or database administrator. Since the data is extracted into character delimited files, these must be loaded into another database tool before you can perform any type of reporting. If you wish to do Impromptu reporting on data from subset extracts, it means setting up your own data mart, catalog, and reports.

2. If Position Administration is being used, how can a report be sorted by department?
   When you are reporting on employee data and your company uses Position Administration, it is important to sort any new reports by Sort Order Sequence Numbers (SOSNs). If you fail to do so, the information displayed on the report may be presented in an inappropriate order (for example, a list of divisions, then a list of departments, rather than a list of divisions, with their associated departments).

3. Why are as-of dates important for Reporting Administration?
   As-of dating is a powerful tool for sifting through a mass of information and locating just that which you wish to see. Effective start and end dates are captured with every bit of data as it is extracted from The Solution Series tables and imported into the data mart. This means you can (and should) use as-of dating to load the proper information into the Impromptu report you wish to display.

4. What is the high-level structure of the catalog?
   The catalog has five main folders (with subfolders within each). These main folders are Company Information, Employee Information, Position Management Information, Effective Dates, and Admin.

5. Which catalog folder would you look in to add an employee's nickname to your report?
   If you want your Impromptu report to display any employee nicknames, you must add a field on the report from the Employee Information\Name and Address\Name and Address (all name codes) subfolder.

Using Packaged Reports

Apply the Concept

1. Based on your understanding of this concept, which method of launching online reports assumes that you have already entered the report parameters and companies to be included in the report?
   Using the Report Group Activities form (RGMSTR) to launch reports assumes that these forms are already complete. However, if you launch a report group from the Navigator or menu, you will be prompted to complete these forms before executing the report group.

2. What advantage is there to launching a report group from the Navigator?
   When you select a report group from the Navigator, you are prompted for both the Parameter Selection form and the Limit Companies form. This automated process eliminates the possibility of omitting parameter and company information prior to executing the report group.

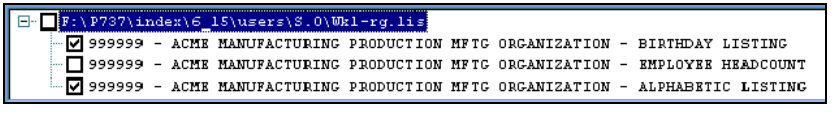
3. Based on your understanding of this concept, which of the following launched reports is active and still running?
   1G-RRG.LIW is the report that is running. Active logs, or logs for reports that are still running, are automatically assigned an LIW extension. The LIW extension denotes a report that is still in progress, or incomplete. When completed, the report will be automatically renamed with an LIS extension. These extensions help the Process Monitor determine which reports are complete and which ones are still in progress.

4. Can you view a report while it is active?
   No. Only completed reports can be viewed.

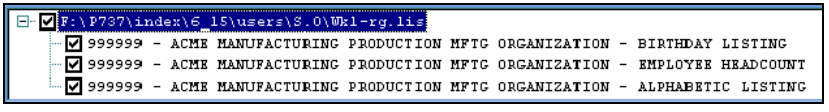
5. Based on your understanding of this concept, how would you use the process log?
   You may find it helpful to monitor the progress of a report run. If a report is expected to produce a very large output file, you may be able to determine and resolve significant errors before the report process ends.

   Using the Process Monitor utility, you will be able to determine which processes and reports have been completed. You can also view and print the completed reports from the Process Monitor.

6. What steps would you perform in the Report Viewer tree view to include all but one report?
   If you want to select all but one of the reports in the report group, clear the root entry and appropriate report check boxes.



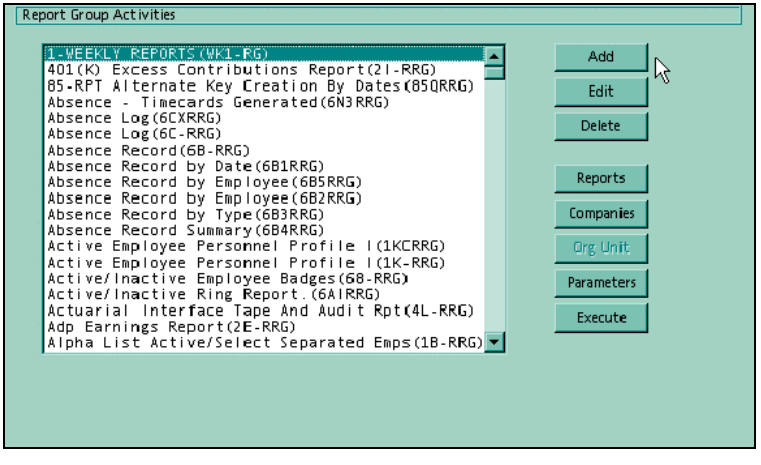
7. What steps would you perform in the Report Viewer tree view to include all reports?
   Select the check box for the main, or root entry, report file. All reports within the report group will automatically be selected.

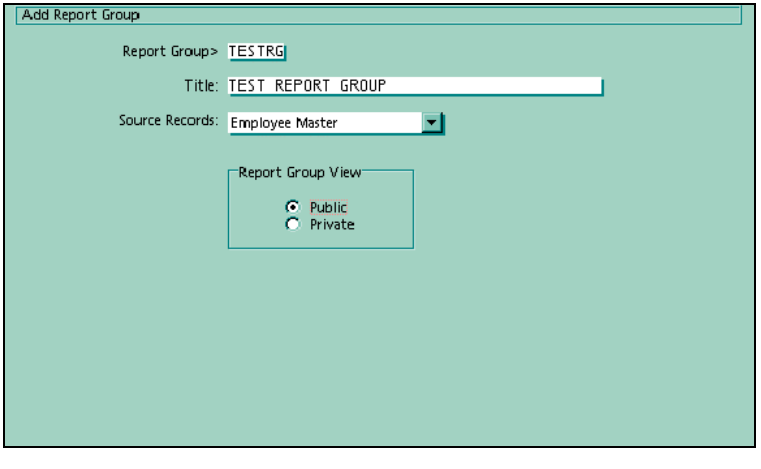


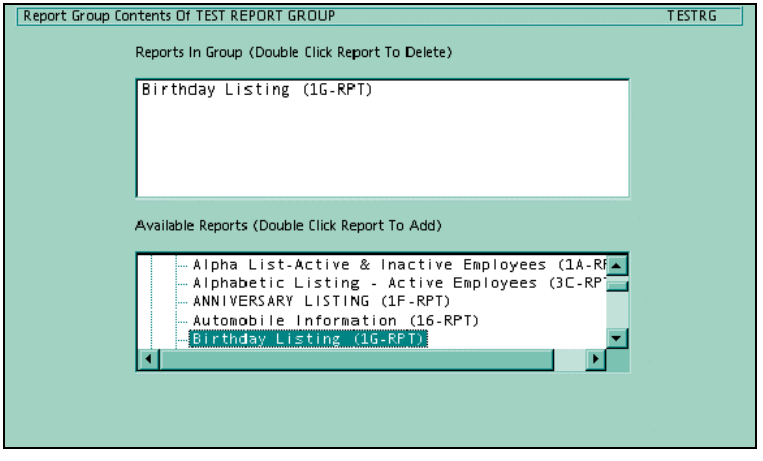
Extended Practice

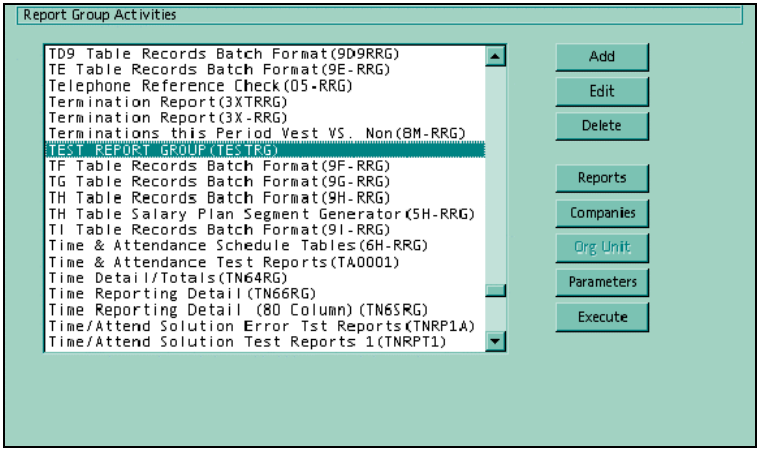
Note: The answers provided here assume an NT or Unix environment.

1. Add a test report group named TESTRG. Include the Birthday Listing report (1G-RPT) that is located in the HRMS report category.
   Use the Add button on the Report Group Activities form (RGMSTR).

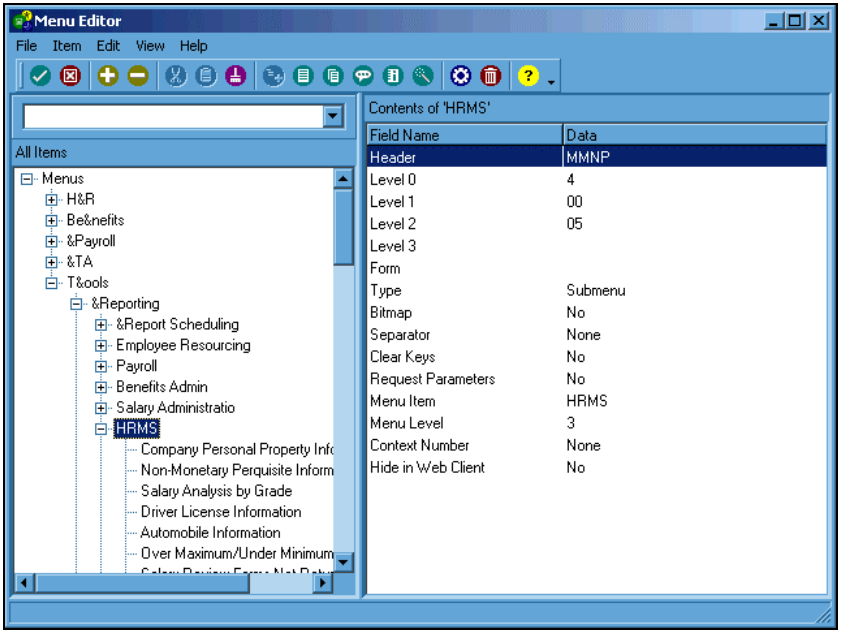


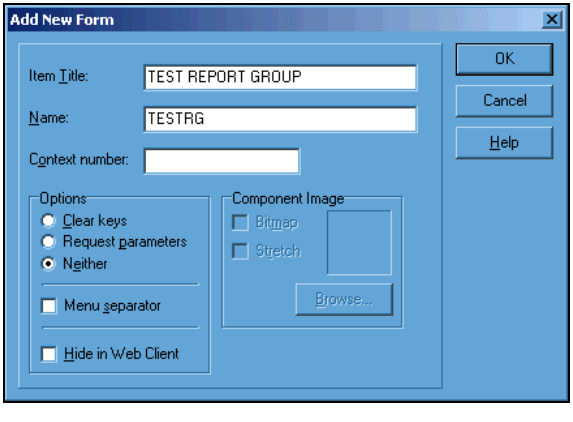


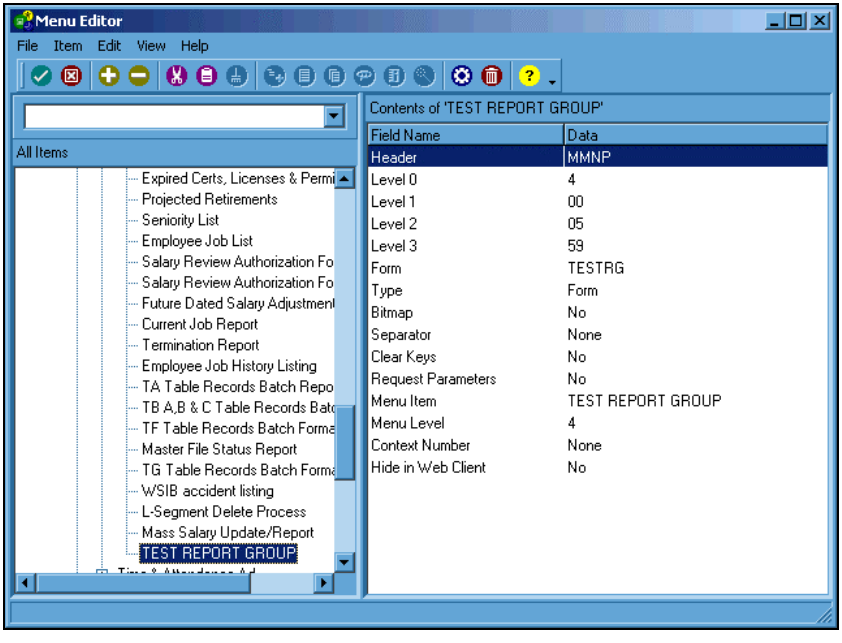




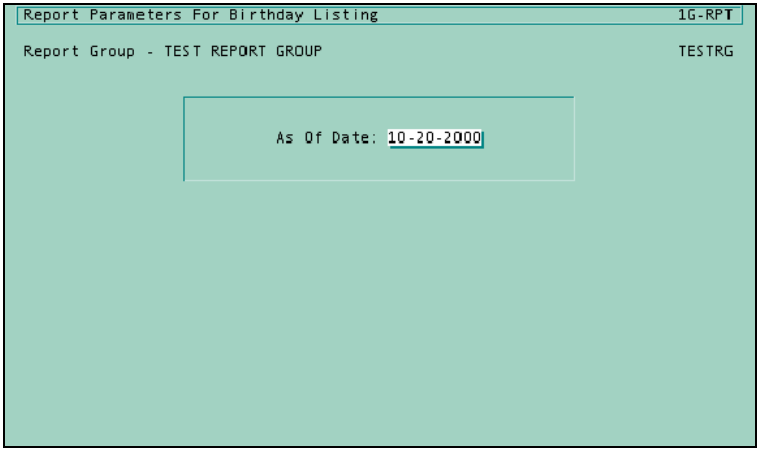
2. Add the TESTRG report group to the Tools ▶ Reporting ▶ HRMS menu. *Use the Menu Editor.*

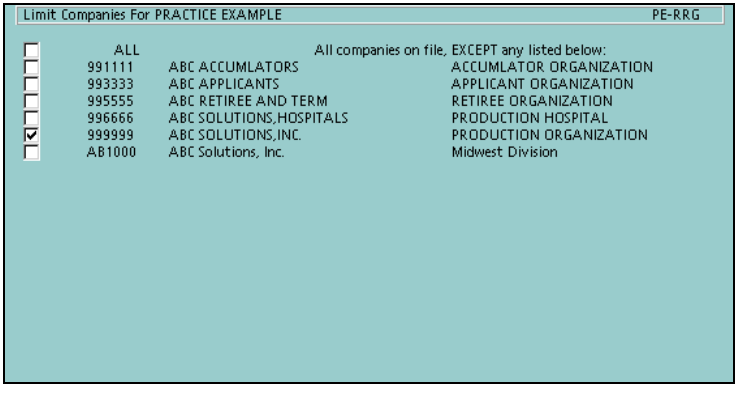

Menu Editor
File Item Edit View Help
All Items
Menus
H&R
Be&nefits
&Payroll
&TA
T&ools
&Reporting
&Report Scheduling
Employee Resourcing
Payroll
Benefits Admin
Salary Administratio
HRMS
Company Personal Property Inf
Non-Monetary Perquisite Inform
Salary Analysis by Grade
Driver License Information
Automobile Information
Over Maximum/Under Minimum
Contents of 'HRMS'
Field Name
Data
Header
MMNP
Level 0
4
Level 1
00
Level 2
05
Level 3
Form
Type
Submenu
Bitmap
No
Separator
None
Clear Keys
No
Request Parameters
No
Menu Item
HRMS
Menu Level
3
Context Number
None
Hide in Web Client
No

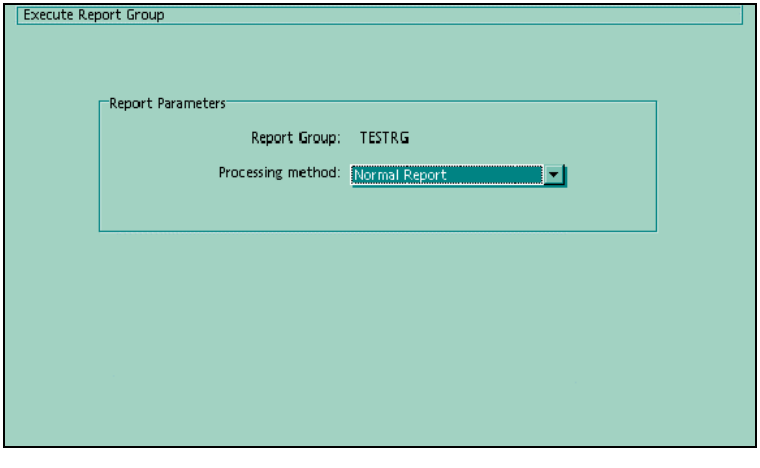

Add New Form
Item Title:
TEST REPORT GROUP
Name:
TESTRG
Context number:
OK
Cancel
Help
Options
Clear keys
Request parameters
Neither
Menu separator
Hide in Web Client
Component Image
Bitmap
Stretch
Browse...

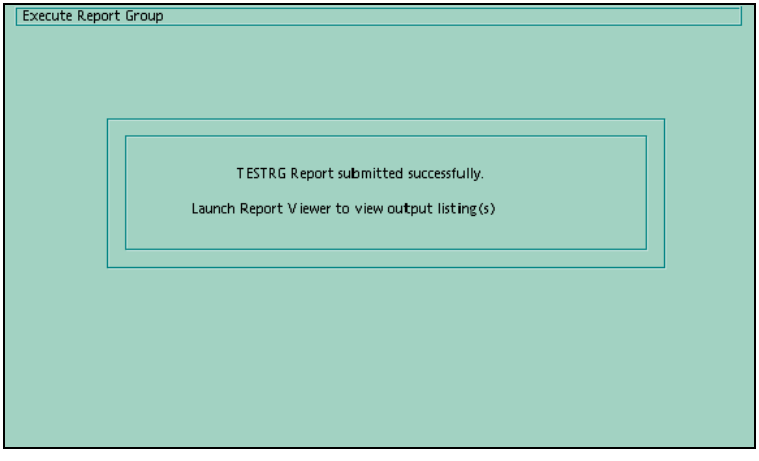

Menu Editor
File Item Edit View Help
All Items
Expired Certs, Licenses & Permi
Projected Retirements
Seniority List
Employee Job List
Salary Review Authorization Fo
Salary Review Authorization Fo
Future Dated Salary Adjustment
Current Job Report
Termination Report
Employee Job History Listing
TA Table Records Batch Repo
TB A,B & C Table Records Bat
TF Table Records Batch Forma
Master File Status Report
TG Table Records Batch Forma
WSIB accident listing
L-Segment Delete Process
Mass Salary Update/Report
TEST REPORT GROUP
Contents of 'TEST REPORT GROUP'
Field Name
Data
Header
MMNP
Level 0
4
Level 1
00
Level 2
05
Level 3
59
Form
TESTRG
Type
Form
Bitmap
No
Separator
None
Clear Keys
No
Request Parameters
No
Menu Item
TEST REPORT GROUP
Menu Level
4
Context Number
None
Hide in Web Client
No

3. Launch the TESTRG report group from the menu.
   Locate and click the report group on the menu. Enter the parameters and organizations on their associated forms. Save the Execute Report Group form to execute the report.

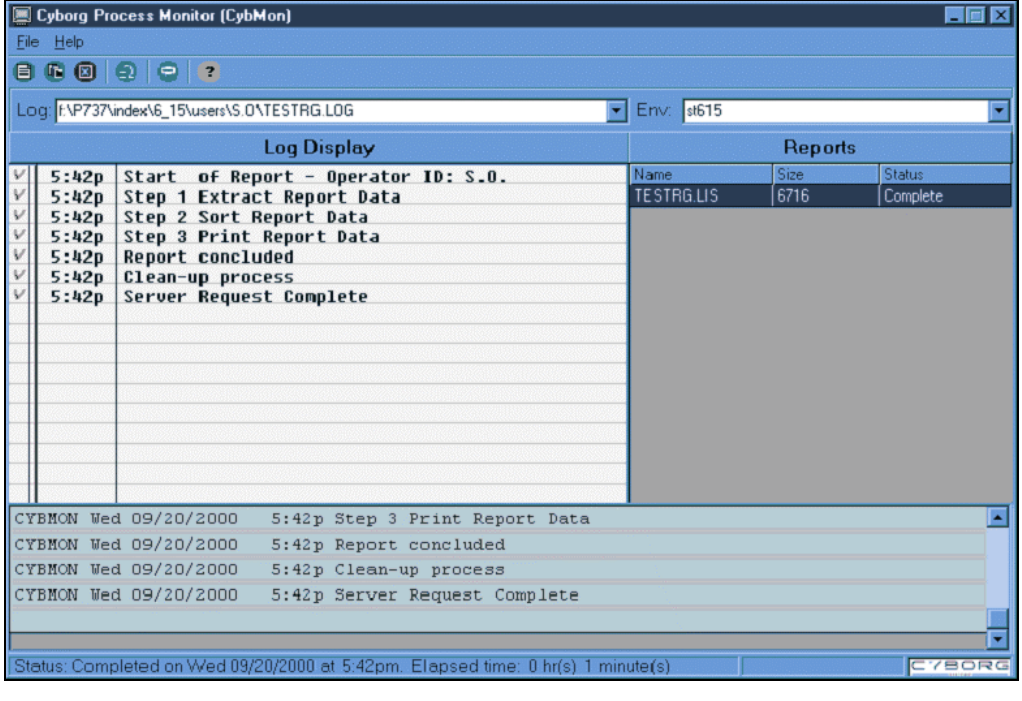

Report Parameters For Birthday Listing
1G-RPT
Report Group - TEST REPORT GROUP
TESTRG
As Of Date: 10-20-2000


Limit Companies For PRACTICE EXAMPLE
PE-RRG
ALL
All companies on file, EXCEPT any listed below:
991111 ABC ACCUMLATORS ACCUMLATOR ORGANIZATION
993333 ABC APPLICANTS APPLICANT ORGANIZATION
995555 ABC RETIREE AND TERM RETIREE ORGANIZATION
996666 ABC SOLUTIONS,HOSPITALS PRODUCTION HOSPITAL
999999 ABC SOLUTIONS,INC. PRODUCTION ORGANIZATION
AB1000 ABC Solutions, Inc. Midwest Division

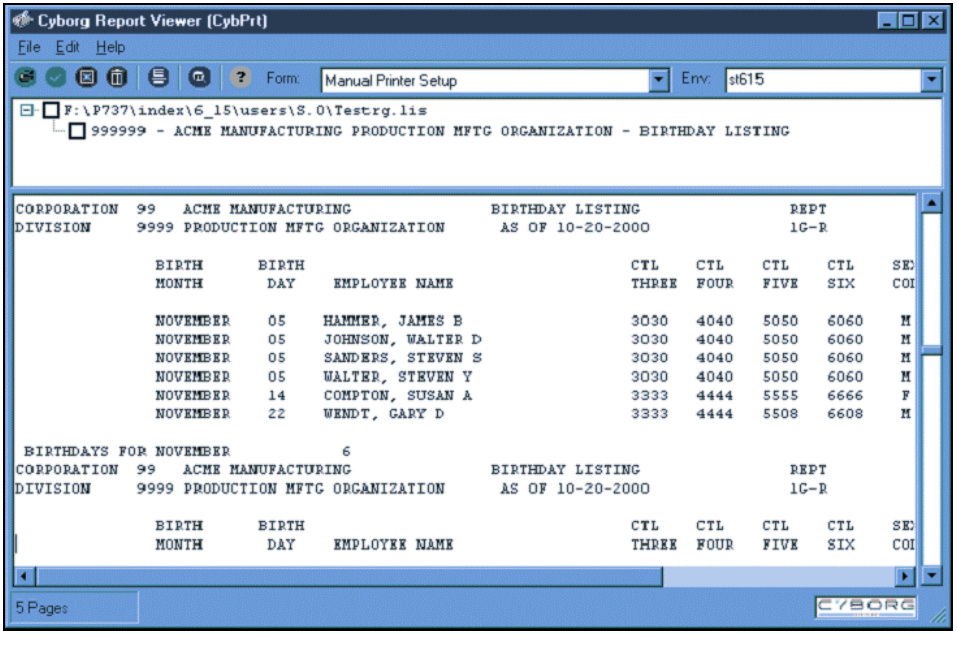

Execute Report Group
Report Parameters
Report Group: TESTRG
Processing method: Normal Report



4. View the TESTRG.LOG file using the Process Monitor.



5. View the TESTRG.LIS report output file using the Report Viewer.



Review of Questions Answered

1. What is packaged reporting?
   Package reporting is a method of producing reports in a processing mode in which a job is submitted to run offline.

2. What is a report group?
   A report group is a series of Solution Series batch reports that are created using the Report Group Activities form(RGMSTR) that are run together.

3. What is the required naming convention for report groups that are launched from the menu?
   All report groups that are delivered with The Solution Series end in RG to distinguish them from regular programs. If you add a report group that will be launched from the menu or Navigator, the report group name must end in RG. For example, the Birthday Listing report group name is 1G-RRG and it contains one report, the Birthday Listing report (1G-RPT).

   Because report groups embedded in a user-defined checklist must already exist on the menu, this naming convention also applies to checklist-launched reports.

   If you add a report group that will be launched only from the Report Group Activities form (RGMSTR), the report group name can end in any characters. There is no restriction.

4. What three methods can be used to launch a report online?

1. The Execute button on the Report Groups Activities form (RGMSTR)
2. The Navigator or menus
3. Add a report group to a checklist

5. What is the Process Monitor and how is it used?
   The Process Monitor is a Solution Series utility that allows you to view the progress of a report while it is running. It also stores logs of previously run reports. Using the Process Monitor, you will be able to determine which processes and reports have been completed. You can also view and print the completed reports.

6. What is the Report Viewer and how is it used?
   The Report Viewer is a Solution Series utility that provides a quick and intuitive method to manage, view, print, save, and delete selected reports. The tree view displays the reports, and the report file is shown in a preview window, which enables you to scroll, search, and jump within the file.

7. How are log files used?
   A log file is an informational file generated when a report is launched online. The log file is used by the Process Monitor to communicate the status, progress, and completion of a report.

8. How are reports archived in The Solution Series?
   You must save the report to a different name; otherwise, it will be overwritten when the same report is run again.

9. How can you make packaged report processing more efficient?
   Packaged reporting can be made more efficient by separating reports that use different source records into different report groups. For example, separate reports that process employee Master Records from reports that process History and Labor Records.

Using Query

Review of Questions Answered

1. What is Solution View?
   Solution View is our user friendly solution for producing custom queries, reports, and extract files in an interactive 'question and answer' session. Solution View is delivered with The Solution Series and provides live data access across all system components.

2. What is a query?
   Queries offer you an ideal way to find out specific information quickly and easily. Unlike the delivered reports, Solution View allows you to create a query that generates the specific information you want using live data, rather than using the data mart.

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.

820 (Premium Payment for Group Insurance Products) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay remittance information and/or premium payments for heath care insurance products.

834 (Benefit Enrollment and Maintenance) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay information relating to the initial enrollment in and subsequent maintenance of individuals enrolled in a health care insurance product.

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 totalled 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.

ACH
US-specific acronym for Automated Clearing House. The ACH Network provides inter-bank clearing of electronic payments for participating depository financial institutions. The American Clearing House Association, Federal Reserve, Electronic Payments Network, and Visa act as ACH Operators—central clearing facilities through which financial institutions transmit or receive ACH entries.

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
Event that can happen to an employee during employment, for example, new hire, leave of absence, termination, and so forth.

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.

Adjustment
Adjustments increase or reduce to-date accumulations of earnings, deductions, and taxes. Adjustments update month-to-date, quarter-to-date, and year-to-date activity. You can also correct or eliminate deduction arrears, transfer amounts or hours from one earning or deduction to another, redistribute labor hours and dollars, and refund deductions. Adjustment transactions are processed the next time the organization is processed by the batch payroll programs during either a payroll or maintenance run.

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.

Agent types
Agent Indicator on the Employer Information Record (QE-SCR). The field's only allowable entries are selected from option list PR55, which consists of two agent types: Agent Indicator code and Common Pay master.

Further definition of agent types:

1. An employer that wants to use an agent prepares Form 2678, Employer Appointment, and submits the form to an agent.

The agent submits to IRS the form received from the employer along with a written request for authority to act as an agent for an employer.

The IRS gives written approval.

2. A common paymaster is a corporation that pays an employee who works for two or more related corporations at the same time.

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 in Payroll Administration 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.

Anniversary date
Period-end date for the next regularly scheduled pay run for a specific pay frequency.

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. Payroll Administration 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.

Applicant organization
Organization used to store and update applicant records.

Appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

Archive
To transfer files to a slower, cheaper media (usually magnetic tape) to either free up the hard disk space they occupy or to create a backup copy of the files that can be used to restore programs and/or data if there is a system failure.

Arrears
Amount that could not be deducted from an employee's net pay because the available net amount was less than the deduction. This amount may be recorded for recovery in a future pay period.

As-of reporting
Ability to report on data for a specified date or date range.

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.

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 452).

Banner
Banner forms separate groupings on forms produced from the Federal, State/Local, and Employee Queues.

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 Master file (P20)
Sequential version of the Payroll Master information from the Employee Database. The Batch Master File (P20) is accessed and maintained during a batch maintenance run or pay run.

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.

Batch transaction
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 transaction, you may verify your totals against those accumulated by the system.

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 Business Partner
See ***Trading Partner*** (on page 475).

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.

Blocking factor
Represents the number of physical records in a logical record.

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 data mart.

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.

CBSVB
COBOL program used to produce reports and to access or maintain The Solution Series offline.

CBT
Computer-based training. Training through use of computer.

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 workflow 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.

Checklist wizard
Tool used to create checklists.

Checkmark
If in the done column of an 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.

Cleared payment
A check that has been cashed or deposited by the payee and has been returned, marked as such, to the payer’s bank, credit union, or financial institution.

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 (ring)
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.

Co-ordinator
A coordinator is an instructional institution, organization or person who administers training courses.

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 pay master
An organization that pays employees who work for different legal entities. If all the conditions related to a common paymaster are met, the FICA and, in most cases, the SUI does not have to start over.

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.

Company logical Master record
Complete record for a company. It may be composed of multiple physical records.

Company validation table
Table that validates that an Organization Control Number is valid and payments can be made.

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?'

Contractual exchange rate
An annually reviewed exchange rate usually based on an employees anniversary date and reviewed once a year; often used for salaries.

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
Organization Control Number. A six-character, customer-defined code that represents a company or group of employees within 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.

Conversion option
The interval at which you are converting currency (for example: yearly, monthly, weekly).

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.

Costing record
Labor record.

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.

Covered Entity
A member of one of three groups subject to the administrative simplification provisions of HIPAA. The three types of Covered Entities are health plans (not fully insured), clearinghouses, and providers that conduct transactions electronically.

Covered Entity Group
A Covered Entity Group represents in the system a partnership between two Covered Entities (benefits business partners) who transmit benefit information electronically between each other in the form of the 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) Transaction Sets.

CPI
Characters per inch.

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.

Crossfoot
An accounting term that means to compare or add figures to make them balance. If you receive an error message such as ‘Entries do not Crossfoot’, this means that some amounts entered into fields are not balanced.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 449).

Cube (Power Play)
File (with the extension .mdc) that contains data organized into dimensions to provide for faster data retrieval and drill down reporting capabilities.

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.

Custom report format
Custom reporting used by states because their reporting format is neither MMREF, ICESA, nor TIB-4.

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.

CYBMST
Library file that contains the main batch payroll software. This file consists of COBOL programs, report generators, and system tables.

Cyborg Scripting Language
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 Extract File Splitter (RSPLIT)
COBOL program that creates separate files for every representative table, using the Data mart Extract File as input.

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.

Data mart
Relational tables with a defined structure that have been designed to automatically accept full data mart extract data seamlessly.

Data mart Extract File (FILE36)
Temporary system file holding the copied data from The Solution Series.

Data store
Repository where data is stored. Client applications request information from a Solution Series data store.

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.

De-enrollment
The process of shutting off plan benefits for an employee for reasons other than a separation activity.

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.

Default
Value that will appear if no entry is typed or selected.

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.

DEL-PE
Utility program used to delete existing Phonetic Keys.

Delimiter
A character that tells the system where an item of data ends and another starts.

Density
Number of bytes per inch that a tape drive writes to a tape.

Dependent
An individual who relies or depends on another for his or her support.

Dependent GTL
Acronym for Dependent group term life insurance plan.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

Deposit advice
Pay document that looks similar to a check and shows the amount deposited to the employee’s account.

Derived data
Reporting Administration enhances data during the extract process by capturing and storing table-derived data, such as salary grade, that do not reside on the employee’s record.

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.

Direct deposit
Also referred to as an Electronic Funds Transfer, or EFT, direct deposit allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

Disability
Inability to pursue certain occupational activities due to physical or mental impairment.

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. In Payroll Administration, 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).

Display text boxes
An area on a form in which data is shown but cannot be modified.

Disposable income
For garnishment purposes in the U.S., an employee's earnings minus deductions required by state or federal law.

Distributed Access Log Table
Form that records the date, time, and last record distributed to a unique location.

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.

Distributed Location NODE Control Table
Form that defines the operating environment of your remote node. It allows you to assign an access password for the node and indicate whether the option list and table records will be distributed to the remote node.

Distributed Rules Table
Form that records the FILE 02 segments that are to be excluded from the remote location.

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 forms. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 451).

Docked toolbar
Toolbar that is located on the edge of a program window.

Document type
Categorization of a document, such as birth certificate, performance review, drivers license, and so on.

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.

DSP08
Program that displays the current contents of the Replication Holding File (FILE08).

DSRF02
Form that records the FILE02 segments that are to be excluded from the remote location.

DSRSET
Program that activates the Distributed Administration indicator on the PP-SCOPTS record of FILE01.

DSSRRL
Program that will display those remote sites that have not had data distributed to them within the past three days.

DSUSET
Program that deactivates the Distributed Solution indicator on the PP-SCOPTS record of FILE 01.

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 U.S. 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 Binary Coded Decimal Interchange Code; 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.

EDI
Electronic Data Interchange. The electronic exchange of business transactions based on standardized guidelines.

EEOC
Equal Employment Opportunity Commission.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EFT
Electronic Funds Transfer or direct deposit. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

EIC
Abbreviation for ***earned income credit*** (on page 452).

EIN
Employer Identification Number. A federally or state assigned number used to distinguish tax entities in the US.

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic documentation
Documentation that can be viewed, searched, and printed on your computer.

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 cancelled 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.

Employee logical Master record
Complete record for an employee. It may be composed of multiple physical records.

Employee Number
Alphanumeric value of up to 10 characters that you define to be used to identify an individual as an employee. It acts as a key to retrieve an employee's record.

Employee status
Represents an employee's present standing in terms of activities processed for the employee, for example, active, inactive, part-time, full-time, and so forth.

Encoding
The process of applying a badge number to an actual badge. This badge number is then entered on the Badge Number Assignments form to assign it to an employee.

English Language
Former name of our fourth-generation programming language, now called Cyborg Scripting Language.

Enhanced Pay Processing and Reporting
Pay run and reporting process that can be executed online.

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.

Alternate definition: The agency to which an organization submits its quarterly unemployment insurance reports.

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 system resides, and any communication protocols. Also, a workspace dedicated to a specific processing type. For example: development, test, and production.

EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 452).

Establishment Reporting
Establishment Reporting occurs when an employer with several business locations chooses to file wage reports, broken down by location or unit, to the Social Security Administration. Each unit is identified by a four-character code, called an Establishment Number. The employer obtains approval from the SSA to use Establishment Reporting. Establishment Reporting does not apply to 1099s.

Euro triangulation
The conversion between one Euro currency and another.

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.

Exchange rate
The ratio of the value of one currency to another.

Exchange rate type
The interval at which you update the exchange rate; for example, yearly, monthly, weekly.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Execution scripts
Generic reference to Job Control Language (JCL) for your operating system's command language.

Extract file
A data file generated to be used by another system or application.

Extract program
Report generator 7F7F and its subroutines.

This program accesses the P20 file to extract the employee information. It extracts all necessary information and is required to run only once per quarter. It may need to be rerun if there are subsequent adjustments applied to the P20.

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. In Payroll Administration, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FEIN
Federal Employer Identification Number.

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).

Filing entity
Agency to which an organization submits its quarterly report.

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.

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, the Tax Authority File does not provide tax specification information. 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.

Floating toolbar
Toolbar that is located within the program window.

Folder
Logical organization device for the content of a Cognos catalog.

Foreign currency
The currency into which or from which you must convert.

Form
Section of the Work Area in which data is entered and displayed, including text boxes and other controls. This was formerly known as a screen.

Form 300
Log of Work-Related Injuries and Illnesses, used to classify work-related injuries and illnesses and to note the severity and extent of each case. The delivered OSHA Form 300 Log of Work-Related Injuries and Illnesses report (20-RPT) is a facsimile of the Form 300.

Form 300A
Summary of Work-Related Injuries and Illnesses, used to show the totals for the year in each (illness or injury) category. The delivered OSHA Form 300A Summary of Work-Related Injuries and Illnesses report (21-RPT) is a facsimile of the Form 300A.

Form 301
Injury and Illness Incident Report. This must be completed when a recordable work-related injury or illness has occurred. This must be completed by the employer within 7 calendar days following receipt of information that the recordable work-related injury or illness occurred. This form must be kept on file for five years following the year to which it pertains. The delivered OSHA Form 301 Injury and Illness Incident Report (22-RPT) is a facsimile of Form 301.

Form area
An area of the window that contains a form.

Form Builder
A tool 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
Full Time Equivalent. An FTE is the ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of .5 means working time is half of the time that represents full time employment.

FTP
File Transfer Protocol. 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.

Function keys
Keys F2 through F12 on the keyboard that can be assigned to a bookmark or favorite.

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
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.

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.

HIPAA
Acronym for Health Insurance Portability and Accountability Act of 1996. HIPAA is a law that protects citizens from being denied health insurance coverage due to a pre-existing condition, and protects the privacy and security of citizens' healthcare information by enforcing standards for the manner in which health information is transmitted electronically.

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 location
The country in which an employee permanently resides.

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.

I-beam
Symbol that identifies the insertion point.

ICESA
Interstate Conference of Employment Security Agencies. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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.

Impromptu
Tool for interactive database reporting. Reports are built from the database using a pre-defined catalog.

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
An 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

Acronym for Integrated Postsecondary Education Data System.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

"NCES has established the Integrated Postsecondary Education Data System (IPEDS) as its core postsecondary education data collection program (prior to IPEDS some of the same information was collected by the Higher Education General Information Survey-HEGIS). It is a single, comprehensive system that encompasses all identified institutions whose primary purpose is to provide postsecondary education.

IPEDS consists of institution-level data that can be used to describe trends in postsecondary education at the institution, state and/or national levels. For example, researchers can use IPEDS to analyze information on 1) enrollments of students, undergraduate, first-time freshmen, graduate and first-professional students by race/ethnicity and gender; 2) institutional revenue and expenditure patterns by source of income and type of expense; 3) salaries of full-time instructional faculty by academic rank and tenure status; 4) completions (awards) by type of program, level of award, race/ethnicity, and gender: 5) characteristics of postsecondary institutions, including tuition, room and board charges, calendar systems, etc.; 6) status of postsecondary vocational education programs; and 7) other issues of interest."

IRP/BSS

Information Reporting Program/Bulletin Board

IRS/MCC

Internal Revenue Service/Martinsburg Computing Center

JDBC

Java Database Connectivity Application Programming Interface. An application programming interface for accessing tabular data sources from the JAVA programming language.

JMNTRUN

Script used to assign check numbers and create history records.

Job

A 'Job' is a generic description of a role within the organization—for example, Manager.

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. Control statements that execute programs.

Alternately: Jobstreams

Job type

A generic category that further defines a particular job.

JPAYRUN

Script that is used to calculate pay and create payroll reports.

JQTRRUN

Script that executes the new quarterly reporting process.

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.

JXP5QTR

Stand-alone script used on all platforms to extract and compile the new quarterly COBOL program.

KEY-PE

Utility program used to rebuild the QUERY Alternate Keys.

KEYDEL
Utility program used to delete existing QUERY Alternate Keys.

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 (GG-SCR).

Large number
The Multicurrency Payroll component contains a large-number format time entry form that accepts a nine-digit number as opposed to the seven-digit maximum in the standard Payroll Administration.

LDEFAULTS
Term used for a text/list box default template.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Link/jump
Reference to another document. Links (or hotspots) appear as underlined text. When you move your cursor over a link, the cursor changes to a hand. Click the link to access or jump to the referenced document.

LIS file
Standard file name used by all completed report files that are launched online. Files are automatically assigned this extension by the Online Initiation of the Pay Processing and Reporting feature.

Local currency
The currency in which the employee is paid.

Local currency country
The work location for tax purposes.

Log file
Informational file generated when a report is launched online. The log file is used by the Process Monitor to communicate the status, progress, and completion of a report.

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 per inch.

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, calculate pay or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

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 form or page.

Manual payment
A payment not created within The Solution Series.

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 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 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.

MMREF
Magnetic Media Reporting and Electronic Filing. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media. See Social Security Administration publication MMREF-1 for specifications and instructions for reporting quarterly wage information to participating states through magnetic media.

Model (PowerPlay)
File (with the extension .pye) that contains definitions of PowerCube dimensions and measures, queries that define the data sources, and other details needed to create a defined cube. Defined models reflect performance requirements as well as requirements of the final user of the cube.

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.

Multicurrency costing records
Records that maintain a history of the deduction and deposit transactions for each exchange rate.

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.

NACHA
American not-for-profit trade association that develops operating rules and business practices for the Automated Clearing House (ACH) Network and for other areas of electronic payments.

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.

NCES
Acronym for National Center for Educational Statistics.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

Primary federal entity for collecting and analyzing data that are related to education in the United States and other nations.

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 period pay run
Pay run for which the earning and deduction cycles are incremented. New-period pay runs are typically part of a regular pay schedule, and do not include off-cycle runs.

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.

Notional value
A value input for informational purposes only.

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.

Off-cycle pay run
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.

One-stop document
Documentation that contains reference information, step-by-step procedures, and training exercises.

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
A list of valid options and associated descriptions from which you may select an appropriate entry. 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.

The organization is the highest level in The Solution Series structure and is identified by a six character code. All records are organized by organization.

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 levels
Hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are customer-defined.

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.

OSHA
U.S. Department of Labor Occupational Health and Safety Administration.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

P2EDIT
Transaction editor program. This is the first program executed as part of the batch payroll process. This program performs edits on the input transactions.

P4CALC
Program that performs payroll calculations and updates to the sequential Batch Master File during a payroll run.

P5PRNT
Program that formats and creates all output, including payments, reports, tapes, and records that must be recycled to future payroll runs.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Packaged reports
Delivered reports developed using a Fourth Generation scripting language, Cyborg Scripting Language (CSL).

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 extract
Process that extracts data from the online Employee Database.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semi-monthly. Also referred to as a payroll period.

Pay merge
Process that updates the Employee Database with the current data from the recently processed pay run.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A pre-printed 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
An automated process that 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 Control Language.

PDF
Portable Document Format. 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.

Permanent Master Record
Individual employee record in the Employee Database. This record contains all the information about an employee, such as name, address, pay frequency, and salary.

Permanent records of employee earnings, taxes, and deductions in the Employee Database. This is the only record group that contains month-do-date, quarter-to-date, and year-to-date accumulations.

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 definitions:

1. to place an object in a specified location.

2. a location, particularly in a record

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.

PowerPlay
Business intelligence tool for multidimensional analysis of corporate data, also known as Online Analytical Processing (OLAP).

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. To be safe, fill out the Direct Deposit Information form (H9-SCR) 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.

Process Monitor
Utility that allows you to monitor the progress of reports and payroll processes launched online.

Program
A program is a series of classes being administered using Training Administration. For example, 'The Training Schedule for January-June 2004' may be a program consisting of eight different classes.

Alternative definitions:

1. A form or other set of instructions within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

2. A set of coded instructions that enables a computer to perform a desired sequence of operations.

Prompt
Expression set up to enable users to filter data by typing or picking a value, or a series of values, when the report opens.

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 that appears depressed when clicked on (now known as command button).

Qualifier
A drop-down list (field) referring to a data element on the HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions used to describe the type of information supplied in a related data element (field). For example, a Telephone Qualifier drop-down list identifies whether the telephone number supplied in a Telephone Number text box is a home, work, or fax telephone number.

Quarter-end P20
P20 is a file structure used in batch payroll processing. The quarter-end P20 file contains payroll data that is used in the quarterly processing.

Quarterly Processor
Combination of forms, report generators, and COBOL programs that extracts quarterly wage reporting information and produces all of the selected quarterly reports and formatted filing output (paper, tape, or diskette) for all selected employees in all selected states.

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.

Reconciliation number
The unique identification number printed on each pay document. Reconciliation numbers are used in the payment reconciliation procedure to verify cleared and outstanding payments.

Record
A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definitions:

1. To set down for preservation in writing or other permanent form.

2. The reporting format for magnetic media as in Tape Record Type such as ICESA, TIB-4, or MMREF

3. Information or data on a particular subject collected and preserved

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.

Regulatory bulletin
Contains updates to varying components of The Solution Series necessary to maintain regulatory compliance. Tax specifications supplied are delivered in regulatory bulletins (RBs).

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
Batch program that creates report extract records.

Alternate definitions:

1. A detailed accounting of an activity; for example, the quarterly report of unemployment insurance details to a filing entity.

2. As in 'Report Select character', this represents the selection frequency for this output.

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.

Report Viewer
Utility that allows you to view, search, print, save, and delete reports that are launched online.

Reporting Administration
HRMS reporting and analysis tool that links the database functionality found in The Solution Series with sophisticated, yet easy to use business intelligence tools from Cognos®.

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 definitions:

1. key on keyboard used to perform a carriage return; can also be known as Enter.

2. to send back to the originator; for example, the Tape Return Information form (QT-SCR) gives the address to which a filing entity would return a magnetic tape containing errors.

Review process
A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

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.

A Schedule Master table is used to associate schedules with a Policy Master table. A Schedule Master table can also be used to override values held on its corresponding Policy Master table.

Employees are assigned to a Schedule Master table. Schedule Master tables may be created for individual employees, or for use by groups of employees or by crews.

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 system.

SEIN
State Employer Identification Number; required by some states for wage and tax reporting.

Selectable File08 Display
Program that displays FILE08 information based on a selectable record key, starting key, time, and date.

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.

Also known as the Batch Master File.

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 Differential/ Premiums
Premium (or allowance) added to an employee's regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

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 key
Key that corresponds to a command name on a menu, such as CTRL+Z.

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.

SIC
Standard Industrial Classification.

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.

SOAP
Simple Object Access Protocol. This is an XML-based protocol that exchanges structured and typed information on the Web.

SOC
Standard Occupational Classification.

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 retrieves information from a relational database so it can populate Impromptu reports.

Standalone Time and Attendance
Customers who are using Time and Attendance Administration but not Payroll Administration.

Standard Pay Processing and Reporting
Pay run and reporting process that is executed in batch.

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.

Statutory employee
Any of the four categories of workers who are independent contractors under common law and are treated by statute as employees. These include:
(1) a driver who distributes beverages (other than milk) or meat, vegetables, fruits, or bakery products; or who picks up or delivers laundry or dry cleaning, if the driver is your agent or is paid by commission.
(2) certain types of full-time insurance sales reps
(3) an individual who works at home on materials supplied by you that must be returned to you
(4) certain full-time travelling or city salespeople.

Social Security and Medicare (FICA) taxes may or may not be withheld. Income taxes are not withheld from a statutory employee. A statutory employee will receive a W-2 with the 'Statutory Employee' box checked.

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.

SUI
State Unemployment Insurance.

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.

Switches
Text or list box options that allow decisions to be recorded; in some cases, to be turned on or off.

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.

Alternate definition: a function to be performed; objective

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 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 class
Defines taxability for pre-tax deductions. These contributions can vary by tax authority. In the U.S.:

* Tax Class 1 defines taxability for 401(k) plans (maintained for all but local authorities)

* Tax Class 2 defines Section 125 plans (maintained for federal only)

* Tax Class 3 defines tax-sheltered annuities (maintained for federal only)

* Tax Class 4 - 9 fields are customer-defined

Tax code
The three-character to seven-character 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 supplied tax files. A Tax Maintenance File is a file issued 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 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
Income tax, unemployment insurance (including special assessments), and disability insurance are examples of tax types. At the federal level, there are also entitlement taxes: Social Security (FICA-OASDI) and Medicare (FICA-HI). The types of taxes to collect and the methods of collecting them vary by tax authority.

Tax-related Regulatory Bulletin
A regulatory bulletin contains the updates to tax specifications, consisting of a bulletin document and a tax file that contains the updated tax specifications.

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.

TDR
Table Definition Record.

Template
A basis from which to create a custom item. For example, you can use an existing 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 (").

Third Party Administator
An organization outside of a company that administers employee benefit plans on the company's behalf.

TIB-4
Technical Information Bulletin (Social Security Administration Publication 42-007). Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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 Time and Attendance Administration 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.

TLCN
Tape Library Control Number - a government-provided control number.

ToolTip
Text that displays under a tool to describe its function when the mouse is held over the tool.

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.

TPA
Acronym for ***Third Party Administrator*** (see "Third Party Administator" on page 474).

Track
One of the concentric magnetic rings that form separate data storage areas on an electronic medium.

Trading Partner
A Covered Entity with whom another Covered Entity transmits health information electronically through the use of an Electronic Data Interface. Trading partners must create an agreement as to the specific information that will be passed during their transactions. The Electronic Data Interface is standardized by the provisions set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Also referred to as Business Partner.

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 cancelled, 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.

Transaction Set
Refers to HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions meaning the smallest meaningful set of information exchanged between ***trading partners*** (see "Trading Partner" on page 475). The transaction set consists of a transaction header segment, one or more data segments in a specified order, and a transaction trailer segment.

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 definitions:

1. To move data or files from one computer to another

2. Electronic Funds Transfer or direct deposit

3. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

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.

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.

UI
Unemployment Insurance.

UI Number
Unemployment Insurance Number (or SUI number, State Unemployment Insurance number); required by all states.

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 Payroll Administration, 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 that 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 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 delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning
An employee’s schedule warning times.

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.

XML
Extensible Mark-up Language is a language for documents containing structured information.

XML Schema Definition Language
A language for describing and constraining the content of XML documents.

XSLT
Extensible Stylesheet Language Transformations. A language for transforming XML documents into other XML documents.

Year End Master File
P20OUT file from the final payroll run of the year

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Hewitt

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PART 1

Introduction

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CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the functional administration of the administrative solutions to perform your business tasks.

This manual has been designed as a reference document. It is also used in classroom training. You will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is designed to be used by new customers and customers who are upgrading from previous versions of the system. The following users will find it most useful:

- System support staff (analysts, programmers, system administrators)
  Any member of the support staff who programs customizations to the system and who will be involved in the implementation, upgrade, or maintenance of the system will find this manual's information and guidance helpful.

- Human Resource and Payroll managers
  The concepts and business tasks discussed in this manual provide the knowledge that will be required to successfully customize the functional administrative aspects of the administrative solutions and subsequently incorporate them into the daily business tasks.

Prerequisite skills

Users of this manual should possess a variety of technical skills, depending on the roles they will play. At a minimum, all users should have:

- Basic understanding of Microsoft Windows.
- Attended training or have experience using The Solution Series.

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Additional documentation and training courses

The following documentation and training courses are available to help you understand and administer the administrative solutions:

Documentation

Document	Description
Using The Solution Series: Administrative Solutions, or eCyborg: Using the Web Client (for users of the web client)	This documentation covers the introductory concepts and tasks related to The Solution Series or eCyborg. It describes how to navigate through the software and explains the important concepts and functionality of the system.
Technical Administration	This manual provides descriptions of and detailed instructions for performing the technical tasks that support The Solution Series or eCyborg.

If you do not have copies of these documents, you can obtain them from the Customer Center on our website www.hewitt.com/ecyborg.

Training Courses

Related Course	Description
Using The Solution Series	Provides the introductory concepts and tasks related to The Solution Series.
eCyborg: Using the Web Client	Web-based training which provides the introductory concepts and tasks relating to eCyborg.
Technical Administration	Introduces important concepts and tasks for the administrator who performs the technical tasks that support the administrative solutions.

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

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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:

	Chapters	Description
1. Introduction	1–2	Provides an introduction to this material
2. Personalizing Option Lists, Menus, and Checklists	3–5	Provides concepts and detailed instructions for customizing and maintaining option lists, menus, and checklists
3. Integrating Desktop Applications and Data	6-8	Provides concepts and detailed instructions for creating and maintaining communication events, export data files and import provides, and for using Desktop Document Integration
4. Appendices	A	Provides detailed reference information

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 Optimizing System Features:

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 Optimizing System Features	A high-level overview of the functional administration aspects of the system

Part 2: Personalizing Option Lists, Menus, and Checklists

The chapters in Part 2 describe three ways to personalize the system for your organization and to suit your work style:

Read this chapter		To learn about
3	Maintaining Option Lists	How to add, modify, and remove an item in an option list
4	Designing a Business Process	How to add, modify, and remove a checklist
5	Maintaining Menus	How to add, modify, and remove a menu item

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Part 3: Integrating Desktop Applications and Data

The chapters in Part 3 describe various tools that can be integrated with your desktop applications:

Read this chapter		To learn about
6	Setting Up a Communication Event	How to trigger emails and print letters automatically or manually when employee data is created, updated, or deleted
7	Exporting and Importing Data	How to create export data files, design import profiles, and process imports that will update company and employee records
8	Desktop Document Integration	How to link documents to employee records and then browse through and launch these documents

Part 4: Appendices

The appendices in Part 4 contain practice and review answers:

Use this appendix		To learn about
A	Practice and Review Answers	Detailed answers to the practices and reviews in the instructional chapters

How to use this manual

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

Table of contents

This 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.

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.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 will help 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:

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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

Detailed Directions provide the specific steps to complete a task. The Detailed Directions contain navigation for both North American and UK users.

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 use the test data delivered with the software. This test data must not be altered.

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the Review of Questions Answered 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 for you 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.*

See also:

- ***A topic to find more detail or more discussion on a given topic (on page no n.)***

For more information.

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.*

Important!

Important note or warning.

How to get additional help

If you cannot 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 at www.hewitt.com/ecyborg 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.

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CHAPTER 2

Overview of Optimizing System Features

In This Chapter

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Option list customization 20
Navigation customization 21
Workflow capabilities 23

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Introduction

This section provides you with the 'big picture' of Optimizing System Features. It describes the ways of making the system work for you by building in customizations to the interface, adding workflows, and integrating desktop functionality into your organization's daily business processes.

This section introduces you to the export and import of data and the use of wizard technology to create workflow processes and communication events. In addition, it covers option list and navigation customization.

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Communication events

In addition to recording employee information in the system, your workflow process requires that some of that information be communicated to the employee or other areas of your organization. A communication event tool is provided, which can be set up to send emails and print letters automatically or manually when employee data is created, updated, or deleted in the system.

The Communication Event Manager is the controller of this functionality. It allows you to create, copy, modify, and remove communication events.

Communication event types

You may set up parameters for the automatic and manual generation of two types of communication events—email and letter:

- Email communication events use your automated email software package.
- Letter communication events use Microsoft Word 97 or any newer version. Letters can be created using its templates and mail merge features.

After it has been set up by an administrator, a communication event is system-wide and available to all system users.

Communication event triggers

Event triggers allow you to set up the parameters that will cause a communication event to occur. There are two types of communication event triggers—form and checklist:

A form trigger can be set up to occur when a user adds information to a form, changes information on a form, or deletes an existing form from the employee record.

A checklist trigger can be set up to occur when a user is working through a checklist and activates one of the following options:

- Finish Checklist after completing all the mandatory steps
- Finish Checklist without completing all the optional information
- Pause Checklist

As well as an automatic trigger, a manual trigger option allows a user to generate a communication event by using a button on the toolbar when working with a form or checklist that has no automatic trigger.

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Email communication events

An email communication event provides your company with more capabilities than standard email software. You will be provided with multiple methods for specifying the email recipient(s), including the address book from your organization's email application. If Position Administration is in use, you can also specify that the recipient be the position to which the employee reports (direct or indirect).

You can set up a communication event to merge data from the system into the text, so that employee-specific information can be automatically displayed. For instance, you can include registration and class information in an email to an employee regarding an upcoming class.

Several options during setup allow you to fine tune the email process. You may choose to activate one or more of the following options that give the user control when the email is generated:

- Display email preview
- Email can be cancelled
- Recipients can be modified
- Prompt if multiple recipients—provides the option of selecting the required recipient if a position had multiple recipients

Letter communication events

A letter communication event provides your company with the ability to automatically generate customized letters based on specific trigger parameters.

Microsoft Word template and merge features are included in the letter communication event process. All the functionality will work as described by Microsoft while creating the letter text. In addition, you will be able to insert fields from forms into the text, so that employee-specific information can be automatically displayed.

The following example could be the text of a letter that is sent to an employee who has been awarded a bonus or commission:

```
<<Date_Recorded>>
Congratulations <<Employee Name>>,

You have been awarded a <<HED_Xref>> in  the amount of $<<Amount_Awarded>>. You
will receive this amount on <<Date_Paid>>.

Sincerely,


G. Zarmin
Vice President, HR
```

Letters can be viewed and modified prior to printing. You have the option of printing letters immediately, queuing them for printing later, or being prompted when the letter is ready. Letters can be viewed and modified prior to printing, provided the user doesn't choose to print them immediately.

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The system maintains one 'last printed' file. This means that after letters have been viewed or printed, they are moved to a 'last printed' list at the bottom of the queued letters. This acts as a backup in the event that letters need to be reprinted.

☞ *Refer to* **Setting Up a Communication Event** *(on page 193) for more detailed information on communication events.*

Data export and import

The ability to retrieve data from the administrative solutions, perform calculations or manipulate that information, and then import that enhanced data to update company and employee records allows your organization to reap the highest benefits from the administrative solutions. You can use the import profile wizard to design and process imports that will update company and employee records.

Exporting data

Several tools are provided to help you extract and report on information about your organization, employees, benefits, and payroll:

- Reporting Administration
  Using Reporting Administration functionality is the easiest way to manipulate data. As delivered, Reporting Administration provides a means of extracting a great deal of information from the administrative solutions. By reviewing the data already defined, you may determine that the data you want to extract is already defined. Then the task of manipulating data and importing it back into the system could be as simple as creating an Impromptu report, saving its content in comma delimited format, altering the data, and using the Import feature to apply the manipulated data. If this is the case, you need to verify that a fresh extraction has been performed before creating your Impromptu report.

- Using ISQL or another tool to query a relational database implementation of the system
  If you have a relational system, you can use ISQL or another tool to run queries directly from the relational tables of the system. You can then save the query content in comma delimited format, alter the data, and use the Import feature to reload the manipulated data.

- Packaged reports
  Hundreds of delivered reports that have been developed using the Cyborg Scripting Language. You can use these reports in their delivered form or customize them to report on specific data. Once the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

  You can also use Cyborg Scripting Language to create your own program that could be run offline to extract data.

- Solution View (create an extract)
  Solution View is a delivered user tool for developing forms, fields, on-request queries, extracts, and reports. The Report Writer in Solution View can be used to create an extract file from data within the system. After the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

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Regardless of the method used to extract the data, the report or file must be converted to a delimited file or placed in an Excel spreadsheet to create the import file. This file is the one used by the Import functionality to update company and employee information on the system.

Importing data

The import process moves data from an external source to any company or employee form. All you need is authority to access the import file.

The Import Profile Manager is the delivered tool that allows you to easily create, modify, rename, and remove an import profile, as well as start the import and view the resulting message log.

The Create or Modify options on the Import Profile Manager launch the Import Creation and Amendment wizard. This wizard guides you, step by step, through the tasks and options necessary to create or modify an import profile.

An import profile sets up the relationship between the import data and the form to which it will be imported, and is independent of the actual data.

Allowable import files

You can use a Microsoft Excel 97 (or higher version) spreadsheet to calculate and manipulate information. That data can then be applied to one or more forms in the system. You may also use any extracted application data that can be saved as a delimited file.

Target forms

You may easily import data into any form to which you have access, as defined by your user profile that has been set up by your Security Officer. If you have access to only ten forms, then only ten forms are presented when you are browsing for a target form.

Position Administration fields may be the target of import data. Position, job, and organization unit information may be imported.

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The Import wizard

The Import Creation and Amendment wizard provides you with an easy method of setting parameters for importing data. Import profiles are specific to each user, but may be shared by copying them to another PC.

Eight steps take you through the creation of the import profile that is required prior to processing the import:

1. Welcome
2. Choose form
3. Choose file
4. Select delimiter
5. Header record
6. Message
7. Form and fields
8. Summary information

After import profiles are established, they can be shared by copying the local files from one PC to another. It is not possible to share import profiles across a network.

Control options for importing data

Prior to the actual posting of import records, you must specify how the import handles errors and specify automated options.

Pre-import validation

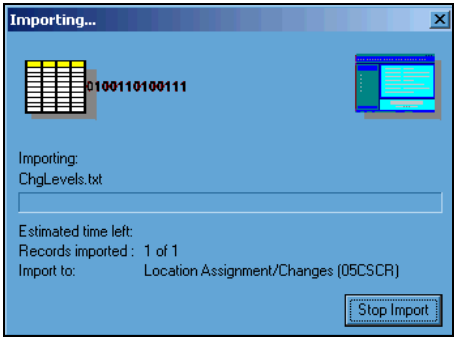
After the import options have been selected, field validation takes place. These validation checks are conducted before any records are actually imported to the system.

If all fields validate with no errors, the import process begins. If there are errors, a dialog will display all of the import records and indicate which ones are in error.

Running the import

After the import options are entered, all the validation checks are performed, and all errors are corrected in the import file, the import begins automatically.

While the import is in progress, the following dialog is displayed:



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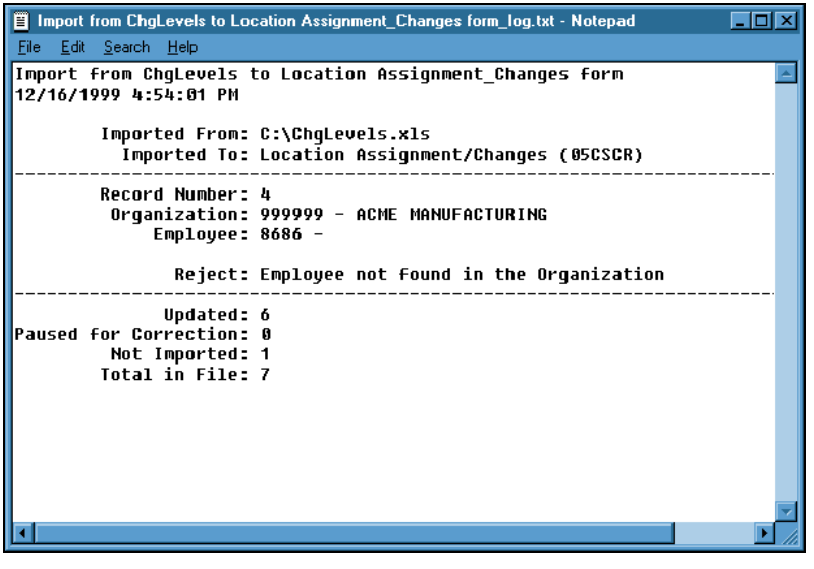
You may monitor the progress of the import run, or you may start another session of The Solution Series and perform other tasks while import is running. However, if you have chosen the option to pause the import process for errors, your attendance during the import run is required to address each error that is encountered.

If, for any reason, you need to stop the import, you can restart the import from a specific record.

Message log

If you selected the option to show a message log when the import is finished, then the log file will be automatically opened in Microsoft Notepad or other text view assigned on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

The message log contains system-level error and warning information:



The last lines of the report display a record count for the following items:

- Updated—records applied
- Paused for Correction—records you were prompted to correct
- Not Imported—uncorrected records
- Total in File—total records in the import file (excluding header record)

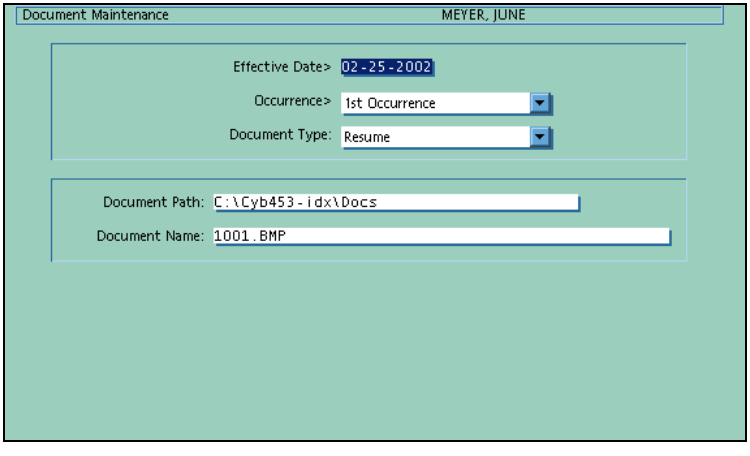
☞ *Refer to* **Exporting and Importing Data** *(on page 141) for more detailed information on the import wizard.*

Desktop Document Integration

Further desktop integration capabilities provide you with the mechanism to link employees to documents (including images) such as resumes, performance appraisals, photographs, and so forth, to employee records, and then browse through and launch these documents using a document explorer.

The Document Maintenance form

The Document Maintenance form (DR-SCR) is used to link documents to employees.



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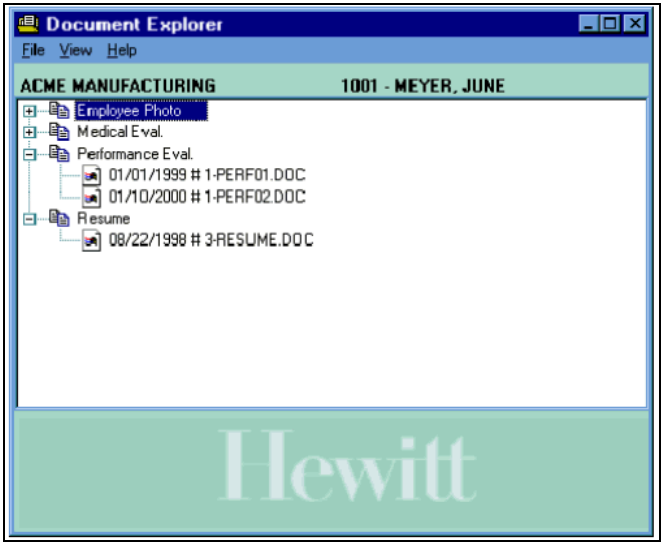
The Document Explorer

The Document Explorer is a tool that provides a view to the employee's document types and documents in a manner similar to that of Windows Explorer.



☞ *Refer to* **Document Management Facility** *(on page 261) for more detailed information on using the Document Explorer.*

Option list customization

An option list contains the predefined options from which you can select an entry for a list box. You must select one of the predefined options as your selection in a list box. In contrast to a text box, you can not key your own data into a list box.

For example, the Frequency option list (PP29) on the Employee Information form (EF-SCR) has the following options:

- None
- Bi Weekly
- Monthly
- Semi Monthly
- Weekly

The system is delivered with default options for each list box. These options can be modified to add or remove options to meet the requirements of your organization.

For example, you could modify the Frequency option list (PP29) to include Quarterly as a frequency type.

About the Option List Editor

The Option List Editor (CSUPDT) allows you to add a new item to an existing option list, change information about an existing item, or delete an item.

Using the Option List Editor (CSUPDT), you can modify the description and alternate language, and change the status of an item. You can not change the code itself. If you need to modify a code, you must delete the code and then add it again using the correct code.

If a universal, type 9, or organization-specific option list contains calculation or relational logic, you must use the Edit Utility (EDIT) to edit the logic or to add documentation. You must also use the Edit Utility (EDIT) to create or delete an option list.

Impact of option list maintenance

When you finish editing an option list, both the System Control Repository and the Client Data File on your workstation are updated immediately. Other users will see the changes the next time they press Enter.

☞ *Refer to* **Maintaining Option Lists** *(on page 27) for more detailed information on editing and customizing option lists.*

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Navigation customization

You are given easy access to all information through the Navigator and menus. Customizing menus provides another way to personalize the system to meet the needs of your organization. Using the Menu Editor, you can edit any of the delivered application menus to show only those items you will use, change the order of items, or replace items.

Delivered menus

The delivered menu bar contains two types of menus—function menus and application menus:

- Function menus (File, Edit, View, Bookmarks, Actions, Go, and Help)
- Application menus (HR, Benefits, Payroll, TA (Time and Attendance), and Tools)

Application menus provide access to the business components and to tools and utilities. You can edit only the application menus. You can not edit the function menus. Changes made to menus are available to all users.

Menu Editor

Using the Menu Editor, you can edit any of the delivered application menus to add an item, show only those items you will use, change the order of items, or replace items.

The Menu Editor looks and works like the Windows Explorer with its tree structure:

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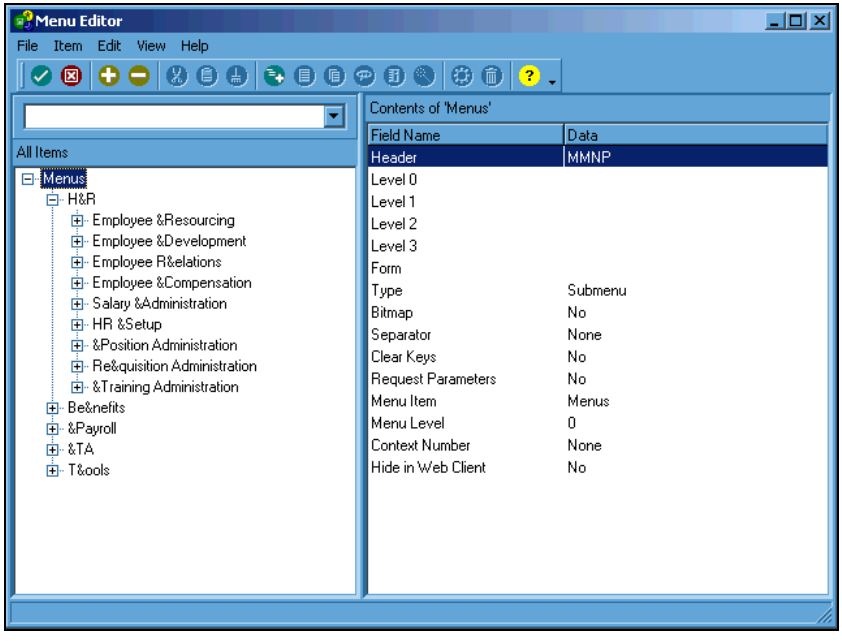

Result of menu customization

When you finish editing a menu, both the System Control Repository and the Client Data File on your workstation are updated immediately. In client/server environments, other users will see the menu changes the next time they log on to the system.

☞ *Refer to* **Maintaining Menus** *(on page 107) for more detailed information on editing your menus.*

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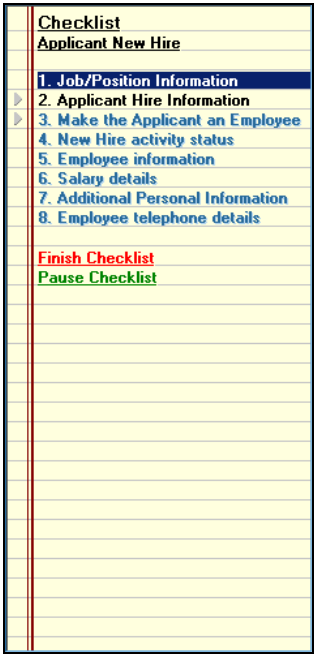
Workflow capabilities

Recording and maintaining employee information requires many tasks. You may use several forms in the system to complete these tasks, entering and displaying various employee information. You can use the checklist feature to design business processes that utilize the forms required to record and maintain employee information.

Checklists can link items such as forms, dialogs, report groups, and other checklists to guide users through a process. Each of these items can then be completed consecutively, using the checklist to navigate them. Checklists help users identify the tasks they need to complete, as well as how much they've completed in a process.

For example, a checklist called 'New Hire' is delivered. This checklist contains all the items that need to be completed in order to add a new employee to the system, and optional information you might want to add:



Checklists eliminate the need to navigate to individual items. They also ensure that all the items that are part of a workflow are presented for completion. When you access a checklist, you are presented with a list of items in the sequence in which they should be completed. After they are created, checklists can be modified or removed as needed.

Local and universal checklists

A checklist can be local or universal:

- Local checklists are stored on a user's PC in the Checklist subdirectory. They automatically appear on the user's Bookmark menu and Favorites toolbar.
- Universal checklists are stored in the System Control Repository so all users can access them. They must be added to the menu using the Menu Editor. This process automatically updates the Navigator.

Creating a new checklist

A wizard is delivered to help you maintain and create new checklists. You can also use the Edit Utility (EDIT) to maintain existing checklists.

The wizard gather information and is very intuitive to use. The checklist is created after the wizard is completed.

Creating a decision point dialog

The last option in the wizard (through Advanced Features) is to create links to other checklists. You do this by entering the checklist name. If you enter more than one name, it creates a dialog box listing the checklists the user can select. The dialog then becomes a 'decision point'—the user's entry will indicate the next action the checklist performs. You can place a 'decision point' at the beginning or the end of a checklist process.

☞ *Refer to* **Designing a Business Process** *(on page 51) for more detailed information on checklists and using the checklist wizard to create checklists.*

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PART 2

Personalizing Option Lists, Menus, and Checklists

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CHAPTER 3

Maintaining Option Lists

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Introduction

When using option lists to complete a form, you are rarely concerned about the type of option list you are using. In fact, there is no visible difference among the different types of option lists when working with a form. However, when maintaining option lists, you need to be aware of the different types of option lists and how they are maintained. Typically, delivered option lists are modified and new option lists are created during the implementation of the system. Maintenance can be performed at any time.

Tasks

This section explains the following:

- Accessing the Option List Editor
- Adding an item to a universal option list
- Adding an item to an organization-specific option list
- Modifying an item's description
- Modifying an item's status
- Removing an item from an option list
- Displaying an option list

Prerequisites

Before you can maintain option lists, you must have The Solution Series installed and have reviewed the delivered option lists.

You must also have the authority to add, change, and delete option list contents.

Questions answered

The following questions are answered in this section:

1. What are the different types of option lists?
2. What is the Option List Editor (CSUPDT) and what is its purpose?

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Option list types

There are three basic types of option lists:

- Universal
- Type 9
- Organization-specific

All of these option list types appear the same to the person using them. Their types are important only from a maintenance point of view.

Universal option lists

Universal option lists are delivered with the system and are populated. These option lists are available to all organizations, including the delivered test organizations. In general, you can add to or remove options from these lists, but you will need to check each option list's documentation to be sure.

Note: To check an option list's documentation, you use the What's This help for a list box.

If you add an option to a calculation option list, you need to add the logic to process the option you add.

The Marital Status option list (HR04), used on the Additional Personal And ID Information form (02-SCR), is a universal option list. As delivered, it contains the following codes and descriptions:

Code	Description
D	Divorced
L	Legally Separated
M	Married
S	Single
W	Spouse Deceased

Universal option lists have five-position names, with a blank in the fifth position. The Marital Status option list is named HR04.

Type 9 option lists

Type 9 option lists are so named because they have a 9 in the fifth position of their names. For example, the Insurance Carrier option list is named BA629.

A set of populated Type 9 option lists is delivered. The options in these lists are available only to the delivered test companies, those whose organization IDs start with the number 9. They are intended to be used for testing purposes only and may not be meaningful to your organization.

For testing purposes, you can add test organization-specific options to the delivered Type 9 option lists, but you must do so using the Edit Utility (EDIT). These new options would then be available only to the test companies.

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If you add options to the Type 9 option lists, but do not make them test organization-specific, they are available to all of your live organizations—those whose organization IDs do not start with a 9—found on the Employee Database. This allows you to hide the options that are applicable only to test organizations.

Organization-specific option lists

You can create option lists that are specific to an organization. For example, you may have organizations that each have unique perquisites. The perquisite options would be defined, along with their Organization IDs, making them available only to that particular organization.

To create an organization-specific option list, use the Edit Utility (EDIT). You must:

- Associate each option in the list with an organization
- Verify that there is a 'Y' in the fifth position of the option list's name

Note: Because of the naming convention requiring a 'Y' in the fifth position, these option lists are sometimes referred to as type-Y option lists.

☞ *Refer to the Technical Administration and the Cyborg Scripting Language documentation for information on using the Edit Utility (EDIT).*

Naming conventions for delivered option lists

As a naming convention for delivered option lists, the first two positions of the name reflect the component or solution with which the option list is associated. For example, Human Resource option lists begin with the letters 'HR'. Examples include option lists HR09 (Activity Codes) and HR10 (Employee Status). Salary Administration option lists begin with the letters 'SA', and so forth.

Advanced option list processing

In addition to supplying a list of standard options, option lists can also contain items that have calculation or relational editing logic. Calculation and relational editing logic are written in the Cyborg Scripting Language.

Calculation option lists

When an option list has calculation logic attached to it, it is called a calculation option list. For example, Appraisal Ratings (HR16) is a calculation option list. Logic is embedded for each rating, identifying the maximum position in range attainable by an employee if he or she receives the performance rating specified.

Modification of the calculation logic requires knowledge of the Cyborg Scripting Language.

Relational option lists

When an option list has relational logic associated with it, it is called a relational option list. It contains embedded Cyborg Scripting Language code that relates specific conditions to the values of the option list.

Modification of the relational editing logic requires knowledge of the Cyborg Scripting Language.

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Option list documentation

Option list documentation can be viewed online. In addition, the One-Stop Document for each component of the system contains information on the specific option lists used for that component. For example, the Using Salary Administration manual contains an appendix covering each option list used in Salary Administration processing.

Apply the Concept

Based on your understanding of the option list types and naming conventions as explained in this concept, which of these two option lists would contain values that could be used by all organizations, even delivered test organizations—HR04 or HR459?

Option List Editor (CSUPDT)

You can use the Option List Editor (CSUPDT) to maintain existing option lists. You can add a new item to an existing option list, change information about an existing item, or delete an item. To create a new option list or delete an option list, you must use the Edit Utility (EDIT).

☞ *Refer to the Cyborg Scripting Language Programming documentation for details on adding and deleting option lists.*

You can use the Option List Editor (CSUPDT) for the following types of option lists:

- Universal
- Type 9
- Organization-specific

Universal, type 9, and organization-specific option lists can contain calculation or relational logic. You will always use the Edit Utility (EDIT) to edit an option's calculation or relational logic, or to add documentation. You will use the Option List Editor (CSUPDT) to edit the option list's items.

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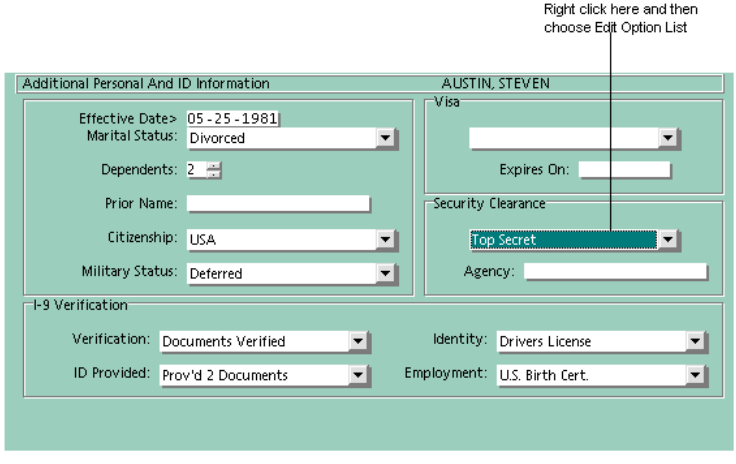
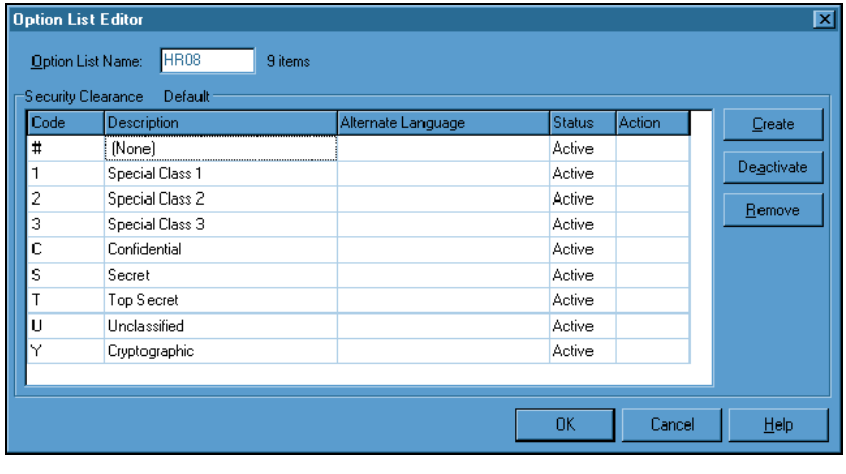
Option List Editor access

You can access the Option List Editor (CSUPDT) from a list box, the Navigator, or from the menus.

The simplest and quickest way to access the Option List Editor (CSUPDT) is by right-clicking on a list box. The system automatically displays the detailed information for the option list used for that list box. For example, if you access the Option List Editor (CSUPDT) from the Security Clearance list box on the Additional Personal And ID Information form (02-SCR)...



… the resulting display will look like this, showing the options in code order:



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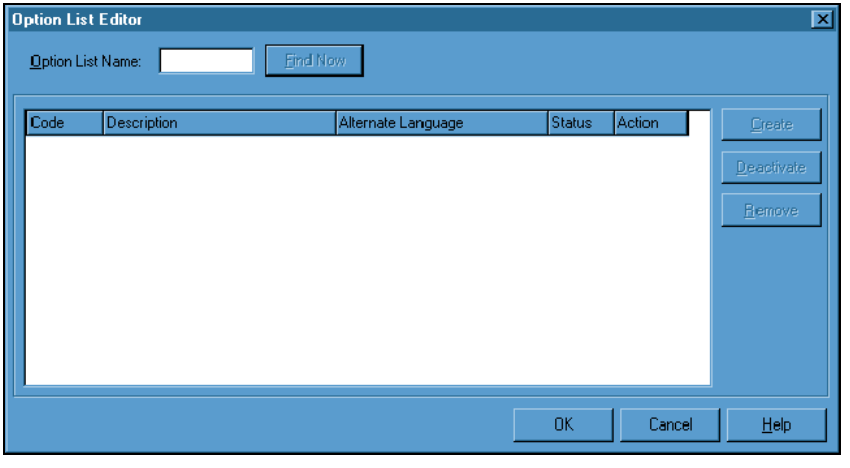
If you access the Option List Editor (CSUPDT) from the Navigator or from the menus, you need to supply the name of the option list. Accessed from the Navigator or the menus, the dialog box looks like this:



Note: *If you set the Options dialog to include technical details, the five-position option list name is displayed in the status bar when the pointer is clicked in a list box.*

See also:

- Accessing the Option List Editor from a list box ***(on page 38)***
- Accessing the Option List Editor from the Navigator ***(on page 39)***

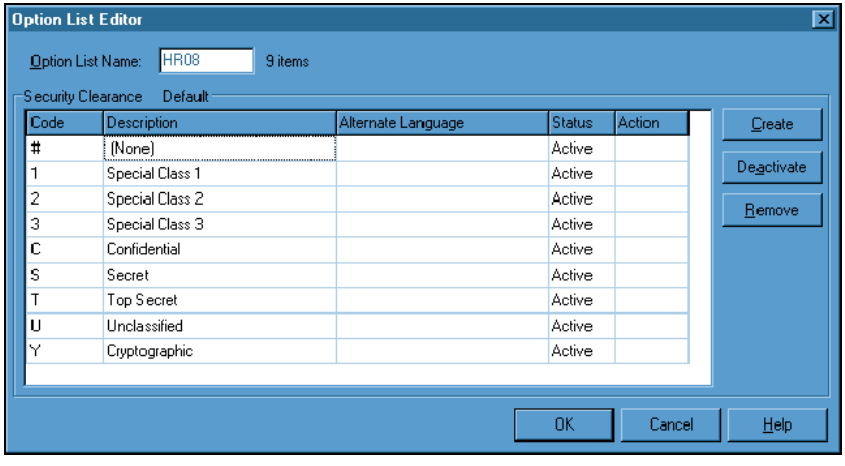
For detailed instructions for accessing the Option List Editor (CSUPDT).

Information displayed in the Option List Editor

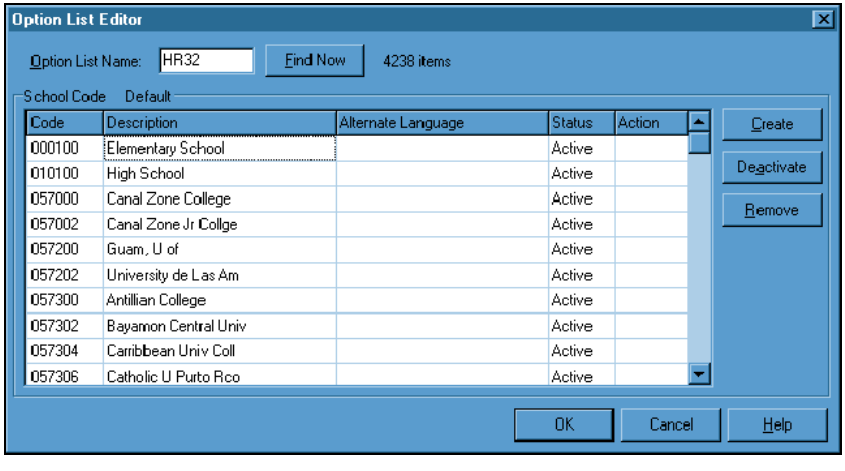
For universal and type 9 option lists, the Option List Editor (CSUPDT) displays the following information:

- Name of the option list
- Number of items in the list
- Title of the option list
- Default (or country label for a variant option list)
- Code (sorted by numeric and then alphabetic values)
- Description—the alphanumeric description of the code
- Alternate Language—if defined, the translation of the description
- Status—Active or Inactive
- Action—filled in by the system when you choose Create or Remove

The following is an example of the Option List Editor (CSUPDT) display for the Security Clearance option list (HR08):



If there are more items than can be shown at once, a vertical scroll bar is displayed, as shown in the following figure of the School Code option list (HR32):



Note: *Type 9 option lists (those with a 9 in the fifth position of the option list name) will only display universal values. Test organization values will not be displayed in the Option List Editor dialog (CSUPDT).*

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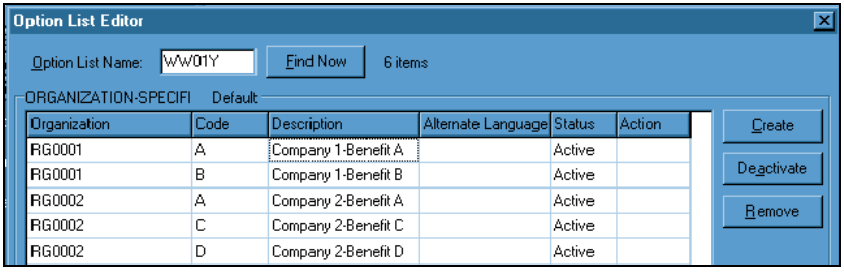
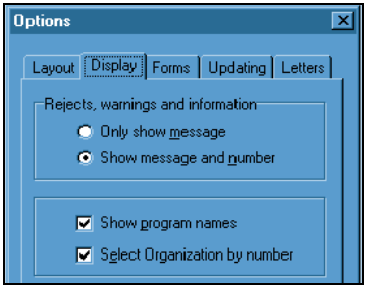
Information displayed for an organization-specific option list is the same as for universal and type 9 option lists, with the addition of the organization. This is shown in the following example of an organization-specific option list:



To show only the organization number in the Organization column, verify that the 'Select Organization by number' check box is checked on the Display tab of the Options dialog box (accessed through the Change Options task within the User Tools process of the User Tools component of the Navigator). If this box is not checked, both the organization name and number are displayed:



Information required to add an item to an option list

The rules for adding an item to an option list depend on the option list type.

Rules for universal and type 9 option lists

To add an item to a universal or type 9 option list, you must have the following information:

- Code—the value to be stored in a record
- Description—the alphanumeric description of the code that will display in the drop-down list box
- Alternate Language—if you are using more than one language in the system, this is the description in the alternate language

Note: If you want to add a test organization-specific option to a type 9 option list, you must use the Edit Utility (EDIT).

See also:

- Adding an item to a universal option list ***(on page 40)***

For detailed instructions for adding an item to a universal option list.

Rules for organization-specific option lists

Options in an organization-specific option list must always be associated with an organization. This allows a different group of options to be associated with each organization while still using the same option list. When you access a list box tied to an organization-specific option list, its drop-down list contains only those descriptions associated with the organization for the current employee.

Suppose you defined an option list called 1234Y with the following values:

Organization	Code	Description
111111	A	Company 1-Benefit A
111111	B	Company 1-Benefit B
222222	A	Company 2-Benefit A
222222	C	Company 2-Benefit C

Based on these definitions, when you process a form, the drop-down list for option list 1234Y will be as follows:

Current Organization	This list displays
111111	Company 1-Benefit A Company 1-Benefit B
222222	Company 2-Benefit A Company 2-Benefit C

See also:

- Adding an item to an organization-specific option list ***(on page 42)***

For detailed instructions for adding items to an organization-specific option list.

Modification of option list items

Using the Option List Editor (CSUPDT), you can modify the description, alternate language, and status for an item. You can not change the code itself. If you need to modify a code, you must delete the item and then add it again with the correct code.

☞ *Refer to Using the EXPORT utility in the Technical Administration guide to learn how to use the EXPORT utility to obtain a printable version of the entire contents of an option list.*

Status

Option list items have an active or inactive status. Items with an active status can be selected by users.

Using the Option List Editor (CSUPDT), you can change an item's status from active to inactive. An item with an inactive status does not display in the list, and therefore can not be selected. It does, however, remain in any records that already contain it. Inactive items display in a different color than active items.

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A caution when removing option list items

Exercise caution when removing items from an option list. If you are not sure that it is still in use, consider changing an item's status to inactive rather than removing it.

If you are certain that no employee records contain the item, you can safely delete it. However, if you delete an item from an option list and the option still exists in employee records, problems can occur. These problems will surface when a form is opened that accesses the option list for an employee whose record still contains the now-invalid code. The drop-down list in the list box using the option list will appear blank, suggesting that it contains no value. You must select an option to replace the code in the employee's record.

Impact of option list maintenance

When you finish editing an option list, both the System Control Repository and the Client Data File on your workstation are updated immediately. You may verify option list contents at any time by using the Option List Display/Report form (CDLIST). Other users will see the option list changes the next time they press Enter.

See also:

■ Modifying an item's description ***(on page 43)***
For detailed instructions for modifying an item's description.

■ Modifying an item's status ***(on page 44)***
For detailed instructions for modifying an item's status.

■ Removing an item from an option list ***(on page 45)***
For detailed instructions for removing an item.

■ Displaying an option list ***(on page 46)***
For detailed instructions for displaying an option list.

Apply the Concept

Based on your understanding of the Option List Editor (CSUPDT) functionality as explained in this concept, indicate which of the following tasks you can complete after accessing it:

Add a new item to an existing option list
Add a new option list
Change information about an existing item
Delete an item
Delete an option list

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Accessing the Option List Editor from a list box

To access the Option List Editor (CSUPDT) from a list box, follow these steps:

1. Position the pointer in the list box

Position the pointer in the list box that uses the option list to be edited.

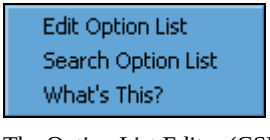
Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Additional Personal And ID Information

2. Right-click

Right-click the list box to display the selection dialog.

3. Choose Edit Option List

Select Edit Option list from the options that are displayed.



The Option List Editor (CSUPDT) displays the detailed information for the requested option list.

See also:

- Option List Editor access ***(on page 31)***

For more information on accessing the Option List Editor (CSUPDT).

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Accessing the Option List Editor from the Navigator

To access the Option List Editor (CSUPDT) from the Navigator, follow these steps:

1. Access the Option List Editor (CSUPDT)

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

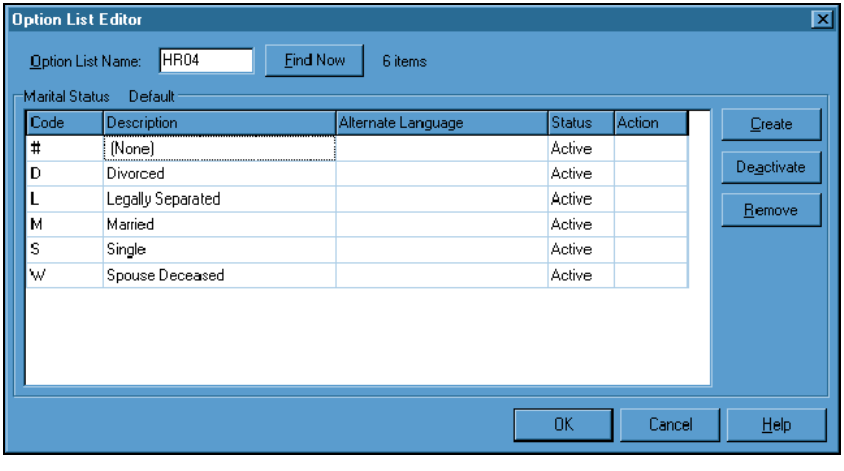
2. Enter the Option List Name

Type the name of the option list to be edited.

3. Click Find Now

The system displays the detailed information for the requested option list.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



See also:

- Option List Editor access ***(on page 31)***

For more information on accessing the Option List Editor (CSUPDT).

Adding an item to a universal option list

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

Component:	Employee Resourcing
Process:	Maintain Basic Employee Details
Task:	Telephone/Previous Applicant Info

To add an item to a universal option list, follow these steps:

1. **Access the Option List Editor (CSUPDT)**
   Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).
2. **Click Create**
   A blank line is inserted, allowing you to add the new item.
3. **Enter the Code**
   Type a unique code or value. The length of the code depends on the particular option list with which you are working.
4. **Enter the Description**
   Type a description of up to 20 characters for the code. This is the description that will be displayed in the drop-down list box.
5. **Enter the Alternate Language**
   If an alternate language is being used, type the description for the code in that language.

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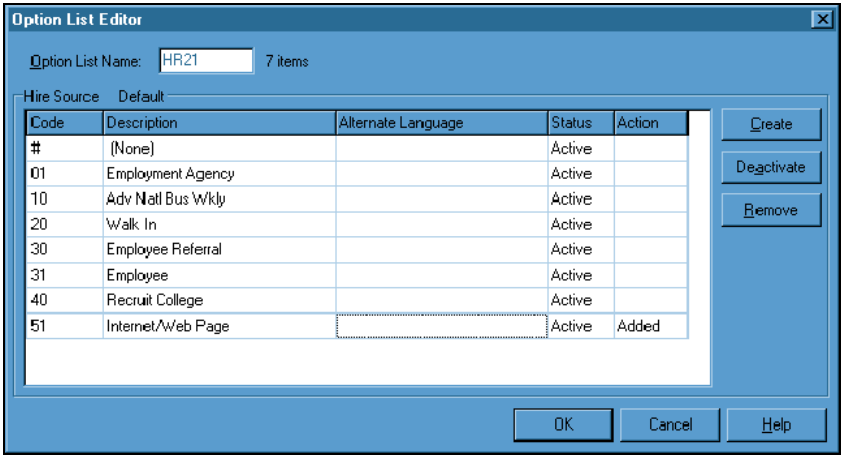
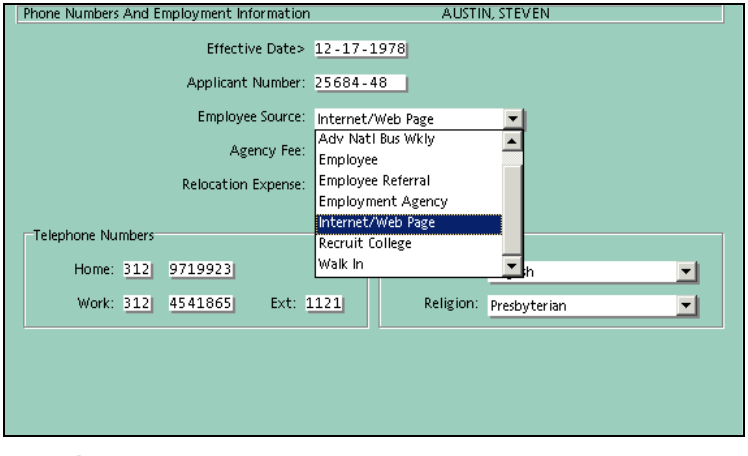
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



6. Click OK or press Enter

No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed

If you completed the previous step, the contents of the option list should look similar to the example that follows:



See also:

- Information required to add an item to an option list ***(on page 35)***

For more information on adding items to an option list

Adding an item to an organization-specific option list

To add an item to an organization-specific option list, follow these steps:

1. Access the Option List Editor (CSUPDT)

Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

The Option List Editor dialog (CSUPDT) is displayed. Only non-test organization values are shown.

2. Click Create

A blank line is inserted, allowing you to add the new item. The organization number defaults to the organization that is displayed on the Status bar.

3. Enter the Code

Type a unique code or value. This value, together with the organization number, will be stored in the database.

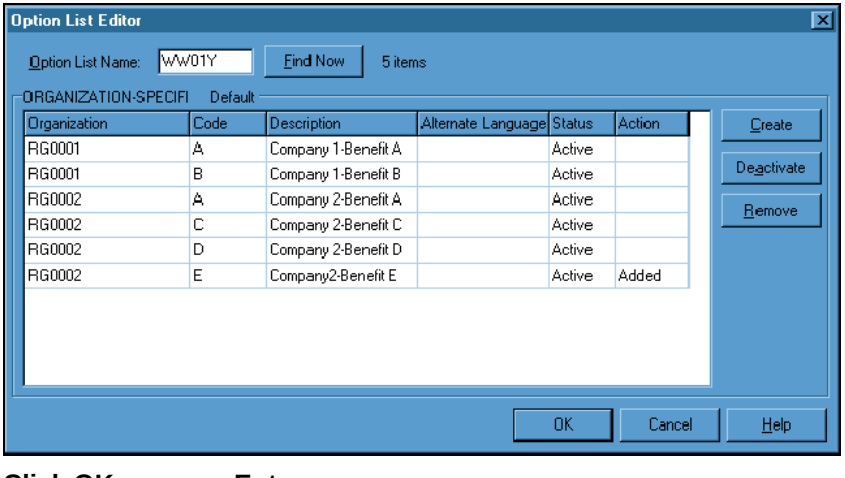
4. Enter the Description

Type a description of up to 20 characters for the code. This is the description that will be displayed in the drop-down list for the list box.

5. Enter the Alternate Language

If an alternate language is being used, type the description for the code in that language.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



6. Click OK or press Enter

No items are added to the option list until you click OK. When you click OK, the additions are made immediately. No confirmation message is displayed.

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See also:

- Information required to add an item to an option list ***(on page 35)***

For more information on adding items to an option list.

Modifying an item's description

To modify an item's description, follow these steps:

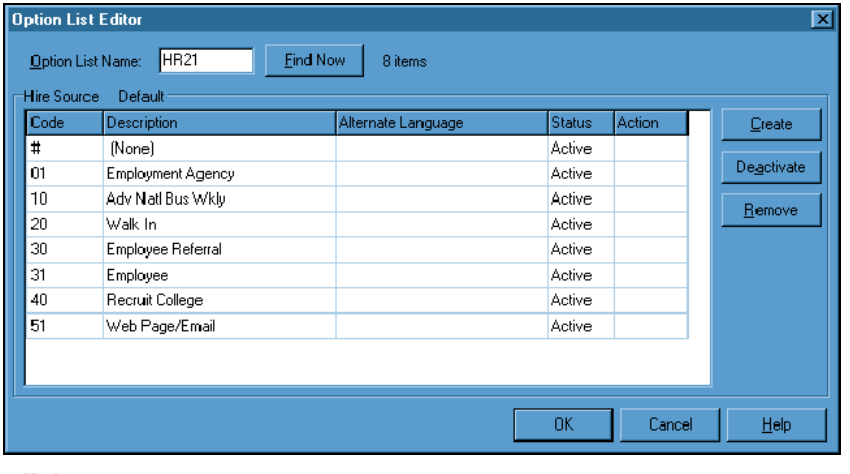
1. Access the Option List Editor (CSUPDT)

Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

2. Modify the description

To change a description, double-click on its text box and then type over the information displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



3. Click OK or press Enter

No changes are made to the option list until you click OK. When you click OK, the changes are made immediately. No confirmation message is displayed.

See also:

- Modification of option list items ***(on page 36)***

For more information on modifying option lists.

Modifying an item's status

To modify an item's status, follow these steps:

1. Access the Option List Editor (CSUPDT)

Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

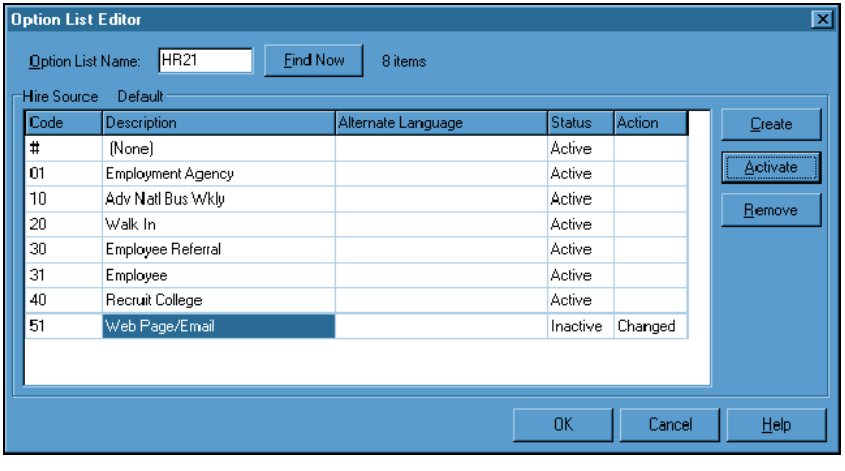
2. Position the pointer on the line of the item to be modified

Click on the line for the item that is to be changed. Note that you can not position the pointer in the Code, Status, or Action text box.

3. Click Deactivate or Activate

Depending on the item's current status, either the Deactivate or Activate button is displayed. If the item's current status is Active, click Deactivate to change the status to Inactive. If the item's current status is Inactive, click Activate to change its status to Active.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click OK or press Enter

The changes are made immediately. No confirmation message is displayed.

See also:

- Modification of option list items ***(on page 36)***

For more information on modifying option lists.

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Removing an item from an option list

To remove an item from an option list, follow these steps:

1. Access the Option List Editor (CSUPDT)

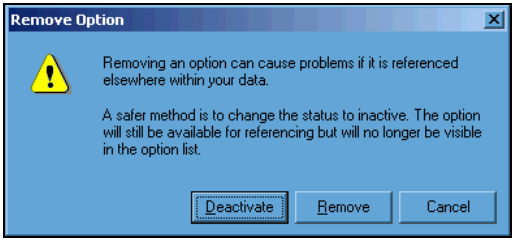
Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

2. Position the pointer on the line of the item to be removed

Click on the line for the item that is to be removed. You may not position the pointer in the Code, Status, or Action text box.

3. Click Remove

Click Remove in the Option List Editor dialog (CSUPDT). After you click Remove, the system displays a Remove Option warning message dialog, asking you to confirm the deletion.



4. Click Remove

If you want to remove the item, click Remove in the Remove Option dialog. The item is not removed yet. Its action changes to 'Removed'.

If you have started the process of removing an option list item and you change your mind after clicking Remove, you may reverse the action by clicking on the Reinstate button that is displayed on the Option List Editor dialog (CSUPDT).

5. Click OK

Confirm the deletion by clicking OK. The item is removed from the option list.

See also:

- Modification of option list items ***(on page 36)***

For more information on removing option list items.

Displaying an option list

To display an option list, follow these steps:

1. Access the Option List Display/Report form (CDLIST)

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

Component: Development Tools
Process: Option Lists
Task: Display

2. Enter the Option List name

Type the exact name of the option list. This entry is case-sensitive. Use '=' as a wildcard.

To display all option lists alphabetically by name, type '=' in all positions of this text box. To display only the name and title of all option lists, type '=' in all positions of this text box and 'N' in the remaining text boxes.

3. Enter a Code values preference

If you want the code values to be displayed, leave this text box blank (the default is 'Y') or type 'Y'. If you do not want code values to be displayed, type 'N'.

4. Enter a Documentation preference

If you want the documentation displayed, type 'Y'. Otherwise, leave this text box blank.

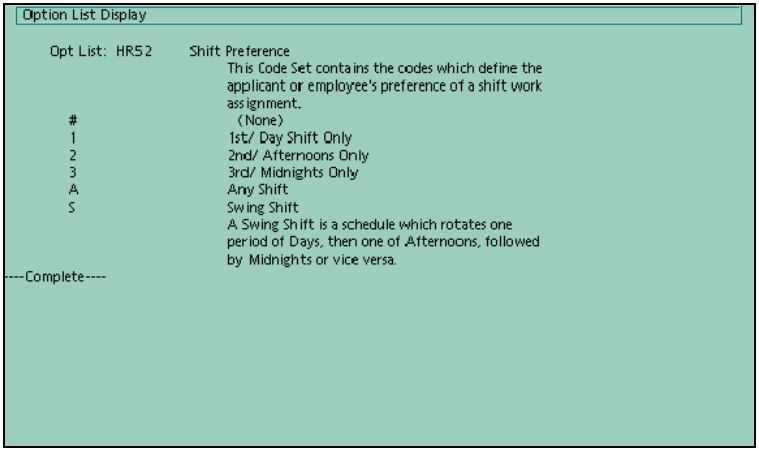
5. Enter a Calculations preference

If you want the calculation used to be displayed, type 'Y'. Otherwise, leave this text box blank.

6. Press Enter

Press Enter to generate and display the requested information.

If you completed the previous steps, the resulting form should look similar to the example that follows:



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See also:

- Modification of option list items ***(on page 36)***

For information on displaying option lists.

Extended Practice

Your company has purchased laptop computers for your consulting staff, and you have been asked to add this item to the Company Property option list (HR24). Using the Option List Editor, add code 'P1' to option list HR24 and give it a description of 'Laptop Computer'.

After the new entry has been made, access the Company Personal Property form (22-SCR) for Jerry Jones, employee 1111 in Organization 999999, and record his newly assigned laptop computer. Access this form from the Navigator by making the following selections:

Component: Employee Resourcing
Process: Maintain Additional Employee Details
Task: Company Property

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Review of Questions Answered

1. What are the different types of option lists?

2. What is the Option List Editor (CSUPDT) and what is its purpose?

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CHAPTER 4

Designing a Business Process

In This Chapter

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Introduction

Recording and maintaining employee information requires many tasks. You may use several forms to complete these tasks, entering and displaying various employee information. This section describes how you use checklist feature to design business processes that utilize the forms required to record and maintain employee information.

Tasks

The following tasks are discussed in this section:

- Creating a checklist
- Modifying a checklist
- Removing a checklist
- Viewing paused checklist details
- Unlocking locked checklists
- Running the Paused Checklist report

Prerequisites

Before you can begin designing a business process using a checklist, you must be signed on to The Solution Series and have the authority to create checklists.

Questions answered

The following questions are answered in this section:

3. What is a checklist?
4. What are the differences between a personal checklist and a universal checklist?
5. What tool do you use to create a checklist?
6. What tool do you use to delete a checklist?
7. What tool do you use to control checklists?

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Business processes

Your organization follows various processes to record, maintain, and manage employee information. When a new employee is hired, for example, your organization follows several business processes that ensure the employee's personal, benefit, and payroll information is entered in a timely manner. These processes could be documented in a procedure manual or summary form.

The Solution Series uses a tool, called a checklist, which you can use to design, create, and maintain business processes that use the forms required to maintain employee information. When used, checklists ensure that all the items that are part of a business process are presented and tracked for completion.

See also:

- Creating a personal checklist ***(on page 75)***
- Creating a universal checklist ***(on page 85)***

For detailed directions on creating a checklist.

Checklists

Checklists can link forms, dialogs, report groups, and other checklists within the system to guide you through a business process. Checklists help you identify the steps you need to complete and track your progress. Checklists can also be used to trigger emails and letters.

You can add a report group to a user-defined checklist, so that launching the report is part of a business task accomplished online. Report groups that are added to a user-defined checklist must already exist on the menu.

If you have not implemented checklists yet, you may want to consider creating some to complement the Interactive Workforce process. For example, you could create a new hire checklist that includes all the core forms you need to complete before you give the new employee access to Interactive Workforce

There are two types of checklists:

- Personal checklists
- Universal checklists

Personal checklists

Personal checklists are created by you; only you have access to them. Personal checklists are stored on your computer with an LCL filename extension.

See also:

- Creating a personal checklist ***(on page 75)***

For detailed directions on creating a personal checklist.

Universal checklists

Universal checklists are available to everyone. They are stored in the System Control Repository. The system assigns all universal checklists a number as they are created. They are identified in the System Control Repository with a record ID beginning with MML and followed by a six-digit number. The number indicates who created the checklist. Numbers 000000 through 499999 identify checklists created by anyone in your organization, and numbers 500000 through 999999 identify checklists delivered with The Solution Series.

Checklists are assigned numbers in descending order. Whenever a checklist is created, the system takes the last assigned number, subtracts one and assigns the next number to that checklist.

A feature unique to universal checklists is that they can be linked to up to six other checklists. For example, after completing the checklist that records basic employee information, the checklist could present the option to access another checklist that records benefits, salary, or Position Administration information.

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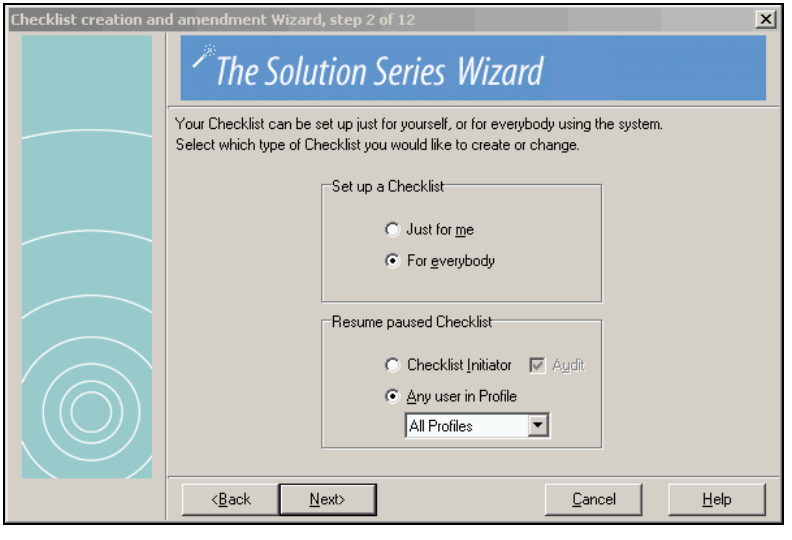
When defining a universal checklist you can also indicate who can resume the checklist when it is paused. You can define that only the individual who starts the checklist may finish it, that it can be resumed by anybody in the same group (that is, has the same profile) as the user who started it, or can be resumed by anybody. This is useful in situations when a user begins a checklist then finds that they do not have all of the information to complete the checklist. In this situation that user would pause the checklist and another member of the team could resume that checklist at a later time. The checklist can then be paused by the second user and have it resumed by yet another member of the team until it is completed.

Who can resume a checklist is defined in Step 2 of the Checklist Wizard:



See also:

- Creating a universal checklist ***(on page 85)***

For detailed directions on creating a universal checklist.

Accessing a checklist

Checklists can be added to and accessed from the Bookmarks menu, Favorites toolbar, or the menus and Navigator. When you create a personal checklist, it is automatically added to your Bookmarks menu and Favorites toolbar. Universal checklists must be added manually to the menus and Navigator.

User profile considerations

You must have the proper authorization to create and modify checklists. Depending on your user profile authorization, you will be able to create and modify one of the following:

- Only personal checklists
- Only universal checklists
- Both personal and universal checklists
- No checklists

Note: Contact your Security Officer regarding your user profile.

Your user profile can also be used to determine which universal checklists you are able to resume if they are paused by the user who started it.

Design considerations

Before you use the system to create a checklist, you should be aware of the capabilities and options that can affect the way checklists work.

Consider the following options and capabilities when designing checklists:

- Decision dialogs
- Special new hire processing
- Selecting the same effective date
- Identify items that are mandatory
- Identify forms that can not be re-entered
- Assign dependencies

The first three options listed are at the checklist level. The last three apply to one or more items within a checklist.

Decision dialogs

You can link a universal checklist to up to six other checklists through decision dialogs. Decision dialogs are displayed on completion of a checklist. You can create a checklist that uses forms to complete one business process and then displays the option to link to other checklists that complete other business processes.

You can also create a checklist that uses no forms but offers the option to link to other checklists. Designing a checklist in this manner allows you to display a decision dialog before using any form dialogs.

Using decision dialogs allows you to modularize your checklists so that common steps can be grouped in one checklist and unique steps in separate checklists. For example, if your organization has both union and non-union employees, you may have some steps that are common to both groups and others that are unique to each group. You can group the common steps together in one checklist, and link to two other checklists; one that is unique to union employees, and one that is unique to non-union employees.

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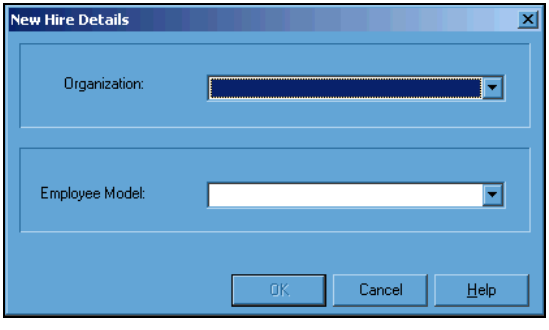
New Hire checklist

You use templates called logical employee models when processing new hires. Each logical employee model contains default information to make the process more efficient. Your organization can have many logical employee models. When you process a new hire, you must identify the organization and which logical employee model is to be used.

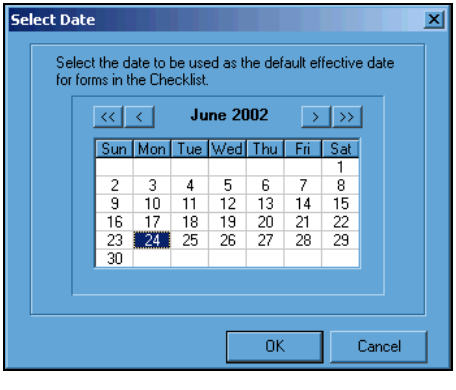
If you create a checklist that processes new hire information, you must identify it as such. Doing so causes special processing to occur that allows the person using the checklist to select the organization and logical employee model to use with the new hire.

When you identify a checklist as a new hire checklist, a New Hire Details dialog box similar to the following displays first when the checklist is accessed.



Same Effective Date

You can elect to use the same effective date for all items in a checklist. When you select this option, the Select Date dialog box will be displayed with the current date already selected when the checklist is accessed. The date that is selected from this dialog box will be used to populate the effective date for every item in the checklist.



Mandatory items

Some steps in your business process may be mandatory, others optional. You can select those forms that are mandatory. When the checklist is accessed, mandatory steps are identified with an arrow and must be completed before the checklist can be successfully finished.

Until the mandatory steps are complete, the Finish Checklist control will be displayed in red. The Finish Checklist control is displayed in green when all mandatory steps have been completed.

If the Finish Checklist control is available, the checklist can be stopped even though all mandatory items have not been completed. Stopping a checklist before mandatory items have been completed, however, cancels all further processing. A special option can be set that makes the Finish Checklist control unavailable until all mandatory items have been completed.

Forms that can not be re-entered

If a form in a checklist creates a record or sends a message, you may not want that form to be accessed more than once. The Employee Transfer form (ET-SCR), for example, is used to transfer records from one organization to another and would not be re-entered.

When you design a checklist, you can select which forms can not be re-entered. Selecting forms that can not be re-entered prevents the person using the checklist from accessing the form again after the step that uses that form has been completed.

Dependencies

Some steps in your checklist may be dependent upon the completion of another step. If this is the case, you can identify these relationships when the checklist is created. Dependent steps can not be accessed until the step on which they are dependent has been completed.

Example checklist

An example checklist called 'Hire a New Employee' is delivered. Although it displays as one checklist on the Navigator and menus, it is actually five universal checklists working together. These checklists use many of the options available to you when you create your checklists. Consider looking at how these are constructed and how they work before creating your own. They can give you an idea of how checklists work in general and how the options you select affect how checklists work.

The delivered checklists can be viewed using the Checklist wizard.

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The Checklist wizard

The Checklist wizard is the tool you use to create checklists. The Checklist wizard walks you through the tasks and options necessary to create a checklist step-by-step.

Creating a checklist can take up to 12 steps. The following is a summary of each step:

1. Welcome
2. Identify checklist type
3. Name the checklist
4. Add items to the checklist and identify their sequence
5. Indicate if it is a new hire checklist and if the same effective date should be applied to every item
6. Change the description of the items (if desired)
7. Select items that are mandatory
8. Finish the checklist or select additional advanced features (Steps 9–11)
9. Assign items that can not be re-entered
10. Assign dependencies
11. Build links to other checklists (universal checklists only)
12. Finish

The Checklist wizard will guide you through each step, one-by-one. It may skip one or more steps, depending on your user profile, the type of checklist you are creating, and the options you select. For example, if your user profile only allows you to create personal checklists, the wizard will skip Step 2.

As you progress through the steps of creating a checklist, the Checklist wizard indicates which step you are on in its title bar.

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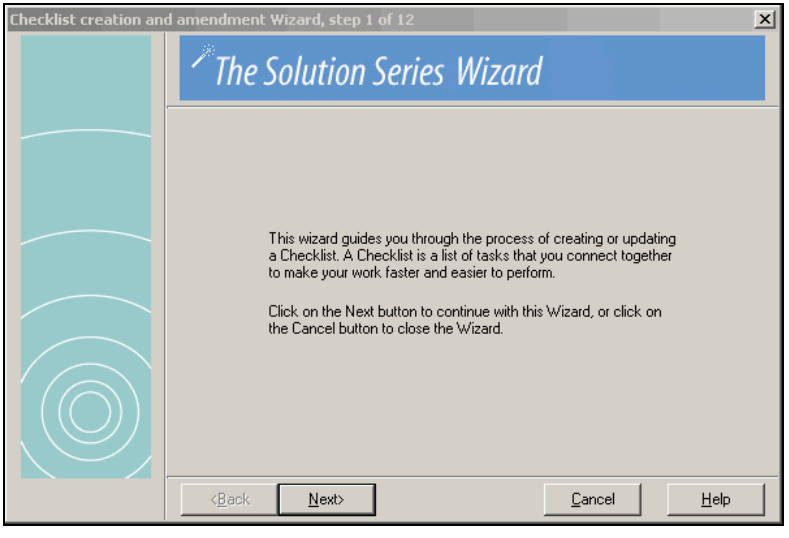
The following example shows the first step of the Checklist wizard:



Note: When you create a universal checklist, the number assigned to the checklist will also display in the title bar.

See also:

- Creating a personal checklist ***(on page 75)***
- Creating a universal checklist ***(on page 85)***

For detailed directions on using the Checklist wizard to create a checklist.

- Modifying a personal checklist ***(on page 91)***
- Modifying a universal checklist ***(on page 96)***

For detailed directions on using the Checklist wizard to modify a checklist.

Navigating the Checklist wizard

There are three buttons that you can use to navigate through the Checklist wizard:

- Back—moves you backwards one step
- Next—moves you forward one step
- Cancel—exits the wizard

When appropriate, the Next button is replaced by a Finish button. The checklist is not created until you click Finish. Until you do so, you will be able to use the Back and Next buttons to move back and forth between the steps and make changes before the checklist is actually created.

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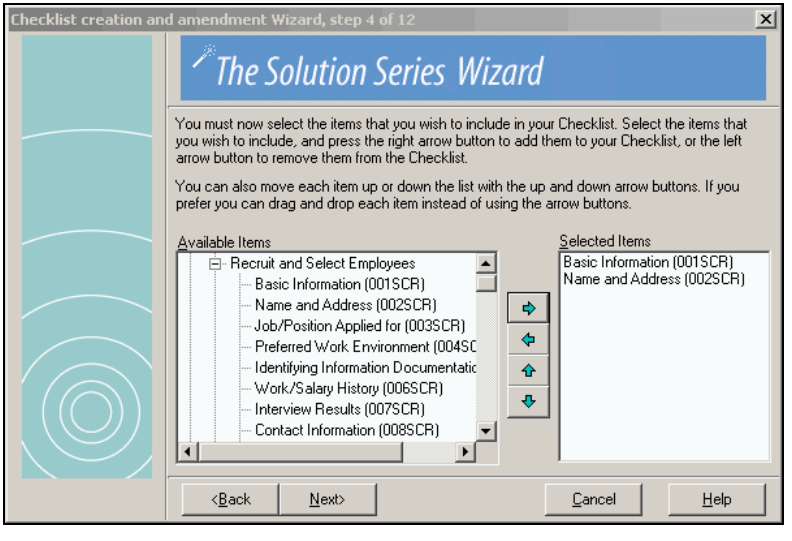
Naming the checklist

When you create a checklist, you name it in Step 3 of 12 of the Checklist wizard. Use a name of up to 30 characters. The name you use will be shown on the Bookmarks menu and Favorites toolbar for personal checklists and on menus and the Navigator for universal checklists, if added.

Selecting and renaming checklist items

You select items for your checklist in Step 4 of 12 of the Checklist wizard. You can have up to 999 items in a single checklist.

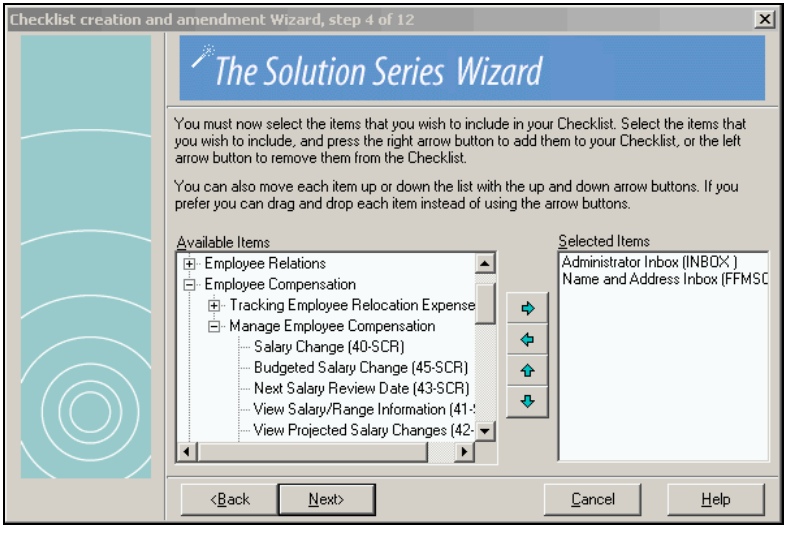
The following example shows Step 4 of the Checklist wizard.



Navigation in the Available Items pane

You select items or forms from the Available Items pane. Forms are at the lowest level of the tree in the pane. If you are familiar with using the Windows Explorer, navigating through the Available Items pane will be familiar to you. If an item has forms below it that are not displayed, it will have a '+' next to it. When an item is expanded, its '+' sign is changed to a '-' sign. Forms are shown without either symbol.

In the following example, 'Employee Compensation' and 'Manage Employee Compensation' have been expanded. The forms under 'Manage Employee Compensation' can be added to a checklist. Items such as 'Employee Relations' and 'Tracking Employee Relocation Expenses' have sub-items that are not displayed. In other words, they are 'collapsed'.



The following navigation and display options are available.

- To expand a particular item, click the '+' sign next to the item.
- To collapse a particular item and its sub-items, click the '-' sign next to the parent item.

Adding, moving, and deleting checklist items

There are two ways that you can add, move, or delete checklist items:

- Drag them
- Use the arrow buttons

You can add items by dragging them from the Available Items pane to the Selected Items pane. If you want to delete an item that you have added, drag the item back to the Available Items pane. After you have added several items, you can change the order by dragging an item before or after other items within the Selected Items pane.

The items in the Available items pane are the same as those displayed on your Navigator. You can select any form listed.

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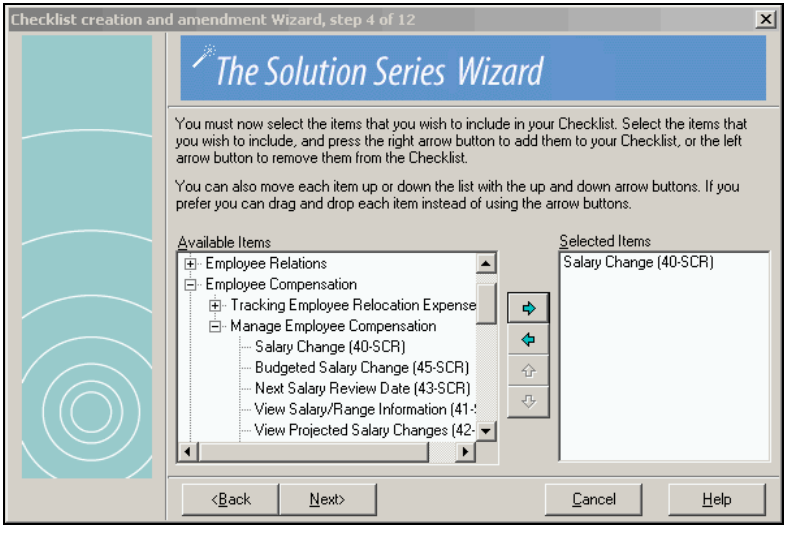
The example below shows the Salary Change form (40-SCR) has been added to the Selected Items pane.



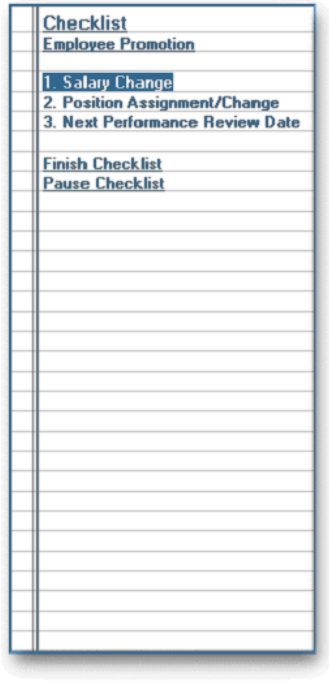
If you do not want to drag items, you can use the arrow keys to add, move, and delete items. To use any of the arrow keys, you must first select an item. To add an item, you would select it in the Available Items pane, and then click the right arrow button. After an item is in the Selected Items pane, you can select it and use the left arrow button to delete it or the up and down arrow buttons to move it before or after other items.

Note: *The order in which items display in the Selected Items pane determines the sequence in which they are listed when the checklist is accessed.*

Changing the description of an item

The forms that you select in Step 4 of 12 of the Checklist wizard display as steps in the Navigator when the checklist is accessed. By default, the description you see when you select an item will be shown in the checklist. The description also displays as a ToolTip for the previous and next buttons on the Checklist toolbar.

The following example shows the default descriptions of items selected for a checklist used to record employee promotion information.



In Step 6 of 12 of the Checklist wizard, you have the option of changing the default description of any item in the checklist. You can enter a description of up to 40 characters.

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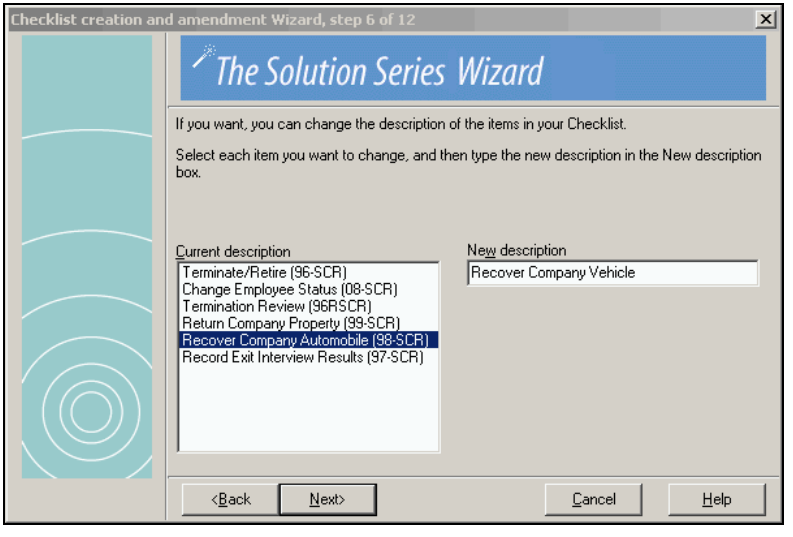
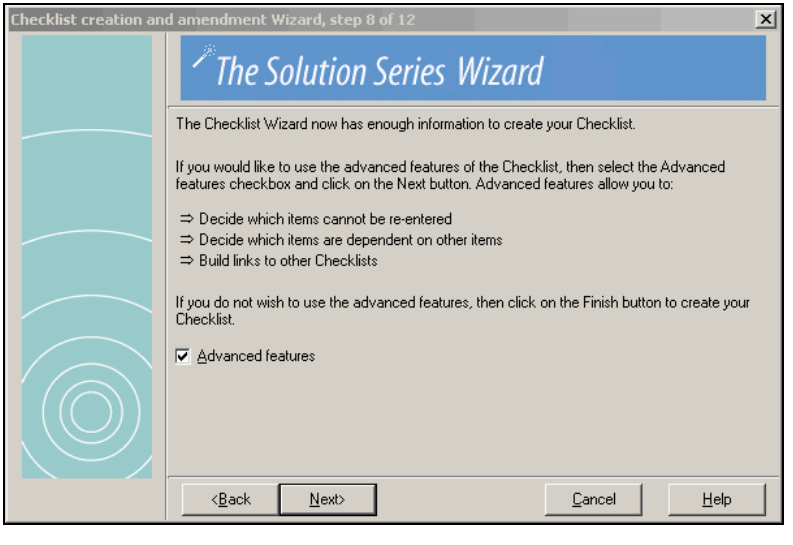
The fifth item in the example below, 'Recover Company Automobile', is being renamed to 'Recover Company Vehicle':



Advanced features

In Step 8 of 12 of the Checklist wizard, you are given the option to finish the checklist you are creating or go on to select advanced features. Advanced features include selecting items that can not be re-entered, assigning dependencies, and for universal checklists, building links to other checklists.

There follows an example of Step 8 of 12 of the Checklist wizard:

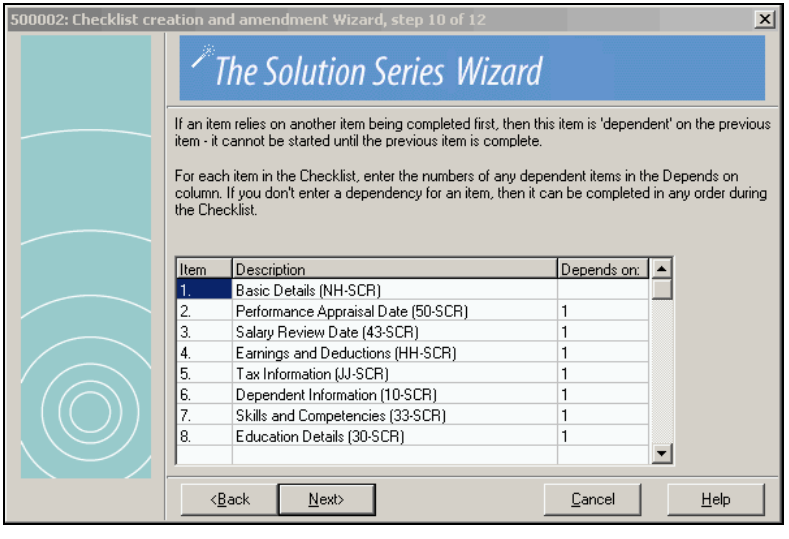


By default, 'Advanced features' is not checked and the 'Finish' button is displayed. If you want to use one or more of the advanced features, click Advanced features. When this check box is checked, the 'Finish' button is replaced by a 'Next' button, allowing you to continue on to the advanced features.

Assigning dependencies

In Step 10 of 12 of the Checklist wizard, you can assign dependencies. Dependencies identify steps that must be completed before others can be accessed. You do so by entering the number of the step that must be completed in the Depends On column.

The following example shows that Steps 2 through 8 of the delivered 'New Hire' checklist are dependent on the completion of Step 1:



Links to other universal checklists

In Step 11 of 12 of the Checklist wizard, you can build links to other universal checklists. You can build links to up to six other universal checklists. When the checklist that you are creating is accessed and completed, the links to other universal checklists that you identify in this step are presented in a dialog of option buttons.

Note: An option of 'None' is automatically included along with the other links that you specify. This gives the user of the checklist the option of completing the checklist without linking to another checklist.

To create a link, you must enter a description and select the universal checklist from an option list. The universal checklist that you want to link to must already be created. The description that you enter displays in the dialog of options when the checklist is accessed and completed.

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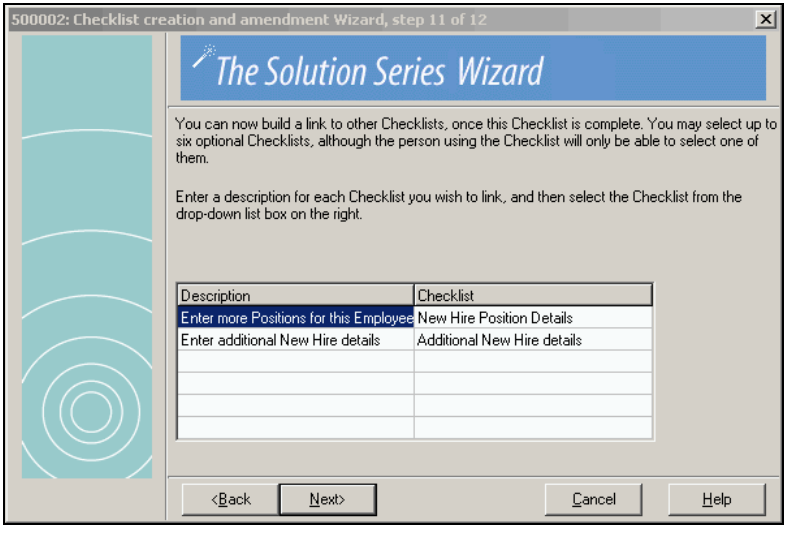
The following example shows the delivered New Hire initial dialog checklist linked to the Applicant New Hire and New Hire checklists.



Canceling the Checklist wizard

You can cancel the Checklist wizard at any time. When you do, you will lose any additions or changes that you have made in any of the steps. A warning message will remind you that your changes will be lost.

See also:

- Creating a personal checklist ***(on page 75)***
- Creating a universal checklist ***(on page 85)***

For detailed directions on creating a checklist.

Checklist maintenance

As your business processes change, you will need to maintain the checklists that address those processes. You can modify and delete checklists.

Checklist modification

Modifying a checklist is similar to creating one. To modify a checklist, you use the Checklist wizard. You will be guided through steps that are similar to those used to create a checklist.

When you modify a personal checklist, you will be presented with the option to add the checklist to the Favorites toolbar. If the checklist is already on the Favorites toolbar and you select this option, the checklist will be added again.

See also:

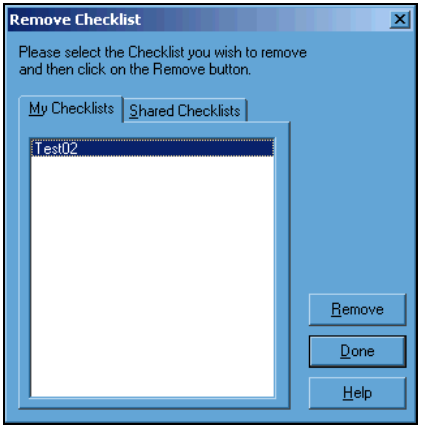
- Modifying a personal checklist ***(on page 91)***
- Modifying a universal checklist ***(on page 96)***

For detailed directions on using the Checklist wizard to modify a checklist.

Checklist removal

When you no longer need a checklist, you can remove it.

You use the Remove Checklist dialog box to remove a checklist. As shown below, there are two tabs on the Remove Checklist dialog box. Personal checklists are listed on the My Checklists tab and universal checklists on the Shared Checklists tab.



Removing a checklist does not automatically delete the checklist entry from the Bookmarks menu, Favorites toolbar, or custom menus. To remove a checklist entry from these parts of the system, you must manually delete it.

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See also:

- Removing a personal checklist ***(on page 100)***
- Removing a universal checklist ***(on page 102)***

For detailed directions on removing a checklist.

☞ *Refer to* **Maintaining Menus** *(on page 107) for information on deleting a checklist from the menus or navigator.*

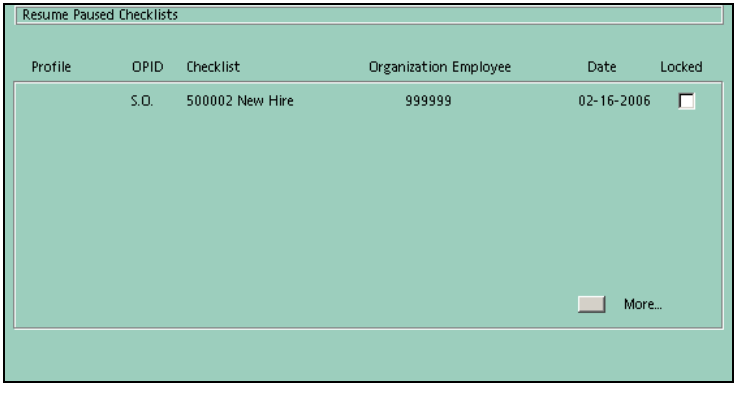
Checklist administration

You can administer various aspects of universal checklists, such as unlocking those that have become locked, seeing which checklists are paused, or viewing who has accessed a checklist.

Locked checklists

When a paused universal checklist is in action (meaning that a user has opened that checklist) the checklist will be locked so that other users cannot access the checklist at the same time. The checklist will be displayed in both the group and administrator paused checklist list when they log on, but if a user tries to action that checklist an error will be displayed indicating who is currently working on that checklist.

The administrator has the ability to unlock a checklist in case something happens that results in the checklist being permanently locked using the Resume Paused Checklist form (MMPRSC).



See also:

- Unlocking locked checklists ***(on page 103)***

For detailed directions on unlocking a checklist.

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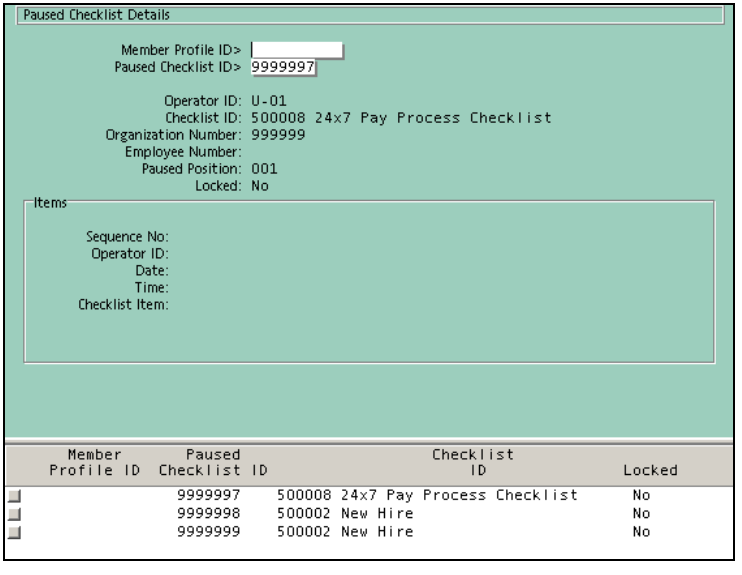
Paused checklists

Because checklists are used to organize the flow of tasks completed in the system related to different processes, it can be important that a Supervisor or Manager of a group be able to verify certain elements of checklist use. The Paused Checklist Report (MMPRPT) provides details of the number of outstanding checklists and indicates how many people have completed steps in the checklist. If a checklist is started and is not viewed for a number of days, this will appear on the report and it will serve as a reminder that any checklists not completed should be finished.

To view paused checklists online, use the Paused Checklist Details form (MMPSCR):

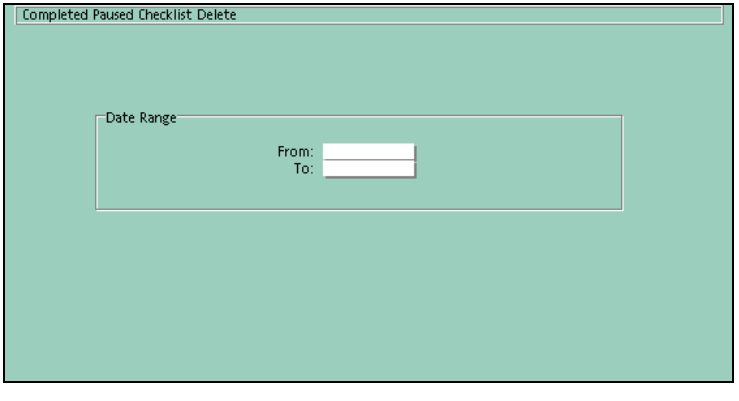


To view completed checklist details online, the administrator can open the Completed Paused Checklist View form (MMPCSC), accessed by making the following selections from the Navigator:

Component: Administrator Tools
Process: Checklist Tools
Task: View Completed Paused Checklists

Completed checklist records are kept until they are deleted using the Completed Paused Checklist Delete form (DELMMP):

Component: Administrator Tools
Process: Checklist Tools
Task: Delete Completed Paused Checklists



See also:

- Running the Paused Checklist report ***(on page 104)***

For detailed directions on running the report.

- Paused Checklist Report (MMPRPT) ***(on page 302)***

For further details on the report.

- Viewing paused checklist details ***(on page 103)***

For detailed directions on viewing paused checklists online.

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Checklists and communication events

As part of your business process, you may want to automate communication that should take place within your organization when checklists are used. For example, if you use a checklist to create the forms required for a new hire, you might want to automatically generate a letter welcoming a new employee to the company when the checklist has been completed. To accomplish this, after you have created a checklist, you would create a communication event for that checklist.

A communication event can be in the form of a letter or an email. Using the Communication Event Manager, you can set up a letter or email to be automatically generated when any of the following occur:

- A checklist is finished and all of the mandatory steps have been completed
- A checklist is finished and all of the mandatory steps have not been completed
- A checklist is paused

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Controlling checklists using Edit

Most checklist options can be set using the Checklist wizard. There are, however, several options that can only be set using the Edit Utility (EDIT):

- The name of the Cyborg Scripting Language program to execute on finish
- Suppressing the summary dialog
- Disabling the Finish Checklist control until all mandatory items have been completed
- Clearing all forms the first time they are presented

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Detailed Directions

This section provides detailed directions on completing a business task.

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Creating a personal checklist

There are two types of checklists—personal and universal.

Note: *To create a personal or universal checklist, you must have the proper authority. If you do not have the authority to create checklists, the system will direct you to see your administrator to change your user profile.*

To create a universal checklist, follow the steps in ***Creating a universal checklist*** (on page 85).

To create a personal checklist, follow these steps.

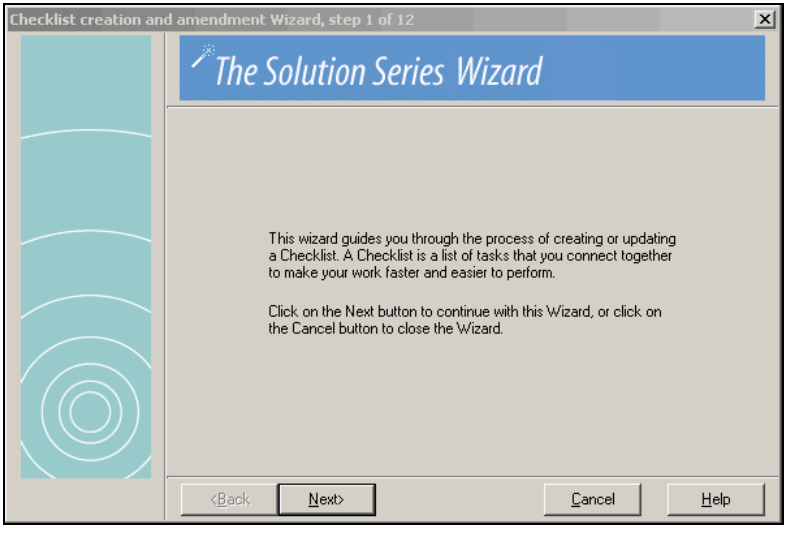
Note: *To create a personal checklist, you will use the Checklist wizard. Depending on your user profile and the options you select, the wizard may skip one or more steps.*

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Create/Modify a Checklist

If you completed the previous step, the resulting dialog should look similar to the example that follows:



Welcome (1 of 12)

2. Click Next

Click Next to continue creating a checklist.

Checklist type (2 of 12)

3. Select 'Just for me'

Select 'Just for me' to create a personal checklist.

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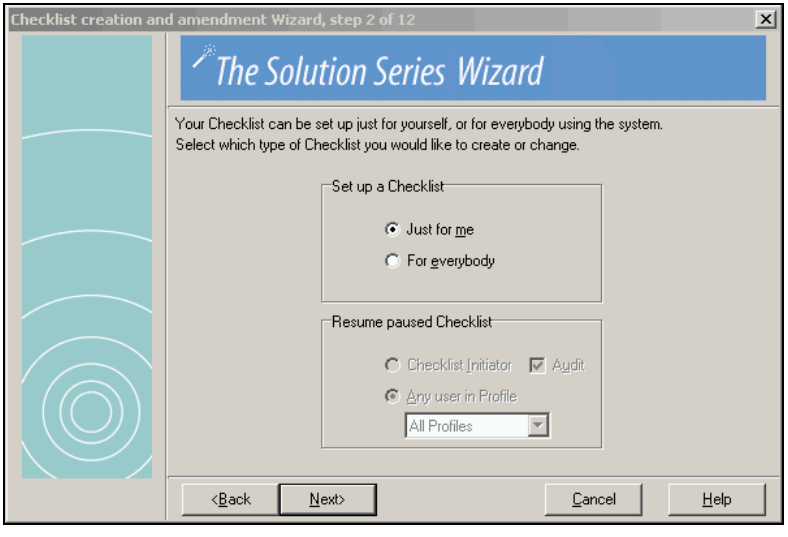
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue creating a checklist.

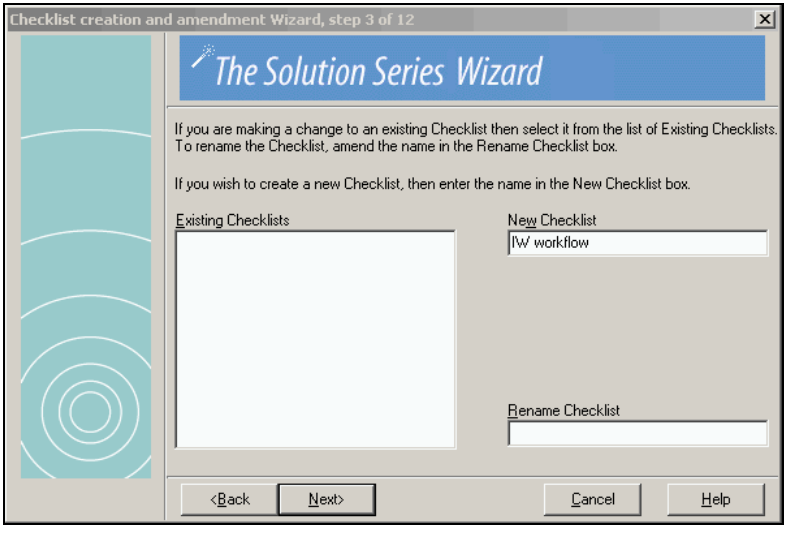
Checklist name (3 of 12)

5. Position the pointer in the New Checklist text box

The insertion pointer displays in the New Checklist text box.

6. Enter the checklist name

Enter a name of up to 30 characters for the checklist.



7. Click Next

Click Next to continue creating a checklist.

Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

Fully expand the tree view in the Available Items pane.

To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item that you have added, drag the item from the Selected Items pane back to the Available Items pane.

The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

The item is added to the Selected Items pane. Repeat this step to add more items to your checklist.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane.

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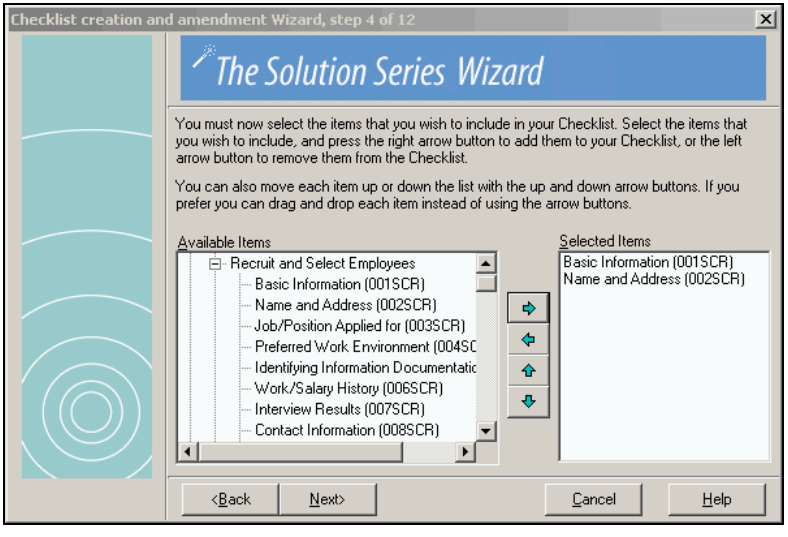
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



9. Click Next

Click Next to continue creating a checklist.

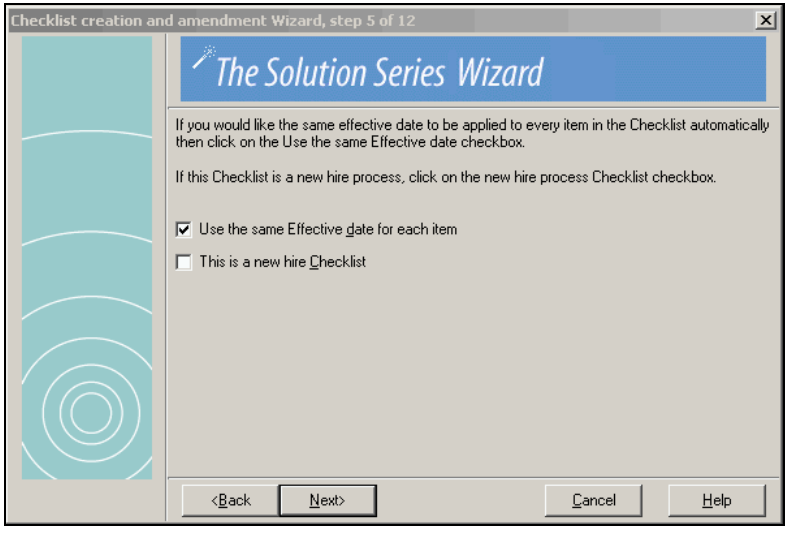
Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.



12. Click Next

Click Next to continue creating a checklist.

Item descriptions (6 of 12)

13. Select an item to change

If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

14. Enter a New description

Enter a new description of up to 40 characters.

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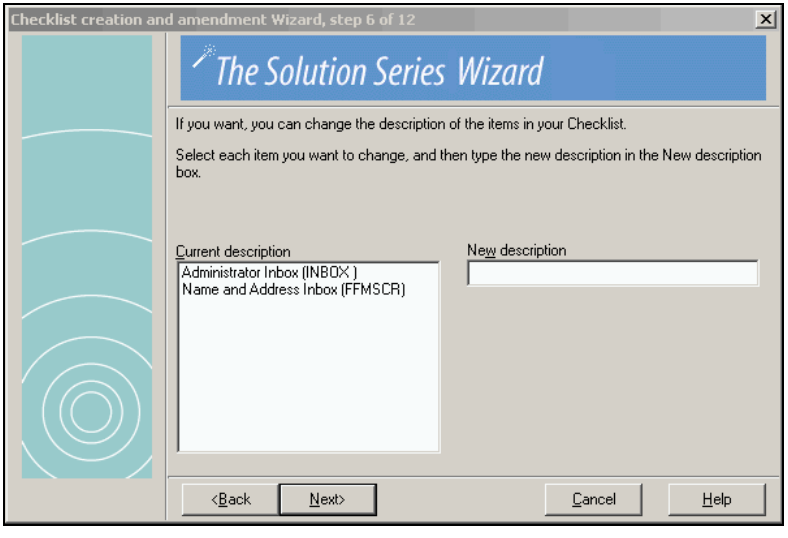
Repeat Steps 13 and 14 to change any other description.



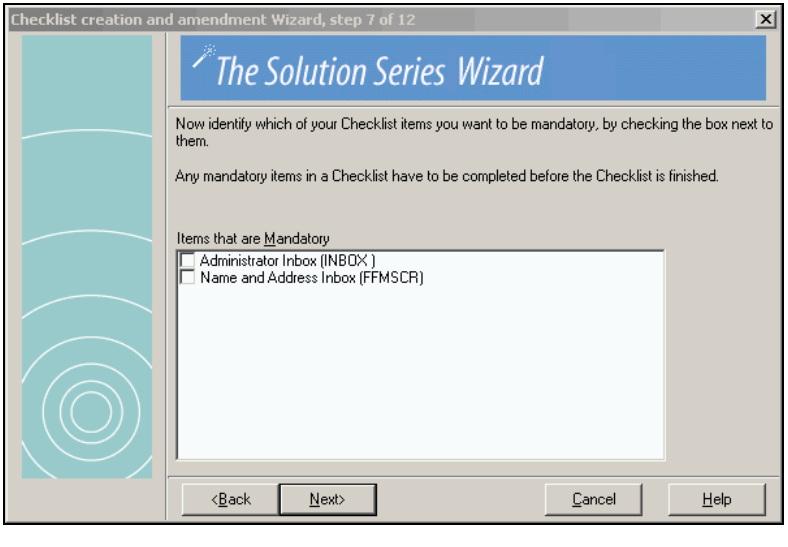
15. Click Next

Click Next to continue creating a checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.



17. Click Next

Click Next to continue creating a checklist.

Finish or request advanced features (8 of 12)

18. Select Advanced features

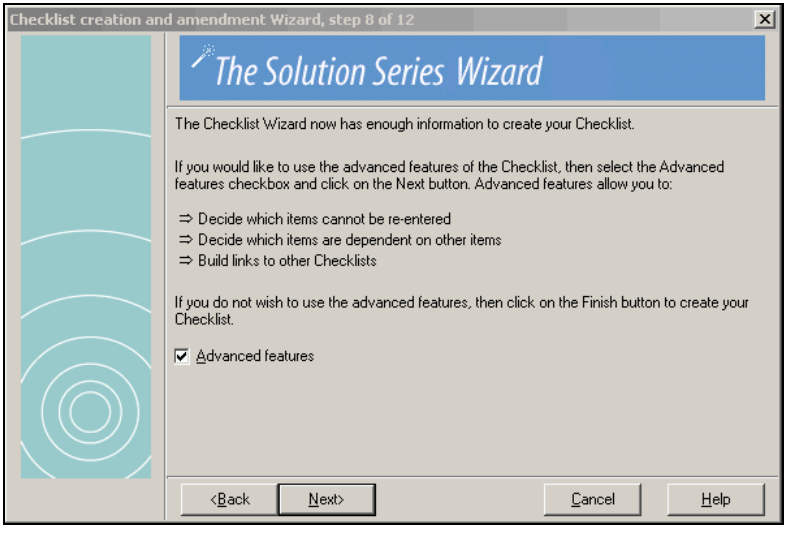
If you want to select advanced features which include identifying items that can not be re-entered and identifying items that are dependent on others, click the Advanced features check box.

Note: Building links to other checklists are for universal checklists only.

If you do not want to select advanced features, continue with Step 24.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



19. Click Next

Click Next to continue creating a checklist.

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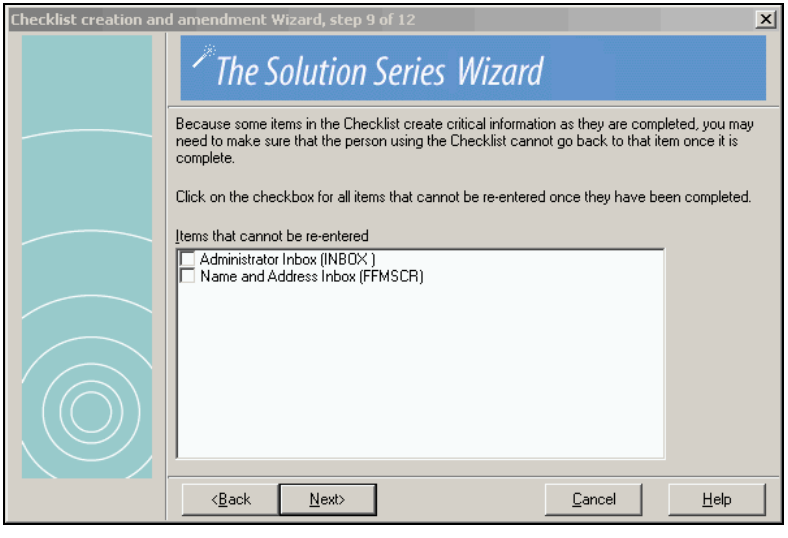
Assign items that can not be re-entered (9 of 12)

20. Select Items that can not be re-entered

Click the check box of any item in the checklist that can not be re-entered. A check mark indicates the item can not be re-entered.



21. Click Next

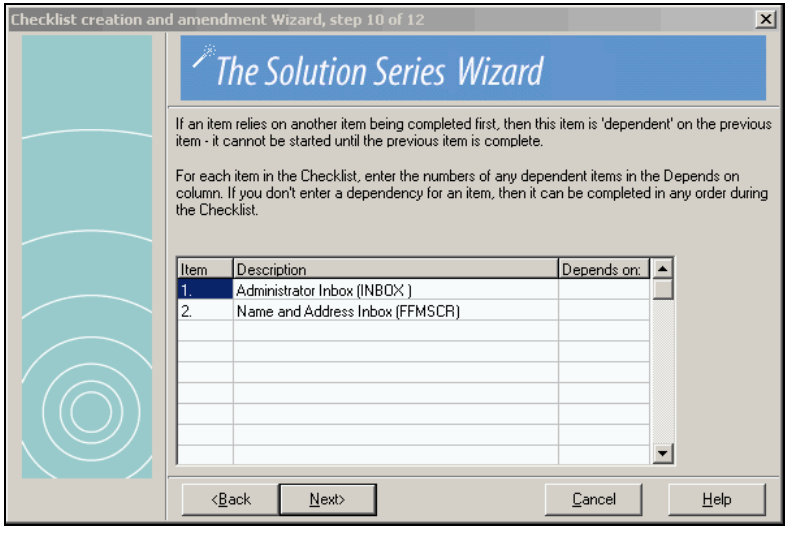
Click Next to continue creating a checklist.

Assign dependencies (10 of 12)

22. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before item 3 is performed, you would enter '1' in the Depends on text box for item 3.

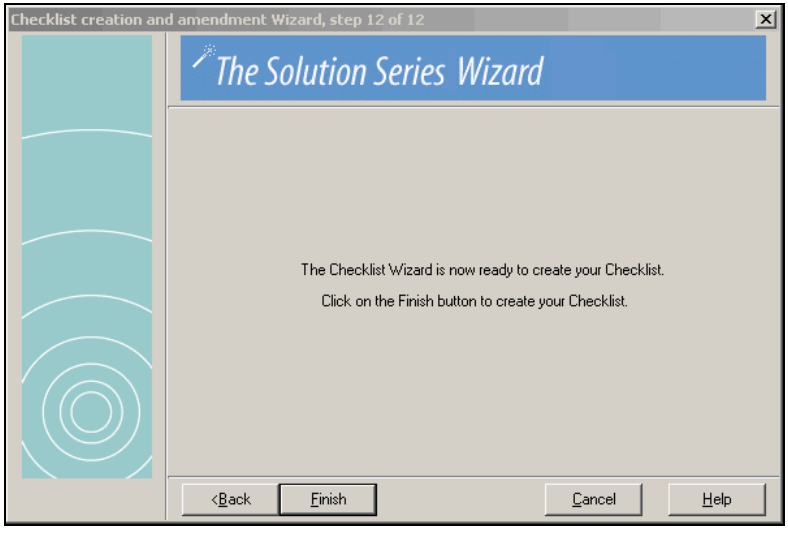
Repeat this step for any other item that depends on another.



23. Click Next

Click Next to continue creating a checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



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Finish (12 of 12)

24. Click Finish

Click Finish to create the checklist.

The checklist is added to the Bookmarks menu and Favorites toolbar.

See also:

- The Checklist wizard ***(on page 59)***

For more information on creating personal checklists.

Creating a universal checklist

There are two types of checklists—personal and universal.

Note: To create a personal or universal checklist, you must have the proper authority. If you do not have the authority to create checklists, the system will direct you to see your administrator to change your user profile.

To create a personal checklist, follow the steps in ***Creating a personal checklist*** (on page 75).

To create a universal checklist, follow these steps.

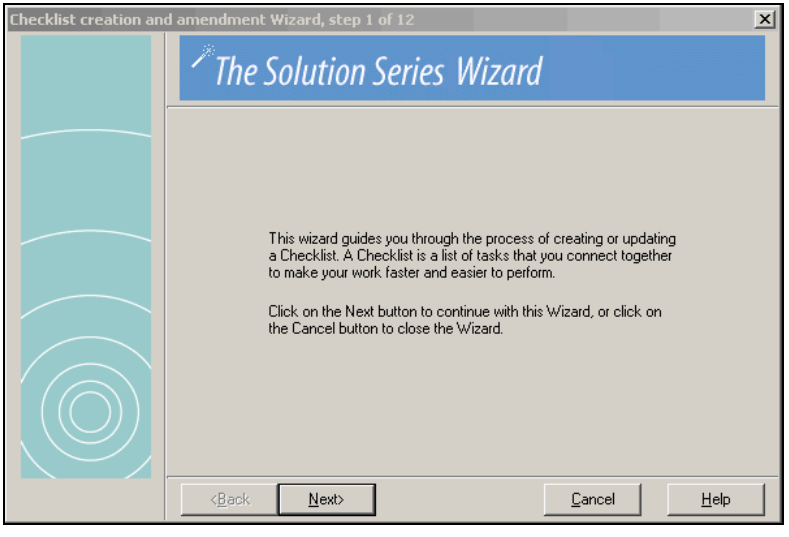
Note: To create a universal checklist, you will use the Checklist wizard. Depending on your user profile and the options that you select, the wizard may skip one or more steps.

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Create/Modify a Checklist

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



Welcome (1 of 12)

2. Click Next

Click Next to continue creating a checklist.

Checklist type (2 of 12)

3. Select 'For everybody'

Select 'For everybody' to create a universal checklist.

Select who is able to resume this checklist when it is paused. This can be either only the user who started the checklist may resume it, or any user from a particular profile (select 'All Profiles' if you would like any user to be able to resume this checklist when it is paused).

If the Audit checkbox is clear (that is, not checked), once the checklist is completed no information on this checklist will be stored in the system. This will mean that details of this checklist will not show in any of the checklist forms or the checklist report.

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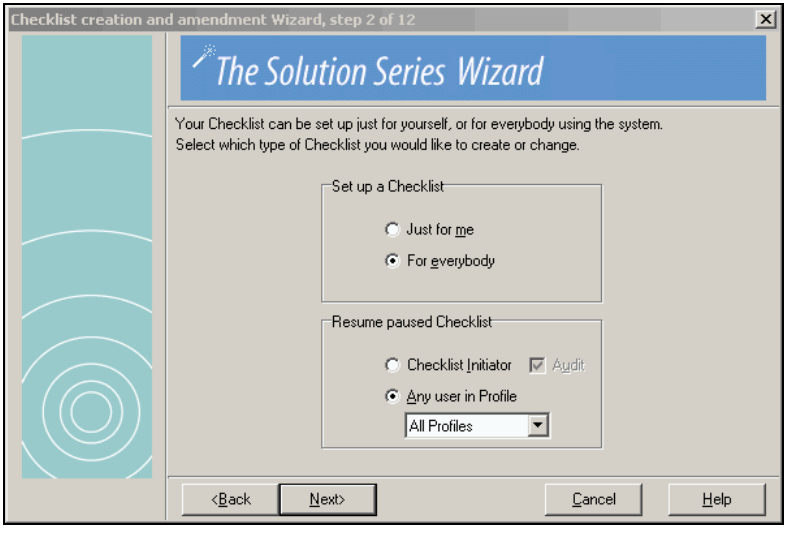
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue creating a checklist.

Checklist name (3 of 12)

5. Position the pointer in the New Checklist text box

The insertion pointer displays in the New Checklist text box.

6. Enter the checklist name

Enter a name of up to 30 characters for the checklist.

7. Click Next

Click Next to continue creating a checklist.

Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

Fully expand the tree view in the Available Items pane.

To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item that you have added, drag the item from the Selected Items pane back to the Available Items pane.

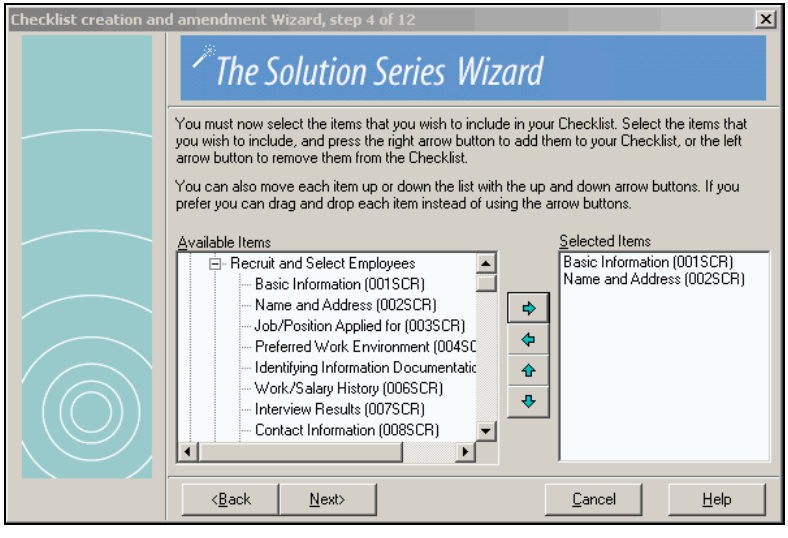
The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

Note: If you want to create a checklist that only presents links to other checklists, do not select any items. Continue with Step 9.

The item is added to the Selected Items pane. Repeat this step to add more items to your checklist.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



9. Click Next

Click Next to continue creating a checklist.

Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.

12. Click Next

Click Next to continue creating a checklist.

Item descriptions (6 of 12)

13. Select an item to change

If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

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14. Enter a New description

Enter a new description of up to 40 characters.

Repeat Steps 13 and 14 to change any other description.

15. Click Next

Click Next to continue creating a checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.

17. Click Next

Click Next to continue creating a checklist.

Finish or request advanced features (8 of 12)

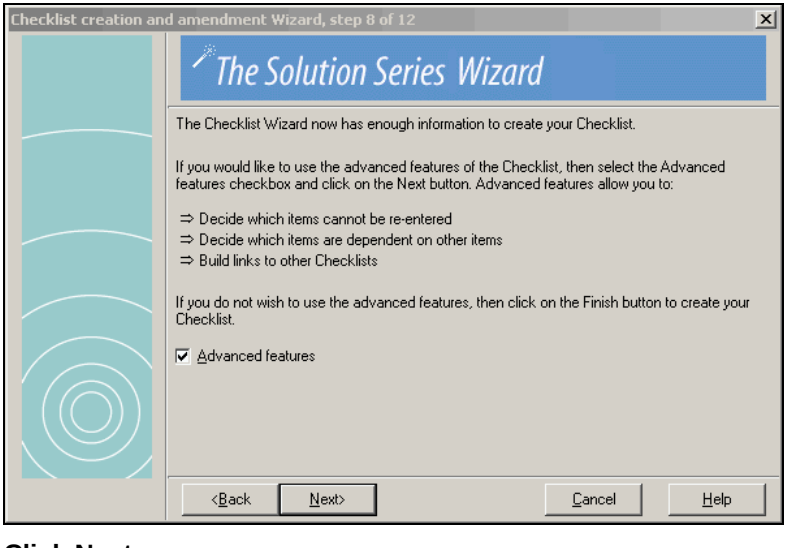
18. Select Advanced features

If you want to select advanced features which include identifying items that can not be re-entered, identifying items that are dependent on others, and building links to other checklists, click the Advanced features check box.

If you do not want to select advanced features, continue with Step 27.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



19. Click Next

Click Next to continue creating a checklist.

Assign items that can not be re-entered (9 of 12)

20. Select Items that can not be re-entered

Click the check box of any item in the checklist that can not be re-entered. A check mark indicates the item can not be re-entered.

21. Click Next

Click Next to continue creating a checklist.

Assign dependencies (10 of 12)

22. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before Item 3 is performed, you would enter '1' in the Depends on text box for item 3.

23. Click Next

Click Next to continue creating a checklist.

Build links to other checklists (11 of 12)

24. Enter a Description

Enter a description of up to 40 characters. The description will be displayed as an option to link to another checklist when this checklist is executed.

25. Select a checklist

Select a checklist from the list box to link to after this checklist is executed.

Note: In order to build a link to another checklist, that checklist must already exist.

Repeat Steps 24 and 25 to build links to up to six checklists.

26. Click Next

Click Next to continue creating a checklist.

Finish (12 of 12)

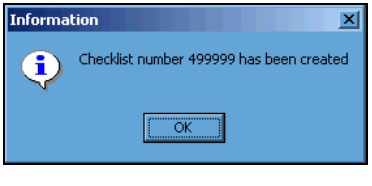
27. Click Finish

The checklist is created. The universal checklist can now be added to menus and the Navigator so users can access it.

An information dialog will display confirming that the checklist has been created.

28. Click OK

Click OK on the information dialog.



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See also:

- The Checklist wizard ***(on page 59)***

For more information on creating universal checklists.

Modifying a personal checklist

There are two types of checklists—personal and universal.

Note: *To modify a personal or universal checklist, you must have the proper authority. If you do not have the authority to modify checklists, the system will direct you to see your administrator to change your user profile.*

To modify a universal checklist, follow the steps in ***Modifying a universal checklist*** (on page 96).

To modify a personal checklist, follow these steps.

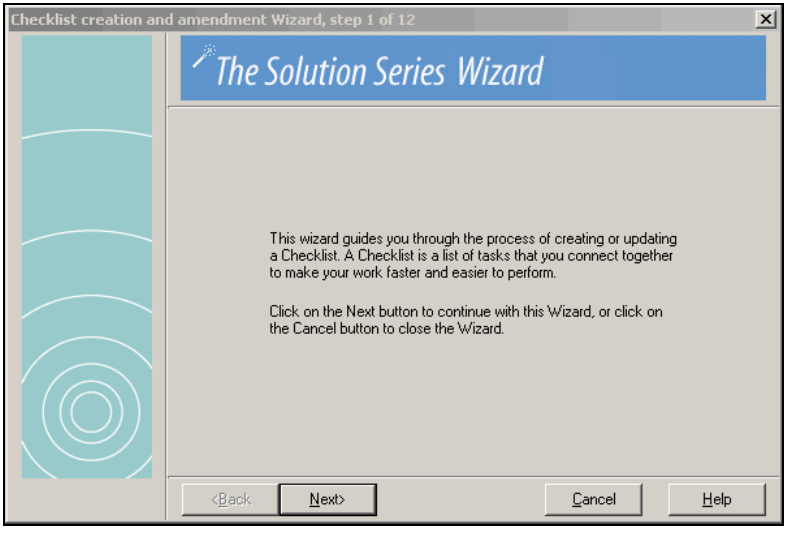
Note: *To modify a personal checklist, you will use the Checklist wizard. Depending on your user profile and the options that you select, the wizard may skip one or more steps.*

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Create/Modify a Checklist

If you completed the previous step, the resulting dialog should look similar to the example that follows:



Welcome (1 of 12)

2. Click Next

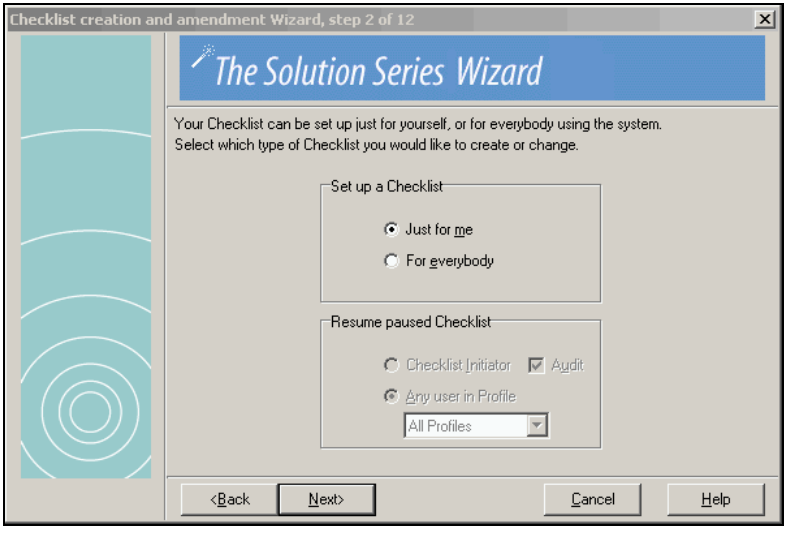
Click Next to continue modifying a checklist.

Checklist type (2 of 12)

3. Select 'Just for me'

Select 'Just for me' to modify a personal checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue modifying the checklist.

Checklist name (3 of 12)

5. Select the checklist to be modified

The checklist is highlighted and the name is displayed in the Rename Checklist text box.

6. Modify the checklist name

If you want to modify the name of the checklist, enter a name of up to 30 characters in the Rename Checklist text box.

7. Click Next

Click Next to continue modifying the checklist.

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Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

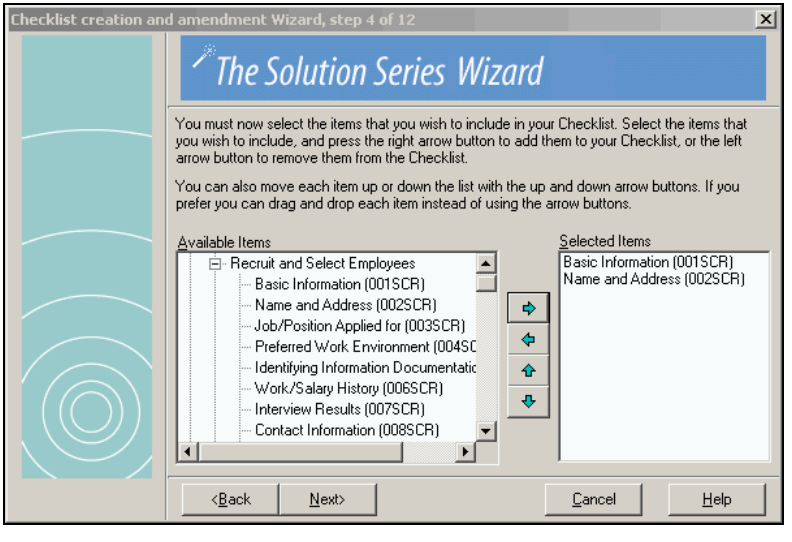
Fully expand the tree view in the Available Items pane.

To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item, drag the item from the Selected Items pane back to the Available Items pane.

The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane. If you change the order or delete an item which has dependencies set, the system will display a warning message informing you that the dependencies will be lost if you continue with the change.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



9. Click Next

Click Next to continue modifying the checklist.

Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box. If you do not want the same effective date to be applied, clear the check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.

12. Click Next

Click Next to continue modifying the checklist.

Item descriptions (6 of 12)

13. Select an item to change

If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

14. Enter a New description

Enter a new description of up to 40 characters.

Repeat Steps 13 and 14 to change any other description.

15. Click Next

Click Next to continue modifying the checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.

17. Click Next

Click Next to continue modifying the checklist.

Add to favorites and Advanced features (8 of 12)

18. Select Add to favorites

If you want to add the checklist to the Favorites toolbar, click the Add to **f**avorites check box.

Note: If the checklist is already on the Favorites toolbar and you click the Add to favorites check box, the checklist will be added again.

19. Select Advanced features

If you want to select advanced features which include identifying items that can not be re-entered and identifying items that are dependent on others, click the **A**dvanced features check box.

Note: Building links to other checklists are for universal checklists only.

If you do not want to select advanced features, continue with Step 25.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

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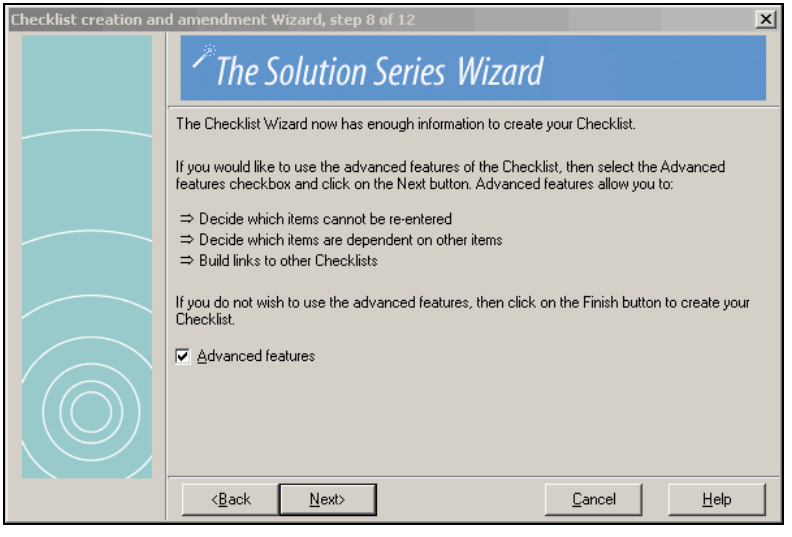
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



20. Click Next

Click Next to continue modifying the checklist.

Assign items that can not be re-entered (9 of 12)

21. Select Items that can not be re-entered

A check mark indicates the item can not be re-entered. Click the check box of any item in the checklist that can not be re-entered. Clear the check box of any item that can be re-entered.

22. Click Next

Click Next to continue modifying the checklist.

Assign dependencies (10 of 12)

23. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before item 3 is performed, you would enter '1' in the Depends on text box for item 3.

Repeat this step for any other item that depends on another.

24. Click Next

Click Next to continue modifying the checklist.

Finish (12 of 12)

25. Click Finish

Click Finish to save your modifications.

See also:

- Checklist modification ***(on page 68)***

For more information on maintaining checklists.

Modifying a universal checklist

There are two types of checklists—personal and universal.

Note: To modify a personal or universal checklist, you must have the proper authority. If you do not have the authority to modify checklists, the system will direct you to see your administrator to change your user profile.

To modify a personal checklist, follow the steps in ***Modifying a personal checklist*** (on page 91).

To modify a universal checklist, follow these steps.

Note: To modify a universal checklist, you will use the Checklist wizard. Depending on your user profile and the options that you select, the wizard may skip one or more steps.

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Create/Modify a Checklist

Welcome (1 of 12)

2. Click Next

Click Next to continue modifying a checklist.

Checklist type (2 of 12)

3. Select 'For everybody'

Select 'For everybody' to modify a universal checklist.

Select who is able to resume this checklist when it is paused. This can be either only the user who started the checklist may resume it, or any user from a particular profile (select 'All Profiles' if you would like any user to be able to resume this checklist when it is paused).

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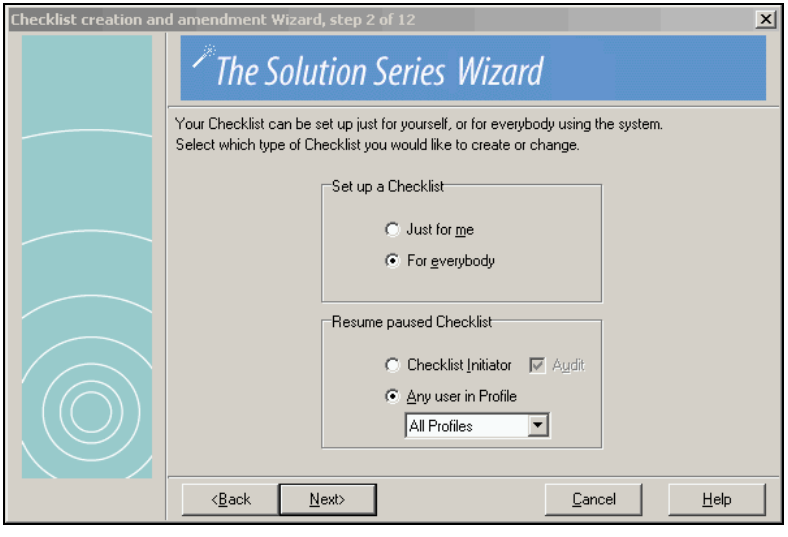
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue modifying the checklist.

Checklist name (3 of 12)

5. Select the checklist to be modified

The checklist is highlighted and the name is displayed in the Rename Checklist text box.

6. Modify the checklist name

If you want to modify the name of the checklist, enter a name of up to 30 characters in the Rename Checklist text box.

7. Click Next

Click Next to continue modifying the checklist.

Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

Fully expand the tree view in the Available Items pane.

To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item that you have added, drag the item from the Selected Items pane back to the Available Items pane.

The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane.

9. Click Next

Click Next to continue modifying the checklist.

Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box. If you do not want the same effective date, clear this check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.

12. Click Next

Click Next to continue modifying the checklist.

Item descriptions (6 of 12)

13. Select an item to change

If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

14. Enter a New description

Enter a new description of up to 40 characters.

Repeat Steps 13 and 14 to change any other description.

15. Click Next

Click Next to continue modifying the checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.

17. Click Next

Click Next to continue modifying the checklist.

Finish or request advanced features (8 of 12)

18. Select Advanced features

If you want to select advanced features which include identifying items that can not be re-entered, identifying items that are dependent on others, and building links to other checklists, click the Advanced features check box.

If you do not want to select advanced features, continue with Step 27.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

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19. Click Next

Click Next to continue modifying the checklist.

Assign items that can not be re-entered (9 of 12)

20. Select Items that can not be re-entered

Click the check box of any item in the checklist that can not be re-entered. A check mark indicates the item can not be re-entered.

21. Click Next

Click Next to continue modifying the checklist.

Assign dependencies (10 of 12)

22. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before item 3 is performed, you would enter '1' in the Depends on text box for item 3.

23. Click Next

Click Next to continue modifying the checklist.

Build links to other checklists (11 of 12)

24. Enter a Description

Enter a description of up to 40 characters. The description will be displayed as an option to link to another checklist when this checklist is executed.

25. Select a checklist

Select a checklist from the list box to link to after this checklist is executed.

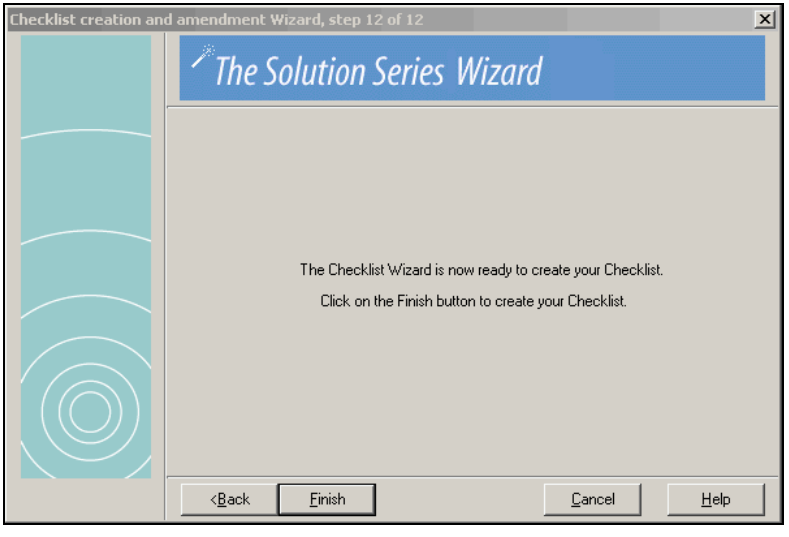
Note: In order to build a link to another checklist, that checklist must already exist.

Repeat Steps 24 and 25 to build links to up to six checklists.

26. Click Next

Click Next to continue modifying the checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



Finish (12 of 12)

27. Click Finish

The checklist is modified.

See also:

- Checklist modification ***(on page 68)***

For more information on maintaining checklists.

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Removing a personal checklist

To remove a universal checklist, follow the steps in ***Removing a universal checklist*** (on page 102).

To remove a personal checklist, complete the following steps:

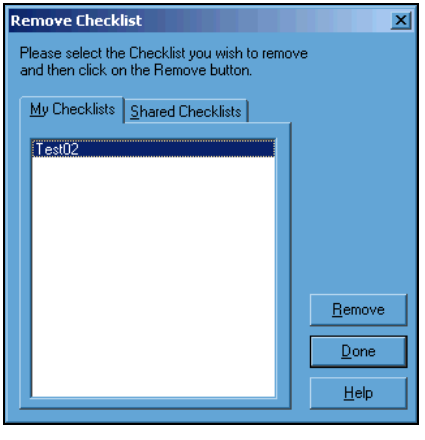
1. Access Remove a Checklist dialog box

Access this dialog box by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Remove a Checklist

2. Select the checklist

Select the checklist to be removed. The checklist is highlighted and the Remove button is enabled.



3. Click Remove

The checklist is removed from the Remove Checklist dialog box.

Repeat Steps 2 and 3 to remove other checklists.

4. Click Done

The Remove Checklist dialog box is closed.

Note: The checklist is not automatically removed from the Bookmarks menu or Favorites toolbar. You must remove it manually.

See also:

- Checklist removal ***(on page 68)***
For more information on removing checklists.

- Deleting a menu item ***(on page 130)***
For detailed directions on removing a checklist from a menu.

Removing a universal checklist

To remove a personal checklist, follow the steps in ***Removing a personal checklist*** (on page 100).

To remove a universal checklist, complete the following steps:

1. Access Remove Checklist dialog box

Access this dialog box by making the following selections from the Navigator:

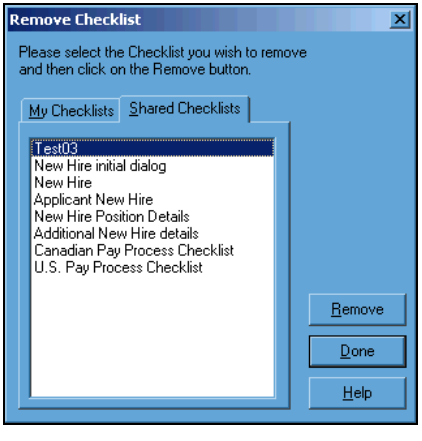
Component: User Tools
Process: User Tools
Task: Remove a Checklist

2. Click Shared Checklists

Click the Shared Checklists tab. Universal checklists are displayed.

3. Select the checklist

Select the checklist to be removed. The checklist is highlighted and the Remove button is enabled.



4. Click Remove

The checklist is removed from the Remove Checklist dialog box.

Repeat Steps 3 and 4 to remove other universal checklists.

5. Click Done

The Remove Checklist dialog box is closed.

See also:

- Checklist removal ***(on page 68)***

For more information on removing checklists.

- Deleting a menu item ***(on page 130)***

For detailed directions on removing a checklist from a menu.

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Viewing paused checklist details

To view details of paused checklists, follow these steps:

1. Open Paused Checklist Details form (MMPSCR)

Open this form by making the following selections from the Navigator:

Component: Administrator Tools
Process: Checklist Tools
Task: Paused Checklist Details

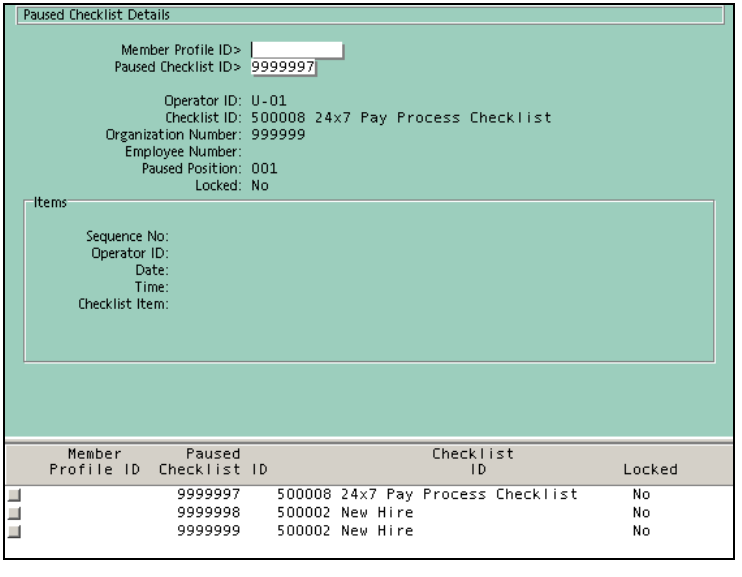
2. Click Select

Click the Select icon on the toolbar to to refresh the selection list.

3. Select checklist

Select the checklist you wish to view from the selection list.

The details for the selected checklist will be shown.



Note: The Member Profile ID is the profile ID that can resume these paused checklists as defined when the checklist was set up. Blank means "All profiles".

See also:

- Paused checklists ***(on page 70)***

For further information on paused checklists.

Unlocking locked checklists

To unlock checklists that have become locked, follow these steps:

1. Open the Resume Paused Checklists form (MMPRSC)

Open this form by making the following selections from the Navigator:

Component: Administrator Tools
Process: Checklist Tools
Task: Edit Paused Checklists

2. Unlock checklist

A list of checklists will display. Those that are locked will have a check in the Locked checkbox. Remove this for the checklist you wish to unlock.

See also:

- Locked checklists ***(on page 70)***

For further information on locked checklists.

Running the Paused Checklist report

To run the Paused Checklist report (MMPRPT), follow these steps:

1. Access the Report Group Activities form (RGMSTR)

Access the Report Group Activities form (RGMSTR) by making the following selection from the Navigator:

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

2. Select the Paused Checklist Report

Select the Paused ChecklistReport group (MMPRRG) from the list.

3. Click Parameters

4. Click Set Parameters

The report parameters form will display.

5. Enter Start date

Enter the start of the date range in the format MM-DD-CCYY.

6. Enter End date

Enter the end of the date range in the format MM-DD-CCYY.

7. Click Save or press Enter

8. Press Enter

Press Enter a second time to return to the Repor Group Activities form (RGMSTR).

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9. Click Execute

Click the Execute button on the lower right side of the form to launch the report.

A confirmation form will display.

See also:

- Paused checklists ***(on page 70)***

For more information about the audit report generated by the Paused Checklist Report (MMPRPT).

- Paused Checklist Report (MMPRPT) ***(on page 302)***

For details on the report and to see an example of the report.

Review of Questions Answered

1. What is a checklist?

2. What are the differences between a personal checklist and a universal checklist?

3. What tool do you use to create a checklist?

4. What tool do you use to delete a checklist?

5. What tool do you use to control checklists?

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CHAPTER 5

Maintaining Menus

In This Chapter

Introduction 108
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Menu Editor.....112
Detailed Directions 123
Extended Practice 136
Review of Questions Answered.....137

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Introduction

Maintaining menus provides another way to customize the system to meet the needs of your organization. Using the Menu Editor, you can edit any of the delivered application menus to show only those items you will use, change the order of items, or replace items.

Tasks

This section explains the following:

- Adding a menu item
- Defining a shortcut key for a menu item
- Changing the order of menu items
- Modifying a menu item
- Deleting a menu item
- Adding a report group to the menu

Prerequisites

Before you can maintain menus, you must be logged on to The Solution Series and have the authority to maintain menus.

Questions answered

The following questions are answered in this section:

1. What types of menus are delivered with the system?
2. What is the relationship between the menu structure and the Navigator?
3. What is the Menu Editor and how is it used?

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Menus

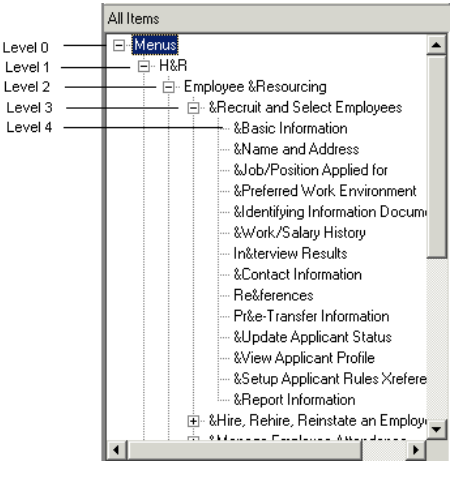
The delivered menu bar contains two types of menus—function menus and application menus:

- Function menus (File, Edit, View, Bookmarks, Actions, Go, and Help)
- Application menus (HR, Benefits, Payroll, TA (Time and Attendance), and Tools)

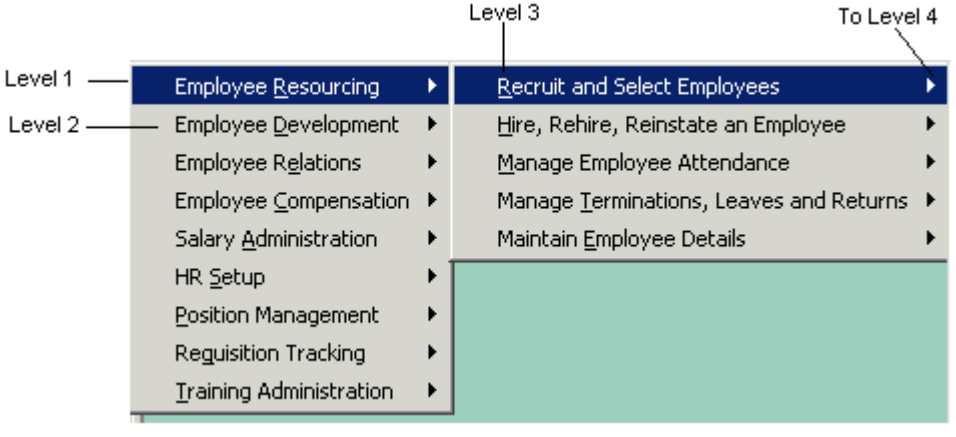
Application menus provide access to the business components of the administrative solutions and to its tools and utilities. You can edit only the application menus. You can not edit the function menus. Changes made to menus are available to all users.

Menu levels

Menus and submenus are assigned level numbers that correspond to their level in the menu hierarchy. The following figure illustrates menu levels:



- Menu level-0, Menus, defines a starting point for the menus. It is not displayed on the Work Area, and it can not be deleted.
- Menu level-1 is the item displayed on the menu bar. This is an application.
- Menu level-2 represents the first submenu. This is a component of an application.
- Menu level-3 represents the second submenu. This is a process.
- Menu level-4 represents the third (last) submenu. This level links you to forms, checklists, and dialogs. You can not define a menu beyond level 4.



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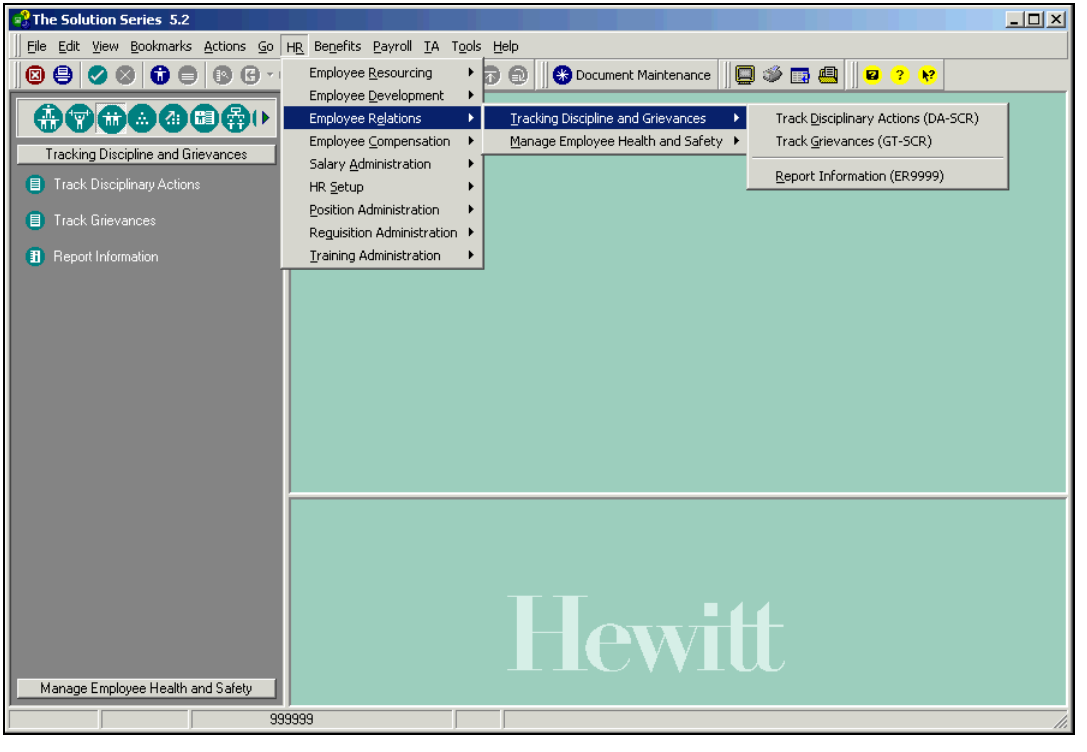
Relationship of the menu structure and the Navigator

The menu structure is mirrored in the Navigator. Menu levels two through four are shown in the Navigator. The following figure shows both the HR menu structure for accessing the Tracking Discipline and Grievances tasks and the corresponding Navigator access path. As you can see, Employee Relations (level two), Tracking Discipline and Grievances (level three), and Track Disciplinary Actions, Track Grievances, and Report Information (level four), are duplicated in the Navigator.



Because of this relationship between the menus and the Navigator, any changes made to the menus are automatically reflected in the Navigator. There is no additional work required.

Apply the Concept

Based on your understanding of the menu structure as explained in this concept, which level of the menu would you need to modify if you were adding a new form to the menu structure?

Apply the Concept

Would you also need to modify the Navigator to include the new form?

Menu Editor

The Menu Editor is used to add, modify, and delete menu items. You can edit the delivered application menus and add your own menus. The Menu Editor is accessed from the Development Tools component and the System Control Repository Utilities process.

In addition to adding forms and checklists, you can use the Menu Editor to add your report groups to the menu. This will allow you to launch the report groups from the Navigator or menu. Report groups that are to be launched from the menus must have names that end in 'RG'.

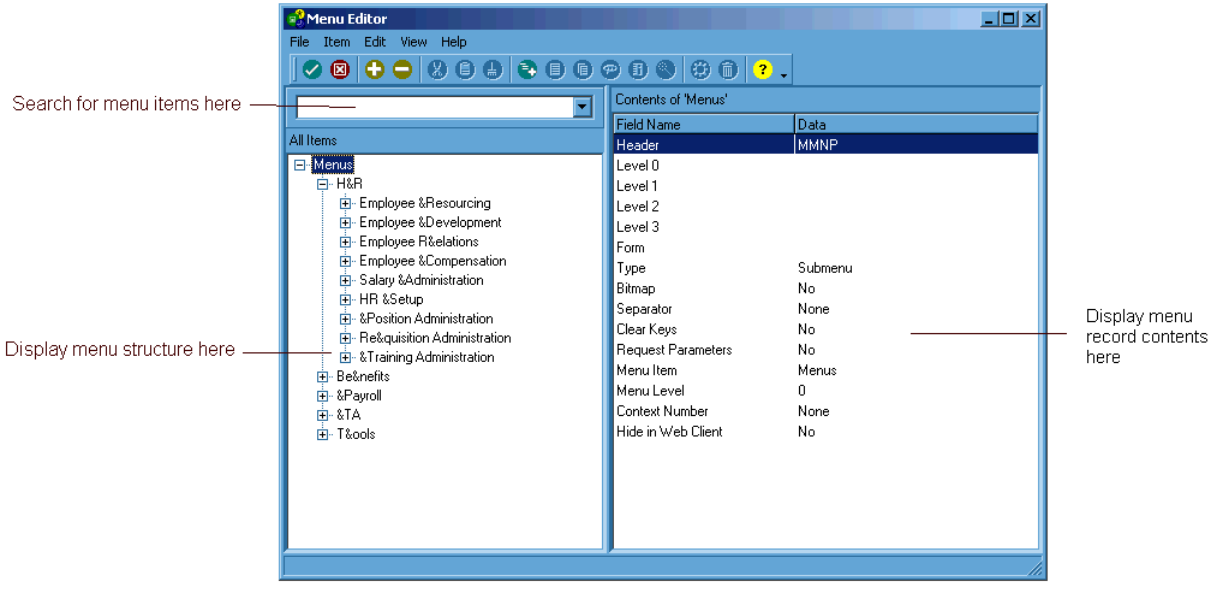
☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more information about report groups.*

See also:

- Adding a report group to the menu ***(on page 131)***

For detailed instructions for adding a report group to the menu.

The Menu Editor contains a toolbar for initiating actions, a drop-down list for searching for menu items, and two panes for displaying menu information.



The left pane, titled 'All Items', shows a 'tree view' of the existing menu structure. You use the left pane for working. For example, you use the tree view to indicate what level of information you want to see, to select items to add to or modify, and to select items for which you want to view detail in the right pane.

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The right pane, titled 'Contents of xxx', shows the detail of the menu record for the selected menu item. Using this display, you can verify the definition of a menu item.

If the selected item was the New Hire checklist, the right pane would look like this:

Contents of 'Hire a New Employee'

Field Name	Data
Header	MMNP
Level 0	0
Level 1	00
Level 2	01
Level 3	00
Form	500001
Type	Checklist
Bitmap	No
Separator	None
Clear Keys	Yes
Request Parameters	No
Menu Item	&Hire a New Employee
Menu Level	4
Context Number	None
Hide in Web Client	No

The information displayed in the left pane is explained in the following table:

Field Name	**Data**
Header	Will always be MMNP
Level 0–Level 3	The level in which the item resides
Form	Form name; only applies to level 4
Type	Item type
Bitmap	Image name
Separator	Indicates if the item has a separator
Clear Keys	Indicates if the key and additional key information is cleared before the form is displayed
Request Parameters	Indicates if parameters are requested before the form is displayed
Menu Item	The name of the menu item
Menu Level	Level of the item (0–4)
Context Number	Help topic ID
Hide in Web Client	Indicates if this option is visible in the Web Client

The information in the right pane is for display only; you can not enter or modify information in the right pane.

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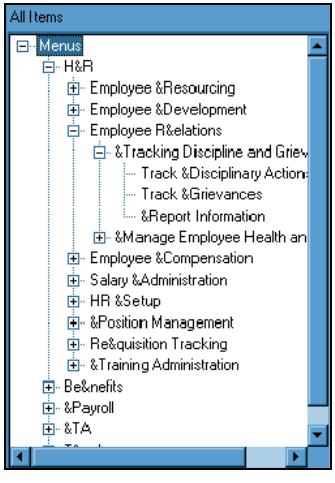
Navigation in the left pane

If you are familiar with using the Windows Explorer, navigating through the left pane will be familiar to you. If a menu item has items below it that are not displayed, it will have a '+' next to it. When a menu item is expanded, its '+' sign is changed to a '-'. In the following figure, items such as 'Menus' and 'H&R' have been expanded. Items such as 'Employee &Resourcing' and 'Employee &Development' contain sub-items that are not displayed. In other words, they are 'collapsed'.



The following navigation choices are available:

- Expand and collapse item displays
- Search for menu items

Expand and collapse item displays

- To expand a particular item, click the '+' sign next to the item.
- To collapse a particular item and its sub-items, click the '-' sign next to the parent item.
- To expand all items, click the Expand button in the toolbar.
- To collapse all items, click the Collapse button in the toolbar.

Search for menu items

To quickly display information about a menu item, select it from the drop-down list box, located just above the left pane. This drop-down list contains only level-two menu items.

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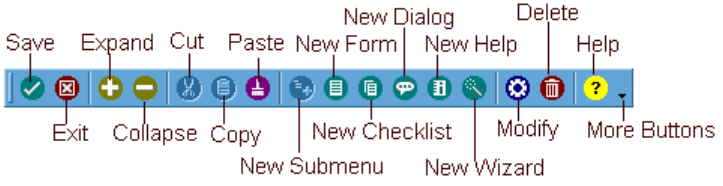
Menu Editor toolbar

The Menu Editor toolbar contains the controls you use to initiate actions. To initiate an action, click a toolbar button. The following figure shows the actions you can take:



The 'new' options available depend on the level to which you are adding an item. If you are working at levels one and two, only the New Submenu button will be active. If you are working at level three, all of the buttons, excluding New Submenu, will be active. No buttons will be active at level four. You can not add an item below this level.

New items

To add a new item, you click the 'parent' item, then select the button for the type of item being added. You can add the following types of items to the menus:

- Universal checklists
- Forms
- Help
- Submenus
- Wizards
- Dialogs

All types of menu items are added using the Add 'item' dialog.

Note: *New menu items must have all four levels before they will appear on the menu or Navigator.*

Options for forms

When adding a form item to a menu, you can set options to:

- Clear keys—clear the key and additional key text boxes before displaying the form.
- Request parameters—display a form requesting parameters to be entered before displaying the details on the form. The record key is created from the parameters and used to display the appropriate information.

By default, options are set to 'Neither'.

Separator lines

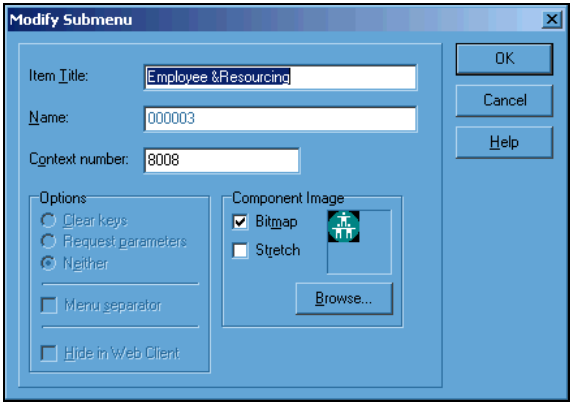
To visually mark a logical group of menu items, use a separator line. This figure shows a separator line used to group tasks and report information.

Component images

If you are adding a level-two menu—a component in the Navigator—you have the option of showing a bitmap for the component in the Navigator and having the bitmap stretched to fit the square in which it is displayed.

When using a bitmap image to represent the component, the Item Title will be used as the ToolTip. If you do not assign a bitmap image to a component, a default image will be used.

This figure shows the Modify Submenu dialog box for the 'Employee &Resourcing' component. This component uses the bitmap displayed:



Note: *If you assign a bitmap to a menu item and do not select the Hide in Web Client option, the image shown against the new component in the Web Client will be the default one:*

If you would like to have the images showing as the same in both clients, you would need to save your chosen bitmap image as a CompuServe Graphics Interchange (.gif) format, with the transparency set as appropriate, then copy that new graphic file to your webserver.*

Help for components

When you add a component menu item, you have the option of displaying 'What's This?' help for the component. If your organization wants to assign help to an item and connect the component to the help topic, then you must enter the help topic ID in the Context number text box.

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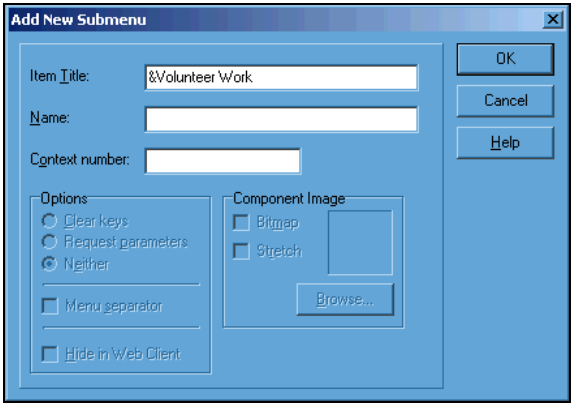
Example

Suppose you wanted to add a new submenu (level 3) under Employee Development (level 2) to track employee volunteer work. You would like to call the item 'Volunteer Work' and you would like the shortcut key to be the 'V' in Volunteer. The Add New Submenu dialog could look like this:



See also:

- Adding a menu item ***(on page 123)***

For detailed instructions for adding a menu item.

☞ *Refer to* **Shortcut keys and menu items** *(on page 118) for more information on shortcut keys.*

Order of menu items

You can easily change the order of menu items by dragging them to new locations. When you move a menu item to a new location, any submenu items are also moved.

You can only drag items to the same level in the menu structure. Refer to the following figure. You could move '&Training Administration' anywhere along the vertical line on which it resides.

For example, you might move it just below 'Salary &Administration'. However, you can not move it to a lower or higher level in the menu structure.

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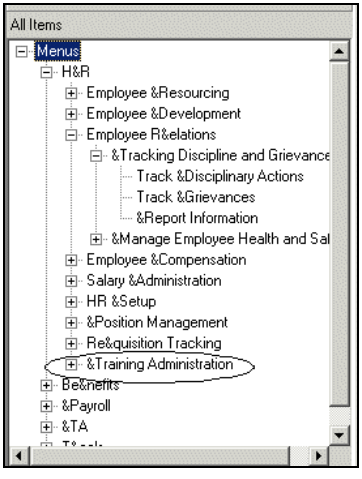


See also:

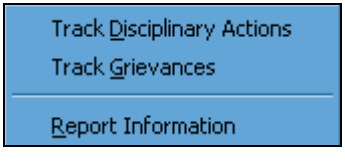
- Changing the order of menu items ***(on page 128)***

For detailed instructions for changing the order of menu items.

Shortcut keys and menu items

Shortcut keys provide an alternate method for accessing commands. Each delivered menu item has an underlined letter that indicates the keyboard shortcut key for choosing the menu item. Using the Menu Editor, you can define your own shortcut keys for event menu items. The shortcut keys you define will be used in combination with the ALT key.

To define a shortcut key for a menu item, you type an ampersand (&) before the letter to be used as part of the shortcut key combination. In this figure, you can see that the shortcut keys are the D in Disciplinary, the G in Grievances, and the R in Report:



In the Menu Editor, the definitions for these menu items look like this:

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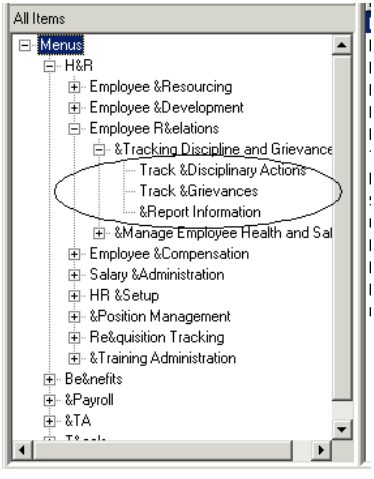


Note: *The system does not check for duplicate shortcut keys; you need to manually track the assignment of shortcut keys.*

See also:

- Defining a shortcut key for a menu item ***(on page 127)***

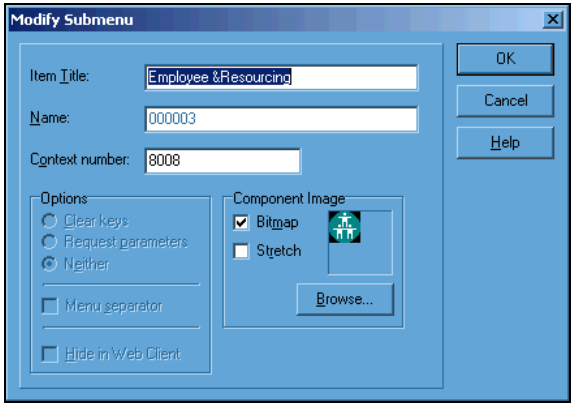
For detailed instructions for creating shortcut keys.

Apply the Concept

Based on your understanding of shortcut keys as they are used in the menu structure, what letter would be defined as a shortcut key in the item 'Re&quisition Tracking'?

Menu item changes

Changing a menu item is similar to adding one. Access the Menu Editor, select the item to modify, and click the Modify button on the toolbar. If you select the menu item 'Employee &Resourcing' to edit, the Modify Submenu dialog box will look like this:



Notice that even though 'Employee &Resourcing' is a level-two menu, the Name text box contains a value. All non-form items are automatically assigned a number that reflects their position in the menu hierarchy. In this example, 'Employee &Resourcing' is the third item below the zero level item, Menus.

See also:

- Modifying a menu item ***(on page 130)***

For detailed instructions for modifying a menu item.

Menu item deletion

You can delete any menu item, excluding level-0. To delete an item, you select it, and then click the Delete button on the toolbar. All dependent menu items will also be deleted.

See also:

- Deleting a menu item ***(on page 130)***

For detailed instructions for deleting a menu item.

Result of menu maintenance

When you finish editing a menu, the System Control Repository is updated immediately. Users will see the menu changes the next time they log on to the system when the client file (menu.dat) on their PCs is updated. If they are already logged on to the system they would need to log off and log back on again to see the changes.

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Menu record lock safety protection

If for any reason the system is disabled during the editing of the menu records, a locked flag can be left on the MMN header record. The locked flag is a safety feature that prevents any other user from accessing the record. To manually unlock records under these circumstances, the Unlock Menu Records utility (FIXMMN) must be used to reset the flag.

Access this utility by making the following selections from the Navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Unlock Menu Records

Menu items and the Web Client

You have the option to prevent an item from being displayed in the Web Client interface of eCyborg. You would want to do this if, for example, it is not possible to perform the action from a web browser (if the process requires any action on the user's PC, for instance), or if you consider the task inappropriate for Web Client access.

To prevent an item from displaying in the Web Client you would select the Hide in Web Client option.

Menu items and user profiles

Access to level-two menu components, can be restricted through user profiles. By selecting the components with which a user can work, you can determine the components that will show in the Navigator and appear in the menus.

Apply the Concept
Based on your understanding of menu maintenance as explained in this concept, when would you expect to see the changes you have made to a menu structure?

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Design Tips

When creating or maintaining menus, consider the following guidelines. We recommend these guidelines for usability and consistency:

- Group items in a way to minimize the number of clicks needed to get to another task.
- Always consider the business process and structure tasks logically for it.
- Place the most frequently used process at the bottom of the list. Because the Navigator displays the tasks for the last process in the list, placing the most frequently used process at the bottom will help the user.
- Try to keep the number of items on a process or task list under nine. More than nine may make the process or task appear cumbersome to the user. For example, if you have 12 tasks, you may consider creating two processes to make the grouping more manageable.
- Avoid creating a list of processes or tasks that requires scrolling. For example, on a 800 x 600 resolution screen, with five process bars, you can have 14 tasks.
- If used, place a report information task at the bottom of the list for consistency.
- Avoid using abbreviations.
- Any task that calls a dialog that requires additional information to proceed should be followed with an ellipsis (…), which you must enter manually.

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Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Adding a menu item 123
Defining a shortcut key for a menu item 127
Changing the order of menu items 128
Modifying a menu item 130
Deleting a menu item 130
Adding a report group to the menu 131

Adding a menu item

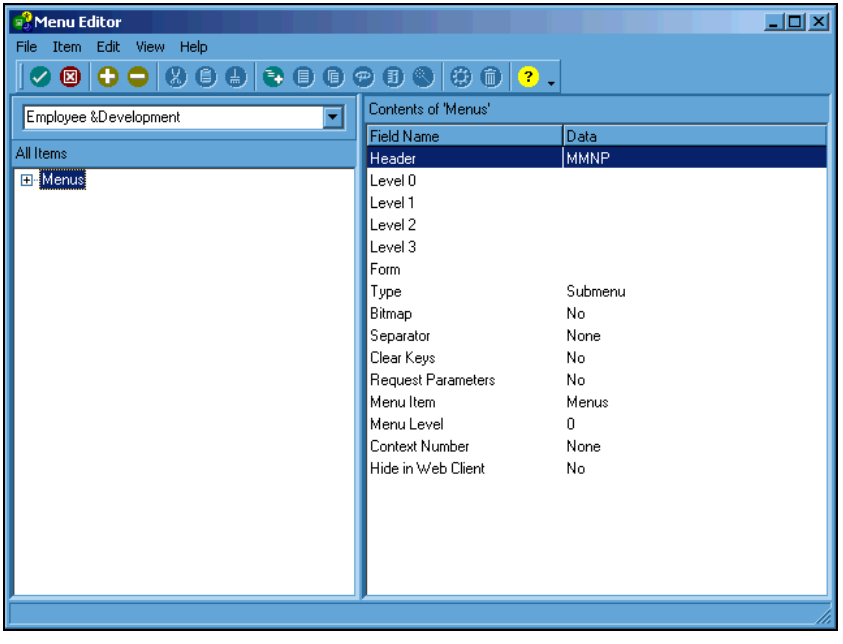
To add a menu item, follow these steps

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Customize Menus

If you completed the previous step, the dialog that is displayed should look similar to the example that follows:



2. Select the parent item to receive the new item

Click the parent item in the tree view in the left pane.

If the item is not displayed, use the expand function or the menu search function.

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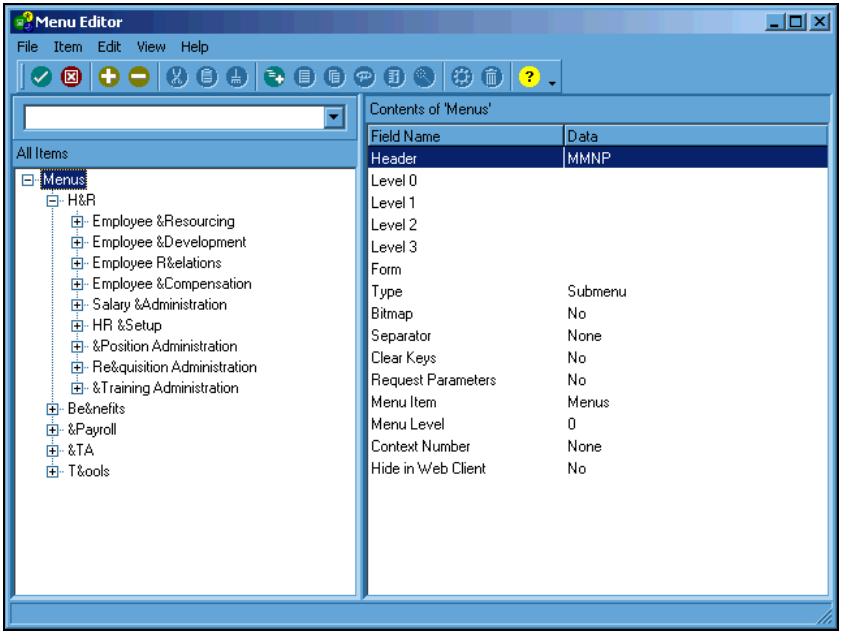
If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



3. Select the type of item to add

Click the appropriate button on the toolbar. The Add dialog box appears.

4. Enter the Item Title

Type the name that should appear on the menu. This name can be up to 38 alphanumeric characters.

5. Enter the Name

Type the name of the task. This option is only available for level-four items (tasks).

6. Enter the Context number (optional)

Type the four-position context number for the help topic. Values must be numeric and within the range 8000–8999.

This option is only available for components.

7. Select Options

If you are adding a form item, these options will be active. By default, 'Neither' is selected.

- Choose 'Clear Keys' if you want the key and additional key information to be cleared before the form is displayed.
- Choose 'Request parameters' if you want a form to appear requesting key information before the actual form is displayed.

8. **Select Menu separator**
   Select this check box if you want a line to be drawn above the menu item's position in the menu list. Separators logically group related items.

9. **Select Hide in Web Client**
   Select this check box if you do not want this menu item to appear in the Web Client.

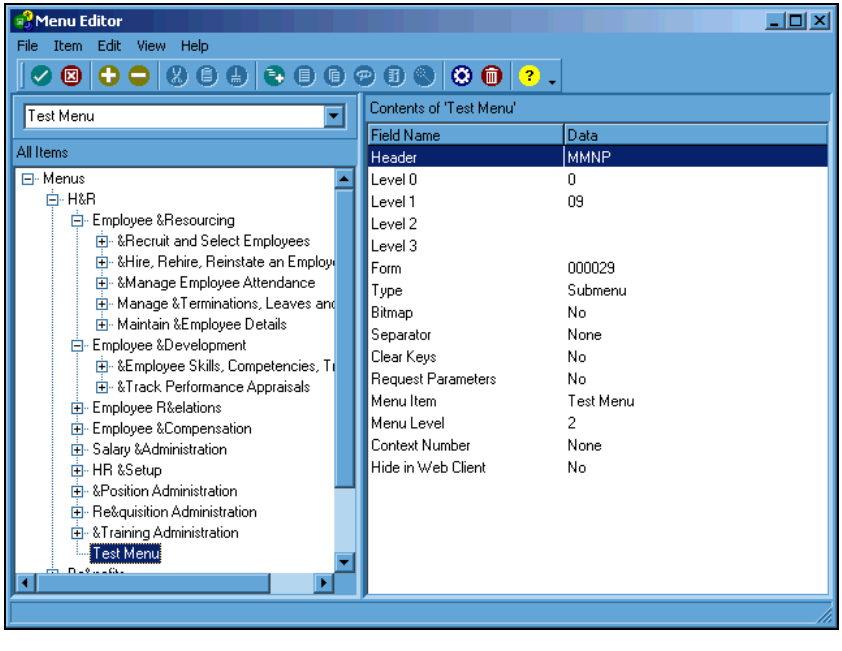
10. **Select Component Image Bitmap**
    If you are defining a level-two menu, a component, you can specify that an icon be associated with it in the Navigator.

11. **Click Browse**
    To assign a bitmap file for a component image, click Browse and then locate the file using the standard Windows Browse dialog box.

12. **Select Component Image Stretch**
    If you are defining a level-two menu, a component, you can specify that an icon be sized to fit the square in which it is displayed.

13. **Click OK or press Enter**
    If you are satisfied with your entries, confirm this by clicking OK or pressing Enter.

    If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



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14. Click Save

Click the Save button on the toolbar to save the new menu record.

15. Click Exit

Click the Exit button on the Menu Editor toolbar.

If you close the dialog box without saving, a save dialog box will be displayed, asking you if you want to save your changes to the menu structure.

Note: Changes made to menu items lower than level three will only be displayed in the Menu bar.

See also:

- Menu Editor ***(on page 112)***

For more information about adding a menu item.

Defining a shortcut key for a menu item

To define a shortcut key, follow these steps:

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component:		Development Tools
Process:		System Control Repository Utilities
Task:		Customize Menus

2. Select the item

Click the item in the tree view.

If the item is not displayed, use the expand function or the menu search function.

3. Display the Add or Modify dialog box

- If you are defining a new item, click the parent item and click the Add button on the toolbar.
- If you are modifying an item, click the item and then click the Modify button on the toolbar.

4. Point to Item Title

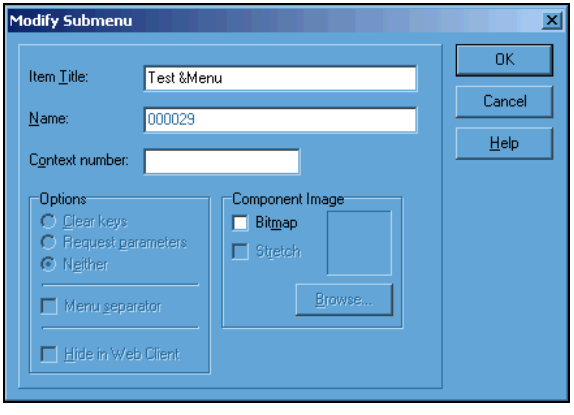
Point to the name of the item and click in the text box for the next step of adding the shortcut designation.

5. Enter an ampersand (&) before the character used as a shortcut key

Type an ampersand (&) immediately before the character to be used as a shortcut key.

Note: The system does not edit for duplicate shortcut keys. You will have to manually track your use of shortcut keys.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



6. Click OK

Click OK to activate the shortcut on the menu.

See also:

- Shortcut keys and menu items ***(on page 118)***

For more information about shortcut keys.

Changing the order of menu items

To change the order of menu items, follow these steps:

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Customize Menus

2. Select the item to be relocated

In the tree view in the left pane, point to the item.

If the item is not displayed, use the expand function or the menu search function.

3. Drag the item to its destination

Hold down the mouse key and move the item. You can only drag the item to the same level within the menu structure.

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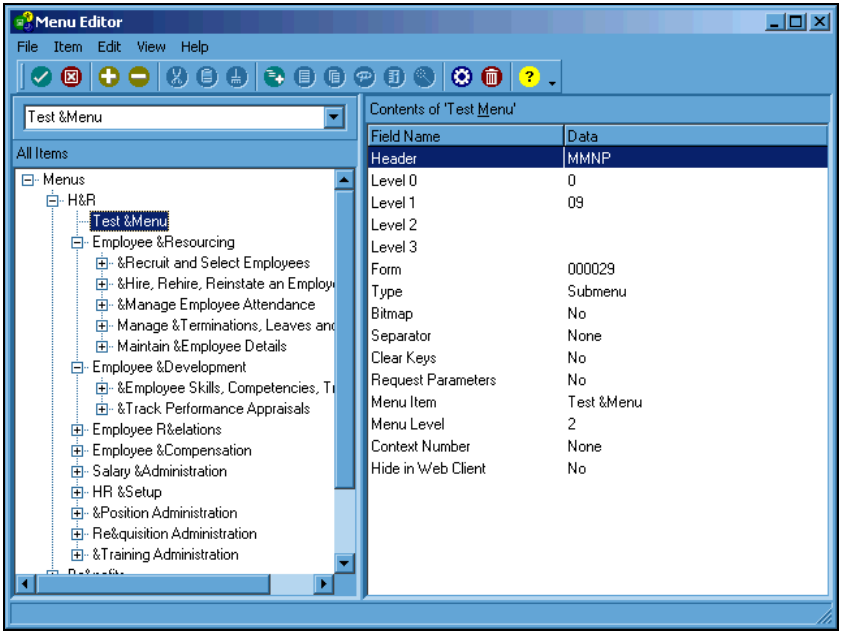
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Save

Click the Save button on the toolbar to save the new menu record.

5. Click Exit

Click the Exit button on the Menu Editor toolbar.

See also:

- Order of menu items ***(on page 117)***

For more information about changing the order of menu items.

Modifying a menu item

To modify a menu item, follow these steps:

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Customize Menus

2. Select the item to be modified

In the tree view in the left pane, click the item to be modified.

If the item is not displayed, use the expand function or the menu search function.

3. Click Modify

Click the Modify button on the toolbar. The Modify dialog box is displayed for the type of item selected.

4. Make the modifications

Make the required changes.

5. Click OK or press Enter

If you are satisfied with your changes, confirm this by clicking OK or pressing Enter.

6. Click Exit

Click the Exit button on the Menu Editor toolbar.

See also:

- Menu item changes ***(on page 119)***

For more information about modifying a menu item.

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Deleting a menu item

To delete a menu item, follow these steps:

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Customize Menus

2. Select the item to be deleted

Highlight the item to be deleted.

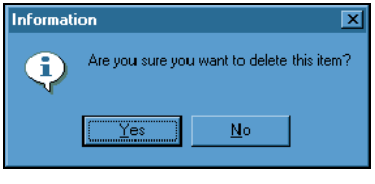
If the item is not displayed, use the expand function or the menu search function.

3. Click Delete

Click the Delete button on the toolbar. A dialog box appears, asking you to confirm your action.

4. Click Yes

Click Yes to confirm the deletion. The item, along with its associated sub-items, is immediately deleted.



5. Click Exit

Click the Exit button on the Menu Editor toolbar.

See also:

- Menu item deletion ***(on page 120)***

For more information about deleting a menu item.

Adding a report group to the menu

To add a report group to the menu, follow these steps:

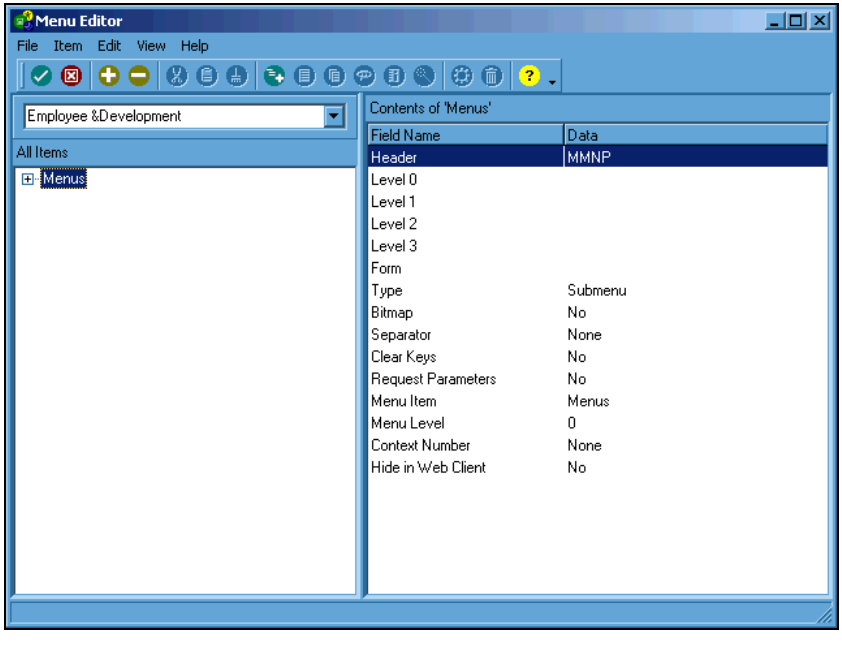
Note: Prior to adding a report group to the menu and using that item to launch a report group, you must add the report group to the system using the Report Group Activities form (RGMSTR). The name of the report group must end in 'RG' if it is to be launched online.

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Customize Menus

If you completed the previous step, the dialog that is displayed should look similar to the example that follows:



2. Expand the 'Menus' item

Click the plus sign (+) to the left of the 'Menus' item in the tree view in the left pane.

3. Expand the 'T&ools' parent item

Click the plus sign (+) to the left of the 'T&ools' parent item in the tree view in the left pane.

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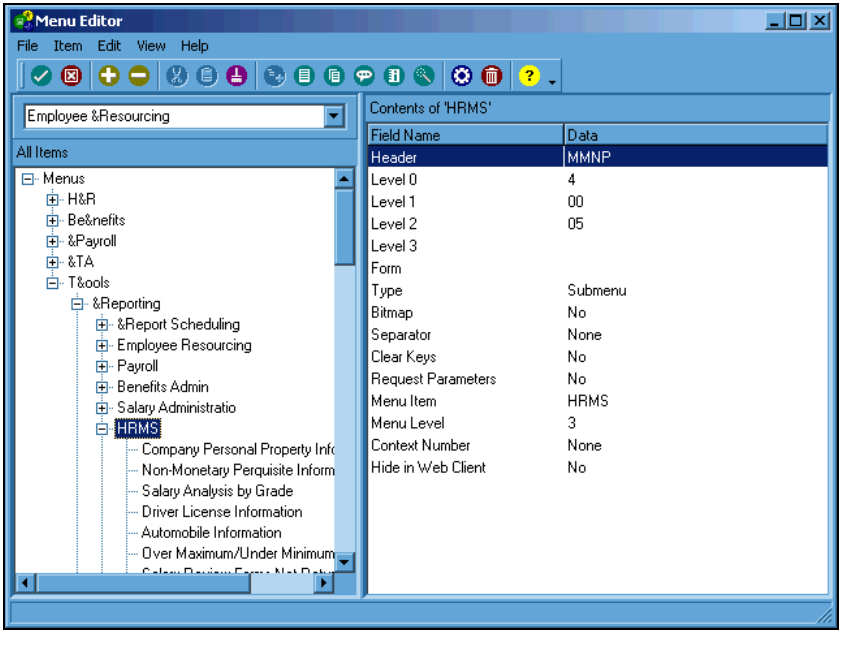
4. Expand the '&Reporting' submenu

Click the plus sign (+) to the left of the '&Reporting' submenu in the tree view in the left pane.

5. Select the report category to receive the new item

Click the report category below the Reporting submenu in the tree view in the left pane.

If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



6. Click the New Form icon

Select the type of item to add by clicking the New Form icon on the toolbar. The Add New Form dialog appears.

7. Enter the Item Title

Type the report group title that should appear on the menu. This name can be up to 38 alphanumeric characters. This must match the title that was entered on the Add Report Group form (RGADD).

8. Enter the Name

Type the name of the report group. This must be the report group name that was entered on the Add Report Group form (RGADD).

9. Enter the Context number (optional)

Type the four-position context number for the help topic. Values must be numeric and within the range 8000–8999.

This option is only available for components and may be left blank when adding a report group.

10. Select Options (optional)

If you are adding a form item, these options will be active. By default, 'Neither' is selected. No change in selection is required for a report group item.

11. Select Menu separator (optional)

Select this check box if you want a line to be drawn above the menu item's position in the menu list. Separators logically group related items. No entry is required for a report group item.

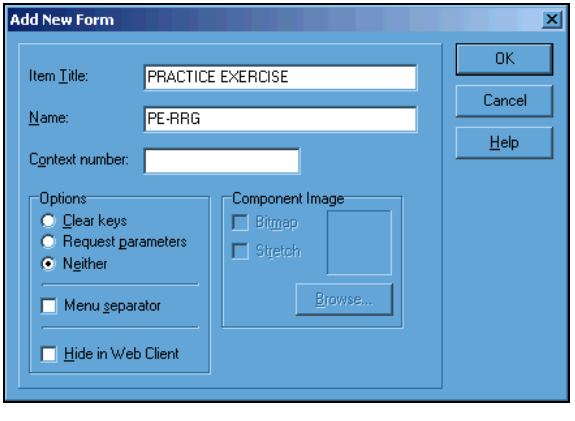
12. Select Hide in Web Client (optional)

Select this check box if you do not want this report group option to appear in the Web Client.

13. Bypass the Component Image selections

These items are not active for a report group item. You may bypass these selections.

If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



14. Click OK or press Enter

If you are satisfied with your entries, confirm this by clicking OK or pressing Enter.

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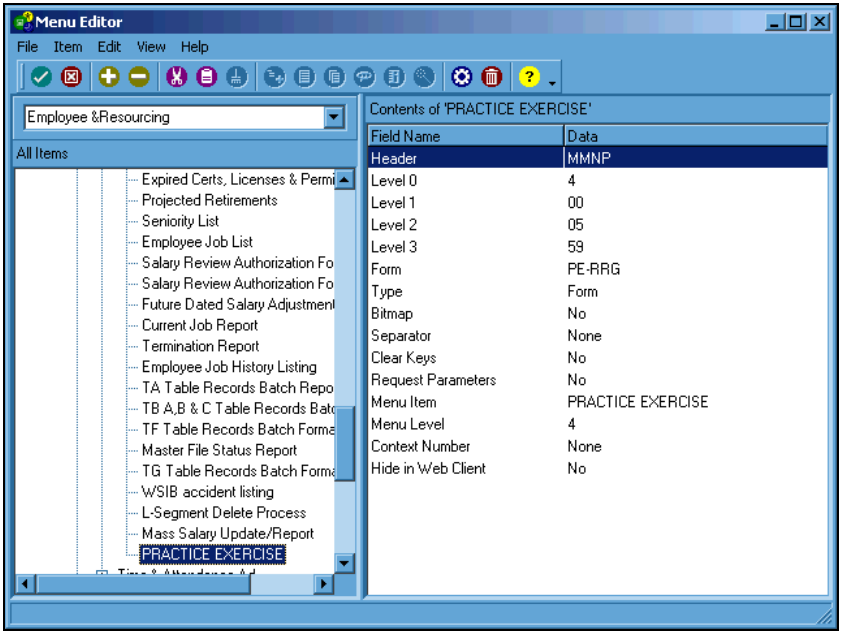
If you completed the previous step, the dialog that is displayed should look similar to the example that follows:



15. Click Save

Click the Save button on the toolbar to save the new menu record.

16. Click Exit

Click the Exit button on the Menu Editor toolbar. The new report group is now available on the Navigator and the menu.

If you close the dialog without saving, a Save dialog will be displayed, asking you if you want to save your changes to the menu structure.

See also:

- Menu Editor ***(on page 112)***

For more information about adding a report group to the menu.

Extended Practice

Using the Employee Resourcing submenu, add a submenu (level 3) named 'Maintain Company Property'. Assign a shortcut key to this item.

Then add two forms to the level 3 submenu with item names of 'Company Property' (form name 22-SCR) and 'Automobiles' (form name 24-SCR). Assign shortcut keys to each new form.

Save your changes. View your changes online.

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Review of Questions Answered

1. What types of menus are delivered with the system?

2. What is the relationship between the menu structure and the Navigator?

3. What is the Menu Editor and how is it used?

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PART 3

Integrating Desktop Applications and Data

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CHAPTER 6

Exporting and Importing Data

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Introduction

The ability to retrieve data from the administrative solutions, perform calculations or manipulate that information, and then import that enhanced data to update company and employee records allows your organization to reap the highest benefits from your system. This section introduces you to the export process and describes how to use the import feature to design and process imports that will update your company and employee records.

Tasks

This section explains the following:

- Creating a data extract using Reporting Administration
- Creating an import profile
- Renaming an import profile
- Modifying an import profile
- Starting an import
- Stopping an import
- Restarting an import
- Viewing the Import Message Log
- Removing an import profile
- Including and excluding target forms

Prerequisites

Before you can use the import functionality, The Solution Series must be installed, you must have the access to the data to be imported, and you must be familiar with the system's forms.

Questions answered

The following questions are answered in this section:

1. What tools can be used to export data?
2. What is the Import Profile Manager and what purpose does it serve?
3. What functions are provided by the Import wizard?
4. What control options are available for the import process?

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The export process

Several tools are provided to help you extract and report on information about your organization, employees, benefits, and payroll. These tools are suited for different purposes, and you will achieve the best results by using the tool that suits your extract requirement.

Options for obtaining extract data include:

- Reporting Administration
- Using ISQL or another tool to query a relational database implementation of the system
- Packaged reporting
- Solution View (create an extract)

Reporting Administration

Using Reporting Administration functionality is the easiest way to manipulate data. As delivered, Reporting Administration provides a means of extracting a great deal of information from the administrative solutions. By reviewing the data that is already delivered, you may determine that the data you want to extract is already defined. Then the task of manipulating data and importing it back into your system could be as simple as creating an Impromptu report, saving its content in comma delimited format, altering the data, and using the Import feature to apply the manipulated data. If this is the case, you need to verify that a fresh extraction has been performed before creating your Impromptu report.

☞ *Refer to the Reporting Administration Data Mart Data Model and/or the Catalog to Field cross reference spreadsheet delivered with Reporting Administration to determine if the data you want to manipulate is already defined in Reporting Administration.*

If the data you want to manipulate is defined in Reporting Administration, but you do not want to perform a full extraction of all defined data, you can define a separate data mart and perform a mini extraction. This course of action requires database administrative skills. To learn how to do this, attend the Customizing Reporting Administration class.

If the data you want to manipulate is not defined in Reporting Administration, but you want to use the functionality of this reporting tool, you must create additional extract programs, either customize the data mart or create a new data mart, and customize the delivered catalogs or create new/additional catalogs. This course of action requires Cyborg Scripting Language skills and database administrative skills. To learn how to do this, attend the Customizing Reporting Administration class.

Note: You will be able to do an extract only if your organization is licensed to use Administration. The full process requires additional software elements. The specific data elements represented in the extract are detailed in the Reporting Administration Data Mart Data Model documentation.

See also:

■ Creating a data extract using Reporting Administration ***(on page 172)***
For detailed instructions for creating a data extract.

ISQL or another tool

If you have a relational system, you can use ISQL or another tool to run queries directly from the relational tables of your system. You can then save the query content in comma delimited format, alter the data, and use the Import feature to reload in the manipulated data.

This is only an option for the most technical users who have detailed knowledge of the data format and table definitions within the relational version of the system.

Packaged reporting

We deliver hundreds of reports that have been developed using the Cyborg Scripting Language. You can use these reports in their delivered form or customize them to report on specific data.

You can also use Cyborg Scripting Language to create your own program that could be run offline to extract data.

Once the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

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

Solution View

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

- Query Writer—to write programs that are run online by the QUERY program
- Report Writer—to write programs that are run in batch

The Report Writer in Solution View can be used to create an extract file from your data. After the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

☞ *Refer to the Using Solution View documentation for details on how to create an extract file.*

The extract data

Regardless of the method used to extract the data, the report or file must be converted to a delimited file or placed in an Excel spreadsheet to create the import file. This file is the one used by the Import functionality to update company and employee information.

Apply the Concept
Based on your understanding of the export options as explained in this concept, which one or more of the solutions will best suit the needs of your organization?

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The import process

The import process moves data from an external source to any company or employee form. All you need is the authority to access the import data file.

The import feature is not a replacement for the Batch Transaction Layout function, which is a batch-only program that produces a report showing batch transaction layouts for application form entries. The report is called the Batch Layout Report (BATCHL). It contains form-specific literals, field information, and comments associated with the entry fields. The Batch Layout Report (BATCHL) can be very helpful when you design conversion and/or interface programs. This feature is specifically suitable for high volume movement of data for installation, conversion, and maintenance purposes.

What is an import profile

An import profile sets up the relationship between the import data and the form to which it will be imported, and is independent of the actual data. Import profiles are specific to each user. Once created, an import profile can be used for multiple imports from different data files, provided the same columns of data still exist.

To create an import profile, you must already have an import file that contains data that can be used to populate the system's forms. You will then select the form on which the import data will be recorded, and specify a one-to-one mapping of import data items to form data items. You also have the option of specifying a header record in the import data file, as well as the file delimiters and text qualifier that were used in the import data file.

After import profiles are established, they can be shared by copying the local files from one PC to another. It is not possible to store import profiles on the server.

What is the import process

After an import profile is set up, the import process can be started. After you specify how the import will handle errors and whether the import records will generate communication events, field validation takes place. You may stop the import and correct the errors. When all the fields validate with no errors, the posting of import data begins. When all the data has been recorded in your system, you may view an Import Message Log that provides error and warning information, as well as import record totals.

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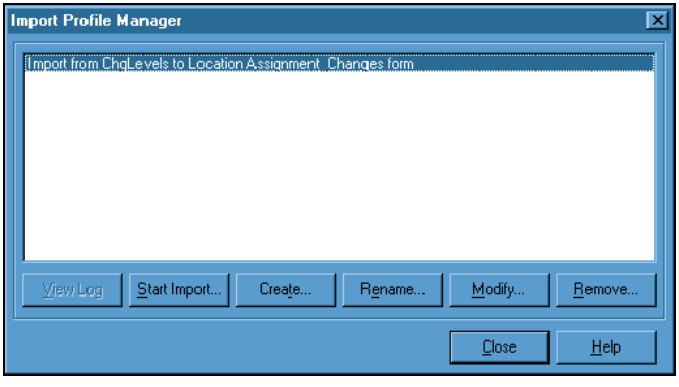
The Import Profile Manager

The Import Profile Manager is the tool that allows you to easily create, modify, rename, and remove an import profile, as well as start the import and view the resulting message log. You may use the Import Profile Manager if you have been given access on your user profile or if you are the Security Officer.



The Create or Modify options on the Import Profile Manager launch the Import Creation and Amendment wizard. This wizard guides you, step by step, through the tasks and options necessary to create or modify an import profile.

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Import data sources

The Import Profile Manager is used to import data on a form by form basis. For instance, a department manager may use spreadsheet software to calculate and manipulate staff position and salary information. After this is done, and the new salary budget has been approved, the spreadsheet data can be imported into your system. The manager can apply the data to as many forms as required, one at a time.

Import data can be extracted from any source, including the administrative solutions.

Allowable import files

You can use a Microsoft Excel 97 (or higher version) spreadsheet to calculate and manipulate information. That data can then be applied to one or more system form.

You may also use any extracted application data that can be saved as a delimited file.

General import data file rules

Whether you import a file that has been created using an Excel spreadsheet, or an extracted application file, you must ensure that you understand what will occur when you import data to an employee's record.

It is a common practice to select the Clear Fields menu option to blank out the existing data on a form before keying new data. This prevents any copying of information from the prior occurrence if it does not apply to the new segment. If the employee record to which you are going to import data already has a form with existing data, any field that is not applied by the import will retain its prior value. Import does not blank out fields to which data is not imported.

To clear a field, a hash symbol (#) or a 'none' selection in an option list must be used in the Import data file cell or keyed directly into the form field during the mapping process. This is the recommended method of blanking out existing information in fields that will not be mapped to a form in the Import Profile.

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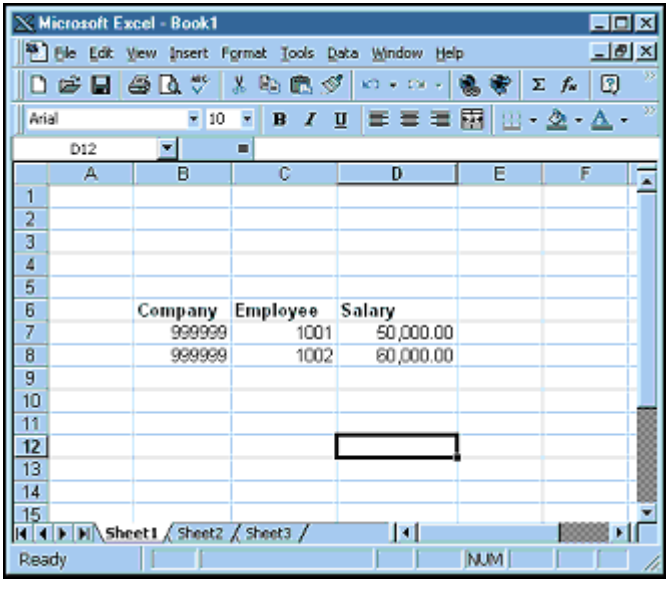
Excel spreadsheet rules

If data is being imported from an Excel spreadsheet, it is important that the following assumptions are known and that the rules are followed to prevent the accidental import of invalid data:

- The spreadsheet data must be contained within 'sheet1'.
- The import process saves the file in a comma-delimited format that automatically ranges the data from the first and last used rows and columns. Leading and trailing blank columns and rows are ignored. Any blank rows or columns that appear in the ranged part of the spreadsheet are saved. When an import is processed and an empty row is encountered within the ranged part of the spreadsheet, the following rows are ignored.
- If the 'First record is a heading' check box is activated in Step 5 of the import setup wizard, it is assumed that the first row of data is the heading row. The import assumes only one heading row.
- Any total lines must be removed from the spreadsheet or pasted into a new sheet 1 before importing.

Note: *An entry typed with leading zeros in an Excel spreadsheet will display without the leading zeros in the cell. If the field on the target form requires leading zeros, the entry in Excel must be preceded by a single quote ('005).*

The following Excel spreadsheet displays an example of an original import file.



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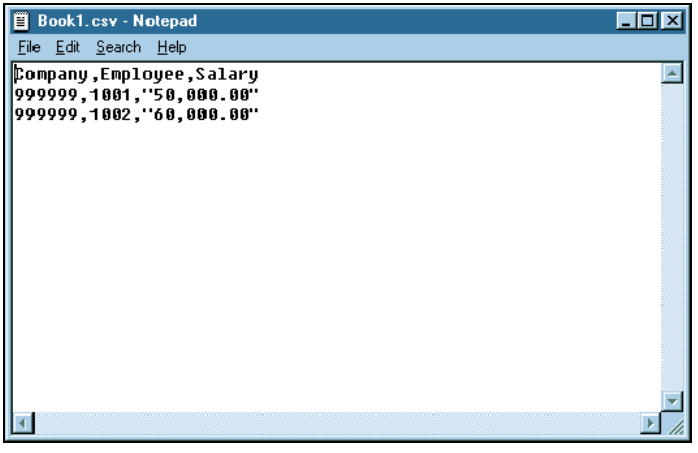
The following example shows how the imported file would be converted.



Delimited files

The second option for an import file is one that has been developed in another application and extracted for use as an import file. This type of file uses delimiters and text qualifiers to separate where one item of data ends and another begins.

The delimiter may be a comma, semicolon, space, tab, or other alphanumeric character of your choice.

If the use of a text qualifier is required to define items within a delimiter, it may be a double quote or single quote.

Apply the Concept
Based on your understanding of the import sources as explained in this concept, would your organization be able to import a tab-delimited file that has been supplied by an insurance company?

Target forms

You may easily import data into any form to which you have access, as defined by your user profile that has been set up by your Security Officer. If your profile allows access to only ten forms, then you will be able to import to those ten forms.

If your user profile allows display-only access to a form, you will not be able to update that form with import data.

Position Administration fields may be the target of import data. Position information may be imported.

Forms that can not be used with the import function do not appear in the form browse during the import profile creation. If your organization wants to exclude import to specific forms, this can be done using the Browse Forms - Import option list (SC52). Forms in this option list can not be used as targets for the import function. This option list can also be used to include forms that are not employee or company forms, but should be used within import, such as time entry forms.

☞ *Refer to* **Maintaining Option Lists** *(on page 27) for information about using the Option List Editor (CSUPDT) and displaying option lists.*

See also:

- Including and excluding target forms ***(on page 189)***

For detailed instructions for including and excluding target forms.

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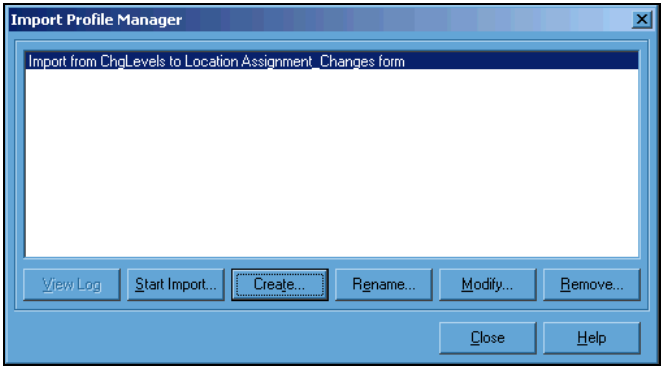
The Import wizard

The Import Creation and Amendment wizard provides you with an easy method of setting parameters for importing data into your system. The wizard takes you through the creation of the import profile that is required prior to processing the import.

The wizard allows the setup of parameters for one form at a time. If you need to import data into more than one form, run the wizard one time for each form. Then run the import program one time for each form for which you have created an import profile.

Navigating the Import wizard

The Import Creation and Amendment wizard is activated by selecting Create from the Import Profile Manager, as shown in the following dialog:



There are four buttons that you can use to navigate through the Import wizard:

- Back—Moves you backwards one step
- Next—Moves you forward one step
- Cancel—Exits the wizard and returns you to the Import Profile Manager
- Help—Displays online information about the wizard

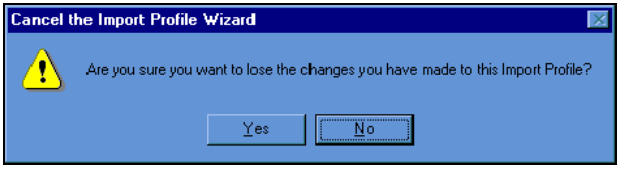
When appropriate, the Next button is replaced by a Finish button. The import profile is not created until you click Finish. Until you do so, you will be able to use the Back and Next buttons to move back and forth between the steps and make changes before the profile is actually created.

Wizard overview

The wizard guides you through the completion of the profile creation. The import profile must be set up prior to processing the import. The following tasks are included in the setup of an import profile:

- Select the target form
- Specify the import data file
- Select import file delimiters and text qualifier (if not an Excel file)
- Specify if a header record is included in the import data file
- Map the relationship between the import data items and the form data items

If, at any time during the wizard process, you select 'Cancel', the following dialog is displayed:



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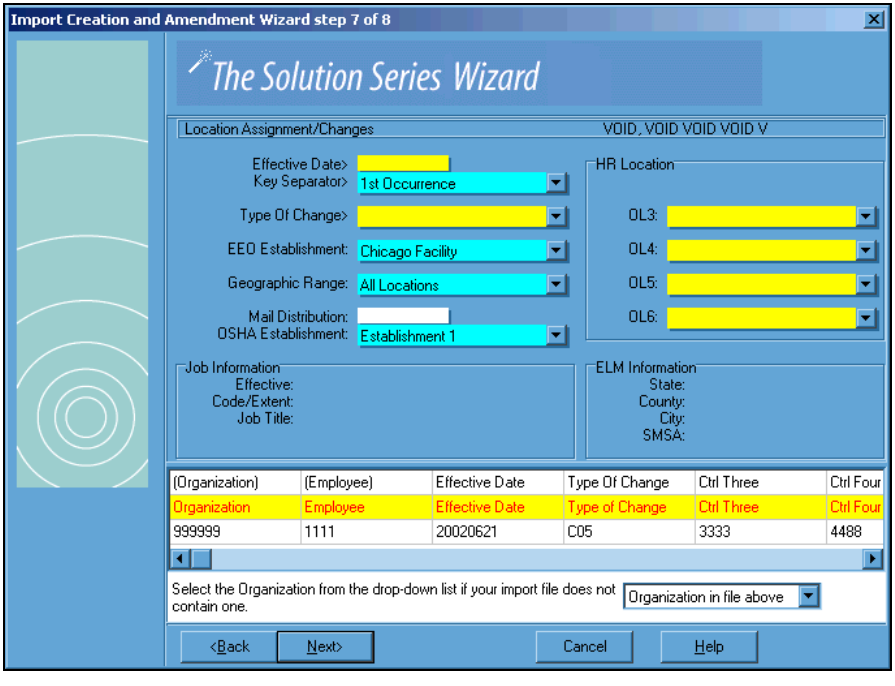
File-to-form relationships

You will use the form and import data that displays in Step 7 of the Import wizard to map, or link, the data from the import file to the destination form. The form uses the currently displayed organization's Logical Employee Model as the employee for the form. The form area may only be used for mapping purposes. While you are processing Step 7, you will be prevented from linking to other forms, viewing history records, and saving the form.



Default values

If some of the form data is the same for all employees, you may choose to exclude that data from the import file and enter it directly on the form during the mapping process. Default values can be entered directly on the form, in exactly the same way that data would be recorded. Entries made directly on the form apply to all employees in the import.

To clear an existing field on the target form, a hash symbol (#) must be keyed directly into the form field. This is the recommended method of blanking out existing information in fields that will not be mapped to a form in the Import Profile.

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Use of a variable date

As an alternative to entering a default date within a date field or mapping to a column in the data, you can also type the word 'Today' or the letter 'T'. This causes the current date to be used when the import occurs. These entries are not case-sensitive.

Days can also be added or subtracted from today's date by entering 'T+n' or 'T-n' (where n is a number in the range of 1 to 99). As an abbreviation for the fuller statement, the entry '-n' or '+n' can be entered. This is useful if the same import is to be used repeatedly. This option will also be available as a context sensitive item on the form (right-click on the date text box).

Effect of organization assumption

Because the wizard relies on its ability to display the form for a specific Logical Employee Model, the following logic is applied when a target form is selected. This logic will ensure that the form can be called:

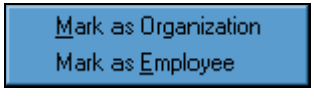
- Logical Employee Model '00' will be called for the currently selected Organization.
- If the Logical Employee Model '00' does not exist, the LMODEL option list (SC42Y) will be examined, and the first Logical Employee Model number for the Organization will be used.
- If this fails, an error message is presented.

Mapping methods

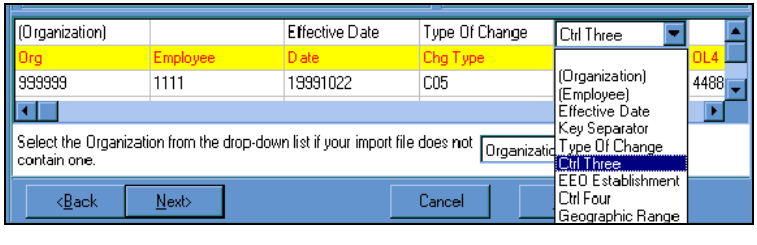
Fields may be mapped, or linked, from the import data to the form data by one of two methods:

- Selecting the field name from the drop-down list at the top of the import data column
- Dragging and dropping an import data column onto the field to which it will be mapped

Right-clicking on a grid column allows a column to be assigned to an Organization or Employee:



If you use the method of selecting the field name from the drop down list at the top of the data column, each form field name displays in the drop down list. As shown in the following illustration, a blank value also exists in the drop-down list to allow the removal of values if an error is made:



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Alternatively, you may drag a column and drop it onto the field to which it is to be mapped. As this is done, the top row of the column is updated to reflect the field name.

Each column of data can only be mapped to a single data field on the form. All key fields on the displayed form must be mapped or manually entered. If the Next button is selected before all of the key values have been mapped or manually entered, an error message is presented.

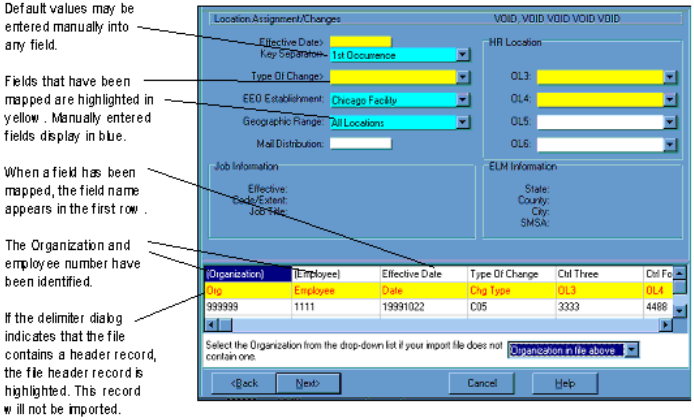
The Import Wizard will try to automatically match the Organization. If the Organization has been mapped from the import file, the Organization list will be set to 'Organization in the file above'. If an Organization is selected from the list, any column mapped to the Organization is cleared.

When mapping to a list box, either the description or the code can be mapped to the option list. During the import, the system will scan both for a match. If the same value is matched in the code and description during the import, the code will be used.

Import data for option buttons must match the option button caption or code. For example, for the Sex option button, the import data must be M, F, Male, or Female. You may use the selection method or the drag-and-drop method for mapping to an option button group.

If a column is dragged to a field that already has a mapping, the old mapping is removed and the new mapping takes its place. If a field is already manually entered, and then a column is dragged to it, the manual entry is cleared.

If you indicated in Step 5 of the wizard that the first row of import data was a header record, then the header information is highlighted in the display in Step 7. This record is not processed by the import.



@

Field color changes

Action	Color of field
Mapping is done by selecting a field from the drop-down list or by dragging the column to a field	Yellow to indicate that the field has been mapped
Manual entry is made in a field on the form	Blue to indicate that the value in the field will be defaulted to all records generated by the import
Field is manually entered, and then a column of import data is dragged to it	Blue changes to yellow after manual entry is cleared
Column of data is mapped to option buttons	Yellow in all of the buttons to indicate that a mapping has taken place
Manual entry is made in an option button group	Blue in all of the buttons, and the button selected will display a black selected mark

Removal of mapped fields

Two methods are available for removing mapped fields if an error is made:

- Select the blank value in the import column option list.
- Right-click the field on the form and click the Remove Link option on the resulting dialog to remove the mapping.

See also:

- Creating an import profile ***(on page 172)***

For detailed instructions for creating an import profile.

Apply the Concept

Based on your understanding of the Import wizard as explained in this concept, how would you determine by looking at the display in Step 7 that all of the desired import items have been mapped to the target form?

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Import profile conventions and maintenance

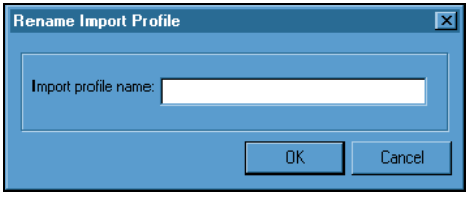
As your business needs change, you may need to maintain the import profiles that simplify your everyday tasks. You can rename, modify, and remove import profiles.

Import profile naming conventions

The name of the profile is derived from the input file name and the form name. Any illegal characters that may occur in the file name, such as '/', are replaced by an underscore, as shown in the following example:

> If the import file name is *review 1999.xls*
> and the form is *Salary Assignment/Changes*,
> then the import profile will be titled *Import from review 1999 to Salary Assignment_Changes form*.

You may change an import profile name if necessary. The Import Profile Manager provides a Rename option that allows you to see the existing name and make any changes. The resulting Rename Import Profile dialog displays the current name and allows you to change it to any other value of up to 100 alphanumeric characters:



If the name that is automatically generated, or entered manually using the Rename Import Profile dialog, is not unique, the system will add a sequence number to the end of the name. For example:

- Import from review 1999 to Salary Assignment_Changes form
- Import from review 1999 to Salary Assignment_Changes form (1)
- Import from review 1999 to Salary Assignment_Changes form (2)

See also:

- Renaming an import profile ***(on page 182)***

For detailed instructions for renaming import profiles.

Import profile storage

When the final step of the Import wizard has been completed, the import profile is saved as a .IMP file on your local PC. It is stored in the following path and location:

```
<Install Directory>\Environments\<Environment Name>\Imports
```

You can view a list of existing import profiles by displaying the Import Profile Manager dialog or by using Windows Explorer to search for all files with an extension of .IMP.

Import profile copies

Because import profiles are stored on your local PC, other users can not access them or run imports using their parameters. However, you may share import profiles by copying the .imp file to a diskette or CD-ROM, or attaching the file to an email. The import data file may also need to be made available to the user, if the same import data is to be used or modified. Alternatively, a template of the import data file can be provided and used with new import data.

Import profile modification and removal

The Modify option on the Import Profile Manager dialog allows you to use the wizard to modify any of your existing import profiles. The profile data that you previously entered will be displayed and you may make any changes that are required.

Import profiles may also be removed by highlighting a specific profile and then selecting the Remove option on the Import Profile Manager. A Remove Import Profile dialog is displayed that allows you to verify your intention to remove the profile.

See also:

- Modifying an import profile ***(on page 182)***

For detailed instructions for modifying import profiles.

- Removing an import profile ***(on page 188)***

For detailed instructions for restarting import record processing.

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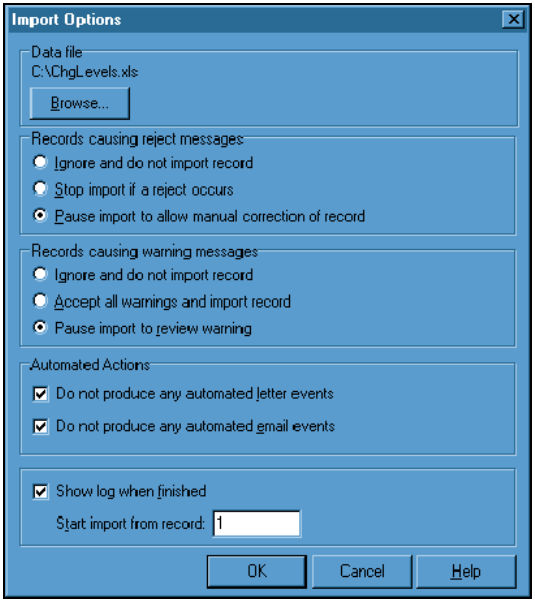
Control options for importing data

After an import file on the Import Profile Manager has been selected and the Start Import button has been clicked, you can specify how the import handles errors and specify automated options by making selections on the Import Options dialog. After this dialog is completed, the pre-import validation begins.



Change import files

A Browse button provides the opportunity to change import files prior to beginning the import process. The changed file must have the same column structure as the original. File. This could be used if you created your field mappings from a dated import file and want to substitute current data at the time of import. For instance, the original import file might be 'JanuaryBudget.xls' and you want to run the 'FebruaryBudget.xls' file in the current Import run. Also, if an import file is shared (the .IMP file copied from one PC to another), you may need to reference a different import file.

Automated options and error handling

Depending on the number of records being processed by the import, you may choose to handle rejects and warnings in different ways.

Records causing reject and warning messages

For rejects, you may choose one of the following actions:

- Ignore and do not import the record
- Stop import if a reject occurs
- Pause import to allow manual correction of record

Note: Pausing the import for each reject may not be advisable when a large number of import records are being processed.

You may choose one of the following options for handling warnings:

- Ignore and do not import record
- Accept all warnings and import record
- Pause import to review warning

Automated actions

When the import is run and forms are updated, all communication events related to the form will occur unless the special defaults on the Import Options dialog are activated.

If the 'Do not produce' options are not activated, all letters produced by the form generation during the import are queued. If letter events are triggered, you will be able to view or print them after the import has finished.

Depending on the number of import records, a large number of communication events may be triggered. Consider the effect of large volumes of emails and letters on your network environment.

Emails are sent without the option to receive a preview dialog. If multiple recipients are found for a position, the email is sent to all of them. If emails are triggered, it may cause the email system to request an email password. This suspends the import process until the password is entered.

Import message log

After an import is completed, a log file is produced. If you set the option on the Import Options dialog to display the log file when the import has been completed, then the file will be automatically opened in Microsoft Notepad or the application assigned to text files on the PC.

Alternatively, if you leave this option unselected, you may view the message log by selecting the View Log button on the Import Profile Manager dialog.

See also:

- Viewing the Import Message Log ***(on page 187)***

For detail directions for viewing the import message log.

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Record starting point

In case you need to stop the import, or a network failure or power problem occurs while import is being processed, you have the option of restarting the import from a specific record. In a restart situation, the Import Options dialog defaults to the aborted record number. Alternatively, you may type the record number to be processed when you restart an import.

See also:

- Starting an import ***(on page 183)***

For detailed instructions for processing import records.

- Restarting an import ***(on page 186)***

For detailed instructions for restarting import record processing.

Apply the Concept

Based on your understanding of the import options as explained in this concept, which option would you choose for rejects and warnings if your organization was processing an import file that contained 75 records?

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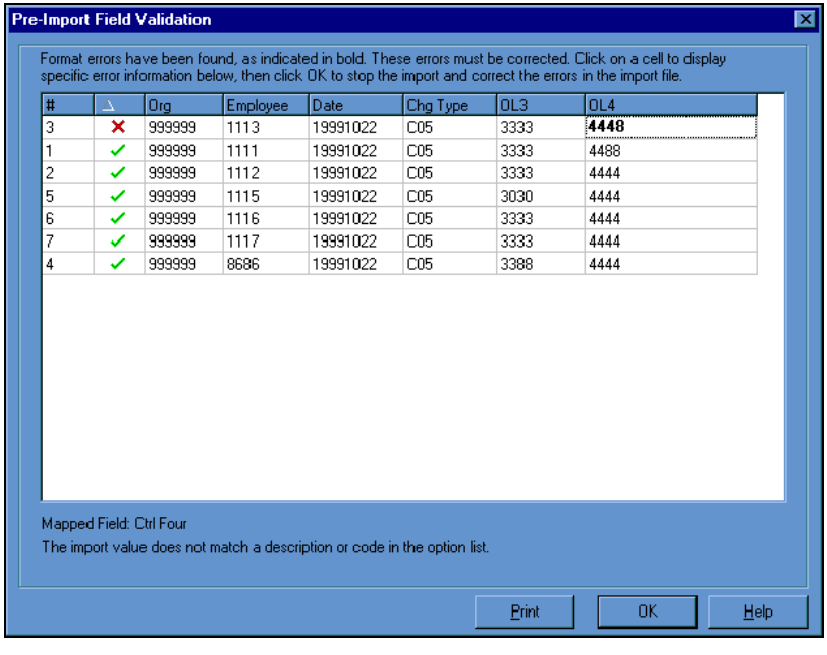
Pre-import validation

After the import options have been selected, field validation takes place. The following are some of the validation checks that are conducted before any records are actually imported:

1. The form must exist. If it does not, an error message is displayed and the process is stopped.
2. The import file must exist. If it does not, an error message is displayed and the process is stopped.
3. The import file must contain records. If it does not, an error message is displayed and the process is stopped.
4. The fields to be imported must be complete and in a valid format. For instance, a date field entry must be formatted correctly.

If field errors are found, the following Pre-Import Field Validation dialog is displayed:



#	Δ	Org	Employee	Date	Chg Type	OL3	OL4
3	✗	999999	1113	19991022	C05	3333	**4448**
1	✓	999999	1111	19991022	C05	3333	4488
2	✓	999999	1112	19991022	C05	3333	4444
5	✓	999999	1115	19991022	C05	3030	4444
6	✓	999999	1116	19991022	C05	3333	4444
7	✓	999999	1117	19991022	C05	3333	4444
4	✓	999999	8686	19991022	C05	3388	4444

Each record is displayed. Records that have errors display a cross (X) to the left and the field in error is in bold. Records without errors display a check to the left. Initially, all error records are sorted at the top. Clicking on any column heading cell will sort the data in the column.

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If you select a cell with a validation error, a validation error message and the name of the mapped field will be displayed at the bottom of the dialog. The Print button may be used to print validation errors to the default printer in the following format:

Record Number	Mapped Field	Column Name or Number	Cell data	Error Message

The following validation messages will display at the bottom of the dialog when a cell in error is selected:

Error message	Explanation
Invalid Date	■ The number of days added or subtracted from Today's date can not exceed 99. ■ The import value is not a valid date or Windows short date.
Invalid Number	■ The import value is too large for the numeric field. ■ The import value has too many decimal places for the numeric field. ■ The import value is not numeric.
Invalid Alphanumeric	■ The import value has too many characters for the alphanumeric field.
Invalid Name	■ The import value is not a valid name; it does not have a comma followed by a space. ■ The import value has too many characters for the name field.
Invalid Option List Value	■ The import value does not match a description or code in the option list.
Invalid Position Administration Table Value	■ Can not locate the Position Administration control number for the Organization. ■ The import value does not match a description or code in the Position Administration table.
Invalid Check Box Type	■ The import value is not a valid Yes or No type.
Invalid Employee ID	■ The import value is not a valid Employee ID; it must have between one and ten characters.
Invalid Organization ID	■ The import value does not match a description or code in the Organization option list.

Error message	Explanation
Invalid Time	■ The import value is not a valid time format. Use the format: HH:MM where HH is hours (00-23) and MM is minutes (00-59). ■ The import value for hours is invalid. Hours must be within the range of 00 to 23. ■ The import value for minutes is invalid. Minutes must be within the range of 00 to 59.
Invalid Option Button Value	■ The import value does not match the option button label or option list code.

Although this dialog displays the errors, it may not be used for error correction. You must make your corrections in the import file.

You may stop the import by clicking OK, allowing you the time you need to correct the errors. All errors must be corrected in the import file prior to continuing the import process. After the errors are corrected, the import process can be started again and the validation checks will be repeated.

If all fields validate with no errors, the import process begins.

See also:

■ Starting an import ***(on page 183)***
For detailed instructions for processing import records.

■ Restarting an import ***(on page 186)***
For detailed instructions for restarting import record processing.

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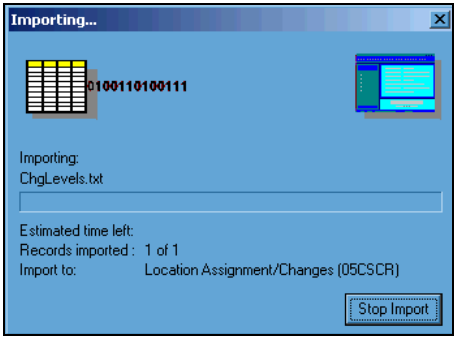
Running the import

After the import options are entered, all the validation checks are performed, and all errors are corrected in the import file, the import of employee data can begin.

If the system identifies that the format of the import data has changed, an Invalid Import File dialog is displayed. A change to the import file may include such conditions as a mismatch in the number of data elements per record, for example, a mapped value in the import that no longer exists. The import stops and must be restarted after the error has been corrected.

While the import is in progress, the following dialog is displayed:



You may monitor this dialog to see the progress of the import run, or you may start another session of the system and perform other tasks while import is running. However, if you have chosen the option to pause the import process for errors, your attendance during the import run is required to address each error that is encountered.

See also:

- Starting an import ***(on page 183)***

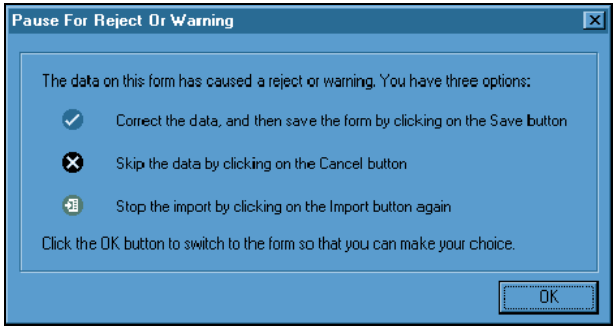
For detailed instructions for processing import records.

- Restarting an import ***(on page 186)***

For detailed instructions for restarting import record processing.

Import pauses for form rejects or warnings

If you selected either of the 'Pause the import' options on the Import Options dialog, the following dialog is displayed when an error occurs:

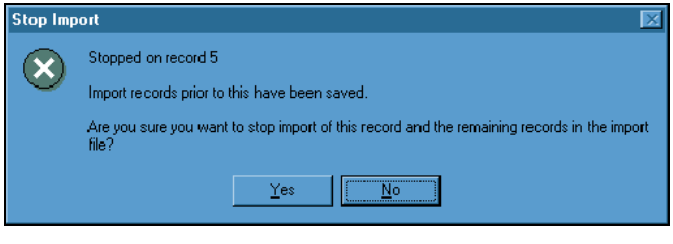


Three options are displayed in the dialog to address an error. After clicking OK on this dialog to switch to the form, you may perform one of the following actions by clicking the specified toolbar button:

- Save—Read the error message and then amend the data or accept the warning on the form being displayed; then click Save. The import continues.
- Cancel—Skip the data, bypassing the import record. No update is recorded; this record will be recorded in the log file as an uncorrected error. The import continues. Pressing Enter also cancels the record.
- Import—Stop the import (perhaps this error reveals a larger problem that must be resolved). The Stop Import dialog is then displayed with a Yes or No option.

Import interruptions

If, for any reason, you need to stop the import, you may do so by clicking the Stop Import button on the Importing dialog. As an alternative, you may click on the Import button on the toolbar, which changes to 'Stop Import' during an import. The following Stop Import dialog is displayed:



This dialog provides you with the information you will need when you restart the import. It also provides you with the alternative of continuing the import. The restart record number will also be recorded on the Import Options dialog and the Import message log if you choose to stop the import at this point.

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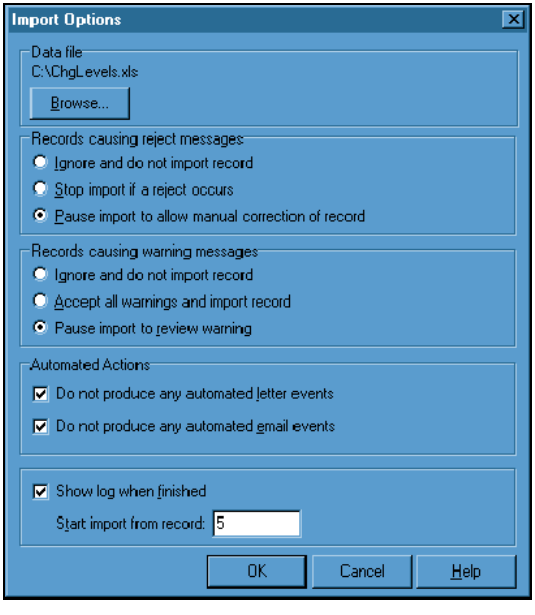
See also:

- Stopping an import ***(on page 185)***

For detailed instructions for stopping import record processing.

Import restarts

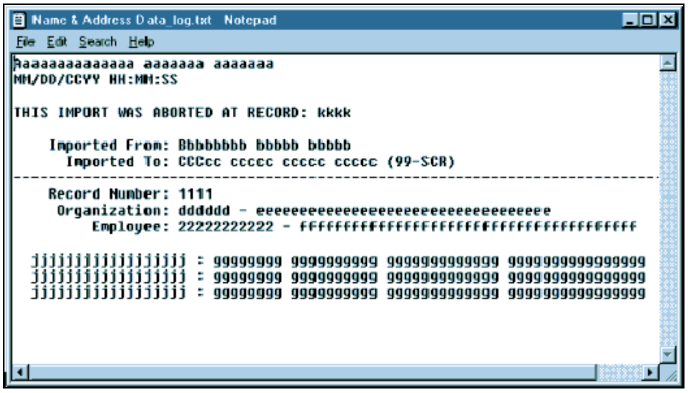
Using the information provided by the Stop Import dialog, you can restart the import from a specific record using the Import Options dialog:



Message log

If you set the option on the Import Options dialog to show a message log when the import has been completed, then the log file will be automatically opened in Microsoft Notepad or other text view assigned on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

The log contains error and warning information that is presented in the format shown in the following example:



The log text will be displayed as follows:

Aaa...	Import title
MM	Month
DD	Day
CCYY	Century and year
HH	Hours
MM	Minutes
SS	Seconds
kkkk	Aborted record number (if import aborted)
Bbb...	Import file name
CCCc...	Form name
99-SCR	Program number
1111	Record number of file
dddd	Organization number
eeeee	Organization name
222…	Employee number
ffff…	Employee name
jjjj...	Type of message (Reject, Ignored Message, or Accepted Message)
gggg...	Error message, with or without error numbers

Note: *The date format is derived from the local PC setting. The date is displayed in Windows short date format, defined in the regional settings control panel dialog.*

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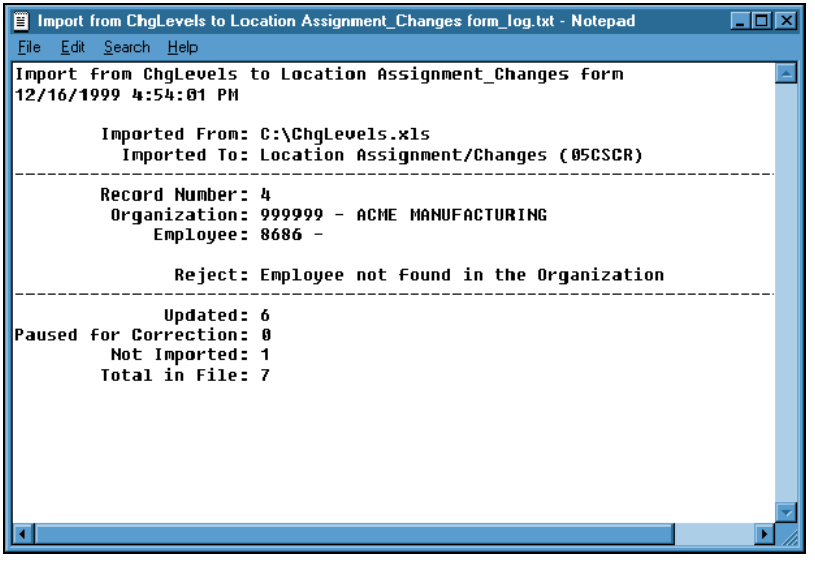
As well as Cyborg Scripting Language rejects and warnings, the following errors will also produce a reject message and be displayed on the log:

- 'Employee not found in the Organization'—when the employee can not be found
- 'Record Locked - Update Bypassed'—when another user is updating the employee record
- 'The import form does not contain any entry fields'—when the user has display-only security
- 'The form contains a different layout from when the import profile was created'—when the import profile is defined for a form that changed
- 'You are not authorized to access this employee'—when a security violation occurs

The following is an example of a message log file:



The last lines of the report display a record count for the following items:

- Updated—Records applied (including records that had warnings that were accepted)
- Paused for Correction—Records that had warnings or errors that were manually fixed or cancelled by the user
- Not Imported—Records not imported due to warnings or errors
- Total in File—Total records in the import file (excluding header record)

The message log file will have the same name as the profile but with a '_log.txt' suffix. Each time a new import is completed, the prior log is replaced with current message log information. The current log for each import is stored in the following path and location on your local PC:

```
<Install Directory>\Environments\<Environment Name>\Imports
```

Note: *If you renamed an import profile, the associated message log is not renamed. However, it can be viewed by accessing Windows Explorer and searching for the file under its original import profile name. If you want to keep additional log history, you may rename and relocate logs as they become available.*

See also:

- Viewing the Import Message Log ***(on page 187)***

For detailed instructions for viewing the message log.

Apply the Concept

Based on your understanding of import run as explained in this concept, what control procedures would you implement to ensure that all import records are posted to your system?

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Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Information and prerequisites before practicing the following detailed directions

The Wizard dialogs shown in the first task may not match your own data. They do, however, represent the resulting dialog in each wizard step.

An import file must be present on your local PC before starting the following detailed directions. It is suggested that you turn on the Office integration toolbar so you can access the Import Manager button.

Access the toolbar by making the following selections from the menus:

View ▶ Customize Toolbars

Then click the Toolbars tab, select Office integration, and click Close.

Creating a data extract using Reporting Administration

To create a data extract using Reporting Administration, follow these steps:

1. **Review the defined Reporting Administration data to see if it is already exported during a Administration extract process.**
2. **If yes:**
   Use Impromptu to create a sample report.
   Save the report as a comma delimited file.
3. **If no:**
   Attend the Customizing Reporting Administration training course to learn how to create your own data mart.

See also:

- The export process ***(on page 143)***

For more information about creating import profiles.

Creating an import profile

To create an import profile using the Import Creation and Amendment wizard, follow these steps:

1. **Access the Import Profile Manager**

   Access this dialog by selecting the Import Manager icon from the toolbar:

   Alternatively, make the following selections from the menu:

   Actions ▶ Office Integration ▶ Import

   The Import Profile Manager dialog is displayed.

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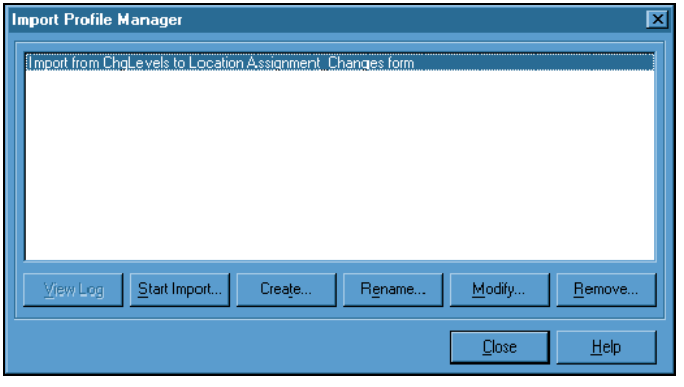
If you completed the previous step, the resulting dialog should look similar to the example that follows:



2. Select Create

Click Create to activate the Import Creation and Amendment wizard.

If you completed the previous step, the resulting dialog should look similar to the example that follows:

Welcome (1 of 8)

This dialog displays a brief description of import profile's purpose—to define the relationship between the data in your file and the data on a form, for the organization currently being displayed.

3. Click Next

Click Next to continue creating an import profile.

Choose form (2 of 8)

This dialog allows you to select the form currently being displayed or a form that you select by using a Browse button on the dialog.

4. Click Browse (optional)

If you want to import data to the form being displayed, you do not need to select a form. Skip to Step 7 of the detailed directions.

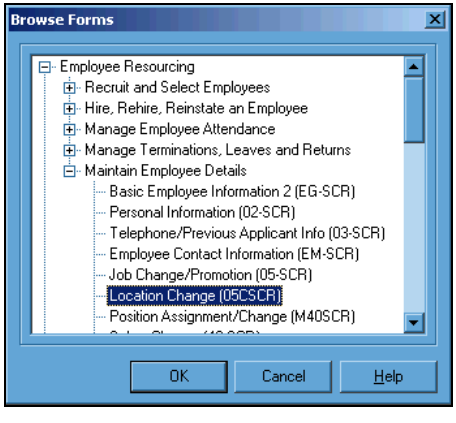
If the form being displayed is one that can not be used with the import functionality, then this dialog functions as if no form is displayed.

If the form displayed in the dialog is not the form to be selected for import, or if no form is being displayed, click Browse to view a list of available forms. This list contains only those forms you are authorized to access. Forms that can not be used with the import functionality are not displayed.

The Browse Form dialog is displayed.

5. Select a task

Fully expand the tree view in the same way that you would use the Navigator to locate a form. Highlight the task representing the form that is to receive the import data.



6. Click OK

Click OK to select the form. The form title and name are displayed on the Choose form dialog (2 of 8).

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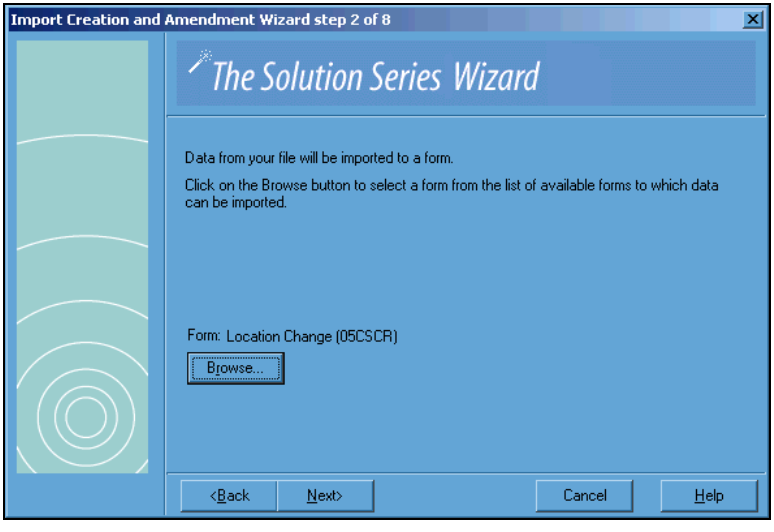
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



7. Click Next

Click Next to continue creating an import profile.

Choose file (3 of 8)

This dialog provides a Browse button to select the import file to be used. The following file types display in the open file dialog:

File extension	File type	Note
.***	All files	
.TXT	Text files	
.XLS	Excel	Default file type Will not use Step 4 of 8
.XLT	Excel template	Will not use Step 4 of 8
.CSV	CSV comma delimited	Will not use Step 4 of 8

8. Click Browse

Click Browse to view the directory contents of your local PC.

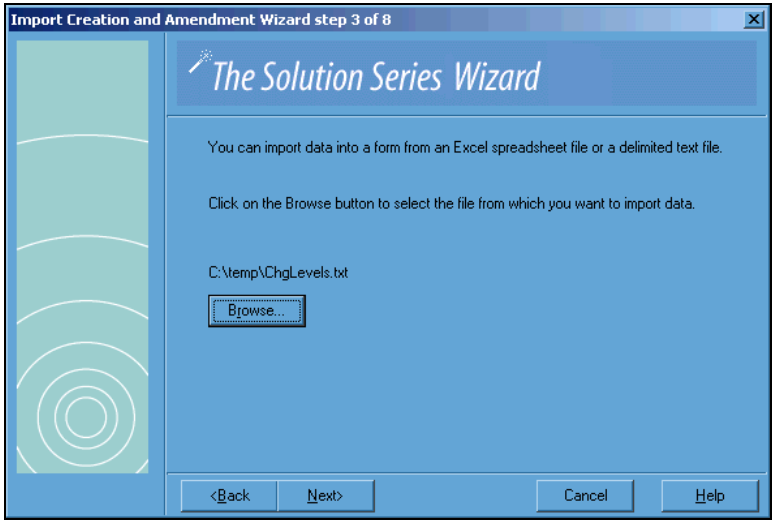
9. Locate and select the import file

A standard Windows Open dialog is displayed, from which you can locate the import file. You may use the Windows Search feature to find the file by name or by extension. When you locate the file, highlight it.

10. Click Open

Click Open to select the import file for this import profile. The file name is displayed in the Choose file dialog.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



11. Click Next

Click Next to continue creating an import profile.

Select delimiter (4 of 8)

This step is not shown if an Excel file is chosen or the file type defines the delimiter. This dialog lets you specify the delimiters and text qualifier (if any) used in your import file.

12. Select a delimiter and text qualifier (optional)

The delimiter, used to specify where one item of data ends and another begins, may be a comma, semicolon, space, tab, or other symbol of your choice. If you choose 'Other' and specify your own delimiter, the character can not be in the ranges a–z or 0–9.

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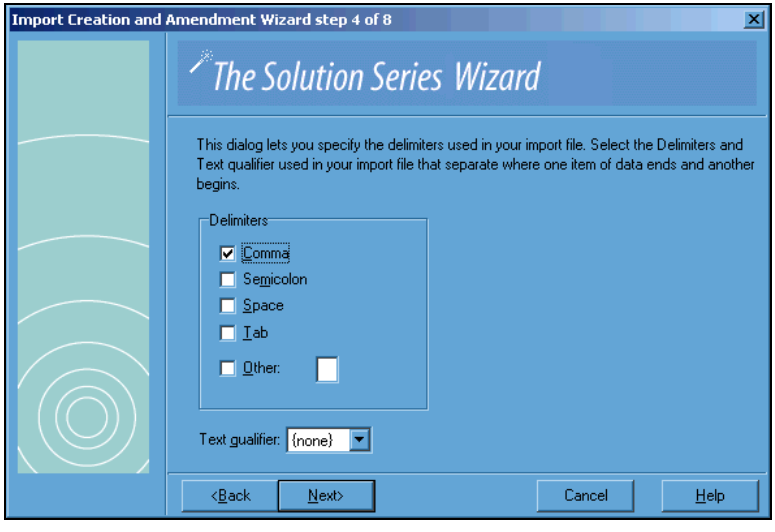
The text qualifier, which acts as a separator within a delimited item, may be a double quote ("), single quote ('), or none.



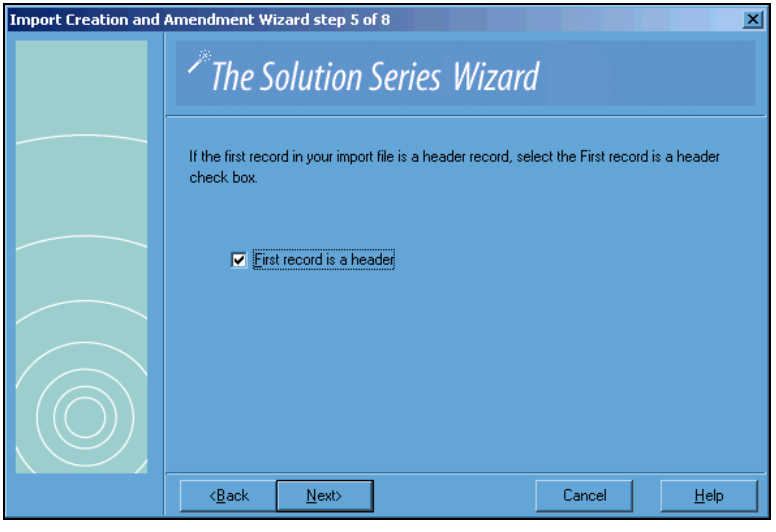
Header record (5 of 8)

This dialog provides a check box to indicate whether or not the first record of the import file is a header.

13. Select the check box (optional)

If you specify that a header record is present in the import data file, the first line of data is identified as the header and subsequently not imported.

The input file must have at least two records, if one record is a header. If you wish to set up a dummy file to create import mapping, this rule must be followed. If no header is included, only one data record is required.



14. Click Next

Click Next to continue creating an import profile.

Map message (6 of 8)

This dialog displays an explanation of Step 7.

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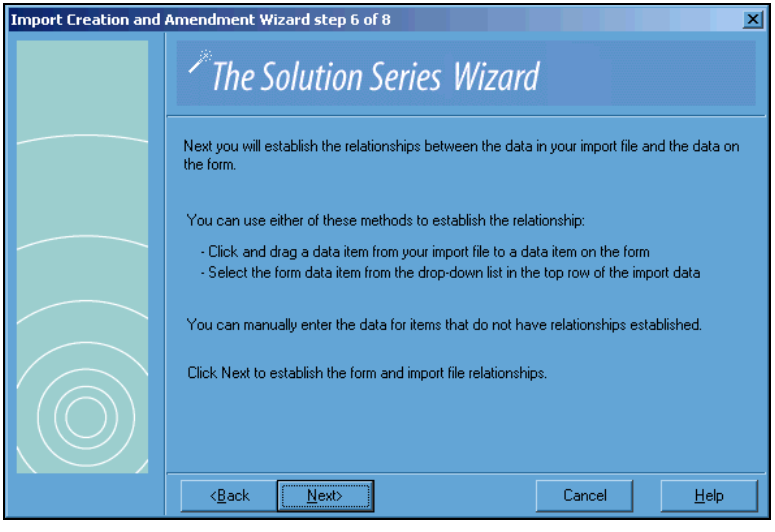
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



15. Click Next

This is an information message only. In the next step, you will establish the relationships between the data in your import file and the data on the target form.

Click Next to continue creating an import profile.

Form and fields (7 of 8)

You will use this dialog to establish the relationship between your import data items and the form data items, as well as indicate whether or not the import file contains Organization information.

16. Map the import-to-form relationship

This dialog allows you to view the target form as part of the wizard dialog and view the first lines of the import file below it. All key fields on the displayed form must be mapped or manually entered. Use one of the following methods to complete the mapping:

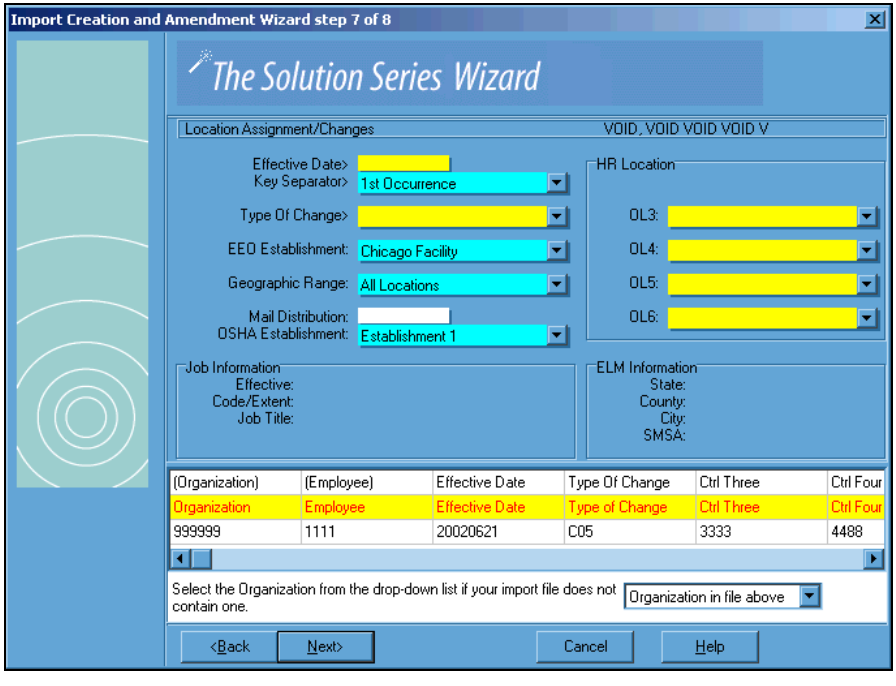
- Select the field name from the drop-down list at the top of the import data column by clicking the column header.
- Drag and drop an import column onto the field to which it will be mapped.
- Make an entry directly into a form field. This entry will be applied to all records that are updated by the import file.

Note: Clicking at the top of a partially displayed column will scroll the grid to the right. A second click will display the drop-down field list.

To remove a mapped field, use one of these methods:

- Select the blank value in the import column option list.
- Right-click the field on the form to remove its mapping.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



17. Click Next

Click Next to continue creating an import profile.

Summary information (8 of 8)

This dialog confirms that the necessary steps for creating an import profile have been completed.

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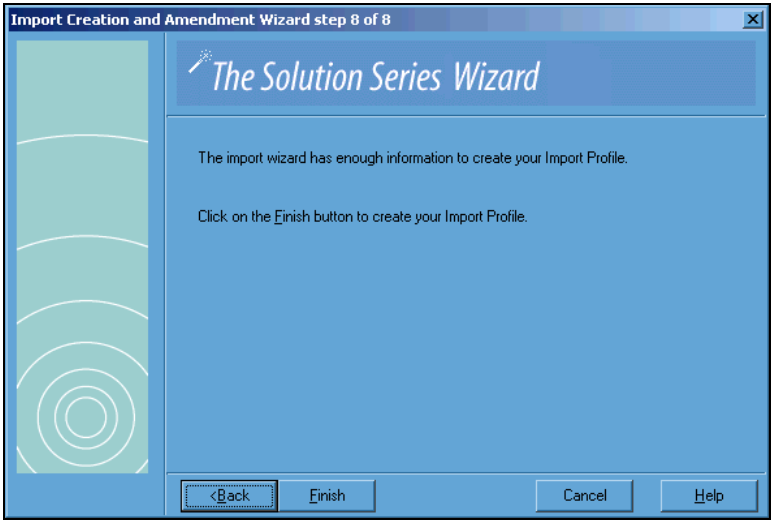
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



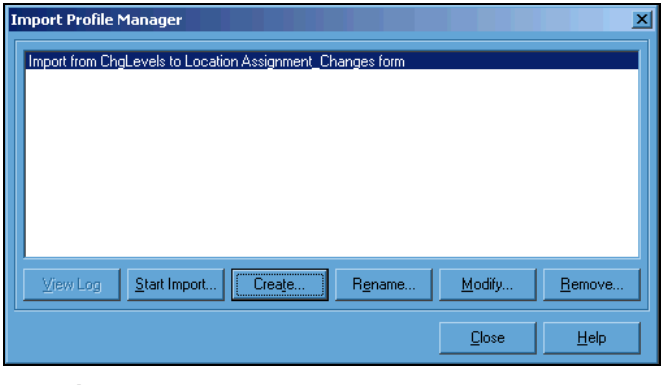
18. Click Finish

Click Finish to create your import profile.

After you click the Finish button, the import profile name is assigned and the import profile is saved on your PC. At this point, you have only a profile—no import has taken place.

The Import Profile Manager dialog is displayed, showing the import profile name.

Note: After import profiles are established, they can be shared by copying the local files from one PC to another. It is not possible to store import profiles on the server.



See also:

- The Import wizard ***(on page 15)***

For more information about creating import profiles.

Renaming an import profile

To rename an import profile using the Import Profile Manager, follow these steps:

1. **Access the Import Profile Manager**
   Access this dialog by selecting the Import Manager icon from the toolbar:

   Alternatively, make the following selections from the menu:

   Actions ► Office Integration ► Import

   The Import Profile Manager dialog is displayed.

2. **Select the import profile to be renamed**
   From the list of existing import profiles, highlight the one to be renamed.

3. **Select Rename**
   Click Rename to display the Rename Import Profile dialog.

4. **Type the new profile name**
   Use up to 100 alphanumeric characters to rename the import profile.

5. **Click OK**
   Click OK to rename the import profile and return to the Import Profile Manager dialog. The file is displayed with the revised name.

See also:

- The Import wizard ***(on page 15)***

For more information about renaming import profiles.

Modifying an import profile

To modify an import profile using the Import Profile Manager, follow these steps:

1. **Access the Import Profile Manager**
   Access this dialog by selecting the Import Manager icon from the toolbar:

   Alternatively, make the following selections from the menu:

   Actions ► Office Integration ► Import

   The Import Profile Manager dialog is displayed.

2. **Select the import profile to be modified**
   From the list of existing import profiles, highlight the one to be modified.

3. **Select Modify**
   Click Modify to activate the Import Creation and Amendment wizard.

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4. Change the required entries

All steps of the wizard are displayed with the import profile's current entries. Make changes to the information as needed.

5. Click Finish

Click Finish on the last step of the wizard to save the import profile changes.

See also:

- The Import wizard ***(on page 15)***

For more information about modifying import profiles.

Starting an import

To start an import using the Import Profile Manager dialog, follow these steps:

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

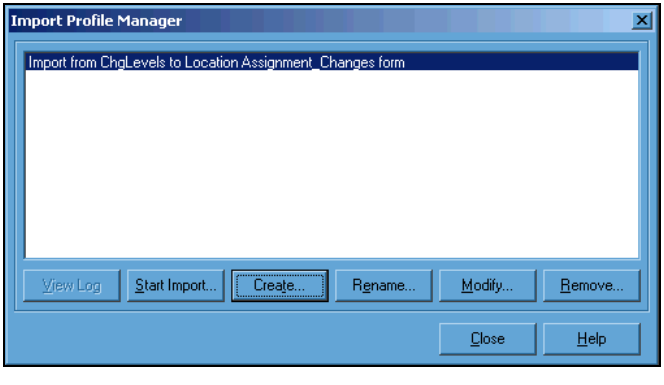
Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

2. Select the import profile to be run

From the list of existing import profiles, highlight the one to be run.



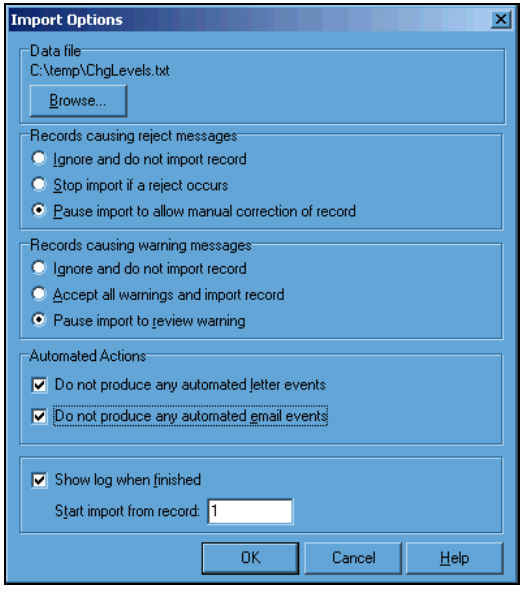
3. Select Start Import

Click Start Import to start the data import. The Import Options dialog is displayed.

4. Select import options

This dialog allows you to specify how the import will handle errors and automated options.

- Select an alternate import file using the Browse option. (Optional)
- Choose an option for handling records that cause reject messages.
- Choose an option for handling records that cause warning messages.
- Choose to produce or not produce automated letters and emails.
- Select the check box to view the message log after the import is finished.
- Alter the starting record number (used mainly under restart conditions; should remain at '1' for a normal import run).



5. Click OK

Click OK to continue the import.

Pre-import validation takes place and a dialog is displayed. If there are any format errors, the import will stop so you can correct the errors. No import data has been posted to the system at this point. You must then restart the import from record 1.

If no format errors are encountered, the posting of import records to the system begins.

The Importing dialog is displayed while the import is active.

If, at any time, you need to stop the import, you may do so by clicking the Stop Import button on the Importing dialog or the Import button on the toolbar.

If you set the option on the Import Options dialog to show a message log when the import has been completed, then the log file will be automatically opened in Microsoft Notepad or the application assigned to text files on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

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See also:

- Control options for importing data ***(on page 159)***

For more information about handling import record errors.

- Pre-import validation ***(on page 162)***

For more information about error detection prior to posting import records.

- Running the import ***(on page 165)***

For more information about processing import records.

Stopping an import

To stop the processing of import data after the import process is running, follow these steps:

1. Click Stop Import on the Importing dialog

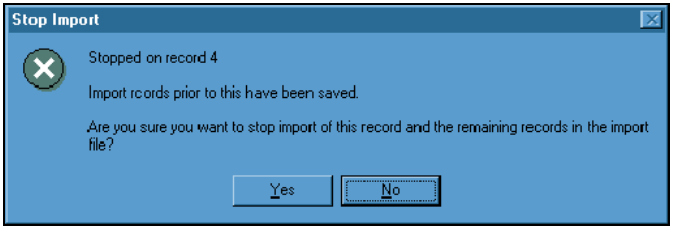
Click Stop Import on the Importing dialog while the import is being processed.

Alternatively, click the Import button on the toolbar to stop the import.

The Stop Import dialog is displayed and provides you with the record number of the last data to be processed before the import was stopped.

2. Click Yes

A No response to the 'Are you sure' statement on the Stop Import dialog allows the import to resume its processing. Clicking Yes stops the import.



See also:

- Running the import ***(on page 165)***

For more information about interrupting an import run.

Restarting an import

To restart an import using the Import Profile Manager dialog, follow these steps:

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

2. Select the import profile to be restarted

From the list of existing import profiles, highlight the one to be restarted.

3. Select Start Import

Click Start Import to start the data import. The Import Options dialog is displayed.

4. Select import options

This dialog allows you to specify how the import will handle errors and automated options:

- Select an alternate import file using the Browse option. (Optional)
- Choose an option for handling records causing reject messages.
- Choose an option for handling records causing warning messages.
- Choose to produce or not produce automated letters and emails.
- Select the check box to view the message log after the import is finished.
- Verify the starting record number (updated when the last import was stopped and now displays the next record to be processed on a restart).

5. Click OK

Click OK to continue the import.

Pre-import validation takes place and a dialog is displayed. If there are any format errors to be corrected, the import will stop so you can correct the errors. No import data has been posted to the system at this point. You must then restart the import.

If no format errors are encountered, the posting of import records to the system begins.

The Importing dialog is displayed while the import is active.

If, at any time, you need to stop the import, you may do so by clicking the Stop Import button on the Importing dialog or the Import button on the toolbar.

If you set the option on the Import Options dialog to show a message log when the import has been completed, then the log file will be automatically opened in Microsoft Notepad or the application assigned to text files on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

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See also:

- Control options for importing data ***(on page 159)***

For more information about handling import record errors.

- Pre-import validation ***(on page 162)***

For more information about error detection prior to posting import records.

- Running the import ***(on page 165)***

For more information about processing import records.

Viewing the Import Message Log

To view the Import Message Log using the Import Profile Manager dialog, follow these steps:

Note: *If you renamed an import profile, the associated message log is not renamed. However, it can be viewed by accessing Windows Explorer and searching for the file under its original import profile name. If you want to keep additional log history, you may rename and relocate logs as they become available.*

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

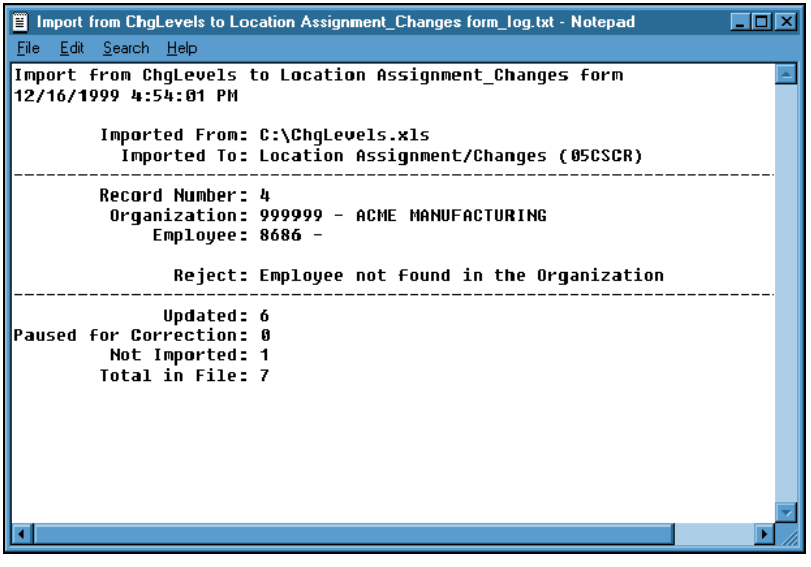
2. Select the import profile

From the list of existing import profiles, highlight the one for which a log is to be displayed.

3. Click View Log

Click View Log to display the Import Message Log for the profile. The Import Message Log is displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



See also:

- Running the import ***(on page 165)***

For more information about Import Message Logs.

Removing an import profile

To remove an import profile using the Import Profile Manager dialog, follow these steps:

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

2. Select the import profile to be removed

From the list of existing import profiles, highlight the one to be removed.

3. Select Remove

Click Remove to display the Remove Import Profile dialog.

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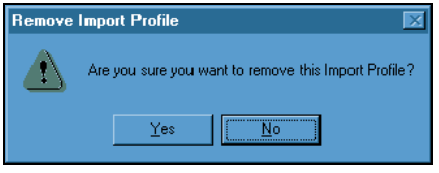
4. Click Yes

This dialog allows you to proceed with the profile deletion or cancel the action. Click Yes to delete the import profile. Click No to cancel the action.



See also:

- Import profile conventions and maintenance ***(on page 157)***

For more information about removing an import profile.

Including and excluding target forms

To include or exclude forms in the Browse Forms - Import option list (SC52) using the Option List Editor (CSUPDT), follow these steps:

1. Access the Option List Editor (CSUPDT)

Access this dialog by making the following selections from the Navigator:

Component:	Development Tools
Process:	Option Lists
Task:	Edit

2. Enter the Option List Name

Type the name of the option list to be edited—'SC52'.

3. Click Find Now

The system displays the detailed information for the requested option list.

4. Click Create

A blank line is inserted, allowing you to add the new item.

5. Enter the Code

Type the program name of the form to be included or excluded, such as 'EF-SCR'.

6. Enter the Description

Type 'E' to indicate that this form is to be excluded. Type 'I' to indicate that a form is not an employee or company form but should be used within import, such as a time entry form.

As-delivered items in this option list may have one of the following entries in this location:

Entry	Definition
'I' or 'i'	Form is not an employee or company form, but should be used within import.
Any other character, including spaces	Excludes the form from import.

7. Click OK or press Enter

No items are updated in the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

Note: If the form to be included or excluded is already in the option list, an error message will be displayed. Instead of adding a new entry, make a correction to the existing entry to include or exclude it.

See also:

- Target forms ***(on page 150)***

For more information about including and excluding forms.

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Extended Practice

Using Excel, create the following import data and save the Excel file as C:\Practice.xls. The first row is header information:

	Emp #	Date	Chg Type	OL3	OL4
999999	1111	20000101	C05	3333	4444
999999	1112	20000101	C05	3030	4040
999999	1113	20000104	C05	3338	4448
999999	1114	20000110	C05	3333	4444
999999	1115	20000112	C05	3338	4448
999999	1116	20000115	C05	3030	4040
999999	1117	20000116	C05	3333	4444

Then create a new import profile to move this data to the Location Assignment/Change form (05CSCR). Complete all of the necessary steps in the Import wizard:

- Select the form by expanding the Employee Resourcing component, and then expand the Maintain Basic Employee Details process. Then click the Location Change (05CSCR) task.
- Map each of the import items to its corresponding form item.
- Manually select '1st Occurrence' as the Key Separator, 'New York Office' as the EEO Establishment, and 'All Locations' as the Geographic Range.
- Finish the import profile.

Resolve any pre-import validation errors and run the import to a successful conclusion.

View the message log.

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Review of Questions Answered

1. What tools can be used to export data?

2. What is the Import Profile Manager and what purpose does it serve?

3. What functions are provided by the Import wizard?

4. What control options are available for the import process?

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CHAPTER 7

Setting Up a Communication Event

In This Chapter

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Introduction

In addition to recording employee information in the administrative solutions, your workflow process requires that some of that information be communicated to the employee or other areas of your organization. A communication events tool is provided that can be set up to send emails and print letters automatically or manually when employee data is created, updated, or deleted in the system.

Tasks

The following tasks are covered in this section:

- Creating a form trigger letter communication event
- Creating a form trigger email communication event
- Creating a checklist trigger letter communication event
- Creating a checklist trigger email communication event
- Changing to a different frequently used field list
- Adding a new field to a frequently used field list
- Creating a custom frequently used field list
- Copying a communication event
- Modifying a communication event
- Removing a communication event
- Adding forms to the exclusions option list

Launching a document from the Document Explorer

To launch a document from the Document Explorer, follow these steps:

1. Click the Document Explorer button

To launch the Document Explorer, click the Document Explorer button on the Launch toolbar while displaying any Solution Series form for the employee.

The Document Explorer displays each document type for which the employee has linked documents.

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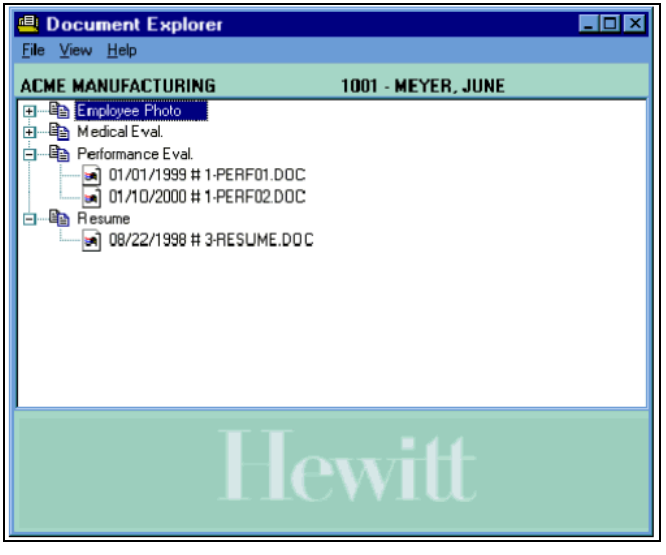
The resulting dialog may look similar to the example that follows:



2. Select the document type

Double-click the document type you are interested in. This expands the view to display the list of documents for that type. The document types are listed in alphabetical order.

Alternatively, select:

View ▶ Expand all

to expand the tree view to display all documents in all document types.

3. Launch the application and open the document

The documents are listed in date order. Double-click a document you want to see. This will launch it in the application indicated by the file extension.

If a Windows file association does not exist for the file extension, the Windows standard 'Open with' dialog will be displayed. Select the appropriate application.

If the file does not exist, a dialog will open giving you the option to create the file.

Note: *If the document is a Microsoft Word document, Word is then launched with the newly-created document. A dialog may appear asking if you want to convert the document. In this case you may need to install a converter. The Microsoft Office website has the required converters—which converter you will need will depend on the version of Word you have installed.*

See also

- Overview of the Document Management Facility ***(on page 263)***

For more information on the document explorer.

- Document Explorer button ***(on page 268)***

For more information on the Document Explorer toolbar button.

Prerequisites

Before you can use communication events, The Solution Series must be installed, and you must have the authority to set up communication events.

Questions answered

The following questions are answered in this section:

1. What is a communication event?
2. What are the types of communication events?
3. What is a communication event trigger?
4. What types of triggers are available?

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Using communication events

Information recorded in the system becomes even more valuable when you have an automated tool to distribute that information to the employee and other need-to-know areas of your organization.

Business process considerations

Workflow management can be substantially enhanced when you implement communication events to replace the cumbersome task of communicating manually. Coupled with the impressive speed of email to reach recipients at your location and around the world, keeping people informed about updates to the employee database through automated events can help to improve the overall performance of your organization.

Communication events in the workflow

After it has been set up by an administrator, a communication event is system-wide and available to all system users. However, each user can specify unique options to provide departmental flexibility. Consider the following examples of ways to use the communication event process to improve workflow and communications capabilities throughout your organization:

- Email notifications to managers about applicants or candidates
- Welcome letters based on new hire information
- Email confirmations of employee job and location changes
- Congratulatory letters for employee promotions
- Email notifications of employee transfers or leaves of absence
- Scheduling confirmations for annual reviews
- Salary and salary range change notifications
- Tax information change confirmations
- Direct deposit setup or change notifications
- Bonus, commission, and perquisite notifications
- Company property assignment notifications
- Certificate, license, and permit notifications
- Email confirmations of physical exams
- Disciplinary action and grievance communications
- Benefit plan enrollment confirmations
- Dependent and beneficiary change confirmations
- Savings bond setup confirmation
- Badge assignment or deletion notification
- Schedule assignment confirmation
- Email notifications of training course refund information

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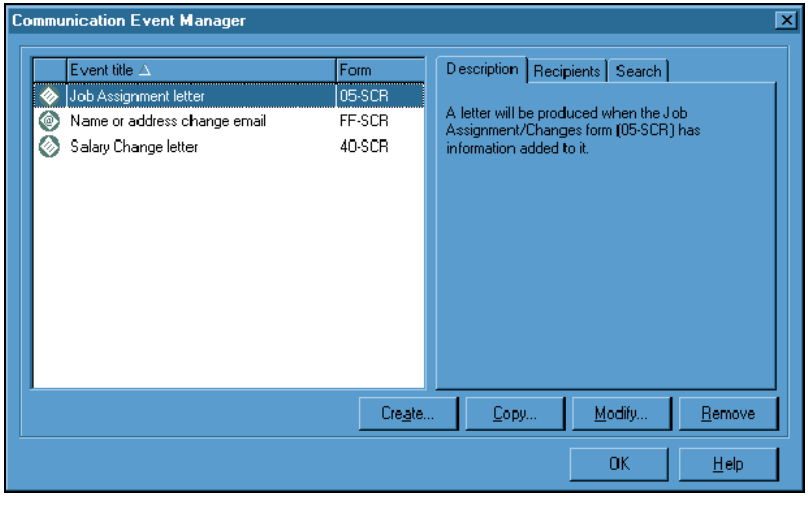
Communication event types

The Communication Event Manager is the controller of this functionality. It allows you to create, copy, modify, and remove communication events:



Events are displayed in ascending order by title in the Event title list. By clicking on the arrow icon, you can toggle the display to show titles in descending alphanumeric order . By clicking on the Form heading, the events will be displayed, sorted by the form's system identifier.

There are three tabs—one that provides a description of the event, one that displays any email recipients defined to receive notification when the event occurs, and one that provides a means of searching for an event based on the email recipient's address. The search option is useful where a large number of events have been created (hundreds) and specific email addresses have been entered. By searching, the user can identify all emails that would automatically have been sent to somebody who, for instance, has changed departments or left the organization.

Using the Communication Event Manager dialog, you may set up parameters for the automatic and manual generation of two types of communication events—email and letter. Data to be contained within the email or letter comes from the form being used as well as delivered lists of frequently used fields. After communication event parameters are set up, the event can be modified, copied, and deleted.

Email communication events use your automated email software package.

Letter communication events use Microsoft Word 97 or any newer version. Letters can be created using its templates and mail merge features.

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Server-based events

You can choose to have the form trigger event executed on the Web server. This will allow the event functionality to be supported by the Web client. As the event functionality occurs on the server, users do not need to have Microsoft Word and MAPI set up.

Note: If you set up and manage communication events, then you will need to have Word and MAPI set up.

When a communication event letter is created, the templates associated with the letter event are stored in the location specified on the System Options form (SCOPTS). This location should be accessible to all users. When you install the server-based events, you enter this same Template Path on the Environment Settings dialog. The paths must be the same.

☞ *Refer to Configure the eCyborg Event Service section of the Installing and Configuring eCyborg documentation for information on installing server events.*

It is likely that if you choose to use server-based events, you will wish to set all form trigger events as server-based events. However, if you wish to combine client and server-based events it is advised that only client-based events exist for a particular form. If both client-based and server-based events exist for a particular form, profiling must be set up and used as a filter in the the server-based event profiling conditions. This will stop the server-based event from being triggered if using the Administrative Client.

☞ *Refer to* **Form trigger profile** *(on page 203) for information on using user profiles in form trigger events.*

Another consideration of having both client-based and server-based form trigger events on your system is that it may be confusing to a user who uses both the Web Client and the Administrative Client as they would need to look in two areas for batches of queued letters.

Note: The options 'Trigger when selected from toolbar' and 'Suppress if a form is in a checklist' are not supported with server events.

If you do not select the server events option, the event will be triggered and processed on the client PC within the Administrative client.

Client/Server event comparison

The following table shows a comparison between Client-based and Server-based events:

Feature	Client-based event	Server-based event
Trigger from all clients (including Checklist events for Administrative and Web clients)	No	Yes
Email user options (such as Preview)	Yes	No
Letter dialog with options to Preview/Queue/Print	Yes	No
Generation of queued mail merge data (downloaded via the use of the Web Application for letters)	No	Yes
Manually execute an event from the toolbar	Yes	No
Option to suppress an event assigned to a form if it is in a checklist	Yes	No

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Communication event triggers

Event triggers allow you to set up the parameters that will cause a communication event. There are two types of communication event triggers within the Communication Event Manager—form and checklist.

See also:

■ Creating a form trigger letter communication event ***(on page 225)***
For detailed instructions for creating a letter communication event

■ Creating a checklist trigger letter communication event ***(on page 238)***
For detailed instructions for creating a letter communication event

■ Creating a checklist trigger email communication event ***(on page 242)***
For detailed instructions for creating an email communication event

Form trigger options

A form trigger can be set up to occur when you:

- Add information to a form
- Change information on a form
- Delete an existing form from the employee record

Example: The Payroll department wants a letter to be generated when a new salary is assigned to an employee. The letter would congratulate the employee on the increased salary. This would be defined as a communication event to occur when information is added to the Salary Assignment/Changes form (40-SCR).

An additional parameter allows you to suppress the form trigger if the form is in a checklist, thereby preventing multiple events from being triggered from a single checklist.

Because forms can change at the organization level, an option is provided that allows a communication event to only be triggered for a specific organization. For instance, different organizations may have different country codes or different functionality active, such as Position Administration—in which case the forms may have different fields displayed.

As well as an automatic trigger, you also have the option to manually generate letters and email when data is created for an employee. A manual trigger option allows you to generate a communication event by using a button on the toolbar when working with a form that has no automatic trigger.

When a manual trigger is available for a specific form, the Select an Email or Select a Letter button will be available on the toolbar. When you select one of these buttons, a selection dialog is displayed.

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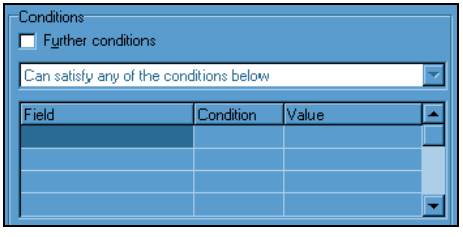
Form trigger conditions

You can specify additional conditions that must be satisfied before a specific form can trigger a communication event. For one or more text boxes on the form, you may define a condition and a value to be met.



The conditions available are dependent on the type of information. The following chart details the available conditions and the resulting value options for each type:

Field type	Conditions	Value
Alphanumeric	=, <>, >, <, =>, =< 'changed'	An alphanumeric value must be entered unless the condition of 'changed' is chosen.
Check box or Option button	=, <> 'changed'	The value field becomes a drop-down list that contains the values 'Yes' and 'No'. *Note: If a field is defined as a Yes-No and you are triggering when information is added or changed, the valid values to include are Y or space. The space defaults to a No.*
Date	=, <>, >, <, =>, =< 'changed'	If these conditions are chosen, the date can be entered in any of the following formats. A right-click on the grid allows the option to display on the standard calendar. You can enter 'Today', 'Today+n', or 'Today-n', where n is a number in the range 1 to 99. This can be entered in any case, with or without spaces. The abbreviation of '+n' and '-n' can also be entered as an abbreviation for the full statement. The calculation is performed on actual days, not working days.

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Field type	Conditions	Value
Numeric	=, <>, >, <, =>, =< 'changed'	A numeric value must be entered. Decimal points (.) must be entered. Optionally, separators can be entered, for example, 1234.56 or 1,234.56 are both valid.
Option list	=(description) =(code) <>(code) >(code) <(code) =>(code) =<(code) 'changed'	The value field becomes a drop-down list that displays all descriptions or codes, depending on the condition chosen. A code of 'none' is treated as zero (0) and will trigger an event if all conditions are met. For example, if the condition is =<200 and 'none' is the code, then the condition is satisfied.

Note: The default condition is '=' (is equal to) until you change it. For Option Lists, the default is '=(description)' (is equal to description).

Example: The Payroll manager wants to be informed if anybody receives a salary increase of over 50,000.00 as this is likely to be a mistake. An additional condition is entered on the Salary Assignment/Changes form (40-SCR), which specifies [Amount Change > 50,000.00]. If this condition is satisfied because an employee is given an increase of more than 50,000.00, an email will be sent.

Form trigger profile

If form triggers need to be restricted to a particular group of users, a user profile condition can be set to include or exclude a person or group.

Note: User profiles define the system options available to a user or group of users. User profiles are created and maintained by your organization's security officer.

Note: An email or letter will only be produced if the form trigger, field condition, and profile condition are satisfied.

Example: The Payroll manager wants to know when a HR staff member makes a salary change, but does not want to know if a Payroll staff member makes a change. The condition could be set up to generate a communication event only if an HR profile or User ID triggered the form.

The opposite formula could be defined, and the event could be set up not to generate a communication event by supplying a list of Payroll profiles or User IDs.

You can also use user profiles to suppress Interactive Workforce or Web Collaboration event triggers for any chosen events.

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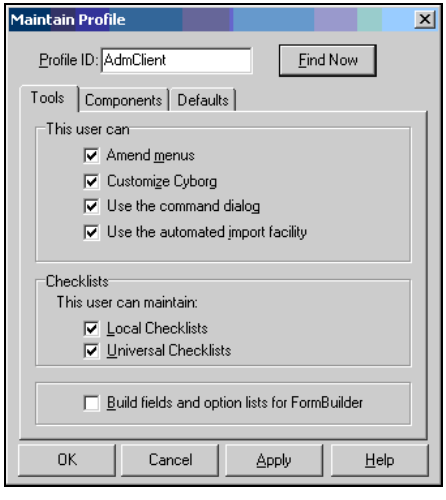
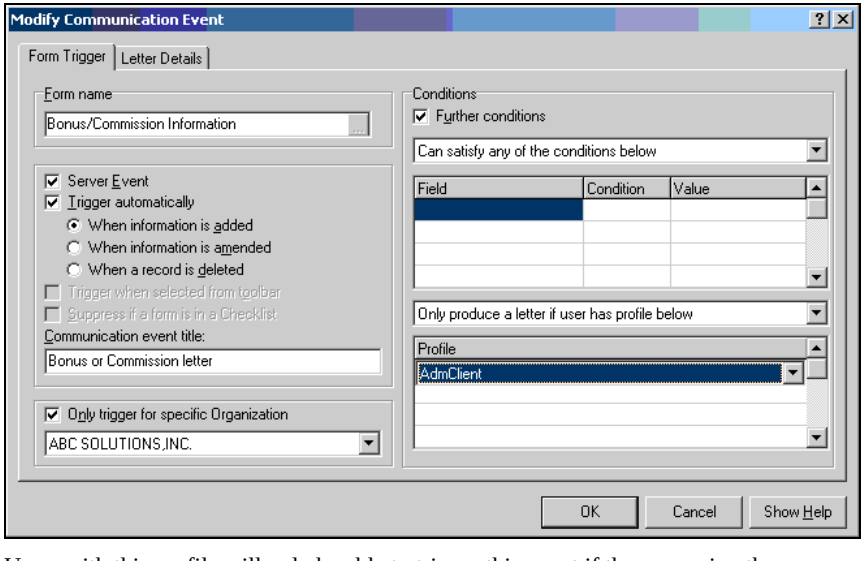
Example: Profile to allow Administrative client only triggered events

As an example, you could set up a profile that would allow users to trigger an event only from the Administrative client. This profile could be called 'AdmClient', for example:



This profile would then be used as a condition for the event trigger:



Users with this profile will only be able to trigger this event if they are using the Administrative client.

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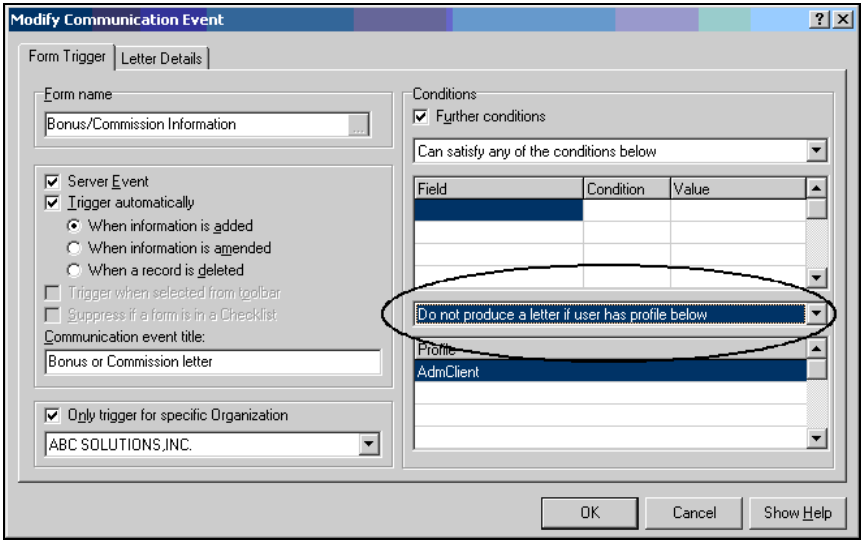
You could use this profile as a filter to only process events triggered from a source other than the Administrative client:

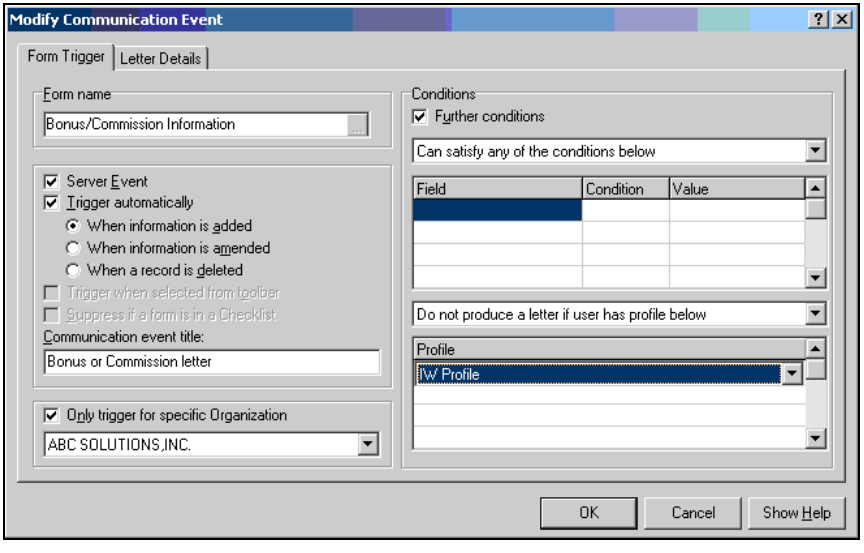


Example: Profile to prevent triggers processed by Interactive Workforce

You could set up a profile, say 'IW Profile', and assign this to the Interactive Workforce user.

☞ *Refer to the Interactive Workforce: The Administrators' Guide documentation for the Interactive Workforce user details.*

Using this profile as a condition of the event trigger, you could ensure that the event is not triggered by an Interactive Workforce process.



A similar profile could be used to prevent triggered events being processed from Web Collaboration.

Checklist trigger options

The checklist trigger options allow the checklist feature to be a powerful embedded workflow. A checklist trigger can be set up to occur when a user is working through a checklist and activates one of the following options:

- Finish Checklist after completing all the mandatory steps
- Finish Checklist without completing all the mandatory steps
- Pause Checklist

Example: The HR department wants to generate a new hire letter welcoming all new employees to the company. This can be generated after all the mandatory forms have been created within the checklist.

The HR manager would like to receive an email if a checklist is finished, but not all mandatory steps have been completed. This is important because the absence of some information may prevent an employee from receiving a salary.

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Trigger events defined for a standalone form still occur if the form is part of a checklist. You must select the 'Suppress if a form is in a Checklist' option on the form trigger to prevent this.

Once you have created a communication event, you will not be able to change the type or trigger. If either one is incorrect, you must delete the communication event and create a new one with a corrected type or trigger.

Checklist trigger profile

The checklist trigger profile is identical to the ***form trigger profile*** (on page 203), and follows the same rules.

If checklist triggers need to be restricted to a particular group of users, a profile condition can be set to include or exclude a person or group. An email or letter will be produced only if the checklist trigger and the profile condition are satisfied.

Excluded form triggers

Only employee forms and checklists can be used to trigger communication events. Non-employee and company forms are filtered out of the form browse dialog.

If there are specific forms that you want to exclude from the list of available triggers, you may add them to the Browse Forms - Email/Letters option list (SC50). Forms that appear in this option list are filtered out of the trigger list.

☞ *Refer to* **Maintaining Option Lists** *(on page 27) for information about using the Option List Editor (CSUPDT) and displaying option lists.*

Cyborg Scripting Language changes can be made to table forms so that they can be used with event triggers. Contact Professional Services for assistance if your organization requires these changes.

See also:

- Adding forms to the exclusions option list ***(on page 257)***

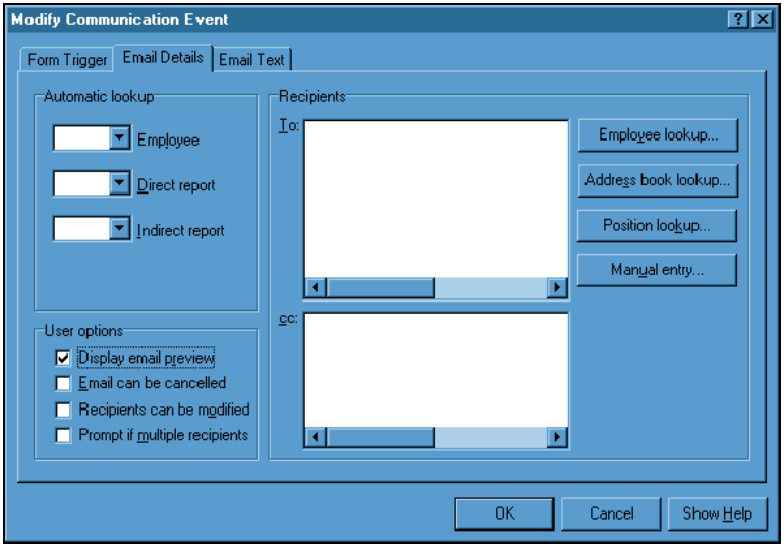
For detailed instructions for excluding forms.

Apply the Concept
Based on your understanding of the communication event triggers as explained in this concept, which business tasks in your organization require some employee or inter-office communication that could be triggered instead by a communication event?

Apply the Concept
In what cases are letters or memos being generated when emails could be more effective?

Email communication event details

An email communication event provides your company with more capabilities than standard email software. You will be provided with multiple methods for specifying the email recipient:



In addition, you will be able to insert data from the system forms into the text, so that employee-specific information can be automatically displayed.

See also:

- Creating a form trigger email communication event ***(on page 231)***
- Creating a checklist trigger email communication event ***(on page 242)***

For detailed instructions for creating a email communication event.

Recipients

There are several avenues for the lookup and selection of email recipients. You may send the email to the address of the employee for whom the data was recorded. You may also designate recipients other than the employee for whom the information was recorded.

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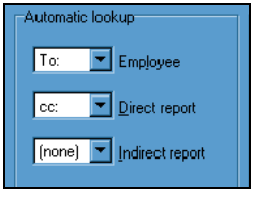
Automatic lookup

The automatic lookup feature allows you to direct the email to the address of the employee for whom the data was recorded, as shown in the following example:



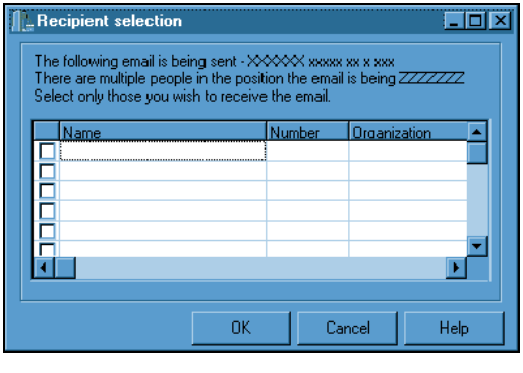
Either a 'To:' or 'cc:' choice can be made by using the drop-down list for each of the following options:

- Employee
  This method sends the email to the employee for whom the data is being recorded. An email address is located on the Employee Contact Information form (EM-SCR). If no email address is recorded on this form, then one is created from the information that is recorded on the Employee Name And Address (FF-SCR) and the Company Name And Address (AA-SCR) forms, for example, john_smith@hewitt.com.

- Direct report
  This option is only available to Position Administration users. The system locates the position record of the employee whose data is being recorded and, from that record, the position to which it reports (direct or indirect) can be found. The incumbents who hold that position, along with their email addresses, can then be identified.

  If there are multiple incumbents for a position, the system will either send email to all of them or prompt you at run time to choose an incumbent. This is dependent on the 'Prompt if multiple recipients' user option setting on the Email Details tab within the Modify Communication Event dialog.

  The following example shows the prompt displayed when this option is checked:



- Indirect report
  This option is only available to Position Administration users. This works in the same way as the direct report option.

You may customize the Cyborg Scripting Language to tailor the location of the email address or provide an alternative method of formulating it.

Note: *When no recipients can be found, which may occur if the recipient has no email address recorded or if the position has no incumbancy, no error will be displayed. If options have been set to display the preview dialog, this will be displayed and, if no recipient exists, the user will be allowed to add 'To' and 'cc' recipients, regardless of the options that were set.*

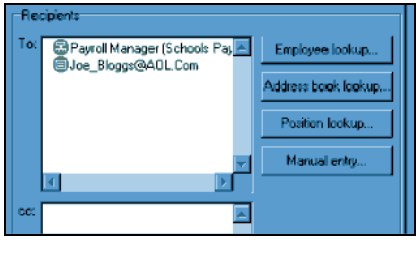
Address types

Depending on the method you choose to locate the email address of a recipient, one of the following four icons will display next to each recipient in the Recipients list box to identify the address type:

Employee Lookup	Position Lookup
Address Book Lookup	Manual Entry

If 'Employee', 'Direct report', or 'Indirect report' are selected, the items selected will appear in the disabled Recipients 'To' and 'cc' list boxes. The Position lookup icon will be used for each of these items. The word 'Employee', 'Direct report', or 'Indirect report' will be displayed to the right of the icon as shown in the following representation:

You may not type directly into the Recipients lists. Entries are made by selecting recipients through the automatic lookup option or the additional options provided on the Email Details tab within the Modify Communication Event dialog:



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Lookup options

Several methods are available for finding email addresses of a recipient other than the person for whom the data was recorded. The following methods allow you to search several different areas of your system:

- Employee Lookup
  This method attaches an employee number as the recipient. To look up an employee, a name search allows you to type three or more characters of the employee's last name. The system then performs a search and displays a list of employee names that start with those characters. If you continue to type more characters, the search stops until you pause. It then continues to refine the list.

- Address book lookup
  The Address Book dialog will be supplied from your organization's email application. If you are already logged onto an email system, this will be used for the address book lookups and to send the email. If you are not logged onto the email system, the email password dialog will be presented.

- Position lookup
  This option is only available to Position Administration users. With this method, a position is assigned to the recipient. When the email is ready to be sent, the incumbents for the position are found and their email addresses are identified.

- Manual entry
  This method offers a dialog into which an email address can be manually entered. You must first select the Manual entry button and then type the email address for each recipient. If email addresses are entered directly, they must be monitored in the event that the addressee leaves the organization, so they can be redirected at that time.

Note: You can remove unwanted names from the Recipients list by highlighting the name and pressing the Delete key on your keyboard.

User options for email

Four user options allow you to fine-tune the email process after the recipient(s) and the text are recorded. You may choose to activate one or more of the following options on the Email Details tab within the Modify Communication Event dialog:

- Display email preview
  If this option is active, the user will be informed that the email is about to be sent, but no cancellation is allowed unless the next option is active as well.

- Email can be cancelled
  If this option is active, the user will be given the same dialog as in the first option, but a Cancel button will be available.

- Recipients can be modified
  If this option is active, the user will be able to add to and delete from the recipient list at execution time.

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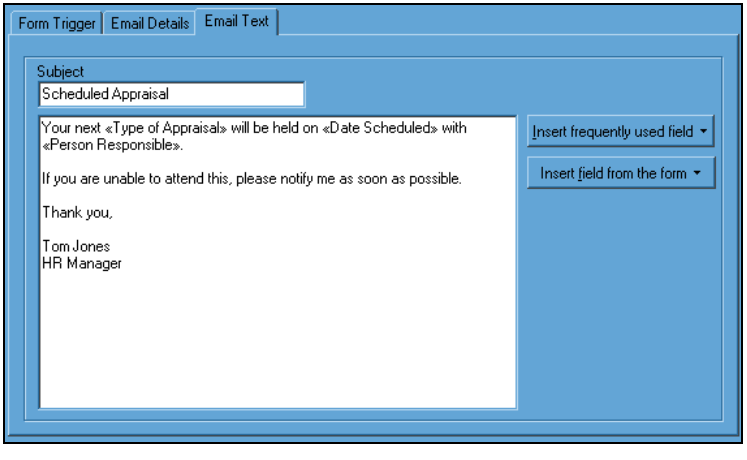
- Prompt if multiple recipients
  If this option is active, a dialog will display at execution time and the user may select the required recipient if a position had multiple recipients. If this option is not active and multiple recipients are encountered, the email is automatically sent to all recipients in the selected position.

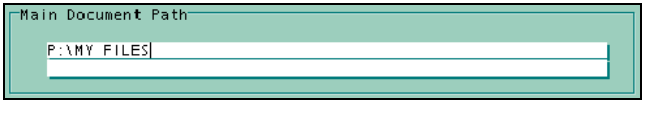
Email text

Standard text formatting is available for the email content. The text auto wraps, but is reformatted when it is sent to the email package. The Enter key inserts a line break. Tabs are also supported. Two buttons allow you to insert system fields. Inserted fields are shown as field names within guillemets, for example, <<Address 2>>.

In the following example, an employee is being notified about a forthcoming appraisal:



The text for the email is saved as a *.txt file. The file will be named the same as the event. The path for that file is defined on the System Options form (SCOPTS) in the Main Document Path text box:



If the Copy option has been used to create an event, then the text will also be copied from the original event.

See also:

- Copying a communication event ***(on page 252)***
  For detailed instructions for copying a communication event.

- Modifying a communication event ***(on page 253)***
  For detailed instructions for modifying a communication event.

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- Removing a communication event ***(on page 256)***

For detailed instructions for removing a communication event.

Apply the Concept

Based on your understanding of the email communication event as explained in this concept, what method(s) would you use to determine the recipients and content of an email communication event in your organization?

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Letter communication event details

A letter communication event provides your company with the ability to automatically generate customized letters based on specific trigger parameters.

Letters allow the same manual options as email events. For example, if a letter is manually triggered by a form, a Select a Letter button will be available on the toolbar. When you select the Select a Letter button, a letter selection dialog is displayed.

Microsoft Word template and merge features are included in the letter communication event process. All the functionality will work as described by Microsoft while creating the letter text. In addition, you will be able to insert fields from system forms into the text, so that employee-specific information can be automatically displayed.

If the Copy option has been used to create an event, then the text will also be copied from the original event.

See also:

- Creating a form trigger letter communication event ***(on page 225)***
- Creating a checklist trigger letter communication event ***(on page 238)***

For detailed instructions for creating a letter communication event.

Working with Word templates

When you are ready to create the letter text, you will be presented with the template selection dialog provided by Microsoft Word. Templates may be added and changed within Word. After you have selected a template, a new document is created.

A floating toolbar will automatically be placed within the window, offering options from which to select fields to be inserted. You may select from a list of fields contained on the trigger form. Alternatively, you may select fields from two delivered frequently-used-field lists containing selected extract fields.

The following example could be the text of a letter that is sent to an employee who has been awarded a bonus or commission:

```
Congratulations ,
You have been awarded a  in the amount of $.
You will receive this amount on .
Sincerely,
G. Zarmin
Vice President, HR
```

Letter templates location

When a communication event letter is created, the templates associated with the letter event are stored in the location specified on the System Options form (SCOPTS). This location applies to all users.

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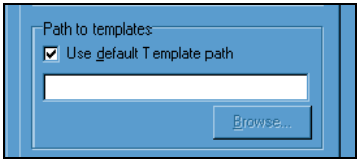
The Path to templates group box on the Options dialog tells the system where to look for letter templates that have already been created when you trigger a letter communication event. When the 'Use default Template path' check box is checked, the system looks for the templates in the location specified on the System Options form (SCOPTS):



You can override where the system first looks for existing templates by leaving the Use default Template path check box unchecked and entering a location (drive and path) in the text box. This override location only applies to letter communication events triggered from your computer. Overriding the default location may be useful if the templates are stored on a network drive to which you temporarily do not have access.

The letter templates must be copied from the location specified on the System Options form (SCOPTS) to the location you specify on your Options dialog. When a letter communication event is triggered, the system first looks for the templates in the override location specified on the Options dialog. If the templates are not found, the system then looks in the location specified on the System Options form (SCOPTS). If the templates are still not found, an error message is displayed.

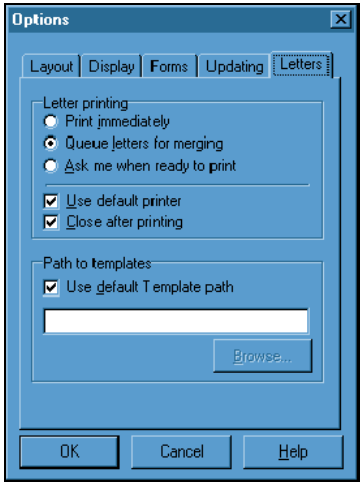
See also:

- Changing to a different frequently used field list ***(on page 248)***

For detailed instructions for changing to a different field list.

Letter printing

Letters can be viewed and modified prior to printing. If you choose to print the letter after a communication event is triggered, either manually or automatically, the Options dialog settings for Letters on your computer will control the printing:



Using the options on the Letters tab, you can control when and how letters are printed:

- Printed immediately, queued for later printing, or prompt before printing
- Use the default printer
- Close the word-processing application after printing

You can also specify where letter templates that have already been set up are located.

☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more information on selecting preferences in the Options dialog.*

Immediate printing

When you select 'Print immediately', the letter is sent directly to the printer.

Note: *Letter events generated during an import will always be queued.*

Queued printing

Selecting 'Queue letters for merging' sends generated letters to a queue, which you can later access at any time from the Office Integration toolbar in the Administrative Client, or from the Bookmarks in the Web Client. From the queue, you can view, edit, and print the letters at a time that is convenient for you. Multiple occurrences of the same type of communication event letter are merged into one document.

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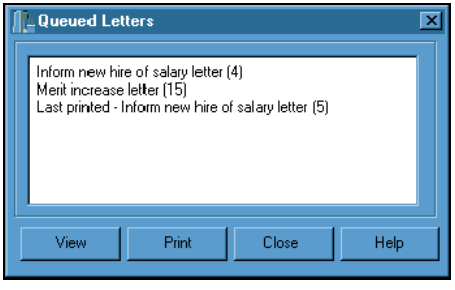
Administrative Client

If you select the option to queue letters, a 'Show Queued Letters List' toolbar button ( ) in the Administrative Client will allow you to display a list of queued letters:



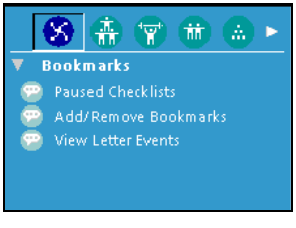
Note: *Changing or removing an event could cause problems with letters that are already generated but not printed.*

☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more information on launching the Office Integration toolbar to display this toolbar button.*

Queued letters are grouped by type, so that each type can be printed individually if required. The option to delete will only be available if you chose the option to cancel the letters at generation time.

Web Client

The Solution Series automatically generates communication event letters and queues them on the server. You access the queued letters through the View Letter Events bookmark on your browser.



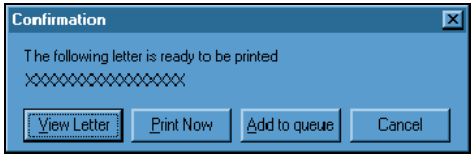
The Queued Letter Events page lists all of the letters queued for printing. The letters are grouped by your ID. To print the letters you must download both the Template (.dat file) and Data (.doc file) files for the letter from the page that displays when you View Letter Events. You use the Microsoft mail merge feature to generate the letter. Downloading and viewing the letters gives you the capability of editing and printing them using the functions and tools in Microsoft Word.

Note: *The mail merge function works differently based on your version of Microsoft Word.*

Prompted printing

Selecting 'Ask me when ready to print' allows you to decide what to do with the letter when it is generated. When the letter is generated, you are given the option to view it, print it, or add it to the queue.

If you choose the option to 'Ask me when ready to print', a letter confirmation dialog is displayed. This dialog gives you control of the disposition of the letter:



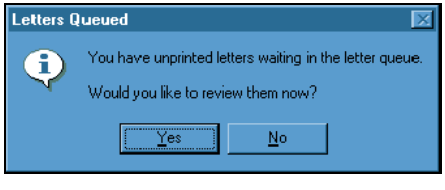
If you choose 'View Letter', Word is opened automatically, the data is merged, and the letters can be seen as a single word document. From this display, you can modify the letters, save them, or print them.

If you choose 'Add to queue', the letters are added to the mail merge queue. This option allows you to batch letters and print them all at one time.

Last printed file

The system maintains one 'last printed' file. This means that after letters have been viewed or printed, they are moved to a 'last printed' list at the bottom of the queued letters. This acts as a backup in the event that letters need to be reprinted. The 'last printed' list is replaced each time a new letter is generated. If letter 'A' was printed, and then letter 'B' was printed, there would be one last printed file for letter 'B'.

You will also be reminded and offered the opportunity to take action on queued letters when you exit The Solution Series. When you exit the system, you will be prompted with the following dialog:



Note: *If data fields in a letter are going to be changed, care must be taken to ensure that users do not already have queued letters for that event. This can result in queued letter files that contain different record layouts, which in turn will result in Word errors when the queued letter is viewed or printed. To be certain this will not happen, the existing event should be copied to a new name and the existing event disabled.*

Apply the Concept

Based on your understanding of the letter communication event as explained in this concept, what would be the advantage of queuing letters for printing later or being prompted when a letter is ready?

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Inserting fields

The letter or email text may include specific data values from forms within the system. Making use of this option allows you to insert the most current and accurate information possible into the text of your email or letter. The following options are available for your use:

- Insert frequently used field
- Insert field from this form

Frequently used field list

When the 'Insert frequently used field' button is selected, a popup menu of the most popular fields is presented. You will have the ability to select a different list of fields from a drop-down list while setting up the communication event.

The following two lists are delivered in the system:

- Basic employee details (Position Administration)
  This list contains employee details such as name, address, salary information, position, job, and organization.
- Basic employee details (non Position Administration)
  This list contains employee details such as name, address, and salary information.

You may insert fields from only one frequently used field list. If you change to another list and use the same field(s), you must clear from your letter any fields that you inserted from the original list.

See also:

- Changing to a different frequently used field list ***(on page 248)***

For detailed instructions for changing to a different field list.

Alternative frequently used field lists

Only one frequently used field list can be used by a single event and, once in use, the list should not be changed without evaluating the effect on existing events.

However, you may add new fields to an existing list or create alternative lists. The Cyborg Scripting Language allows advanced validation conditions to be added as well.

Adding a new field

To add a new field to an existing frequently used field list, the Cyborg Scripting Language for the associated form (assuming all of the fields on the list originate from the same form) has to be edited and the field added to the form. If the field to be added does not currently exist on the associated form, then a custom list from a new Cyborg Scripting Language form may be needed.

See also:

- Adding a new field to a frequently used field list ***(on page 250)***

For detailed directions for using alternative frequently used field lists.

Creating a custom list from a new form

To create a frequently used field list from the fields contained on more than one form, you must create a new form that contains all the fields. To keep the process as simple as possible, the form can be created using FormBuilder and the added fields can be display-only fields.

After the new form has been created and named, it must be added to the Frequently used fields form option list (SC51). You can then select the new list from the Change Frequently Used Field List dialog for a form-triggered email or letter.

See also:

- Creating a custom frequently used field list ***(on page 251)***

For detailed directions for creating a frequently used field list.

- Adding a custom frequently used field list to the option list ***(on page 251)***

For detailed directions for adding a field list to the option list.

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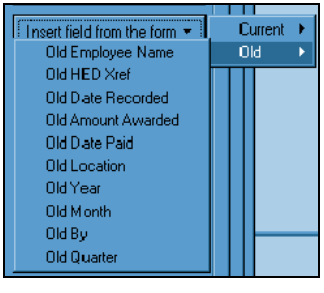
Fields on system forms

When the 'Insert field from the form' button is selected, a popup menu of available fields for the specified form is presented. The following example shows the fields that are displayed when the Bonus/Commission Information form (26-SCR) triggers the event:

The field names will be the same as those that appear on the form. If the automatic form trigger has been set to 'When information is amended', then all fields within the list will have a 'current' and 'old' value.

As shown in the following example, the text 'Old' is used as a prefix to the appropriate fields to designate them as the prior value of the field:



The 'Insert field from this form' option will not be available if the event is being created for a checklist.

Apply the Concept

Based on your understanding of inserting fields as explained in this concept, what benefits can be derived from using system fields as part of your email and letter text?

Technical notes

Directory changes and changes to the Cyborg Scripting Language can be made that allow advanced functionality and conditions in the communication event features.

Default file location for communication event documentation

Newly-created email and letter events are stored on a common network drive as defined by the 120-character alphanumeric entry on the System Options form (SCOPTS):

If an override has been set up, the defined directory is checked for either the letter or email text. If the file is not found, the network directory is then checked.

Override files may be used in the following circumstances:

- When the user does not have access to the network directory, but still wants to produce letters or emails. It is up to the user to copy all letters and emails to the override directory. The user is also responsible for keeping them updated. The system does not attempt to maintain synchronization with the network directory.

- When the user wants to personalize a common (to all users) letter. It is the user's responsibility to maintain synchronization.

Changes to the document path do not take effect until the user logs off and back on again. Override files should be used with caution.

Alternative email address formats

When an email communication event is triggered, the Email Address for Position or Employee program (EM-POS) provides an email address for a position code or an employee number. It first looks at the Employee Contact Information form (EM-SCR) for the recorded email address. If no email address is available, then an email address is formulated using the employee name on the Employee Name And Address form (FF-SCR) and the company name on the Company Name And Address form (AA-SCR). The delivered format for this is:

First_Last@Organization.com

If your organization requires an alternative formula, the Cyborg Scripting Language may be altered at paragraph 700 of the Email Address for Position or Employee program (EM-POS):

```
70000  P700-FIND-EMAIL-ADDRESS.
70010  @
70020  @ If no email address is recorded on EM-SCR an address will
70030  @ be generated by the following code. The example format is
70040  @
70050  @          firstname_lastname@company.com
70060  @
70070  @ This must be changed to your correct format.
70080  @
70100    MOVE '_'     TO W6-01-220.  @ Name join character.
70110    MOVE '@'     TO W6-01-221.  @ Organization join character.
70120    MOVE '.COM' TO W6-04-222.  @ Extension.
70190  @
```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Advanced conditions

As well as allowing you to amend the fields that appear on the frequently used fields list, the communication event programs can also include advanced validation. This allows many records to be searched and complex conditions to be introduced. If after performing this validation, the email or letter generation is to be suppressed, a method of setting an 'Override' flag is provided. This flag, when set, prevents the generation of this communication event.

The Cyborg Scripting Language verb 'OVERRIDE-EVENTS' can be used to replace the value held on line 2, position 7, with an 'O' to prevent an update from taking place. This is the same location as the Add, Change, Delete indicator.

```
OVERRIDE-EVENTS.
or
SET SCREEN TO :88.
MOVE 'O' TO SCREEN.
```

Frequently used field list from more than one form

Although for the majority of situations, a single frequently used fields form is sufficient to hold all the data needed for a letter or email, it is possible that occasionally you will need a larger number.

An ideal example of this is to produce a letter detailing all the benefit plans in which an employee is enrolled, including the dependents and beneficiaries.

To do this, functionality has been included that will allow a primary frequently used fields form to call other forms. The calls can not be nested more than one level. In other words, the primary form must list all the subsequent forms to call.

The field labels should be unique within a frequently used fields form. If the primary form calls other forms, field labels in the primary form and called forms should be unique, as all of these labels are to be grouped together. If duplicate labels exist, a suffix is included in the field label. For example:

- Annual Salary
- Annual Salary (1)

To invoke multiple forms to be called, line 00000 of the Screen Appearance Table record should be edited and each called form added. Multiple forms should be separated with a comma (or alternatively a space), as shown in the following example:

SRRCCWL	TLS	Field	Label
00000		XX-SCR,YY-SCR,ZZ-SCR	

This multiple form list on line zero is only called by the Graphical User Interface and is not used by the Cyborg Scripting Language. This facility should be used sparingly, because multiple form calls will introduce an obvious degradation in performance.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Before practicing the following detailed directions

Prior to starting the detailed directions, it is suggested that you turn on the Office Integration toolbar so you can access the communication event buttons.

Access the toolbar by making the following selections from the menus:

View ▶ Customize Toolbars

Then click the Toolbars tab, select Office integration, and click Close.

Creating a form trigger letter communication event

To create a letter communication event triggered by a form, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog is displayed.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Letter

By default, Letter is the communication event Type selected when the dialog is first displayed. Verify that Letter is selected.

5. Select Form

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Verify that Form is selected.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Form name

Select the form on which this communication event will be triggered by clicking the ellipsis (…) on the right side of the Form name list box. The Browse Forms dialog will display the menu structure from which you can select a form by drilling down through the menus, or you could type the program name of the form (such as EF-SCR) in the text box. Click OK after you make the selection.

The form name is displayed in the text box.

8. Select Server Event

If you wish to allow an event to be triggered by the Web client, Interactive Workforce, and Web Collaboration, click Server Event. The event will then be processed on the event server, and not on the user's client machine.

Leaving this blank will allow the event to be processed only by an Administrative client user on the client machine.

9. Select the automatic trigger conditions (optional)

Select 'Trigger automatically' and then select one of the following conditions to automatically trigger the communication event when the selected condition is met:

- When information is added
- When information is amended (updated)
- When a record is deleted

10. Select manual trigger (optional)

Select 'Trigger when selected from toolbar' to allow users the ability to trigger this communication event manually using the 'Select a Letter' button on the toolbar when working with the selected form:

If 'Trigger when selected from toolbar' is not selected, this communication event will only occur if the conditions specified on the Form Trigger tab are met.

This option is only available for the automatic trigger of 'When information is added'.

11. Select Suppress if a form is in a Checklist (optional)

Select 'Suppress if a form is in a Checklist' if you do not want the communication event to occur when the form is part of a checklist workflow.

Check this option if the form you selected is part of a checklist and you would prefer to produce one letter that summarizes all of the information entered during the checklist, instead of sending out multiple letters that are triggered by specific forms within the checklist.

12. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

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13. Select Only trigger for specific Organization

If you want this communication event to be triggered for only one Organization, select 'Only trigger for specific Organization'. Then click the down arrow and select the Organization to which this communication event applies.

14. Select Further conditions (optional)

To specify field or profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

15. Specify field conditions (optional)

The Further conditions check box must be selected for any condition to be in effect. Field, Condition, and Value collectively specify a condition that must be met to trigger this communication event.

If more than one condition (row of Field, Condition, and Value) is specified, the selection from the list box above the conditions determines whether one or all conditions must be met to trigger the communication event.

Use the arrow keys or point and click to navigate between the cells of the grid.

- Field
  Double-click the field cell to list all fields by their identifying labels on the form. If a label is not specified by the form code, the system name for the field will be displayed.

Note: If the form contains option lists, the option list code and the option list description are treated as separate fields.

- Condition
  Double-click the condition cell to display a list of conditions. When you select a field from the list of field labels, this list box is populated by an equal sign (=) to signify a condition. You may change this default condition by selecting an option from the drop-down list box. The conditions displayed will depend on the trigger and field type.

- Value
  When you select a field from the list of field labels and select a condition, you must enter a value to complete the condition. When entering a numeric value, specify the decimal point if appropriate.

  If you want to include a future or past date within a range of days, type 'today+n' or 'today-n' where n is the number of days in the range of 1 to 99. For example, 'today+14' would include the current date through 14 days forward.

  If an option list description is selected, you can choose the value from a drop-down list.

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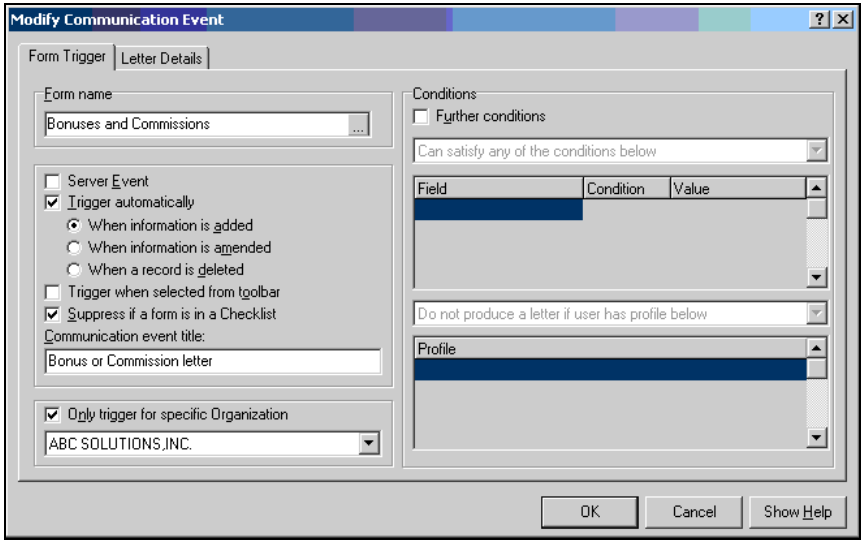
16. Specify profile conditions (optional)

To have the profile or user ID of the person using the form affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



17. Select the Letter Details tab

Select the Letter Details tab to create or modify the letter for this communication event.

The Letter Details dialog is displayed.

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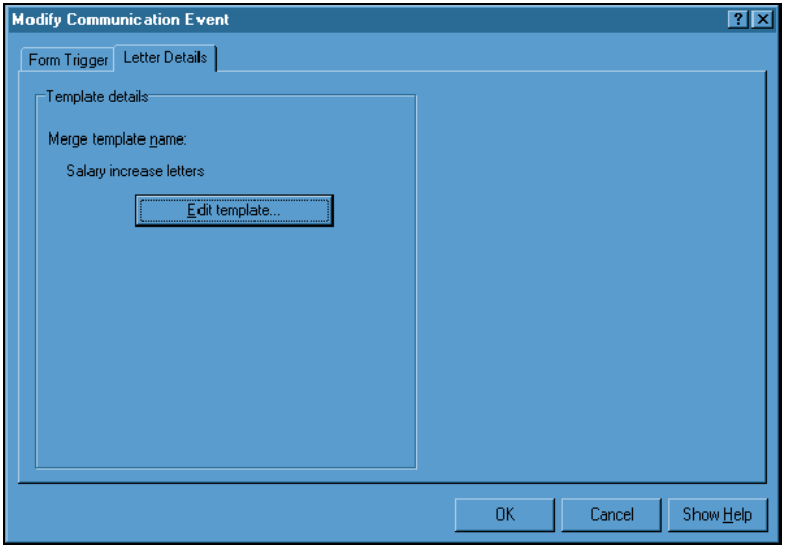
If you completed the previous step, the resulting dialog should look similar to the example that follows:



18. Click Edit template

Click Edit template to create a template for the letter communication event.

The system will launch Microsoft Word 97 (or higher version).

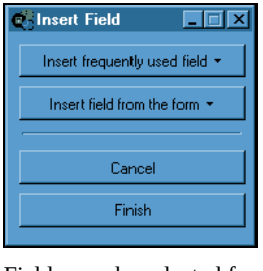
19. Select the template

Select the template to be used for this letter communication event.

20. Type the letter

Type the body of the letter for this communication event in Word.

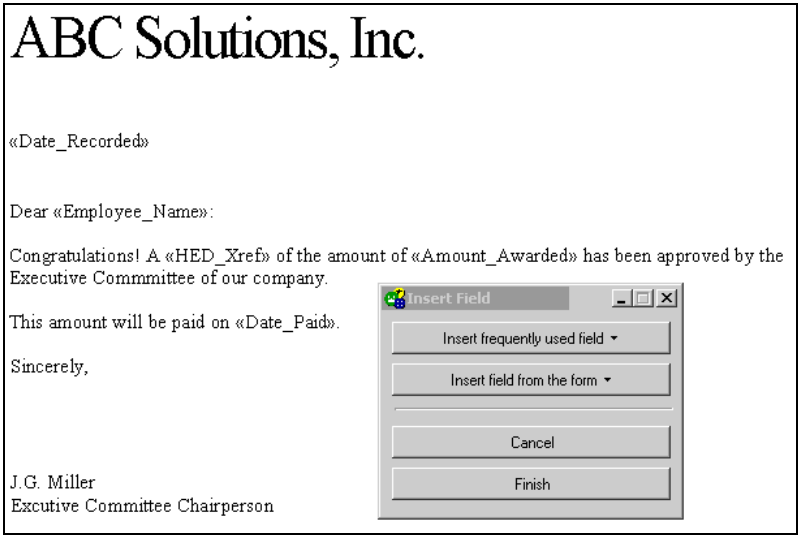
To insert fields into the letter, select the 'Insert frequently used field' or 'Insert field from the form' option from the floating window.



Fields may be selected from both the frequently used fields and the form fields for the same event. However, you may not select fields from more than one frequently used field list for the same event.

Note: The position code and position description are listed in the frequently used fields only. The form fields contain only the position code.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



21. Select Finish

Select Finish on the floating window to save the document and close Word.

22. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

A letter will be produced when the Bonus/Commission Information form (26-SCR) has information added to it.

See also:

- Communication event triggers **(*on page* 201)**

For more information on communication event triggers.

- Letter communication event details ***(on page 214)***

For more information on letter communication events.

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Creating a form trigger email communication event

To create an email communication event triggered by a form, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog displays.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Email

By default, Letter is the communication event Type selected when the dialog is first displayed. Select Email by clicking on its option button.

5. Select Form

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Verify that Form is selected.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Form name

Select the form on which this communication event will be triggered by clicking the ellipsis (…) on the right side of the Form name list box. The Browse Forms dialog will show the menu structure from which you can select a form by drilling down through the menus. Click OK after you make the selection.

The form name is displayed in the text box.

8. Select Server Event

If you wish to allow the event to be triggered by the Web client, Interactive Workforce, and Web Collaboration, click Server Event. The event will then be processed on the event server, and not on the user's client machine.

Leaving this blank will allow the event to be processed only by an Administrative client user on the client machine.

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9. Select the automatic trigger conditions (optional)

Select 'Trigger automatically' and then select one of the following conditions to automatically trigger the communication event when the selected condition is met:

- When information is added
- When information is amended
- When a record is deleted

10. Select manual trigger (optional)

Select 'Trigger when selected from toolbar' to allow users the ability to trigger this communication event manually using the 'Select an Email' button on the toolbar when working with the selected form:

If 'Trigger when selected from toolbar' is not selected, this communication event will only occur if the conditions specified on the Form Trigger tab are met.

This option is only available for the automatic trigger of 'When information is added'.

11. Select Suppress if a form is in a Checklist (optional)

Select 'Suppress if a form is in a Checklist' if you do not want the communication event to occur when the form is part of a checklist workflow.

Check this option if the form you selected is part of a checklist and you would prefer to produce one letter that summarizes all of the information entered during the checklist, instead of sending out multiple letters that are triggered by specific forms within the checklist.

12. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

13. Select Only trigger for specific Organization

If you want this communication event to be triggered for only one Organization, select 'Only trigger for specific Organization'. Then click the down arrow and select the Organization to which this communication event applies.

14. Select Further conditions (optional)

To specify field or profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

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15. Specify field conditions (optional)

The Further conditions check box must be selected for any condition to be in effect. Field, Condition, and Value collectively specify a condition that must be met to trigger this communication event.

If more than one condition (row of Field, Condition, and Value) is specified, the selection from the list box above the conditions determines whether one or all conditions must be met to trigger the communication event.

Use the arrow keys or point and click to navigate between the cells of the grid.

- Field
  Double-click the field cell to list all fields by their identifying labels on the form. If a label is not specified by the form code, the system name for the field will be displayed.

Note: If the form contains option lists, the option list code and the option list description are treated as separate fields.

- Condition
  Double-click the condition cell to display a list of conditions. When you select a field from the list of field labels, this list box is populated by an equal sign (=) to signify a condition. You may change this default condition by selecting an option from the drop-down list box. The conditions displayed will depend on the trigger and field type.

- Value
  When you select a field from the list of field labels and select a condition, you must enter a value to complete the condition. When entering a numeric value, specify the decimal point if appropriate.

  If you want to include a future or past date within a range of days, type 'today+n' or 'today-n' where n is the number of days in the range of 1 to 99. For example, 'today+14' would include the current date through 14 days forward.

  If an option list description is selected, you can choose the value from a drop-down list.

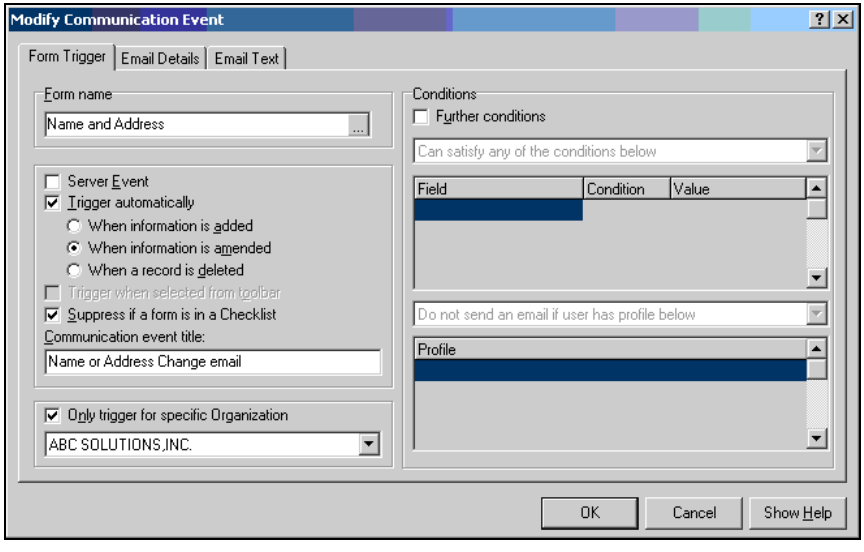
16. Specify profile conditions (optional)

To have the profile or user ID of the person using the form affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



17. Select the Email Details tab

Select the Email Details tab to create or modify information for this communication event.

The Email Details dialog is displayed.

18. Select the Automatic lookup options

Use these options to have the system automatically look up and send the communication event, as a To: or cc:, to the employee for whom the form or checklist is recorded. If Position Administration is in use, choose the automatic lookup to send the communication event to the direct report and indirect report.

19. Select the User options

Choose the option(s) that will allow you to interact with the email communication event:

- Display email preview
  When checked, a preview of the email will display when this communication event is triggered. If not checked, the email generated by this communication will be sent without the opportunity to preview it.

- Email can be cancelled
  When checked, this option allows the email created by this communication event to be cancelled before it is sent.

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- Recipients can be modified
  When checked, the To: and cc: fields in the email created by this communication event can be modified when the email is generated. Recipients may be added or deleted. Checking this option also causes the option 'Prompt if multiple recipients' to be checked.

- Prompt if multiple recipients
  When checked, the user will be prompted to select the recipients of the email if the position (within Position Administration has more than one recipient. If this option is not checked, the email will be sent to all incumbents in the reports to position.

20. Select Recipients

Use these options to select recipients other than the employee for whom the form or checklist was recorded:

- Employee lookup
  Click to display a list of employees. You may select one or multiple employees as To: and cc: recipients of the email. Type the first few characters of the name, and the system will present an alphabetic list containing names matching your entry.

- Address book lookup
  Click to display a list of addresses from those already configured within your company's email application. You may select one or multiple employees as To: and cc: recipients of the email. If you have multiple address books, you can change the address book from which you make your selection.

- Position lookup
  Click to display a list of positions (as configured by Position Administration). You may select one or multiple positions as To: and cc: recipients of the email. Drill through the organization units until you find the one you want. All positions within that organization unit will then be listed. Select the position you want, and then press the To: or cc: button.

- Manual entry
  Click to display an entry dialog that allows you to type in a specific email address, for example, S_Austin@cyborg.com.

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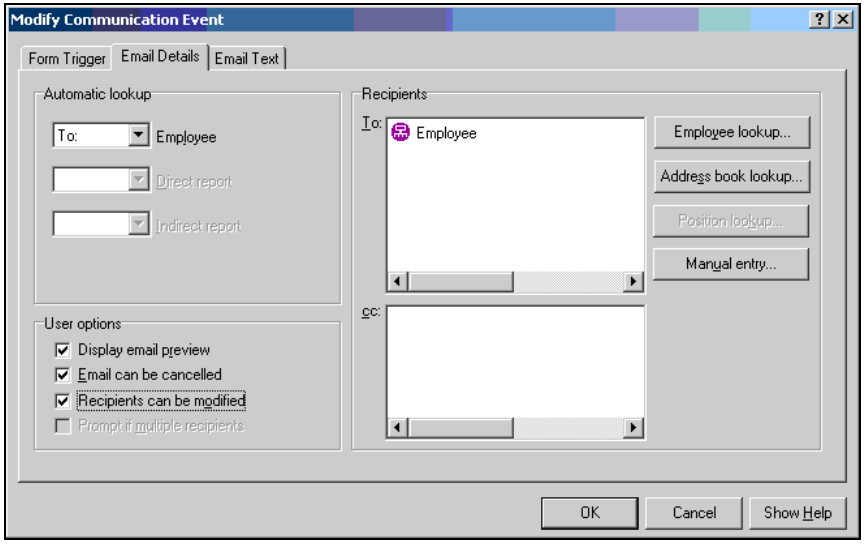
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



21. Select the Email Text tab

Use this tab to create or modify the subject and text for the communication event.

The Email Text tab dialog is displayed.

22. Enter the Subject

This text box contains the title for the email. It is the title that the recipients of the email will see in their inbox.

23. Enter the email text

This text box contains the body of the email. To insert a line break in your text, press Enter. You can insert fields from the frequently used field list or from the form by clicking the button. These fields will then be replaced by the actual data when the email is created.

Fields may be selected from both the frequently used fields and the form fields for the same event. However, you may not select fields from more than one frequently used field list for the same event. The frequently used field list can be tailored to include fields that you may want to use, but are not currently in the list.

Note: The position code and position description are listed in the frequently used fields only. The form fields contain only the position code.

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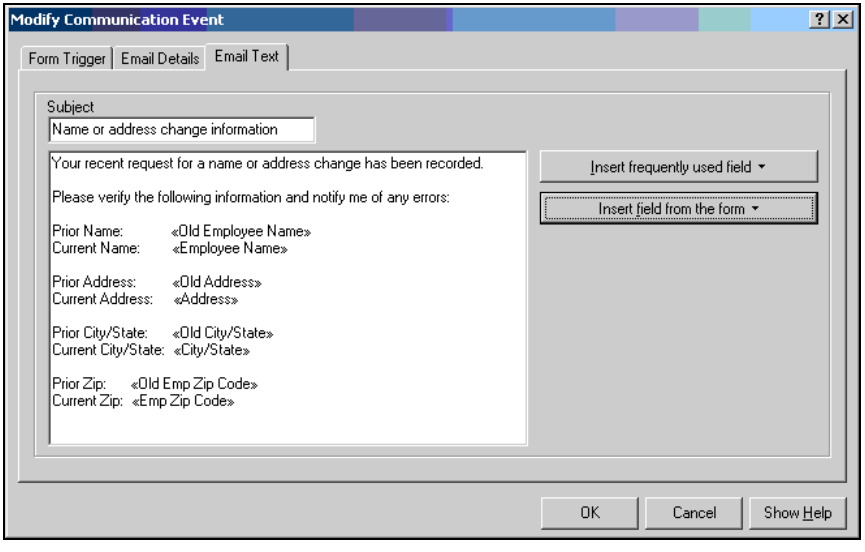
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



24. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

An email will be sent to the employee when changes are made to the Employee Name And Address form (FF-SCR).

See also:

- Communication event triggers ***(on page 201)***

For more information on communication event triggers.

- Email communication event details ***(on page 208)***

For more information on email communication events.

Creating a checklist trigger letter communication event

To create a letter communication event triggered by a checklist, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component:	Administrator Tools
Process:	Administrator Tools
Task:	Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog displays.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Letter

By default, Letter is the communication event Type selected when the dialog is first displayed. Verify that Letter is selected.

5. Select Checklist

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Select Checklist.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Checklist name

Click on the Checklist name down arrow to select the checklist that will trigger this communication event. The checklist name is displayed in the text box.

Note: If you create a communication event that uses the delivered New Hire checklist as a trigger, you may not specify the 'New Hire initial dialog' item (500001) as the trigger checklist. This is a dialog that navigates to other checklists. Checklist events may only be assigned to checklists with forms.

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8. Select the automatic trigger condition

Select one or more of the three conditions listed in the Letter Triggered when a Checklist group box to specify when this communication event should occur.

- Finished - all mandatory steps complete
  Select this option to trigger the communication event only if all of the mandatory steps have been completed when the person working through the checklist clicks the Finish Checklist control. 'Finished - mandatory steps not complete' should not be selected.

- Finished - mandatory steps not complete
  Select this option to trigger the communication event when the person working through the checklist clicks the Finish Checklist control. Mandatory steps do not have to be complete in order to trigger the communication event.

- Checklist paused
  Select this option to trigger the communication event when the person working through the checklist clicks the Pause Checklist control.

9. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

10. Select Further conditions (optional)

To specify profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

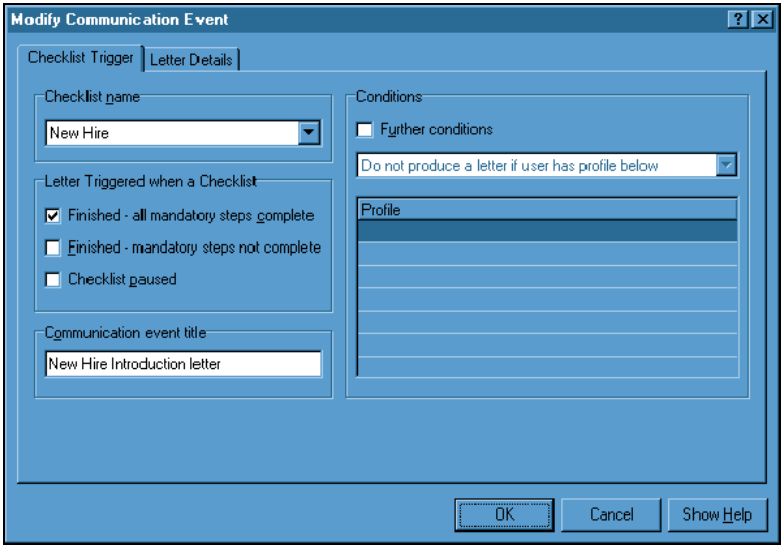
11. Specify Profile conditions (optional)

To have the Profile or user ID of the person using the checklist affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



12. Select the Letter Details tab

Select the Letter Details tab to create or modify the letter for this communication event.

The Letter Details dialog is displayed.

13. Click Edit template

Click Edit template to create a template for the letter communication event.

The system will launch Microsoft Word 97 (or higher version).

14. Select the template

Select the template to be used for this letter communication event.

15. Type the letter

Type the body of the letter for this communication event in Word.

To insert fields into the letter, select the 'Insert frequently used field' option from the floating window.

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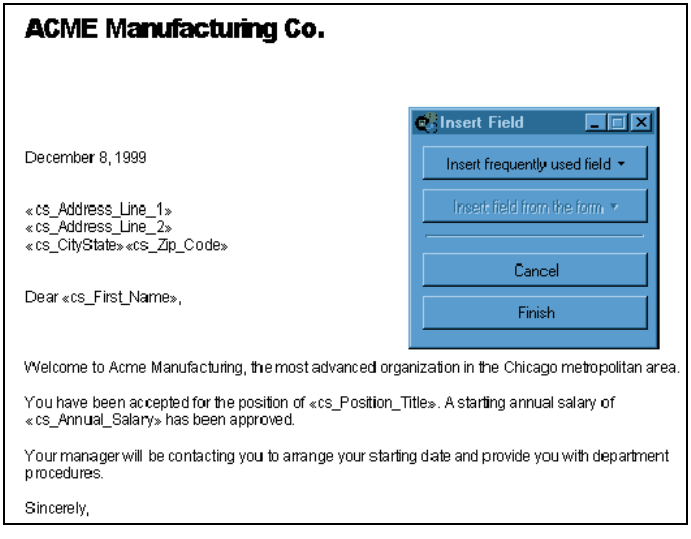
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



16. Select Finish

Select the Finish option on the floating window to save the document and close Word.

17. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

A letter will be produced when the New Hire Checklist is finished and all mandatory steps have been completed.

See also:

- Communication event triggers ***(on page 201)***

For more information on communication event triggers.

- Letter communication event details ***(on page 214)***

For more information on letter communication events.

Creating a checklist trigger email communication event

To create an email communication event triggered by a checklist, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component:	Administrator Tools
Process:	Administrator Tools
Task:	Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog displays.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Email

By default, Letter is the communication event Type selected when the dialog is first displayed. Select Email.

5. Select Checklist

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Select Checklist.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Checklist name

Click on the Checklist name down arrow to select the checklist that will trigger this communication event. The checklist name is displayed in the text box.

Note: If you create a communication event that uses the delivered New Hire checklist as a trigger, you may not specify the 'New Hire initial dialog' item (500001) as the trigger checklist. This is a dialog that navigates to other checklists. Checklist events may only be assigned to checklists with forms.

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8. Select the automatic trigger condition

Select one or more of the three conditions listed in the Email triggered when a Checklist group box to specify when this communication event should occur.

- Finished - all mandatory steps complete
  Select this option to trigger the communication event only if all of the mandatory steps have been completed when the person working through the checklist clicks the Finish Checklist control. 'Finished - mandatory steps not complete' should not be selected.

- Finished - mandatory steps not complete
  Select this option to trigger the communication event when the person working through the checklist clicks the Finish Checklist control. Mandatory steps do not have to be complete in order to trigger the communication event.

- Checklist paused
  Select this option to trigger the communication event when the person working through the checklist clicks the Pause Checklist control.

9. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

10. Select Further conditions (optional)

To specify profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

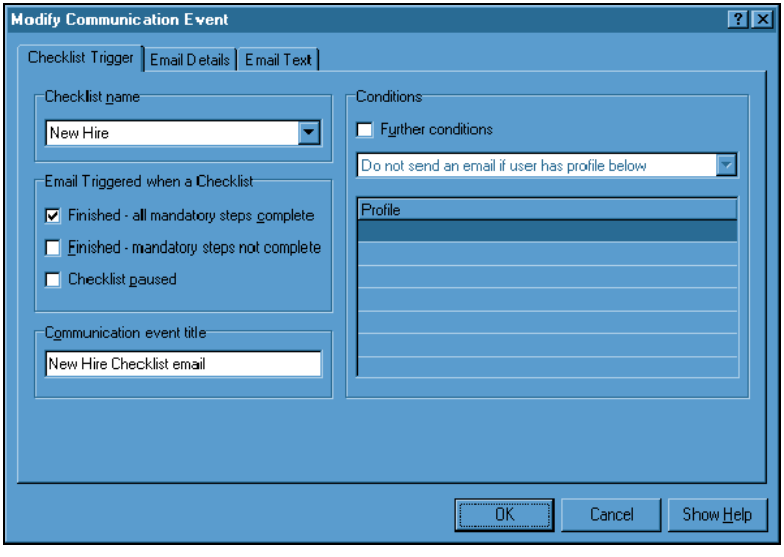
11. Specify Profile conditions (optional)

To have the profile or user ID of the person using the checklist affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



12. Select the Email Details tab

Select the Email Details tab to create or modify information for this communication event.

The Email Details dialog is displayed.

13. Select the Automatic lookup options

Use these options to have the system automatically look up and send the communication event, as a To: or cc:, to the employee for whom the form or checklist is recorded. If Position Administration is in use, choose the automatic lookup to send the communication event to the direct report and indirect report.

14. Select the User options

Choose the option(s) that will allow you to interact with the email communication event:

- Display email preview
  When checked, a preview of the email will display when this communication event is triggered. If not checked, the email generated by this communication will be sent without the opportunity to preview it.

- Email can be cancelled
  When checked, this option allows the email created by this communication event to be cancelled before it is sent.

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- Recipients can be modified
  When checked, the To: and cc: fields in the email created by this communication event can be modified when the email is generated. Recipients may be added or deleted. Checking this option also causes the option 'Prompt if multiple recipients' to be checked.

- Prompt if multiple recipients
  When checked, the user will be prompted to select the recipients of the email if the position (within Position Administration) has more than one recipient. If this option is not checked, the email will be sent to all incumbents in the reports to position.

15. Select Recipients

Use these options to select recipients other than the employee for whom the form or checklist was recorded:

- Employee lookup
  Click to display a list of employees. You may select one or multiple employees as To: and cc: recipients of the email. Type the first few characters of the name, and the system will present an alphabetic list containing names matching your entry.

- Address book lookup
  Click to display a list of addresses from those already configured within your company's email application. You may select one or multiple employees as To: and cc: recipients of the email. If you have multiple address books, you can change the address book from which you make your selection.

- Position lookup
  Click to display a list of positions (as configured by Position Administration). You may select one or multiple positions as To: and cc: recipients of the email. You can drill through the organization units until you find the one you want. All positions within that organization unit will then be listed. Select the position you want, and then press the To: or cc: button.

- Manual entry
  Click to display an entry dialog that allows you to type in a specific email address, for example, S_Austin@hewitt.com

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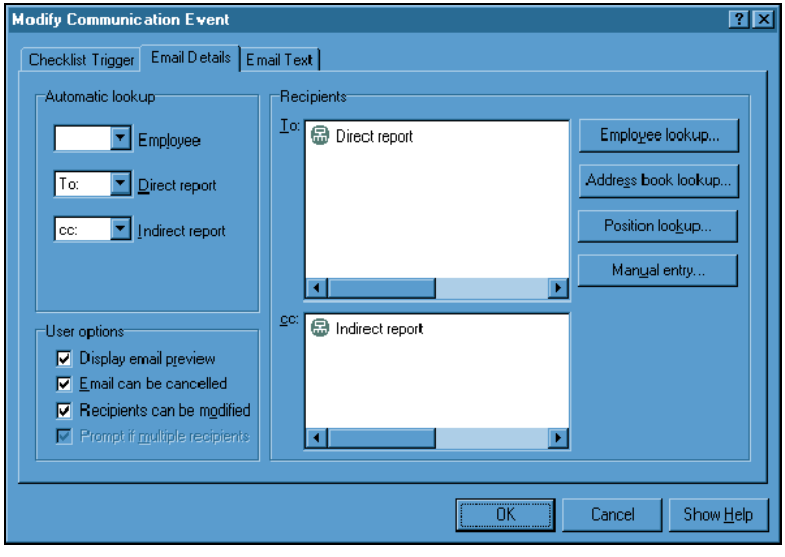
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



16. Select the Email Text tab

Use this tab to create or modify the subject and text for the communication event.

The Email Text tab dialog is displayed.

17. Enter the Subject

Type the title for the email. This is the title that the recipients of the email will see in their inbox.

18. Enter the email text

This text box contains the body of the email. To insert a line break in your text, press Enter. You can insert fields from the frequently used field list by clicking the button. These fields will then be replaced by the actual data when the email is created.

The frequently used field list can be tailored to include fields that you may want to use, but are not currently in the list.

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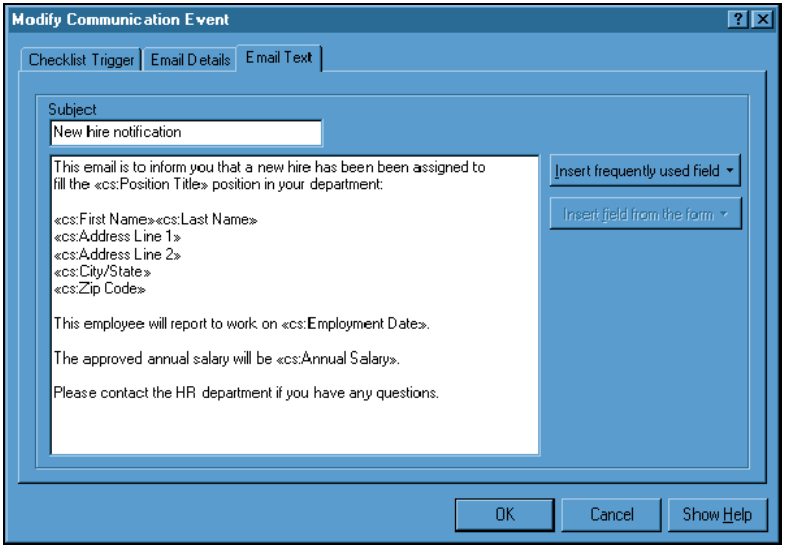
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



19. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

An email will be sent to the direct and indirect reports when the New Hire checklist is finished and all mandatory steps have been completed.

See also:

- Communication event triggers ***(on page 201)***

For more information on communication event triggers.

- Email communication event details ***(on page 208)***

For more information on email communication events.

Changing to a different frequently used field list

To change to a different frequently used field list, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Select an event

Select a communication event by clicking on it.

The communication event is highlighted.

3. Click Modify

Click Modify to change the selected communication event.

The Modify Communication Event dialog is displayed.

4. Click the Email Text tab or Letter Details tab

If the communication event is an email event, click the Email Text tab. If the communication event is a letter, click the Letter Details tab.

The tab is displayed.

5. Click Edit Template (letter only)

If the communication event is a letter, click the Edit Template button.

If the communication event is an email, skip this step.

6. Click Insert frequently used field

Click Insert frequently used field to display a list of frequently used fields.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:

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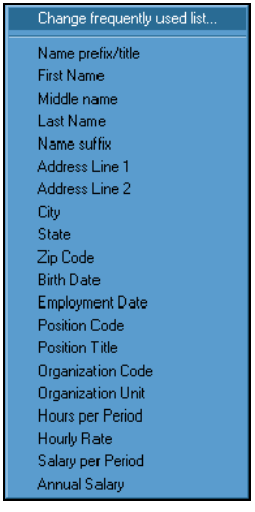
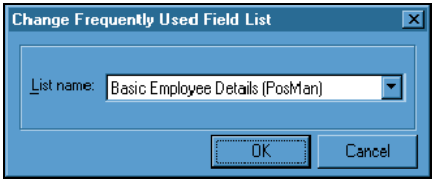


7. Select Change frequently used list

Select Change frequently used list option.

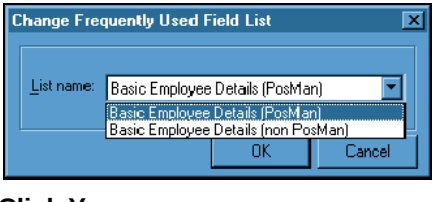
The Change Frequently Used Field List dialog is displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



8. Select a List name

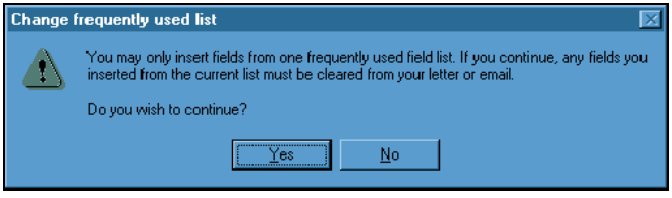
Select a different field list from the List name list box.



9. Click Yes

Because you may only insert fields from one frequently used field list, a warning message is displayed.

If you click Yes, the new list may be used, but you must clear all prior frequently used fields from the letter or email.



If you click No, the Email Text dialog is displayed with no change in the frequently used list that was used for the text.

10. Click OK

Click OK to change the field list and close the Change Frequently Used Field List dialog.

11. Click Insert frequently used field

Click Insert frequently used field to display the new field list.

The new frequently used field list is displayed and you may make your selections for the letter or email text.

The Basic Employee Details (non PosMan) list is displayed.

See also:

- Inserting fields ***(on page 219)***

For more information on options available for inserting fields into email and letter text.

Adding a new field to a frequently used field list

To add a new field to a frequently used field list, follow these steps:

1. Copy the Solution Series Form Appearance Table (GETSAT)

2. Use Form Builder to add the new field and label to the Solution Series Form Appearance Table

3. Alter the Cyborg Scripting Language that supports the Solution Series Form Appearance Table to locate the new data item (optional)

4. Load the amended Screen Appearance Table (PUTSAT)

5. Change to this frequently used list in the Modify Communication Event dialog

6. Select the new field from the frequently used field list

See also:

- Inserting fields ***(on page 219)***

For more information on using alternative frequently used field lists.

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Creating a custom frequently used field list

To create a custom frequently used field list, follow these steps:

1. **Use FormBuilder to create a new Screen Appearance Table and add its fields and labels**

2. **Write new Cyborg Scripting Language code to support the new form and locate its associated data fields**

3. **Load the new Screen Appearance Table (PUTSAT)**

4. **Add the new frequently used field list program name to the Frequently used fields form option list (SC51)**

5. **Change to this frequently used list in the Modify Communication Event dialog**

6. **Select fields from the new frequently used field list**

See also:

- Inserting fields ***(on page 219)***

For more information on using alternative frequently used field lists.

Adding a custom frequently used field list to the option list

To add a custom frequently used field list to the option list using the Option List Editor (CSUPDT), follow these steps:

1. **Access the Option List Editor (CSUPDT)**

   Access this dialog by making the following selections from the Navigator:

   Component: Development Tools
   Process: Option Lists
   Task: Edit

2. **Enter the Option List Name**

   Type the name of the option list to be edited.

3. **Click Find Now**

   The system displays the detailed information for the requested option list.

4. **Click Create**

   A blank line is inserted, allowing you to add the new item.

5. **Enter the Code**

   Type the new frequently used field list program name, such as 'FUFSCR'. This identifies the form from which the fields will be displayed in the frequently used field list.

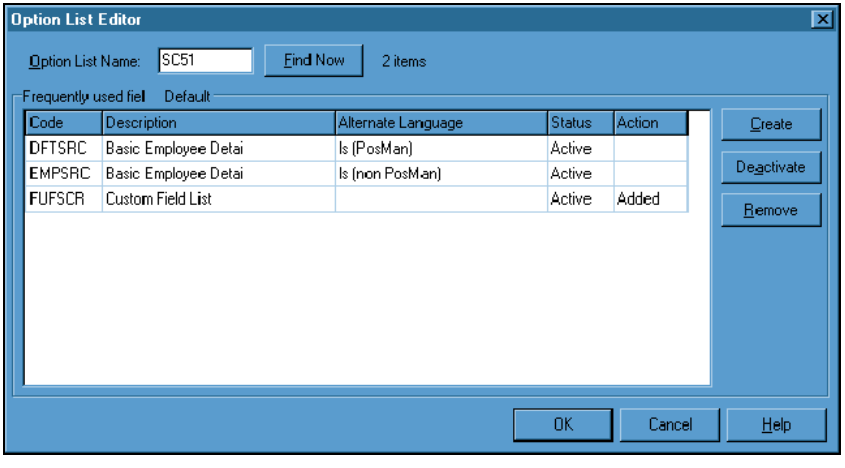
6. Enter the Description

Type a description of up to 20 characters for the code. This is the description that will be displayed in the Change Frequently Used Field List dialog List name drop-down list box.

7. Enter the Alternate Language

If an alternate language is being used, type the description for the code in that language.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



8. Click OK or press Enter

No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

See also:

- Inserting fields ***(on page 219)***

For more information on alternative frequently used field lists.

Copying a communication event

To create a new communication event by copying an existing one, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component:	Administrator Tools
Process:	Administrator Tools
Task:	Manage Events

The Communication Event Manager dialog is displayed.

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2. Select an event

Select the communication event by clicking on it.

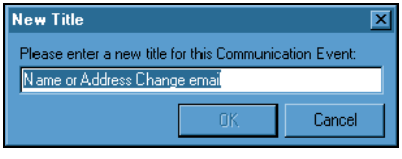
The communication event is highlighted.

3. Click Copy

Click Copy to create a duplicate of the selected communication event.

The New Title dialog is displayed with the name of the original communication event.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Enter a title

Type a unique title, up to 40 characters, for the new communication event.

5. Click OK

Click OK to save the copied communication event. A communication event is created with the new title.

The Modify Communication Event dialog is then displayed to allow changes to the copied event.

6. Click OK

Make modifications, if any, and click OK to save the communication event changes and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed.

See also:

- Using communication events ***(on page 197)***

For more information on the communication event functionality.

Modifying a communication event

To change the details of a communication event, follow the steps below:

Note: You can not change the communication event type (letter or email) or trigger (form or checklist).

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Select an event

Select the communication event by clicking on it.

The communication event is highlighted.

3. Click Modify

Click Modify to change the selected communication event.

The Modify Communication Event dialog is displayed.

4. Make the changes

Make changes to the communication event.

Modifying a communication event is similar to creating an event. Access the desired tabs by clicking on them.

To delete a value, select it and then press the Delete key.

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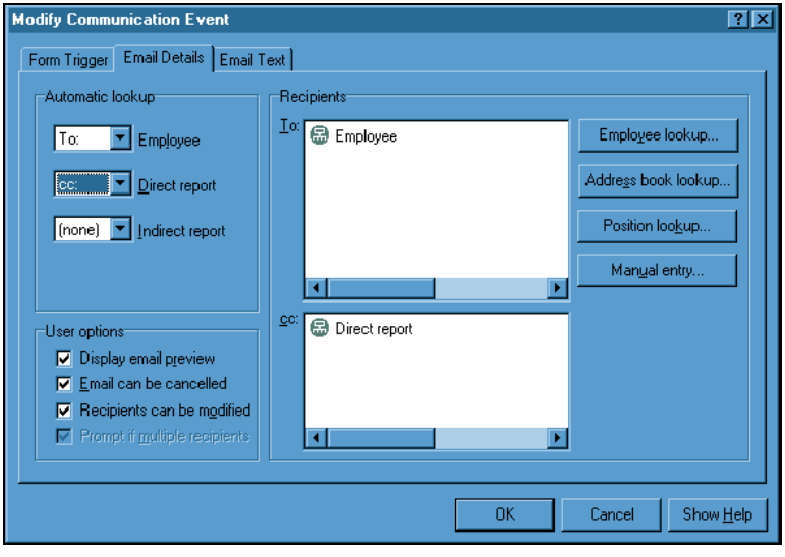
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



5. **Click OK**

Save your changes by clicking OK.

The Communication Event Manager dialog is displayed.

See also:

- Using communication events **(on page** *197***)**

For more information on the communication event functionality.

Removing a communication event

To remove a communication event, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Select an event

Select the event by clicking on it.

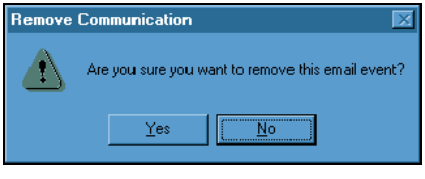
The event is highlighted.

3. Click Remove

Click Remove to delete the selected communication event.

The Remove Communication dialog is displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Yes

Click Yes to remove the communication event.

The selected communication event is removed.

See also:

- Using communication events ***(on page 197)***

For more information on the communication event functionality.

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Adding forms to the exclusions option list

To add forms to the Browse Forms - Email/Letters option list (SC50) using the Option List Editor, follow these steps:

1. Access the Option List Editor (CSUPDT)

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

2. Enter the Option List Name

Type the name of the option list to be edited—'SC50'.

3. Click Find Now

The system displays the detailed information for the requested option list.

4. Click Create

A blank line is inserted, allowing you to add the new item.

5. Enter the Code

Type the program name of the form to be excluded, such as 'EF-SCR'.

6. Enter the Description

Type 'E' to indicate that this form is to be excluded as an event trigger. This indicator prevents the specified form from being displayed by the form browser.

7. Click OK or press Enter

No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

See also:

- Communication event triggers ***(on page 201)***

For more information on communication event triggers.

Extended Practice

Create a form-triggered email event that will notify an employee when a physical exam appointment has been recorded. The event may be automatically triggered, or you may select a manual trigger. You may select the form name by expanding the Employee Relations component, then expanding the Manage Employee Health and Safety process, and selecting the Physical Exams Scheduled/Completed (18-SCR) task.

Set up the event so that it is triggered when information is added to the form. Set the option to preview or cancel the email. Create the appropriate email text and insert fields from the form to describe items such as the appointment date and physician. After you complete the event parameters, execute the form for a 999999 organization employee (such as Jerry Jones, employee number 1111) and preview the email.

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Review of Questions Answered

1. What is a communication event?

2. What are the types of communication events?

3. What is a communication event trigger?

4. What types of triggers are available?

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CHAPTER 8

Document Management Facility

In This Chapter

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Introduction

Additional desktop integration functionality provides the means to link documents such as resumes, performance appraisals, photos, and so forth, to employee records and then review and launch those documents from within The Solution Series.

Tasks

This section explains the following:

- Defining document types
- Linking documents to an employee record
- Viewing document links
- Launching a document from the Document Maintenance form
- Launching a document from the Document Explorer

Prerequisites

Before you can use the Document Launcher, you must install The Solution Series. Also, to implement the Document Management Facility, you need to run a program (.exe) that comes with the Installation Media for Solution Series. The directions for running the program are in the Installing The Solution Series/ST document.

Questions answered

The following questions are answered in this section:

5. What option list must be edited to support the Document Management Facility?
6. What tasks must be performed to link documents to employee records?
7. How do you launch a document?
8. What security can be associated with this functionality?

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Overview of the Document Management Facility

The Document Management Facility gives you the ability to attach files and documents to an employee record in your system. The file could be a picture such as an identification photo, a document such as a performance review, or a certificate such as a qualification certificate. Maintaining documents in this way provides an easy-to-use electronic filing system from which retrieval is only a few clicks away.

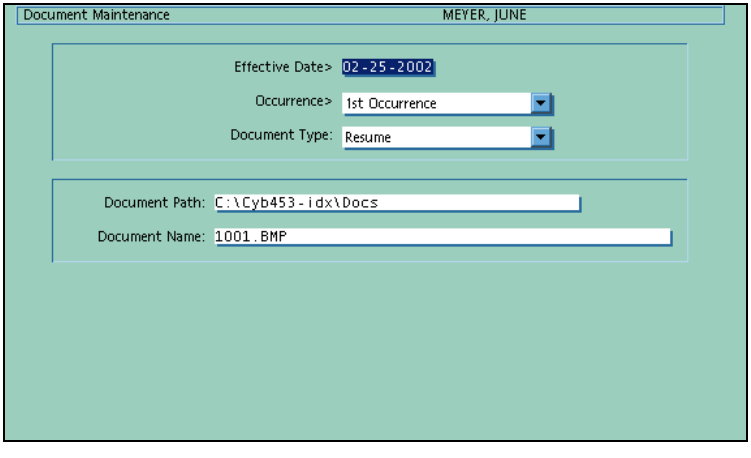
After you have installed the necessary files, the only setup required is to specify the document types you wish to store. These specifications are stored in the Document Definitions option list (SC55).

See also:

- Document types ***(on page 266)***

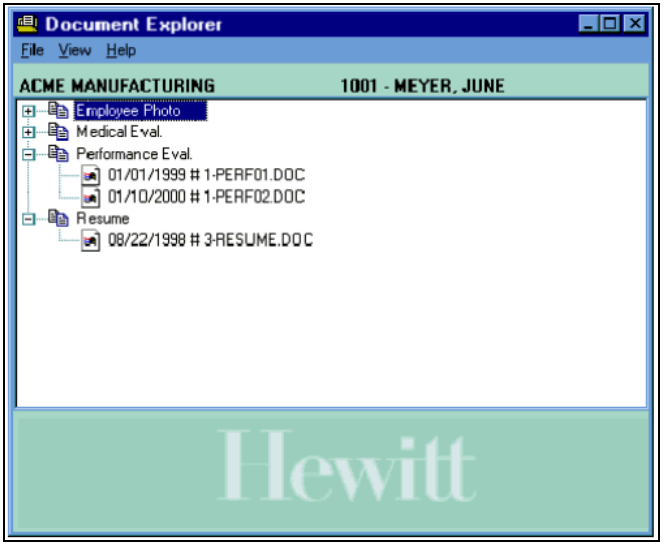
For more information about this option list, its use, and implementation considerations.

To link a file or document to an employee's record, you use the Document Maintenance form (DR-SCR):



This employee form allows you to specify the details of the document, including the path to the document location. The document can be stored locally or on the network. It does not have to be stored on the system server.

To view a specific document, you can access the Document Explorer to display, by document type, all of the documents attached to an employee record:



You launch the document by clicking the Launcher button:

The Document Explorer and Launcher buttons are available on the Launch toolbar.

Note: *This functionality is available in Windows and UNIX environments only.*

Alternatively, you can double-click the document to launch it.

The document is launched in the appropriate software, based on the file properties. For example, a .doc file will be launched in Word, and a .gif file will be launched in your browser. If a Windows file association does not exist for the file extension, the Windows standard 'Open with' dialog will be displayed.

If the file does not exist, a dialog will open giving you the option to create the file.

Note: *If the document does not exist and it is a Microsoft Word document, Word is then launched with the newly-created document. A dialog may appear asking if you want to convert the document. In this case you may need to install a converter. The Microsoft Office website has the required converters—which converter you will need will depend on the version of Word you have installed.*

See also:

- Linking documents to an employee record ***(on page 272)***

For detailed directions for using the Document Maintenance form (DR-SCR).

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- Viewing document links ***(on page 274)***

For detailed directions for viewing all document management records on file for an employee.

- Launching a document from the Document Explorer ***(on page 194)***

For detailed directions for using the Document Explorer.

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Document types

The Document Definitions option list (SC55) is used to specify the different document types you want to attach to employee records. Each document type that you define in this option list contains the default file extension and default file location, to make accessing the documents easier. Using this option list to define document types also reduces the amount of information you have to set up for each document, since the defaults for that document type can be used.

Several document types are delivered. You can edit these and add your own document types as well. The following table displays the delivered document types and their option list entries. The characteristics for each document type are listed. The table headings include the maximum number of characters allowed for each item.

Code (2)	Document Type (20)	Default Extension (3)	Default directory (27)
IM	Employee Photo	BMP	C:\Docs\Images
ME	Medical Eval.	DOC	C:\Docs\Meds
PE	Performance Eval.	TXT	P:\Evals
RE	Resume	WPD	\\Product\Documents

Note: Solution Series does not come with pre-defined directory paths. The table above provides possible examples.

You can specify as many document types as you need. You can be as specific or as general as you want when determining your document types. For example, you may choose to specify one document type for Performance Evaluations, or you may want to specify a performance evaluation for each year, such as 'Perform Ev 2000'. Keep in mind that the code identifier for each document type is only two characters long and each code must be unique.

Although you specify a default directory in the option list, there is opportunity to specify a location for each file if you want to. The same is true for the file extension. Although you may have specified a default file extension for a word processing file as .doc (that is MS Word), you could use a WordPerfect file. At the time that you attach the WordPerfect file to the employee record, you can indicate its specific file type by adding a document extension to the file name.

When using the Document Explorer feature, the documents for an employee will be displayed in Document Type order. In this sequence, it will be easy for you to review the documents that you have linked to an employee record, or find the another file you are looking for. Being specific with your document types can make finding documents easier in the future.

See also:

■ Defining document types ***(on page 270)***

For detailed directions for maintaining the Document Definitions option list (SC55).

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Document security

Documents can be stored in any directory, either local or on a network. They do not have to be stored in only one location. The path can be specified for each individual document.

Consult your Security Officer to discuss the ways you can secure the documents:

- Network and server security to restrict access to where the files are stored
- Security to restrict access to the Document Maintenance form (DR-SCR) and Document Explorer

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Summary of interface options

The following interface options relate to this functionality:

- Launcher button
- Document Explorer button
- Document Maintenance bookmark

Launcher button

When you are displaying a document link on the Document Maintenance form (DR-SCR) this button launches a document in the application that is indicated by the file extension. It is located on the Launch toolbar.

See also:

- Launching a document from the Document Maintenance form ***(on page 276)***

For detailed directions for using the Launcher button.

Document Explorer button

This button launches the Document Explorer for the current organization and employee. It is located on the Launch toolbar.

See also:

- Launching a document from the Document Explorer ***(on page 194)***

For detailed directions for using the Document Explorer button.

Document Maintenance bookmark

This bookmark is used to access the Document Maintenance form (DR-SCR) for the current employee. It is an option on the Bookmarks list and can be added to your Favorites toolbar.

See also:

- Viewing document links ***(on page 274)***
- Launching a document from the Document Maintenance form ***(on page 276)***

For detailed directions on viewing and launching documents from the Document Maintenance form.

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Detailed Directions

This section provides detailed directions on completing a business task.

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Defining document types.....270
Linking documents to an employee record.....272
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Launching a document from the Document Maintenance form 276

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Before practicing the following detailed directions

Only the tasks for ***Defining document types*** (on page 270), ***Linking documents to an employee record*** (on page 272), and ***Viewing document links*** (on page 274) include detailed directions for practice purposes. The remaining tasks require that documents already be stored and available on your server or local drive. In a classroom setting, the instructor may provide documents for your use in completing the tasks for ***Launching a document from the Document Maintenance form*** (on page 276) and ***Launching a document from the Document Explorer*** (on page 194).

Defining document types

To edit the Document Definitions option list (SC55) and define the document types, use the Option List Editor (CSUPDT) and follow these steps:

1. Access the Option List Editor (CSUPDT)

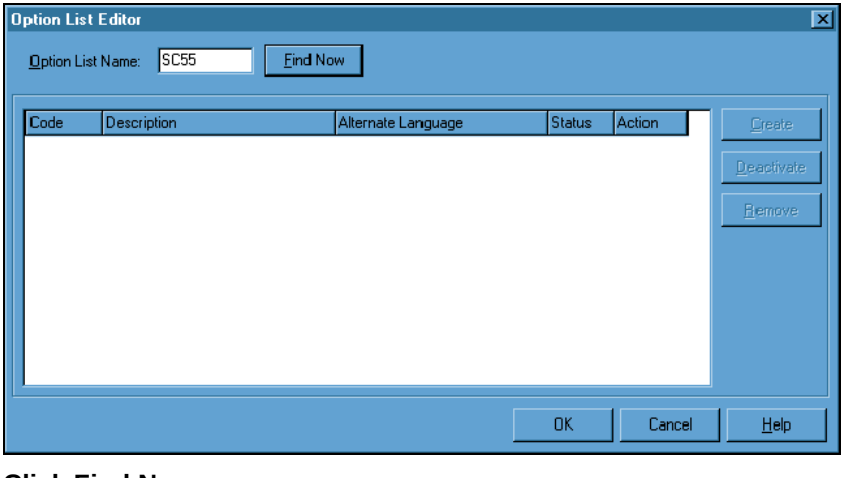
Access this dialog by making the following selection from the Navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

2. Enter the Option List Name

Type the name of the option list to be edited, 'SC55'.

If you completed the previous steps, the resulting form should look similar to the example that follows:



3. Click Find Now

A list of the existing document type entries will be displayed.

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4. Review the delivered default document type entries

5. To add a new entry, click Create

A blank line is inserted, allowing you to add the new item.

6. Enter a two-character code

Use a unique two-character code to identify this document type.

7. Enter the Document Type description

Type the document type description in the Description text box using a maximum of 20 characters.

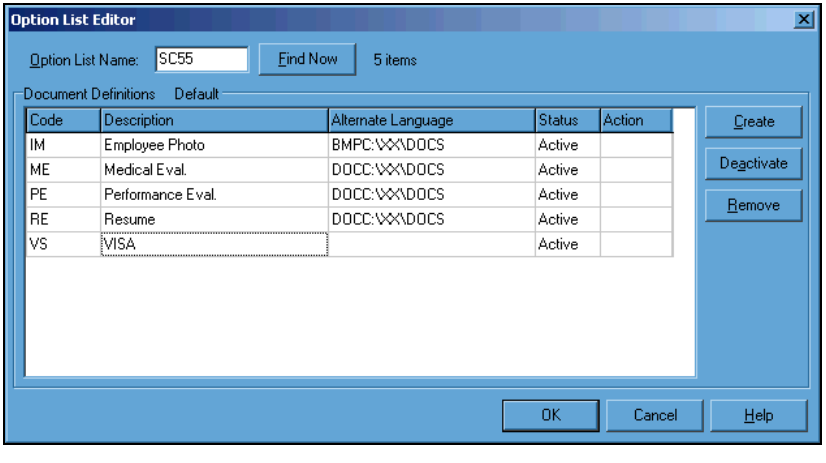
8. Enter the default file extension and directory

For the Alternate Language text, type the default three-character file extension followed by the default directory path that specifies where this document type will be stored. The directory path can total up to 27 characters.

9. Click OK to update the option list

No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

If you completed the previous steps, the resulting form should look similar to the example that follows:



Note: To add more than one entry to the Document Definitions option list (SC55), repeat steps 4–8 until all entries have been made.

See also:

- Document types ***(on page 266)***

For more information about the Document Definitions option list (SC55).

Linking documents to an employee record

To link a document to an employee record using the Document Maintenance form (DR-SCR), follow these steps:

1. Access the Document Maintenance form (DR-SCR)

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

Component: User Tools
Process: Add/Maintain Document Links
Task: Link Documents to Employees

Or use the Document Maintenance bookmark.

2. Enter employee details

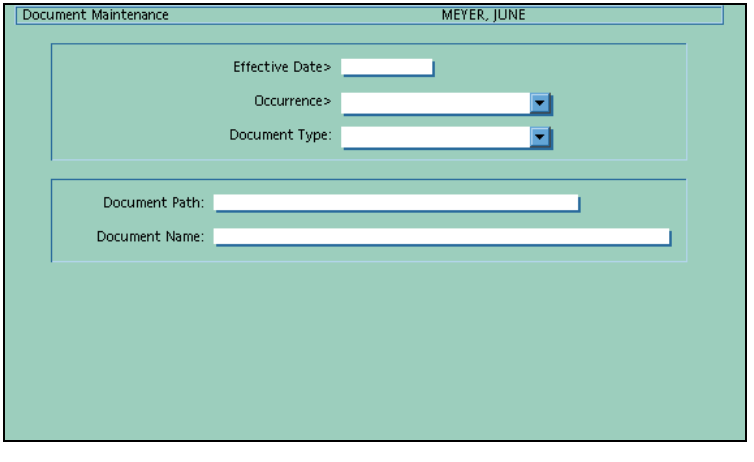
Enter employee number, name, or Social Sec number of the employee you want to use in the Employee Selection dialog box.

3. Click OK

The most recent occurrence of the record is displayed.

Note: If document links have already been set up for an employee, the most recent record will be displayed when you access this form. You may find it helpful to clear the text boxes before entering values for a new document link. To do this, click the Clear Fields button.

If you completed the previous steps, the resulting form should look similar to the example that follows:



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4. Enter the Effective Date

Type the effective date of the document. Enter the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada, excluding Quebec) or DD-MM-CCYY or CCYYDDMM (elsewhere).

5. Select the Occurrence

This entry allows a range of 1st to 10th Occurrence. Options for this list box are provided by the Key Separator Value option list (HR70).

An employee can have up to ten linked documents per Effective Date.

6. Select the Document Type

The Document Type is a required entry. Options for this list box are provided by the Document Definitions option list (SC55).

7. Enter the document path (optional)

The Document Path is an optional text box that specifies the path where the document is stored.

If the document is stored at the default location, as specified in the Document Definitions option list (SC55) for this document type, there is no need to enter the path. The default will be assumed.

If the document is not stored at the default location, enter the specific path.

8. Enter the Document Name

This is the file name for the document. This entry is appended to the Document Path to create a complete file name.

This entry must be completed to ensure that the document is linked to the employee.

If no extension is specified, the default extension will be assumed as defined in Document Definitions option list (SC55) for this document type.

9. Press Enter to save the record

Press Enter to add the document link to the employee record.

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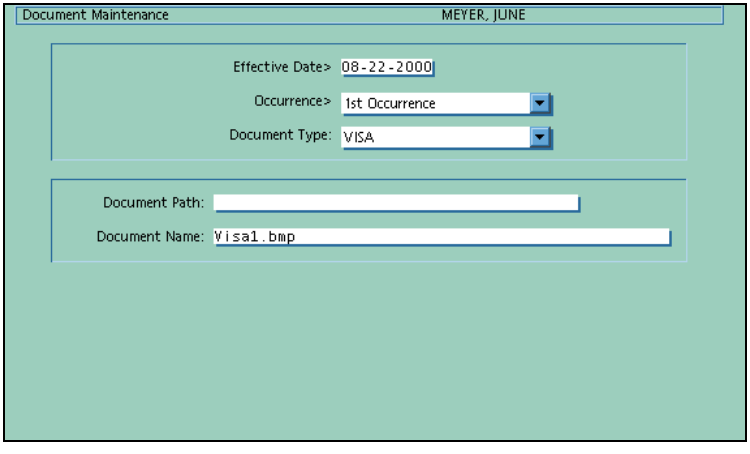
If you completed the previous steps, the resulting form should look similar to the example that follows:



Note: *You may set up another document link so that the next detailed directions task,* **Viewing document links** *(on page 274), can be completed. The second document link is for a performance evaluation dated December 1, 1998.*

See also:

- Overview of the Document Management Facility ***(on page 263)***

For more information about the Launcher and Document Explorer programs.

- Document Maintenance bookmark ***(on page 268)***

For more information on the Document Maintenance bookmark.

Viewing document links

To view all document links on file for an employee by displaying the selection list of the Document Maintenance form (DR-SCR), follow these steps:

Note: *This task requires that more than one document link exists for the employee.*

1. Access the Document Maintenance form (DR-SCR)

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

Component: User Tools
Process: Add/Maintain Document Links
Task: Link Documents to Employees

2. Enter employee details

Enter employee number, name, or Social Sec number of the employee you want to use in the Employee Selection dialog box.

3. Click OK

The most recent occurrence of the record is displayed.

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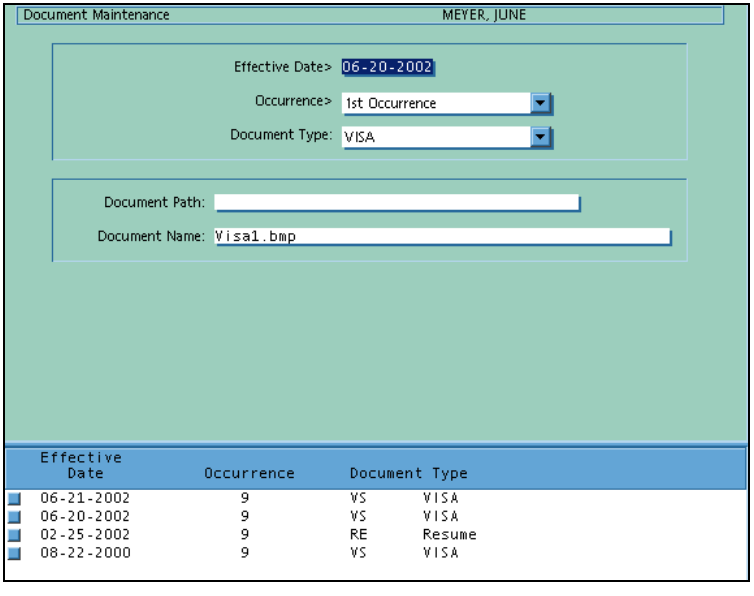
4. Click the Refresh Selection List button

Click the Refresh Selection List button on the Selection Menu toolbar.

The Selection List is displayed in date order, showing the most recent occurrence at the top.

If you completed the previous steps, the resulting form should look similar to the example that follows:



5. Click the record you wish to view

Select the record occurrence from the selection list by clicking the button to the left of the selection.

The selected record displays.

See also:

- Overview of the Document Management Facility ***(on page 263)***

For more information about the Document Maintenance form (DR-SCR).

Launching a document from the Document Maintenance form

In order to launch a specific document, you must specify which organization, employee, and document you want. To launch a document from the Document Maintenance form (DR-SCR), follow these steps:

1. Access the Document Maintenance form (DR-SCR)

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

Component: Reporting
Process: Add/Maintain Document Links
Task: Link Documents to Employees

Or use the Document Maintenance bookmark.

2. Enter employee details

Enter employee number, name, or Social Sec number of the employee you want to use in the Employee Selection dialog box.

3. Click OK

The most recent occurrence of the record is displayed.

4. Click the Refresh Selection List button to view all document links

Click the Refresh Selection List button on the Selection Menu toolbar:

The Selection List is displayed in date order, showing the most recent occurrence at the top.

5. Select the document link

While viewing the Selection list, click the button to the left of the document link you wish to view.

6. Click the Launcher button

To launch the selected document, click the Launcher button on the Launch toolbar.

The document is launched in the application indicated by the document file extension.

Note: This functionality is available Windows and UNIX environments only.

See also:

- Document types ***(on page 266)***

For more information on document types.

- Summary of interface options ***(on page 268)***

For more information on the toolbar buttons used for document management.

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Review of Questions Answered

1. What option list must be edited to support the Document Management Facility?

2. What tasks must be performed to link documents to employee records?

3. How do you launch a document?

4. What security can be associated with this functionality?

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PART 4

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APPENDIX A

Practice and Review Answers

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Introduction

This appendix provides answers for the Apply the Concept, Extended Practice, and Review of Questions Answered that are included in the instructional chapters.

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Maintaining Option Lists

Apply the Concept

1. Based on your understanding of the option list types and naming conventions as explained in this concept, which of these two option lists would contain values that could be used by all organizations, even delivered test organizations—HR04 or HR459?

   Universal option lists have five-position names, with a blank in the fifth position. So the correct answer is HR04, because there is a blank in the fifth position. Universal option lists are delivered with the system and are populated. These option lists are available to all organizations, including the delivered test organizations.

2. Based on your understanding of the Option List Editor (CSUPDT) functionality as explained in this concept, indicate which of the following tasks you can complete after accessing it:
   Add a new item to an existing option list
   Add a new option list
   Change information about an existing item
   Delete an item
   Delete an option list

   You can use the Option List Editor (CSUPDT) to maintain existing option lists. You can add a new item to an existing option list, change information about an existing item, or delete an item. To create a new option list or delete an option list, you must use the Edit Utility (EDIT).

Extended Practice

Your company has purchased laptop computers for your consulting staff, and you have been asked to add this item to the Company Property option list (HR24). Using the Option List Editor (CSUPDT), add code 'P1' to option list HR24 and give it a description of 'Laptop Computer'.

After the new entry has been made, access the Company Personal Property form (22-SCR) for Jerry Jones, employee 1111 in Organization 999999, and record his newly assigned laptop computer.

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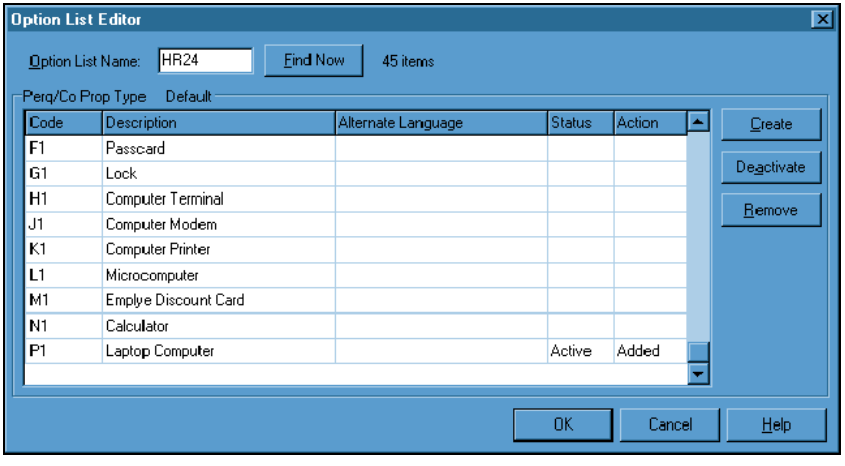
Your option list entry should look similar to the example that follows:



Review of Questions Answered

1. What are the different types of option lists?

   Universal option listed are delivered with the system and are populated. They are available to all organizations. Type 9 option lists are delivered and populated. They are available only to the test companies and used for testing purposes. Organization-specific option lists must be defined. They are used to provide specific codes to specific organizations.

2. What is the Option List Editor (CSUPDT) and what is its purpose?

   The Option List Editor(CSUPDT) is used to maintain existing option lists. You can add a new item, change information about an existing item, or delete an item.

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Designing a Business Process

Apply the Concept

1. Based on your understanding of checklists as explained in this concept, what processes in your organization would be most suitable for a checklist application? (Have you considered the termination process or the salary review and authorization process?)

   This response will be specific to your organization. Consider any business processes that require at least one mandatory form and more than one optional form.

2. Based on your understanding of the checklist wizard as explained in this concept, how could you benefit from examining the construction of the delivered universal checklists?

   An example checklist called 'Hire a New Employee' is delivered. Although it displays as one checklist on the Navigator and menus, it is actually five universal checklists working together. These checklists use many of the options available to you when you create your checklists. Consider looking at how these are constructed and how they work before creating your own. They can give you an idea of how checklists work in general and how the options you select affect how checklists work.

Extended Practice

You have just been assigned the task of creating a universal checklist named 'Employee Termination Process'. Six forms will be included in the checklist. These can be selected from the 'Manage Terminations, Leaves and Returns' process of the Employee Resourcing component:

- Terminate/Retire
- Change Employee Status
- Termination Review
- Return Company Property
- Return Company Automobile
- Record Exit Interview Results

Select items 1 and 2 as mandatory. At your discretion, select or skip advanced features.

Remember that this checklist must be added to the menus before users can access it. You may add this checklist to the 'Manage Terminations, Leaves and Returns' process on the menus after you have reviewed the procedure in the next section.

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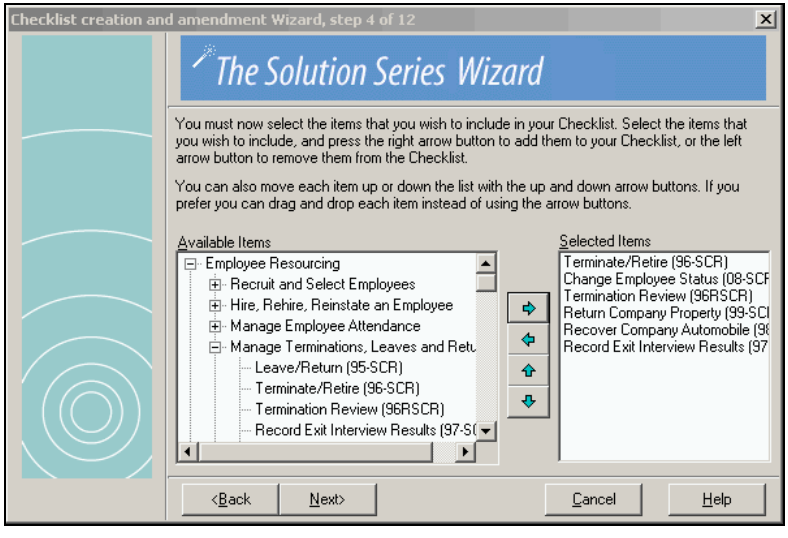
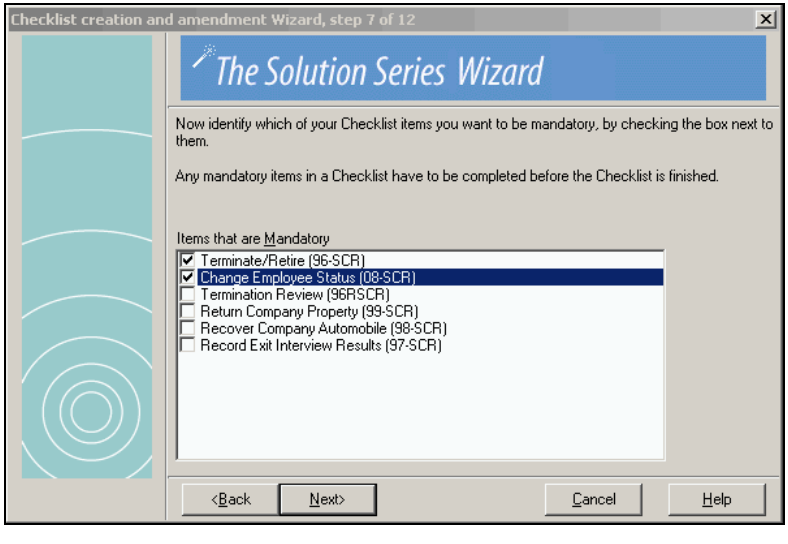
Your checklist parameters should look similar to the examples that follow:





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Review of Questions Answered

1. What is a checklist?

   A checklist is a list of tasks to be performed in sequence, within the Navigator. Checklists allow you to link tasks and even other checklists together to perform work flow functions.

2. What are the differences between a personal checklist and a universal checklist?

   Personal checklists are stored on your computer and only available to you; universal checklists are stored in the System Control Repository and available to everyone. Only universal checklists can be linked to up to 6 other universal checklists.

3. What tool do you use to create a checklist?

   You use the Checklist wizard to create a checklist.

4. What tool do you use to delete a checklist?

   You use the Remove Checklist dialog box to remove a checklist.

5. What tool do you use to control checklists?

   You use the Edit Utility (EDIT) to control a few options that can not be set using the Checklist wizard.

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Maintaining Menus

Apply the Concept

1. Based on your understanding of the menu structure as explained in this concept, which level of the menu would you need to modify if you were adding a new form to the menu structure?

   The answer is menu level 4. Menu level 4 represents the third (last) submenu. This level links you to the system forms. You can not define a menu beyond level 4.

2. Would you also need to modify the Navigator to include the new form?

   The menu structure is mirrored in the Navigator. Because of this relationship between the menus and the Navigator, any changes made to the menus are automatically reflected in the Navigator. There is no additional work required.

3. Based on your understanding of shortcut keys as they are used in the menu structure, what letter would be defined as a shortcut key in the item 'Re&quisition Tracking'?

   The 'q' in Requisition is the shortcut key. To define a shortcut key for a menu item, you type an ampersand (&) before the letter to be used as part of the shortcut key combination.

4. Based on your understanding of menu maintenance as explained in this concept, when would you expect to see the changes you have made to a menu structure?

   When you finish editing a menu, both the System Control Repository and the Client Data File on your workstation are updated immediately. Other users will see the menu changes the next time they sign on to the system.

Extended Practice

Using the Employee Resourcing submenu, add a submenu (level 3) named 'Maintain Company Property'. Assign a shortcut key to this item.

Then add two forms to the level 3 submenu with item names of 'Company Property' (form name 22-SCR) and 'Automobiles' (form name 24-SCR). Assign shortcut keys to each new form.

Save your changes. View your changes online.

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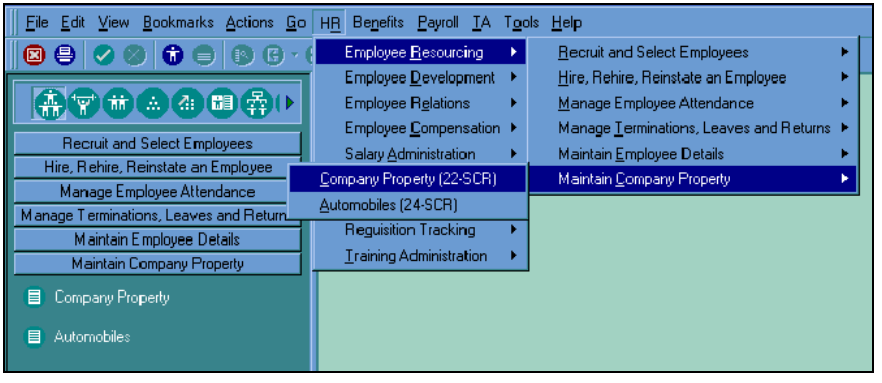
Your menus and Navigator should look similar to the image that follows:



Review of Questions Answered

1. What types of menus are delivered with the system?

   There are two types of menu delivered: function, such as File, Edit, and View, and application, such as HR, Benefits, and Payroll.

2. What is the relationship between the menu structure and the Navigator?

   The menu structure is mirrored in the Navigator. Menu levels two through four are shown in the Navigator, providing another way to access information.

3. What is the Menu Editor and how is it used?

   The Menu Editor is used to add, modify, and delete menu items. You can edit the delivered application menus and add your own menus.

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Setting Up a Communication Event

Apply the Concept

1. Based on your understanding of the communication event triggers as explained in this concept, which business tasks in your organization require some employee or inter-office communication that could be triggered instead by a communication event?

   This response will be specific to your organization. You may consider tasks that involve the relay of training information, salary data, budget planning, or personal employee information updates.

2. In what cases are letters or memos being generated when emails could be more effective?

   This response will be specific to your organization. Consider any communication that relays non-confidential information, such as class scheduling or other communications that do not require a response.

3. Based on your understanding of the email communication event as explained in this concept, what method(s) would you use to determine the recipients and content of an email communication event in your organization?

   This response will be specific to your organization. You may choose automatic lookup of the employee, direct report, or indirect report, as well as lookups by employee name, address book, position, and manual entry.

4. Based on your understanding of the letter communication event as explained in this concept, what would be the advantage of queuing letters for printing later or being prompted when a letter is ready?

   These options are useful in situations when the printer is not in the same room or when letters need to be printed on different paper stock.

5. Based on your understanding of inserting fields as explained in this concept, what benefits can be derived from using system fields as part of your email and letter text?

   Making use of this option allows you to insert the most current and accurate information possible into the text of your email or letter.

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Extended Practice

Create a form-triggered email event that will notify an employee when a physical exam appointment has been recorded. The event may be automatically triggered, or you may select a manual trigger. You may select the form name by expanding the Employee Relations component, then expanding the Manage Employee Health and Safety process, and selecting the Physical Exams Scheduled/Completed (18-SCR) task.

Set up the event so that it is triggered when information is added to the form. Set the option to preview or cancel the email. Create the appropriate email text and insert fields from the form to describe items such as the appointment date and physician.

After you complete the event parameters, execute the form for a 999999 organization employee (such as Jerry Jones, employee number 1111) and preview the email.

Your event parameters and email preview should look similar to the examples that follow:

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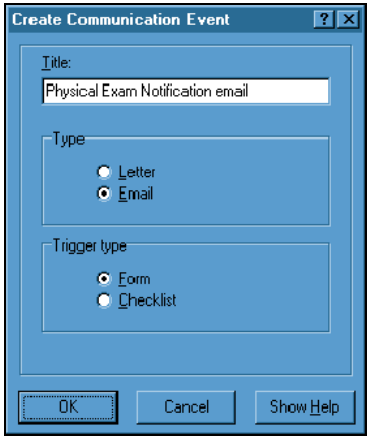

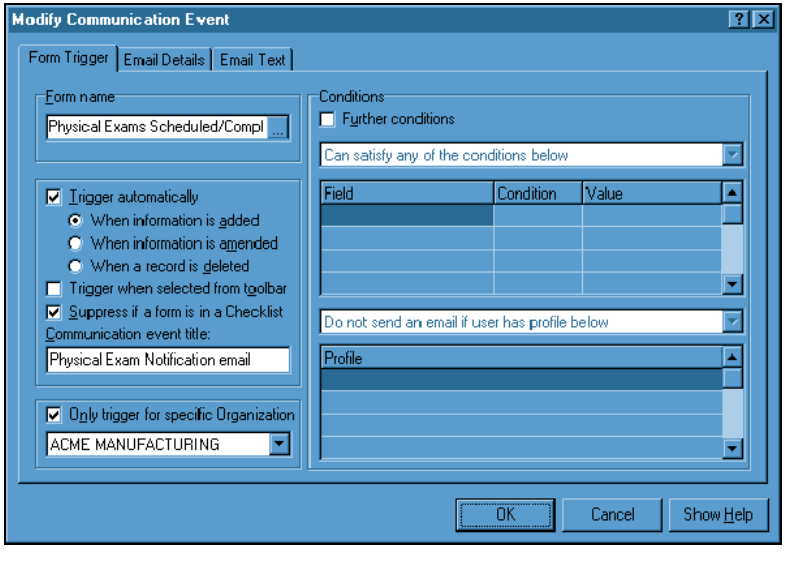

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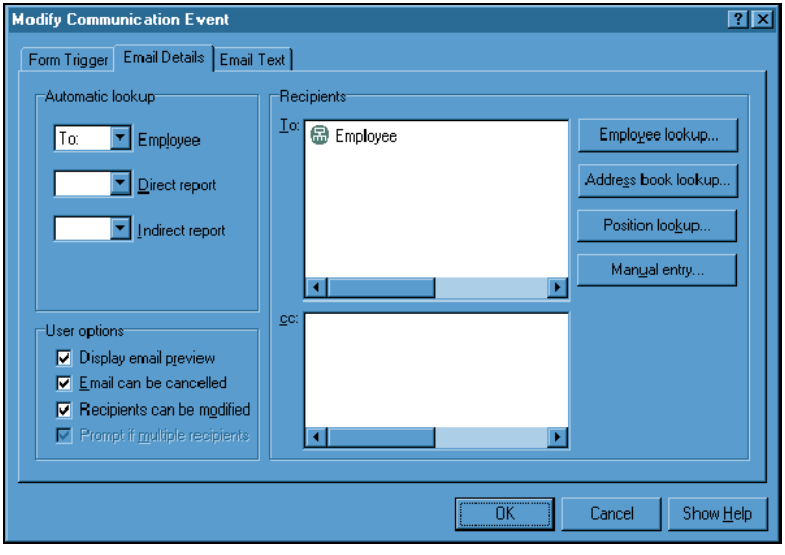
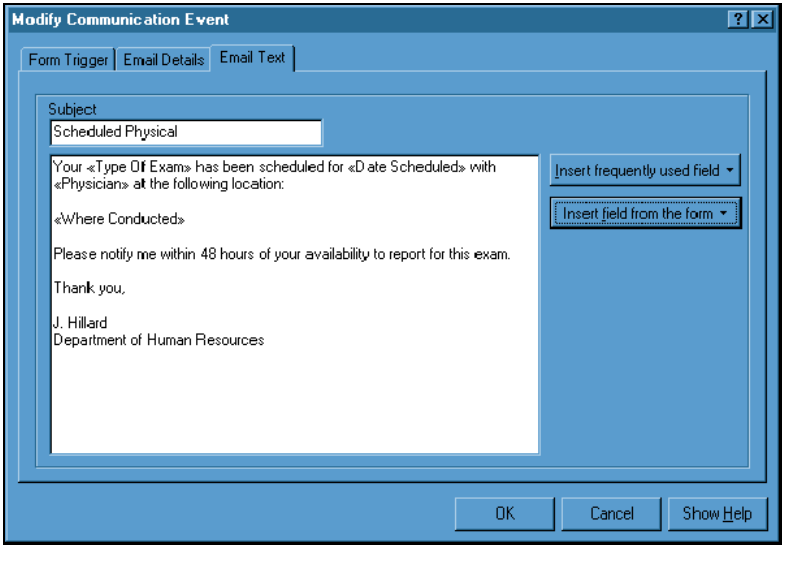
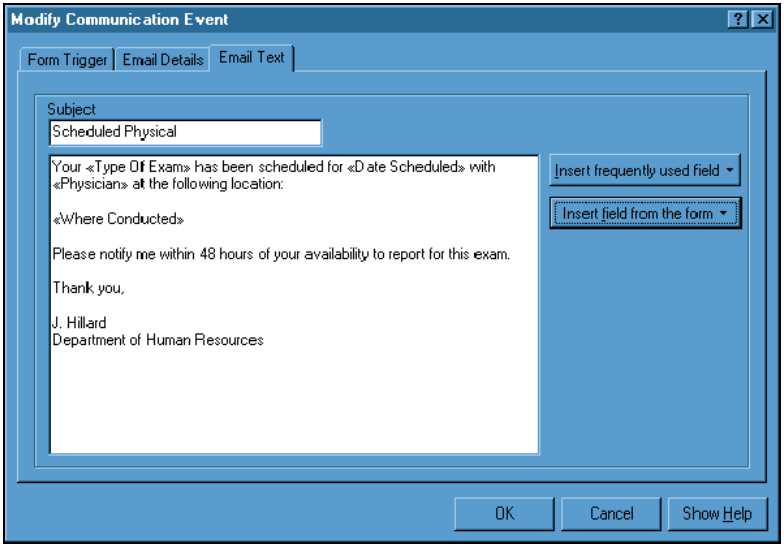

Modify Communication Event
Form Trigger
Email Details
Email Text
Automatic lookup
To:
Employee
Direct report
Indirect report
Recipients
To:
Employee
Employee lookup...
Address book lookup...
Position lookup...
Manual entry...
cc:
User options
Display email preview
Email can be cancelled
Recipients can be modified
Prompt if multiple recipients
OK
Cancel
Show Help


Modify Communication Event
Form Trigger
Email Details
Email Text
Subject
Scheduled Physical
Your «Type Of Exam» has been scheduled for «Date Scheduled» with «Physician» at the following location:
«Where Conducted»
Please notify me within 48 hours of your availability to report for this exam.
Thank you,
J. Hillard
Department of Human Resources
Insert frequently used field
Insert field from the form
OK
Cancel
Show Help



Review of Questions Answered

1. What is a communication event?

   A communication event is the tool that can be used to send emails and print letters automatically or manually when employee data is created, updated, or deleted in the system.

2. What are the types of communication events?

   Using the Communication Event Manager dialog, you may set up parameters for the automatic and manual generation of two types of communication events—email and letters. Data to be contained within the email or letter comes from the form being used as well as delivered lists of frequently used fields. After communication event parameters are set up, the event can be modified, copied, and deleted.

3. What is a communication event trigger?

   Event triggers allow you to set up the parameters that will cause a communication event.

4. What types of triggers are available?

   There are two types of communication event triggers—form and checklist.

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Exporting and Importing Data

Apply the Concept

1. Based on your understanding of the export options as explained in this concept, which one or more of the solutions will best suit the needs of your organization?

   This response will be specific to your organization. However, your choice may be influenced by whether or not your system is relational or whether you have purchased Reporting Administration.

2. Based on your understanding of the import sources as explained in this concept, would your organization be able to import a tab-delimited file that has been supplied by an insurance company?

   Yes. A tab-delimited file meets the requirements for a file that can be used as an import file.

3. Based on your understanding of the Import wizard as explained in this concept, how would you determine by looking at the display in Step 7 that all of the desired import items have been mapped to the target form?

   The top row of the import data column is updated to reflect the field name of each mapped item, regardless of the method chosen to create the mapping. Verify that all items to be mapped to the target form display a field name in the top row of the import data.

4. Based on your understanding of the import options as explained in this concept, which option would you choose for rejects and warnings if your organization was processing an import file that contained 75 records?

   Depending on the importance and sensitivity of the data, your best choice would be to pause the import to allow manual correction of the record. If correction required other resources or indicated more serious problems with the import data, you may prefer to stop the import and review the import file before restarting the import.

5. Based on your understanding of import run as explained in this concept, what control procedures would you implement to ensure that all import records are posted to your system?

   This response will be specific to your organization. However, you may consider an import control log that lists the number of records in the import file compared to the total number of import records as reported by the import message log. The number of updated records plus the number of corrected records should equal the total number of records in the import file.

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Extended Practice

Using Excel for Office 97 (or higher version), create the following import data and save the Excel file as C:\Practice.xls. The first row is header information:

Org	Emp #	Date	Chg Type	OL3	OL4
999999	1111	20000101	C05	3333	4444
999999	1112	20000101	C05	3030	4040
999999	1113	20000104	C05	3338	4448
999999	1114	20000110	C05	3333	4444
999999	1115	20000112	C05	3338	4448
999999	1116	20000115	C05	3030	4040
999999	1117	20000116	C05	3333	4444

Then create a new import profile to move this data to the Location Assignment/Changes form (05CSCR). Complete all of the necessary steps in the Import wizard:

- Select the form by expanding the Employee Resourcing component, and then expand the Maintain Basic Employee Details process. Then click the Location Change (05CSCR) task.
- Map each of the import items to its corresponding form item.
- Manually select '1st Occurrence' as the Key Separator, 'New York Office' as the EEO Establishment, and 'All Locations' as the Geographic Range.
- Finish the import profile.

Resolve any pre-import validation errors and run the import to a successful conclusion.

View the message log.

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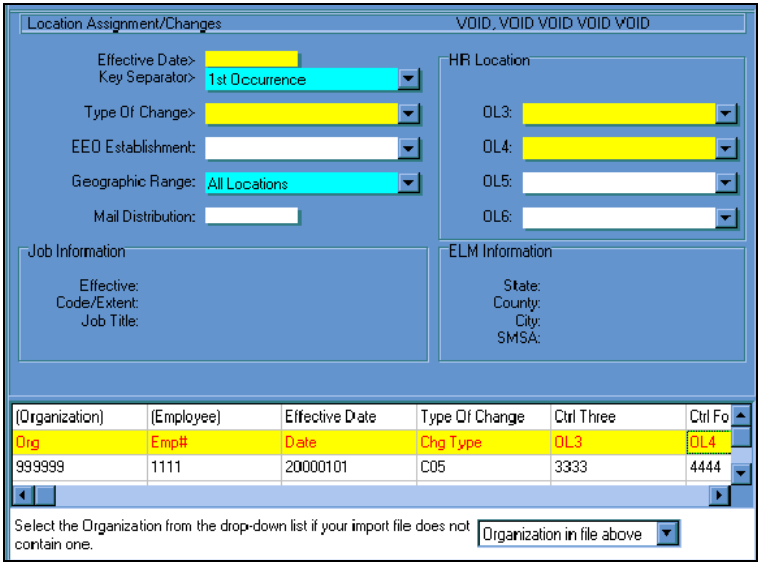
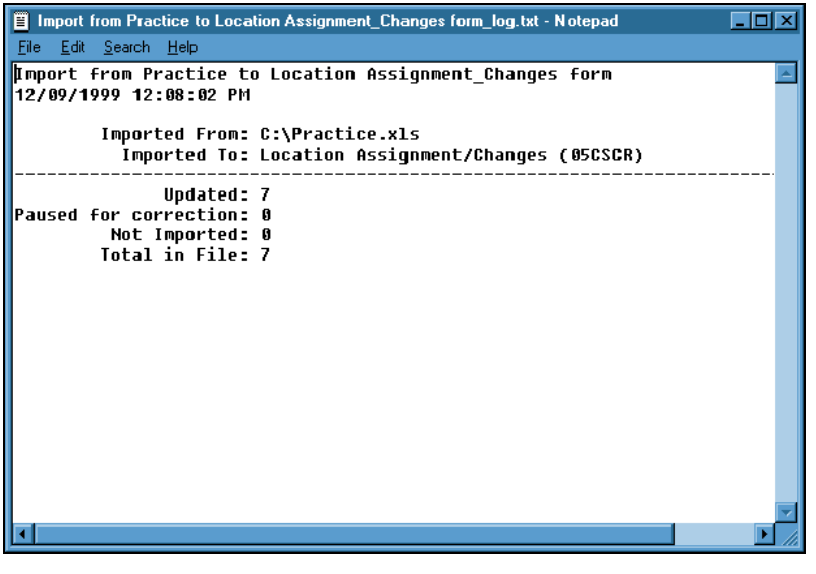
Step 7 of 8 should look similar to the dialog that follows:



Two errors display during the pre-import validation. The OL3 and OL4 option list values are incorrect for employees 1113 and 1115. Correct these values to be 3388 and 4488. Then start the import again at record 1.

The resulting message log should look similar to the following example:



Review of Questions Answered

1. What tools can be used to export data?

   You may select one or more of the following features to export data:

- *ISQL or another query tool—If you have a relational system, you can use these to run queries directly from your system's relational tables. You can then simply save the query content in comma delimited format, alter the data, and use the Import feature to reload in the manipulated data.*
- *Reporting Administration—Using this functionality is the easiest way to manipulate data. As delivered, Reporting Administration provides a means of extracting a great deal of information from your system. By reviewing the data already defined, you may determine that the data you want to extract is already defined. Then the task of manipulating data and importing it back into the system could be as simple as creating an Impromptu report, saving its content in comma delimited format, altering the data, and using the Import feature to apply the manipulated data. If this is the case, you need to verify that a fresh extraction has been performed before creating your Impromptu report.*
- *Batch Reports—We deliver hundreds of batch reports that have been developed using the Cyborg Scripting Language. You can use these reports in their delivered form or customize them to report on specific data. You can also use Cyborg Scripting Language to create your own program that could be run in batch to extract data.*
- *Solution View—The Report Writer in Solution View can be used to create an extract file from data in the system.*

2. What is the Import Profile Manager and what purpose does it serve?

   The Import Profile Manager is the tool that allows you to easily create, modify, rename, and remove an import profile, as well as start the import and view the resulting message log. The Create or Modify options on the Import Profile Manager launch the Import Creation and Amendment wizard.

3. What functions are provided by the Import wizard?

   The Import wizard allows you to complete the following functions:

   - *Choose the target form*
   - *Choose the import file*
   - *Select the import file delimiter and text qualifier*
   - *Specify the presence of an import file header record*
   - *Establish relationships between import data items and form data items*

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4. What control options are available for the import process?

   You may choose an option for each of the following categories prior to starting the posting of import data:

   - *Reject errors*
   - *Warnings*
   - *Communication events related to the target form*
   - *Starting record for an import restart*
   - *Automatic display of an import message log when the import has finished*

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Document Management Facility

Answers for Review Questions

1. What option list must be edited to support the Document Management Facility?

   Using the Document Definition option list (SC55), you must edit the delivered document types and add any document types needed by your organization.

2. What tasks must be performed to link documents to employee records?

   First, you must define the document types in the Document Definition option list (SC55). Then you must enter a Document Maintenance form (DR-SCR) for each document to be linked to an employee.

3. How do you launch a document?

   You launch a document using the *Document Explorer or the Launcher.*

4. What security can be associated with this functionality?

   You can use network and server security to restrict access to the area where the files are stored, or you can use security to restrict access to the Document Maintenance form (DR-SCR).

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APPENDIX B

Report Quick Reference

In This Appendix

Paused Checklist Report (MMPRPT) 302

Paused Checklist Report (MMPRPT)

The Paused Checklist report (MMPRPT) allows an administrator to view all paused and locked checklists.

Parameters

The parameters form allows you to select a start and end date for the period you wish to report on.

Fields

Information reported includes:

- **Profile**—User's profile.
- **OPID**—User's operator ID.
- **Checklist**—Name of checklist.
- **Organization**—Organization number.
- **Employee**—User's employee ID.
- **Date**—Date checklist was paused.
- **Locked**—Yes/No indication if checklist is locked.
- **Item**

No.—Item number in the checklist.
OPID—Operator ID of person who completed this operation.
Date—Date of operation.
Time—Time of operation.

Sort order

The sort sequence for this report is:

Forms/Report-Code	'1MMPR'
Member Profile ID	MMP-PROFILE-ID
Paused Checklist ID	MMP-PAUSED-ID
Sequence Number	MMP-SEQUENCE-NO

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Paused Checklist Report (MMPRPT) Example

```
         1         2         3         4         5         6         7         8         9         0         1         2         3
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789012


Company      77   Cyborg Hewitt Test Company       Paused Checklist                REPT                                  PAGE     1
Division     7777 London                            AS OF 24-10-2003               MMPR                   TIME 12:38 DATE 12-20-2003


                                                                                                      ----------- ITEM ------------
PROFILE     OPID   CHECKLIST                                ORGANIZATION  EMPLOYEE      DATE    LOCKED   NO.   OPID     DATE      TIME
HR1ADMIN    S.O.   499998 U.S. Pay Process Checklist       999999        1001       10-11-2003   Yes    001   A901  04-11-2003   9:54
                                                                                                        002   A901  04-11-2003  10:06
                                                                                                        003   A901  04-11-2003  10:36
                                                                                                        004   A901  04-11-2003  11:16


HR2ADMIN    MNTS   432122 Canadian Pay Process Checklist  999999        1002       11-21-2003    No    001   A801  11-21-2003  14:32
                                                                                                        002   A801  11-22-2003  08:46
                                                                                                        003   A901  11-26-2003  16:09

HR3ADMIN    S.O.   411111 24x7 Pay Process Checklist      999999        1031       11-30-2003   Yes    001   A901  11-29-2003  10:02
                                                                                                        003   A801  11-30-2003  09:01
                                                                                                        004   A801  11-30-2003  16:23
                                                                                                        005   A756  12-01-2003  08:58
                                                                                                        006   A756  12-01-2003  12:04
```

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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.

820 (Premium Payment for Group Insurance Products) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay remittance information and/or premium payments for heath care insurance products.

834 (Benefit Enrollment and Maintenance) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay information relating to the initial enrollment in and subsequent maintenance of individuals enrolled in a health care insurance product.

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 totalled 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.

ACH
US-specific acronym for Automated Clearing House. The ACH Network provides inter-bank clearing of electronic payments for participating depository financial institutions. The American Clearing House Association, Federal Reserve, Electronic Payments Network, and Visa act as ACH Operators—central clearing facilities through which financial institutions transmit or receive ACH entries.

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.

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Activity
Event that can happen to an employee during employment, for example, new hire, leave of absence, termination, and so forth.

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.

Adjustment
Adjustments increase or reduce to-date accumulations of earnings, deductions, and taxes. Adjustments update month-to-date, quarter-to-date, and year-to-date activity. You can also correct or eliminate deduction arrears, transfer amounts or hours from one earning or deduction to another, redistribute labor hours and dollars, and refund deductions. Adjustment transactions are processed the next time the organization is processed by the batch payroll programs during either a payroll or maintenance run.

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.

Agent types
Agent Indicator on the Employer Information Record (QE-SCR). The field's only allowable entries are selected from option list PR55, which consists of two agent types: Agent Indicator code and Common Pay master.

Further definition of agent types:

1. An employer that wants to use an agent prepares Form 2678, Employer Appointment, and submits the form to an agent.

The agent submits to IRS the form received from the employer along with a written request for authority to act as an agent for an employer.

The IRS gives written approval.

2. A common paymaster is a corporation that pays an employee who works for two or more related corporations at the same time.

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 in Payroll Administration 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.

Anniversary date
Period-end date for the next regularly scheduled pay run for a specific pay frequency.

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.

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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. Payroll Administration 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.

Applicant organization
Organization used to store and update applicant records.

Appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

Archive
To transfer files to a slower, cheaper media (usually magnetic tape) to either free up the hard disk space they occupy or to create a backup copy of the files that can be used to restore programs and/or data if there is a system failure.

Arrears
Amount that could not be deducted from an employee's net pay because the available net amount was less than the deduction. This amount may be recorded for recovery in a future pay period.

As-of reporting
Ability to report on data for a specified date or date range.

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.

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.

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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 317).

Banner
Banner forms separate groupings on forms produced from the Federal, State/Local, and Employee Queues.

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 Master file (P20)
Sequential version of the Payroll Master information from the Employee Database. The Batch Master File (P20) is accessed and maintained during a batch maintenance run or pay run.

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.

Batch transaction
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 transaction, you may verify your totals against those accumulated by the system.

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 Business Partner
See ***Trading Partner*** (on page 340).

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.

Blocking factor
Represents the number of physical records in a logical record.

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.

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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 data mart.

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.

CBSVB
COBOL program used to produce reports and to access or maintain The Solution Series offline.

CBT
Computer-based training. Training through use of computer.

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.

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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 workflow 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.

Checklist wizard
Tool used to create checklists.

Checkmark
If in the done column of an 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.

Cleared payment
A check that has been cashed or deposited by the payee and has been returned, marked as such, to the payer's bank, credit union, or financial institution.

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 (ring)
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.

Co-ordinator
A coordinator is an instructional institution, organization or person who administers training courses.

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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 pay master
An organization that pays employees who work for different legal entities. If all the conditions related to a common paymaster are met, the FICA and, in most cases, the SUI does not have to start over.

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.

Company logical Master record
Complete record for a company. It may be composed of multiple physical records.

Company validation table
Table that validates that an Organization Control Number is valid and payments can be made.

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.

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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?'

Contractual exchange rate
An annually reviewed exchange rate usually based on an employees anniversary date and reviewed once a year; often used for salaries.

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
Organization Control Number. A six-character, customer-defined code that represents a company or group of employees within 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.

Conversion option
The interval at which you are converting currency (for example: yearly, monthly, weekly).

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.

Costing record
Labor record.

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.

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Covered Entity
A member of one of three groups subject to the administrative simplification provisions of HIPAA. The three types of Covered Entities are health plans (not fully insured), clearinghouses, and providers that conduct transactions electronically.

Covered Entity Group
A Covered Entity Group represents in the system a partnership between two Covered Entities (benefits business partners) who transmit benefit information electronically between each other in the form of the 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) Transaction Sets.

CPI
Characters per inch.

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.

Crossfoot
An accounting term that means to compare or add figures to make them balance. If you receive an error message such as ‘Entries do not Crossfoot’, this means that some amounts entered into fields are not balanced.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 313).

Cube
File that contains data organized into dimensions to provide for faster data retrieval and drill down reporting and analytical capabilities.

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.

Custom report format
Custom reporting used by states because their reporting format is neither MMREF, ICESA, nor TIB-4.

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.

CYBMST
Library file that contains the main batch payroll software. This file consists of COBOL programs, report generators, and system tables.

Cyborg Scripting Language
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 Extract File Splitter (RSPLIT)
COBOL program that creates separate files for every representative table, using the Data mart Extract File as input.

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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.

Data mart
Relational tables with a defined structure that have been designed to automatically accept full data mart extract data seamlessly.

Data mart Extract File (FILE36)
Temporary system file holding the copied data from The Solution Series.

Data store
Repository where data is stored. Client applications request information from a Solution Series data store.

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.

De-enrollment
The process of shutting off plan benefits for an employee for reasons other than a separation activity.

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.

Default
Value that will appear if no entry is typed or selected.

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.

DEL-PE
Utility program used to delete existing Phonetic Keys.

Delimiter
A character that tells the system where an item of data ends and another starts.

Density
Number of bytes per inch that a tape drive writes to a tape.

Dependent
An individual who relies or depends on another for his or her support.

Dependent GTL
Acronym for Dependent group term life insurance plan.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

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Deposit advice
Pay document that looks similar to a check and shows the amount deposited to the employee's account.

Derived data
Reporting Administration enhances data during the extract process by capturing and storing table-derived data, such as salary grade, that do not reside on the employee's record.

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.

Direct deposit
Also referred to as an Electronic Funds Transfer, or EFT, direct deposit allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

Disability
Inability to pursue certain occupational activities due to physical or mental impairment.

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. In Payroll Administration, 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).

Display text boxes
An area on a form in which data is shown but cannot be modified.

Disposable income
For garnishment purposes in the U.S., an employee's earnings minus deductions required by state or federal law.

Distributed Access Log Table
Form that records the date, time, and last record distributed to a unique location.

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.

Distributed Location NODE Control Table
Form that defines the operating environment of your remote node. It allows you to assign an access password for the node and indicate whether the option list and table records will be distributed to the remote node.

Distributed Rules Table
Form that records the FILE 02 segments that are to be excluded from the remote location.

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 forms. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 315).

Docked toolbar
Toolbar that is located on the edge of a program window.

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Document type
Categorization of a document, such as birth certificate, performance review, drivers license, and so on.

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.

DSP08
Program that displays the current contents of the Replication Holding File (FILE08).

DSRF02
Form that records the FILE02 segments that are to be excluded from the remote location.

DSRSET
Program that activates the Distributed Administration indicator on the PP-SCOPTS record of FILE01.

DSSRRL
Program that will display those remote sites that have not had data distributed to them within the past three days.

DSUSET
Program that deactivates the Distributed Solution indicator on the PP-SCOPTS record of FILE 01.

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 U.S. 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 Binary Coded Decimal Interchange Code; 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.

EDI
Electronic Data Interchange. The electronic exchange of business transactions based on standardized guidelines.

EEOC
Equal Employment Opportunity Commission.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EFT
Electronic Funds Transfer or direct deposit. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

EIC
Abbreviation for ***earned income credit*** (on page 316).

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EIN
Employer Identification Number. A federally or state assigned number used to distinguish tax entities in the US.

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic documentation
Documentation that can be viewed, searched, and printed on your computer.

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 cancelled 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.

Employee logical Master record
Complete record for an employee. It may be composed of multiple physical records.

Employee Number
Alphanumeric value of up to 10 characters that you define to be used to identify an individual as an employee. It acts as a key to retrieve an employee’s record.

Employee status
Represents an employee's present standing in terms of activities processed for the employee, for example, active, inactive, part-time, full-time, and so forth.

Encoding
The process of applying a badge number to an actual badge. This badge number is then entered on the Badge Number Assignments form to assign it to an employee.

English Language
Former name of our fourth-generation programming language, now called Cyborg Scripting Language.

Enhanced Pay Processing and Reporting
Pay run and reporting process that can be executed online.

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.

Alternate definition: The agency to which an organization submits its quarterly unemployment insurance reports.

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 system resides, and any communication protocols. Also, a workspace dedicated to a specific processing type. For example: development, test, and production.

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EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 317).

Establishment Reporting
Establishment Reporting occurs when an employer with several business locations chooses to file wage reports, broken down by location or unit, to the Social Security Administration. Each unit is identified by a four-character code, called an Establishment Number. The employer obtains approval from the SSA to use Establishment Reporting. Establishment Reporting does not apply to 1099s.

Euro triangulation
The conversion between one Euro currency and another.

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.

Exchange rate
The ratio of the value of one currency to another.

Exchange rate type
The interval at which you update the exchange rate; for example, yearly, monthly, weekly.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Execution scripts
Generic reference to Job Control Language (JCL) for your operating system’s command language.

Extract file
A data file generated to be used by another system or application.

Extract program
Report generator 7F7F and its subroutines.

This program accesses the P20 file to extract the employee information. It extracts all necessary information and is required to run only once per quarter. It may need to be rerun if there are subsequent adjustments applied to the P20.

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. In Payroll Administration, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FEIN
Federal Employer Identification Number.

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).

Filing entity
Agency to which an organization submits its quarterly report.

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.

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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, the Tax Authority File does not provide tax specification information. 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.

Floating toolbar
Toolbar that is located within the program window.

FLSA
Fair Labor Standards Act. Additional calculations applied to the retroactive pay results to ensure the knock-on effects of pay rate changes are recognized by the recalculation of related monetary amounts.

Folder
Logical organization device for the content of a Cognos catalog.

Foreign currency
The currency into which or from which you must convert.

Form
Section of the Work Area in which data is entered and displayed, including text boxes and other controls. This was formerly known as a screen.

Form 300
Log of Work-Related Injuries and Illnesses, used to classify work-related injuries and illnesses and to note the severity and extent of each case. The delivered OSHA Form 300 Log of Work-Related Injuries and Illnesses report (20-RPT) is a facsimile of the Form 300.

Form 300A
Summary of Work-Related Injuries and Illnesses, used to show the totals for the year in each (illness or injury) category. The delivered OSHA Form 300A Summary of Work-Related Injuries and Illnesses report (21-RPT) is a facsimile of the Form 300A.

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Form 301
Injury and Illness Incident Report. This must be completed when a recordable work-related injury or illness has occurred. This must be completed by the employer within 7 calendar days following receipt of information that the recordable work-related injury or illness occurred. This form must be kept on file for five years following the year to which it pertains. The delivered OSHA Form 301 Injury and Illness Incident Report (22-RPT) is a facsimile of Form 301.

Form area
An area of the window that contains a form.

Form Builder
A tool 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
Full Time Equivalent. An FTE is the ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of .5 means working time is half of the time that represents full time employment.

FTP
File Transfer Protocol. 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.

Function keys
Keys F2 through F12 on the keyboard that can be assigned to a bookmark or favorite.

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
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.

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.

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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.

HIPAA
Acronym for Health Insurance Portability and Accountability Act of 1996. HIPAA is a law that protects citizens from being denied health insurance coverage due to a pre-existing condition, and protects the privacy and security of citizens' healthcare information by enforcing standards for the manner in which health information is transmitted electronically.

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 location
The country in which an employee permanently resides.

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.

I-beam
Symbol that identifies the insertion point.

ICESA
Interstate Conference of Employment Security Agencies. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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.

Impromptu
Tool for interactive database reporting. Reports are built from the database using a pre-defined catalog.

Inactive plan
A benefits plan that no longer allows employee enrollment.

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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
An 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
Acronym for Integrated Postsecondary Education Data System.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

"NCES has established the Integrated Postsecondary Education Data System (IPEDS) as its core postsecondary education data collection program (prior to IPEDS some of the same information was collected by the Higher Education General Information Survey-HEGIS). It is a single, comprehensive system that encompasses all identified institutions whose primary purpose is to provide postsecondary education.

IPEDS consists of institution-level data that can be used to describe trends in postsecondary education at the institution, state and/or national levels. For example, researchers can use IPEDS to analyze information on 1) enrollments of students, undergraduate, first-time freshmen, graduate and first-professional students by race/ethnicity and gender; 2) institutional revenue and expenditure patterns by source of income and type of expense; 3) salaries of full-time instructional faculty by academic rank and tenure status; 4) completions (awards) by type of program, level of award, race/ethnicity, and gender: 5) characteristics of postsecondary institutions, including tuition, room and board charges, calendar systems, etc.; 6) status of postsecondary vocational education programs; and 7) other issues of interest."

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IRP/BSS
Information Reporting Program/Bulletin Board

IRS/MCC
Internal Revenue Service/Martinsburg Computing Center

JDBC
Java Database Connectivity Application Programming Interface. An application programming interface for accessing tabular data sources from the JAVA programming language.

JMNTRUN
Script used to assign check numbers and create history records.

Job
A 'Job' is a generic description of a role within the organization—for example, Manager.

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. Control statements that execute programs.

Alternately: Jobstreams

Job type
A generic category that further defines a particular job.

JPAYRUN
Script that is used to calculate pay and create payroll reports.

JQTRRUN
Script that executes the new quarterly reporting process.

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.

JXP5QTR
Stand-alone script used on all platforms to extract and compile the new quarterly COBOL program.

KEY-PE
Utility program used to rebuild the QUERY Alternate Keys.

KEYDEL
Utility program used to delete existing QUERY Alternate Keys.

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 (GG-SCR).

Large number
The Multicurrency Payroll component contains a large-number format time entry form that accepts a nine-digit number as opposed to the seven-digit maximum in the standard Payroll Administration.

LDEFAULTS
Term used for a text/list box default template.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Link/jump
Reference to another document. Links (or hotspots) appear as underlined text. When you move your cursor over a link, the cursor changes to a hand. Click the link to access or jump to the referenced document.

LIS file
Standard file name used by all completed report files that are launched online. Files are automatically assigned this extension by the Online Initiation of the Pay Processing and Reporting feature.

Local currency
The currency in which the employee is paid.

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Local currency country
The work location for tax purposes.

Log file
Informational file generated when a report is launched online. The log file is used by the Process Monitor to communicate the status, progress, and completion of a report.

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 per inch.

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, calculate pay or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

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 form or page.

Manual payment
A payment not created within The Solution Series.

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 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 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.

MMREF
Magnetic Media Reporting and Electronic Filing. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media. See Social Security Administration publication MMREF-1 for specifications and instructions for reporting quarterly wage information to participating states through magnetic media.

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Model (PowerPlay)
File (with the extension .pye) that contains definitions of PowerCube dimensions and measures, queries that define the data sources, and other details needed to create a defined cube. Defined models reflect performance requirements as well as requirements of the final user of the cube.

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.

Multicurrency costing records
Records that maintain a history of the deduction and deposit transactions for each exchange rate.

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.

NACHA
American not-for-profit trade association that develops operating rules and business practices for the Automated Clearing House (ACH) Network and for other areas of electronic payments.

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.

NCES
Acronym for National Center for Educational Statistics.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

Primary federal entity for collecting and analyzing data that are related to education in the United States and other nations.

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 period pay run
Pay run for which the earning and deduction cycles are incremented. New-period pay runs are typically part of a regular pay schedule, and do not include off-cycle runs.

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.

Notional value
A value input for informational purposes only.

Number registered
This is the number of employees registered for a training class. It is updated and displayed on the Class Schedule form.

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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.

Off-cycle pay run
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.

One-stop document
Documentation that contains reference information, step-by-step procedures, and training exercises.

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
A list of valid options and associated descriptions from which you may select an appropriate entry. 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.

The organization is the highest level in The Solution Series structure and is identified by a six character code. All records are organized by organization.

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.

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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 levels
Hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are customer-defined.

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.

OSHA
U.S. Department of Labor Occupational Health and Safety Administration.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

P2EDIT
Transaction editor program. This is the first program executed as part of the batch payroll process. This program performs edits on the input transactions.

P4CALC
Program that performs payroll calculations and updates to the sequential Batch Master File during a payroll run.

P5PRNT
Program that formats and creates all output, including payments, reports, tapes, and records that must be recycled to future payroll runs.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Packaged reports
Delivered reports developed using a Fourth Generation scripting language, Cyborg Scripting Language (CSL).

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.

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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 extract
Process that extracts data from the online Employee Database.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semi-monthly. Also referred to as a payroll period.

Pay merge
Process that updates the Employee Database with the current data from the recently processed pay run.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A pre-printed 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.

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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
An automated process that 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 Control Language.

PDF
Portable Document Format. 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.

Permanent Master Record
Individual employee record in the Employee Database. This record contains all the information about an employee, such as name, address, pay frequency, and salary.

Permanent records of employee earnings, taxes, and deductions in the Employee Database. This is the only record group that contains month-do-date, quarter-to-date, and year-to-date accumulations.

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.

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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 definitions:

1. to place an object in a specified location.

2. a location, particularly in a record

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.

PowerPlay
Business intelligence tool for multidimensional analysis of corporate data, also known as Online Analytical Processing (OLAP).

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. To be safe, fill out the Direct Deposit Information form (H9-SCR) 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.

Process Monitor
Utility that allows you to monitor the progress of reports and payroll processes launched online.

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Program
A program is a series of classes being administered using Training Administration. For example, 'The Training Schedule for January-June 2004' may be a program consisting of eight different classes.

Alternative definitions:

1. A form or other set of instructions within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

2. A set of coded instructions that enables a computer to perform a desired sequence of operations.

Prompt
Expression set up to enable users to filter data by typing or picking a value, or a series of values, when the report opens.

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 that appears depressed when clicked on (now known as command button).

Qualifier
A drop-down list (field) referring to a data element on the HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions used to describe the type of information supplied in a related data element (field). For example, a Telephone Qualifier drop-down list identifies whether the telephone number supplied in a Telephone Number text box is a home, work, or fax telephone number.

Quarter-end P20
P20 is a file structure used in batch payroll processing. The quarter-end P20 file contains payroll data that is used in the quarterly processing.

Quarterly Processor
Combination of forms, report generators, and COBOL programs that extracts quarterly wage reporting information and produces all of the selected quarterly reports and formatted filing output (paper, tape, or diskette) for all selected employees in all selected states.

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.

Reconciliation number
The unique identification number printed on each pay document. Reconciliation numbers are used in the payment reconciliation procedure to verify cleared and outstanding payments.

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Record

A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definitions:

1. To set down for preservation in writing or other permanent form.

2. The reporting format for magnetic media as in Tape Record Type such as ICESA, TIB-4, or MMREF

3. Information or data on a particular subject collected and preserved

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.

Regulatory bulletin

Contains updates to varying components of The Solution Series necessary to maintain regulatory compliance. Tax specifications supplied are delivered in regulatory bulletins (RBs).

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.

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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
Batch program that creates report extract records.

Alternate definitions:

1. A detailed accounting of an activity; for example, the quarterly report of unemployment insurance details to a filing entity.

2. As in 'Report Select character', this represents the selection frequency for this output.

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.

Report Viewer
Utility that allows you to view, search, print, save, and delete reports that are launched online.

Reporting Administration
HRMS reporting and analysis tool that links the database functionality found in The Solution Series with sophisticated, yet easy to use business intelligence tools from Cognos®.

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.

Retroactive Pay
The calculation and payment of monies due to pay rate changes for pay periods that have already been processed.

Return
The activity of an employee returning as an employee to active status, usually following a leave of absence.

Alternative definitions:

1. key on keyboard used to perform a carriage return; can also be known as Enter.

2. to send back to the originator; for example, the Tape Return Information form (QT-SCR) gives the address to which a filing entity would return a magnetic tape containing errors.

Review process
A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

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.

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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.

A Schedule Master table is used to associate schedules with a Policy Master table. A Schedule Master table can also be used to override values held on its corresponding Policy Master table.

Employees are assigned to a Schedule Master table. Schedule Master tables may be created for individual employees, or for use by groups of employees or by crews.

Screen
Now known as a form.

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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 system.

SEIN
State Employer Identification Number; required by some states for wage and tax reporting.

Selectable File08 Display
Program that displays FILE08 information based on a selectable record key, starting key, time, and date.

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.

Also known as the Batch Master File.

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 Differential/ Premiums
Premium (or allowance) added to an employee’s regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

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.

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Shortcut key
Key that corresponds to a command name on a menu, such as CTRL+Z.

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.

SIC
Standard Industrial Classification.

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.

SOAP
Simple Object Access Protocol. This is an XML-based protocol that exchanges structured and typed information on the Web.

SOC
Standard Occupational Classification.

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 retrieves information from a relational database so it can populate Impromptu reports.

Standalone Time and Attendance
Customers who are using Time and Attendance Administration but not Payroll Administration.

Standard Pay Processing and Reporting
Pay run and reporting process that is executed in batch.

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.

Statutory employee
Any of the four categories of workers who are independent contractors under common law and are treated by statute as employees. These include:
(1) a driver who distributes beverages (other than milk) or meat, vegetables, fruits, or bakery products; or who picks up or delivers laundry or dry cleaning, if the driver is your agent or is paid by commission.
(2) certain types of full-time insurance sales reps
(3) an individual who works at home on materials supplied by you that must be returned to you
(4) certain full-time travelling or city salespeople.

Social Security and Medicare (FICA) taxes may or may not be withheld. Income taxes are not withheld from a statutory employee. A statutory employee will receive a W-2 with the ‘Statutory Employee’ box checked.

Sub-schedule number
A two-digit numeric text box used to further identify a schedule table.

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Succession planning
Finding and developing employees for placement into identified key positions that are expected to become vacant sometime in the future.

SUI
State Unemployment Insurance.

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.

Switches
Text or list box options that allow decisions to be recorded; in some cases, to be turned on or off.

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.

Alternate definition: a function to be performed; objective

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 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.

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Tax class

Defines taxability for pre-tax deductions. These contributions can vary by tax authority. In the U.S.:

* Tax Class 1 defines taxability for 401(k) plans (maintained for all but local authorities)

* Tax Class 2 defines Section 125 plans (maintained for federal only)

* Tax Class 3 defines tax-sheltered annuities (maintained for federal only)

* Tax Class 4 - 9 fields are customer-defined

Tax code

The three-character to seven-character supplied reference code that identifies a tax and that serves as the link between the Tax Specification Record and the employee tax record.

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 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

Income tax, unemployment insurance (including special assessments), and disability insurance are examples of tax types. At the federal level, there are also entitlement taxes: Social Security (FICA-OASDI) and Medicare (FICA-HI). The types of taxes to collect and the methods of collecting them vary by tax authority.

Tax-related Regulatory Bulletin

A regulatory bulletin contains the updates to tax specifications, consisting of a bulletin document and a tax file that contains the updated tax specifications.

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.

TDR

Table Definition Record.

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Template
A basis from which to create a custom item. For example, you can use an existing 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 (").

Third Party Administator
An organization outside of a company that administers employee benefit plans on the company's behalf.

TIB-4
Technical Information Bulletin (Social Security Administration Publication 42-007). Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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 Time and Attendance Administration 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.

TLCN
Tape Library Control Number - a government-provided control number.

ToolTip
Text that displays under a tool to describe its function when the mouse is held over the tool.

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.

TPA
Acronym for ***Third Party Administrator*** (see "Third Party Administator" on page 339).

Track
One of the concentric magnetic rings that form separate data storage areas on an electronic medium.

Trading Partner
A Covered Entity with whom another Covered Entity transmits health information electronically through the use of an Electronic Data Interface. Trading partners must create an agreement as to the specific information that will be passed during their transactions. The Electronic Data Interface is standardized by the provisions set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Also referred to as Business Partner.

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 cancelled, 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.

Transaction Set
Refers to HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions meaning the smallest meaningful set of information exchanged between ***trading partners*** (see "Trading Partner" on page 340). The transaction set consists of a transaction header segment, one or more data segments in a specified order, and a transaction trailer segment.

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 definitions:

1. To move data or files from one computer to another

2. Electronic Funds Transfer or direct deposit

3. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

Trend analysis
Reporting or statistics that indicate the rate of change in costs and other elements of a benefits plan.

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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.

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.

UI
Unemployment Insurance.

UI Number
Unemployment Insurance Number (or SUI number, State Unemployment Insurance number); required by all states.

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 Payroll Administration, 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 that 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 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.

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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 delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning
An employee's schedule warning times.

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.

XML
Extensible Mark-up Language is a language for documents containing structured information.

XML Schema Definition Language
A language for describing and constraining the content of XML documents.

XSLT
Extensible Stylesheet Language Transformations. A language for transforming XML documents into other XML documents.

Year End Master File
P20OUT file from the final payroll run of the year

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PART 1

Introduction

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CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the functional administration of the administrative solutions to perform your business tasks.

Together with your installer, Customer Support Manager, and Help Desk, it is an important part of the Total Support Solution.

This manual has been designed as a reference document. It is also used in classroom training. You will find sufficient detail for self-study, before and after classroom training.

Who should use this manual?

This manual is designed to be used by new customers and customers who are upgrading from previous versions of the system. The following users will find it most useful:

- System support staff (analysts, programmers, system administrators)
  Any member of the support staff who programs customizations to the system and who will be involved in the implementation, upgrade, or maintenance of the system will find this manual's information and guidance helpful.

- Human Resource and Payroll managers
  The concepts and business tasks discussed in this manual provide the knowledge that will be required to successfully customize the functional administrative aspects of the administrative solutions and subsequently incorporate them into the daily business tasks.

Prerequisite skills

Users of this manual should possess a variety of technical skills, depending on the roles they will play. At a minimum, all users should have:

- Basic understanding of Microsoft Windows.
- Attended training or have experience using The Solution Series.

Additional documentation and training courses

The following documentation and training courses are available to help you understand and administer the administrative solutions:

Documentation

Document	Description
Using The Solution Series: Administrative Solutions, or eCyborg: Using the Web Client (for users of the web client)	This documentation covers the introductory concepts and tasks related to The Solution Series or eCyborg. It describes how to navigate through the software and explains the important concepts and functionality of the system.
Technical Administration	This manual provides descriptions of and detailed instructions for performing the technical tasks that support The Solution Series or eCyborg.

If you do not have copies of these documents, you can obtain them from the Customer Center on our website www.hewitt.com/ecyborg.

Training Courses

Related Course	Description
Using The Solution Series	Provides the introductory concepts and tasks related to The Solution Series.
eCyborg: Using the Web Client	Web-based training which provides the introductory concepts and tasks relating to eCyborg.
Technical Administration	Introduces important concepts and tasks for the administrator who performs the technical tasks that support the administrative solutions.

If you wish to attend any of these courses, contact Customer Support or visit our website www.hewitt.com/ecyborg 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:

	Chapters	Description
1. Introduction	1–2	Provides an introduction to this material
2. Personalizing Option Lists, Menus, and Checklists	3–5	Provides concepts and detailed instructions for customizing and maintaining option lists, menus, and checklists

	Chapters	Description
3. Integrating Desktop Applications and Data	6-8	Provides concepts and detailed instructions for creating and maintaining communication events, export data files and import provides, and for using Desktop Document Integration
4. Appendices	A	Provides detailed reference information

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 Optimizing System Features:

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 Optimizing System Features	A high-level overview of the functional administration aspects of the system

Part 2: Personalizing Option Lists, Menus, and Checklists

The chapters in Part 2 describe three ways to personalize the system for your organization and to suit your work style:

Read this chapter		To learn about
3	Maintaining Option Lists	How to add, modify, and remove an item in an option list
4	Designing a Business Process	How to add, modify, and remove a checklist
5	Maintaining Menus	How to add, modify, and remove a menu item

Part 3: Integrating Desktop Applications and Data

The chapters in Part 3 describe various tools that can be integrated with your desktop applications:

Read this chapter		To learn about
6	Setting Up a Communication Event	How to trigger emails and print letters automatically or manually when employee data is created, updated, or deleted
7	Exporting and Importing Data	How to create export data files, design import profiles, and process imports that will update company and employee records

Read this chapter		To learn about
8	Desktop Document Integration	How to link documents to employee records and then browse through and launch these documents

Part 4: Appendices

The appendices in Part 4 contain practice and review answers:

Use this appendix		To learn about
A	Practice and Review Answers	Detailed answers to the practices and reviews in the instructional chapters

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

This 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 will help 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 appendixes.

Detailed Directions

Detailed Directions provide the specific steps to complete a task. The Detailed Directions contain navigation for both North American and UK users.

A supplemental training data document accompanies this manual, which provides examples of data that you can use with the Detailed Directions. Using the data provided in this document to complete the tasks will help to give you a better understanding of the task you are performing.

To successfully complete a task using this data, you may have to complete the previous tasks in the manual using the data provided. The training data document uses the test data installed with our software, and for the exercises to work as shown, this test data must not be altered.

Note: *To complete the Detailed Directions using the example data in the training data document, you must either have your own copy of the test data or have the test data restored for you.*

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 appendixes.

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

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the Review of Questions Answered at the end of a chapter. The answers to these questions can be found in the appendixes.

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 for you 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 cannot 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 http://www.hewitt.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 Optimizing System Features

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Introduction

This section provides you with the 'big picture' of Optimizing System Features. It describes the ways of making the system work for you by building in customizations to the interface, adding workflows, and integrating desktop functionality into your organization's daily business processes.

This section introduces you to the export and import of data and the use of wizard technology to create workflow processes and communication events. In addition, it covers option list and navigation customization.

Communication events

In addition to recording employee information in the system, your workflow process requires that some of that information be communicated to the employee or other areas of your organization. A communication event tool is provided, which can be set up to send emails and print letters automatically or manually when employee data is created, updated, or deleted in the system.

The Communication Event Manager is the controller of this functionality. It allows you to create, copy, modify, and remove communication events.

Communication event types

You may set up parameters for the automatic and manual generation of two types of communication events—email and letter:

- Email communication events use your automated email software package.
- Letter communication events use Microsoft Word 97 or any newer version. Letters can be created using its templates and mail merge features.

After it has been set up by an administrator, a communication event is system-wide and available to all system users.

Communication event triggers

Event triggers allow you to set up the parameters that will cause a communication event to occur. There are two types of communication event triggers—form and checklist:

A form trigger can be set up to occur when a user adds information to a form, changes information on a form, or deletes an existing form from the employee record.

A checklist trigger can be set up to occur when a user is working through a checklist and activates one of the following options:

- Finish Checklist after completing all the mandatory steps
- Finish Checklist without completing all the optional information
- Pause Checklist

As well as an automatic trigger, a manual trigger option allows a user to generate a communication event by using a button on the toolbar when working with a form or checklist that has no automatic trigger.

Email communication events

An email communication event provides your company with more capabilities than standard email software. You will be provided with multiple methods for specifying the email recipient(s), including the address book from your organization's email application. If Position Administration is in use, you can also specify that the recipient be the position to which the employee reports (direct or indirect).

You can set up a communication event to merge data from the system into the text, so that employee-specific information can be automatically displayed. For instance, you can

include registration and class information in an email to an employee regarding an upcoming class.

Several options during setup allow you to fine tune the email process. You may choose to activate one or more of the following options that give the user control when the email is generated:

- Display email preview
- Email can be cancelled
- Recipients can be modified
- Prompt if multiple recipients—provides the option of selecting the required recipient if a position had multiple recipients

Letter communication events

A letter communication event provides your company with the ability to automatically generate customized letters based on specific trigger parameters.

Microsoft Word template and merge features are included in the letter communication event process. All the functionality will work as described by Microsoft while creating the letter text. In addition, you will be able to insert fields from forms into the text, so that employee-specific information can be automatically displayed.

The following example could be the text of a letter that is sent to an employee who has been awarded a bonus or commission:

```
<<Date_Recorded>>
Congratulations <<Employee Name>>,

You have been awarded a <<HED_Xref>> in  the amount of $<<Amount_Awarded>>. You
will receive this amount on <<Date_Paid>>.

Sincerely,


G. Zarmin
Vice President, HR
```

Letters can be viewed and modified prior to printing. You have the option of printing letters immediately, queuing them for printing later, or being prompted when the letter is ready. Letters can be viewed and modified prior to printing, provided the user doesn't choose to print them immediately.

The system maintains one 'last printed' file. This means that after letters have been viewed or printed, they are moved to a 'last printed' list at the bottom of the queued letters. This acts as a backup in the event that letters need to be reprinted.

☞ *Refer to* **Setting Up a Communication Event** *(on page 187) for more detailed information on communication events.*

Data export and import

The ability to retrieve data from the administrative solutions, perform calculations or manipulate that information, and then import that enhanced data to update company and employee records allows your organization to reap the highest benefits from the administrative solutions. You can use the import profile wizard to design and process imports that will update company and employee records.

Exporting data

Several tools are provided to help you extract and report on information about your organization, employees, benefits, and payroll:

- Reporting Administration
  Using Reporting Administration functionality is the easiest way to manipulate data. As delivered, Reporting Administration provides a means of extracting a great deal of information from the administrative solutions. By reviewing the data already defined, you may determine that the data you want to extract is already defined. Then the task of manipulating data and importing it back into the system could be as simple as creating an Impromptu report, saving its content in comma delimited format, altering the data, and using the Import feature to apply the manipulated data. If this is the case, you need to verify that a fresh extraction has been performed before creating your Impromptu report.

- Using ISQL or another tool to query a relational database implementation of the system
  If you have a relational system, you can use ISQL or another tool to run queries directly from the relational tables of the system. You can then save the query content in comma delimited format, alter the data, and use the Import feature to reload the manipulated data.

- Packaged reports
  Hundreds of delivered reports that have been developed using the Cyborg Scripting Language. You can use these reports in their delivered form or customize them to report on specific data. Once the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

  You can also use Cyborg Scripting Language to create your own program that could be run offline to extract data.

- Solution View (create an extract)
  Solution View is a delivered user tool for developing forms, fields, on-request queries, extracts, and reports. The Report Writer in Solution View can be used to create an extract file from data within the system. After the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

Regardless of the method used to extract the data, the report or file must be converted to a delimited file or placed in an Excel spreadsheet to create the import file. This file is the one

used by the Import functionality to update company and employee information on the system.

Importing data

The import process moves data from an external source to any company or employee form. All you need is authority to access the import file.

The Import Profile Manager is the delivered tool that allows you to easily create, modify, rename, and remove an import profile, as well as start the import and view the resulting message log.

The Create or Modify options on the Import Profile Manager launch the Import Creation and Amendment wizard. This wizard guides you, step by step, through the tasks and options necessary to create or modify an import profile.

An import profile sets up the relationship between the import data and the form to which it will be imported, and is independent of the actual data.

Allowable import files

You can use a Microsoft Excel 97 (or higher version) spreadsheet to calculate and manipulate information. That data can then be applied to one or more forms in the system. You may also use any extracted application data that can be saved as a delimited file.

Target forms

You may easily import data into any form to which you have access, as defined by your user profile that has been set up by your Security Officer. If you have access to only ten forms, then only ten forms are presented when you are browsing for a target form.

Position Administration fields may be the target of import data. Position, job, and organization unit information may be imported.

The Import wizard

The Import Creation and Amendment wizard provides you with an easy method of setting parameters for importing data. Import profiles are specific to each user, but may be shared by copying them to another PC.

Eight steps take you through the creation of the import profile that is required prior to processing the import:

1. Welcome
2. Choose form
3. Choose file
4. Select delimiter
5. Header record
6. Message
7. Form and fields
8. Summary information

After import profiles are established, they can be shared by copying the local files from one PC to another. It is not possible to share import profiles across a network.

Control options for importing data

Prior to the actual posting of import records, you must specify how the import handles errors and specify automated options.

Pre-import validation

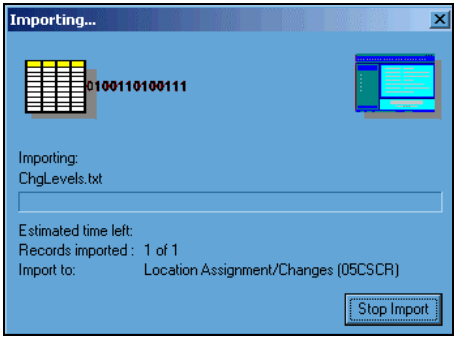
After the import options have been selected, field validation takes place. These validation checks are conducted before any records are actually imported to the system.

If all fields validate with no errors, the import process begins. If there are errors, a dialog will display all of the import records and indicate which ones are in error.

Running the import

After the import options are entered, all the validation checks are performed, and all errors are corrected in the import file, the import begins automatically.

While the import is in progress, the following dialog is displayed:



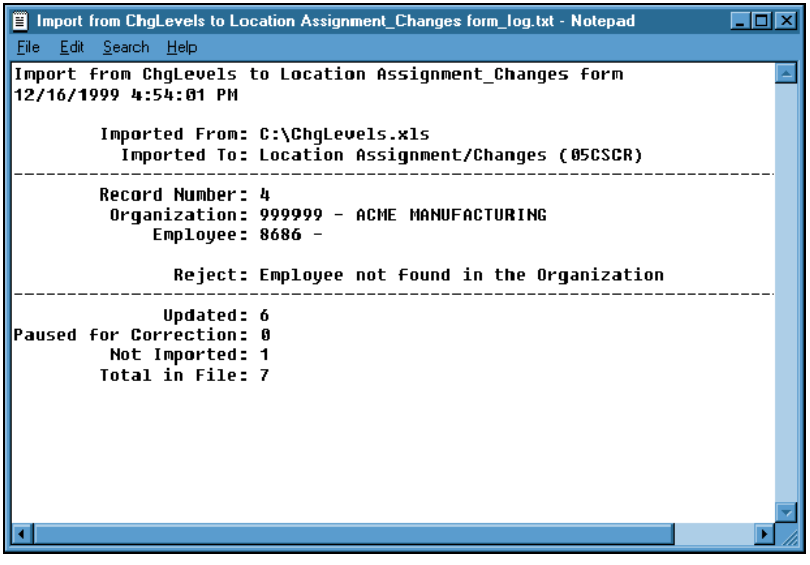
You may monitor the progress of the import run, or you may start another session of The Solution Series and perform other tasks while import is running. However, if you have chosen the option to pause the import process for errors, your attendance during the import run is required to address each error that is encountered.

If, for any reason, you need to stop the import, you can restart the import from a specific record.

Message log

If you selected the option to show a message log when the import is finished, then the log file will be automatically opened in Microsoft Notepad or other text view assigned on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

The message log contains system-level error and warning information:



The last lines of the report display a record count for the following items:

- Updated—records applied
- Paused for Correction—records you were prompted to correct
- Not Imported—uncorrected records
- Total in File—total records in the import file (excluding header record)

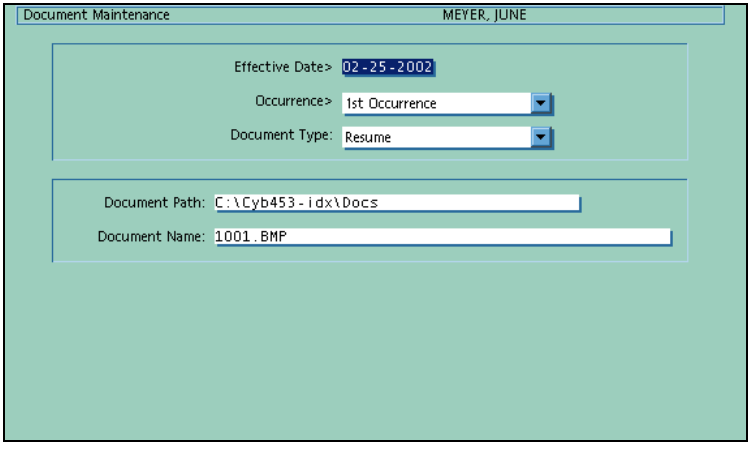
☞ *Refer to* **Exporting and Importing Data** *(on page 135) for more detailed information on the import wizard.*

Desktop Document Integration

Further desktop integration capabilities provide you with the mechanism to link employees to documents (including images) such as resumes, performance appraisals, photographs, and so forth, to employee records, and then browse through and launch these documents using a document explorer.

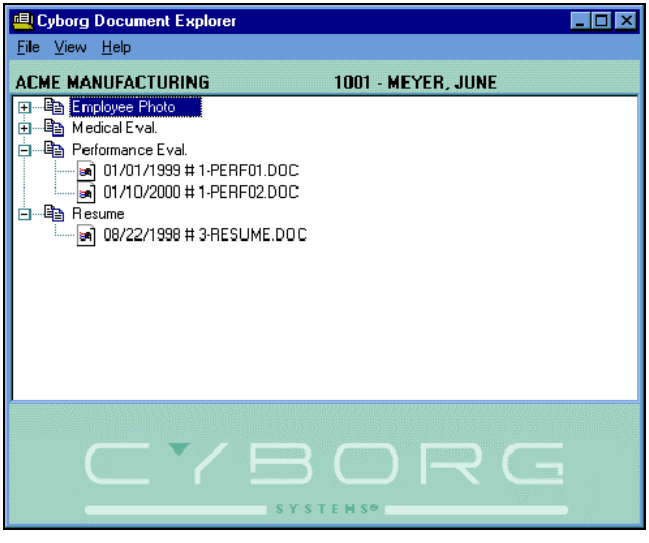
The Document Maintenance form

The Document Maintenance form (DR-SCR) is used to link documents to employees.



The Document Explorer

The Document Explorer is a tool that provides a view to the employee's document types and documents in a manner similar to that of Windows Explorer.



☞ *Refer to* **Document Management Facility** *(on page 253) for more detailed information on using the Document Explorer.*

Option list customization

An option list contains the predefined options from which you can select an entry for a list box. You must select one of the predefined options as your selection in a list box. In contrast to a text box, you can not key your own data into a list box.

For example, the Frequency option list (PP29) on the Employee Information form (EF-SCR) has the following options:

- None
- Bi Weekly
- Monthly
- Semi Monthly
- Weekly

The system is delivered with default options for each list box. These options can be modified to add or remove options to meet the requirements of your organization.

For example, you could modify the Frequency option list (PP29) to include Quarterly as a frequency type.

About the Option List Editor

The Option List Editor (CSUPDT) allows you to add a new item to an existing option list, change information about an existing item, or delete an item.

Using the Option List Editor (CSUPDT), you can modify the description and alternate language, and change the status of an item. You can not change the code itself. If you need to modify a code, you must delete the code and then add it again using the correct code.

If a universal, type 9, or organization-specific option list contains calculation or relational logic, you must use the Edit Utility (EDIT) to edit the logic or to add documentation. You must also use the Edit Utility (EDIT) to create or delete an option list.

Impact of option list maintenance

When you finish editing an option list, both the System Control Repository and the Client Data File on your workstation are updated immediately. Other users will see the changes the next time they press Enter.

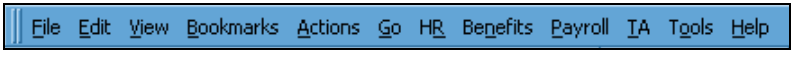
☞ *Refer to* **Maintaining Option Lists** *(on page 27) for more detailed information on editing and customizing option lists.*

Navigation customization

You are given easy access to all information through the Navigator and menus. Customizing menus provides another way to personalize the system to meet the needs of your organization. Using the Menu Editor, you can edit any of the delivered application menus to show only those items you will use, change the order of items, or replace items.

Delivered menus

The delivered menu bar contains two types of menus—function menus and application menus:



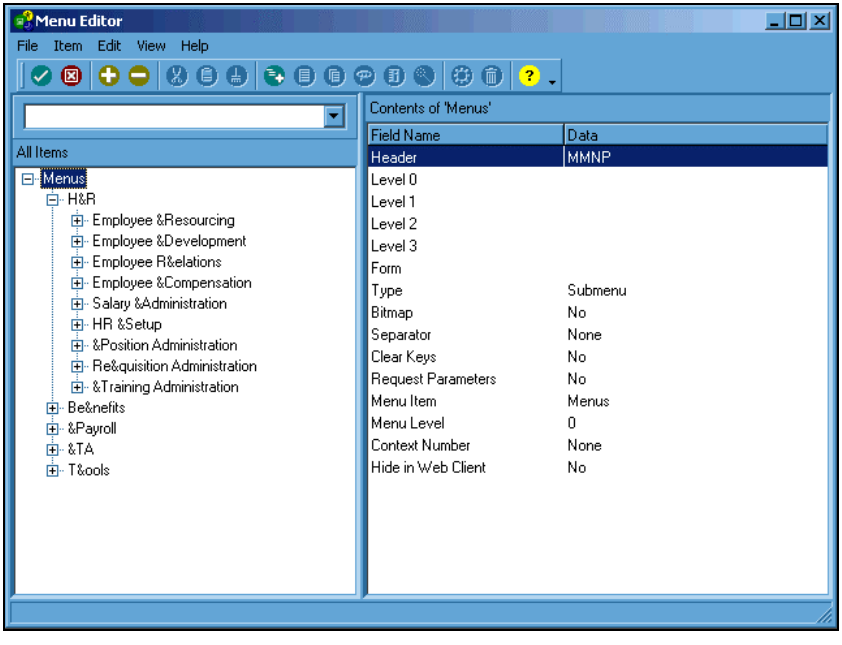
- Function menus (File, Edit, View, Bookmarks, Actions, Go, and Help)
- Application menus (HR, Benefits, Payroll, TA (Time and Attendance), and Tools)

Application menus provide access to the business components and to tools and utilities. You can edit only the application menus. You can not edit the function menus. Changes made to menus are available to all users.

Menu Editor

Using the Menu Editor, you can edit any of the delivered application menus to add an item, show only those items you will use, change the order of items, or replace items.

The Menu Editor looks and works like the Windows Explorer with its tree structure:



Result of menu customization

When you finish editing a menu, both the System Control Repository and the Client Data File on your workstation are updated immediately. In client/server environments, other users will see the menu changes the next time they log on to the system.

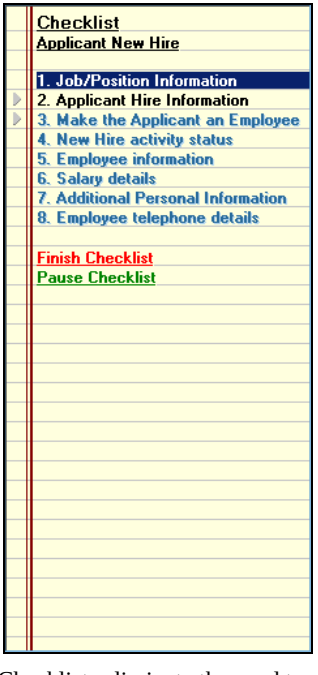
☞ *Refer to* **Maintaining Menus** *(on page 101) for more detailed information on editing your menus.*

Workflow capabilities

Recording and maintaining employee information requires many tasks. You may use several forms in the system to complete these tasks, entering and displaying various employee information. You can use the checklist feature to design business processes that utilize the forms required to record and maintain employee information.

Checklists can link items such as forms, dialogs, report groups, and other checklists to guide users through a process. Each of these items can then be completed consecutively, using the checklist to navigate them. Checklists help users identify the tasks they need to complete, as well as how much they've completed in a process.

For example, a checklist called 'New Hire' is delivered. This checklist contains all the items that need to be completed in order to add a new employee to the system, and optional information you might want to add:



Checklists eliminate the need to navigate to individual items. They also ensure that all the items that are part of a workflow are presented for completion. When you access a checklist, you are presented with a list of items in the sequence in which they should be completed. After they are created, checklists can be modified or removed as needed.

Local and universal checklists

A checklist can be local or universal:

- Local checklists are stored on a user's PC in the Checklist subdirectory. They automatically appear on the user's Bookmark menu and Favorites toolbar.
- Universal checklists are stored in the System Control Repository so all users can access them. They must be added to the menu using the Menu Editor. This process automatically updates the Navigator.

Creating a new checklist

A wizard is delivered to help you maintain and create new checklists. You can also use the Edit Utility (EDIT) to maintain existing checklists.

The wizard gather information and is very intuitive to use. The checklist is created after the wizard is completed.

Creating a decision point dialog

The last option in the wizard (through Advanced Features) is to create links to other checklists. You do this by entering the checklist name. If you enter more than one name, it creates a dialog box listing the checklists the user can select. The dialog then becomes a 'decision point'—the user's entry will indicate the next action the checklist performs. You can place a 'decision point' at the beginning or the end of a checklist process.

☞ *Refer to* **Designing a Business Process** *(on page 51) for more detailed information on checklists and using the checklist wizard to create checklists.*

PART 2

Personalizing Option Lists, Menus, and Checklists

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CHAPTER 3

Maintaining Option Lists

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Introduction

When using option lists to complete a form, you are rarely concerned about the type of option list you are using. In fact, there is no visible difference among the different types of option lists when working with a form. However, when maintaining option lists, you need to be aware of the different types of option lists and how they are maintained. Typically, delivered option lists are modified and new option lists are created during the implementation of the system. Maintenance can be performed at any time.

Tasks

This section explains the following:

- Accessing the Option List Editor
- Adding an item to a universal option list
- Adding an item to an organization-specific option list
- Modifying an item's description
- Modifying an item's status
- Removing an item from an option list
- Displaying an option list

Prerequisites

Before you can maintain option lists, you must have The Solution Series installed and have reviewed the delivered option lists.

You must also have the authority to add, change, and delete option list contents.

Questions answered

The following questions are answered in this section:

1. What are the different types of option lists?
2. What is the Option List Editor (CSUPDT) and what is its purpose?

Option list types

There are three basic types of option lists:

- Universal
- Type 9
- Organization-specific

All of these option list types appear the same to the person using them. Their types are important only from a maintenance point of view.

Universal option lists

Universal option lists are delivered with the system and are populated. These option lists are available to all organizations, including the delivered test organizations. In general, you can add to or remove options from these lists, but you will need to check each option list's documentation to be sure.

Note: To check an option list's documentation, you use the What's This help for a list box.

If you add an option to a calculation option list, you need to add the logic to process the option you add.

The Marital Status option list (HR04), used on the Additional Personal And ID Information form (02-SCR), is a universal option list. As delivered, it contains the following codes and descriptions:

Code	Description
D	Divorced
L	Legally Separated
M	Married
S	Single
W	Spouse Deceased

Universal option lists have five-position names, with a blank in the fifth position. The Marital Status option list is named HR04.

Type 9 option lists

Type 9 option lists are so named because they have a 9 in the fifth position of their names. For example, the Insurance Carrier option list is named BA629.

A set of populated Type 9 option lists is delivered. The options in these lists are available only to the delivered test companies, those whose organization IDs start with the number 9. They are intended to be used for testing purposes only and may not be meaningful to your organization.

For testing purposes, you can add test organization-specific options to the delivered Type 9 option lists, but you must do so using the Edit Utility (EDIT). These new options would then be available only to the test companies.

If you add options to the Type 9 option lists, but do not make them test organization-specific, they are available to all of your live organizations—those whose organization IDs do not start with a 9—found on the Employee Database. This allows you to hide the options that are applicable only to test organizations.

Organization-specific option lists

You can create option lists that are specific to an organization. For example, you may have organizations that each have unique perquisites. The perquisite options would be defined, along with their Organization IDs, making them available only to that particular organization.

To create an organization-specific option list, use the Edit Utility (EDIT). You must:

- Associate each option in the list with an organization
- Verify that there is a 'Y' in the fifth position of the option list's name

Note: Because of the naming convention requiring a 'Y' in the fifth position, these option lists are sometimes referred to as type-Y option lists.

☞ *Refer to the Technical Administration and the Cyborg Scripting Language documentation for information on using the Edit Utility (EDIT).*

Naming conventions for delivered option lists

As a naming convention for delivered option lists, the first two positions of the name reflect the component or solution with which the option list is associated. For example, Human Resource option lists begin with the letters 'HR'. Examples include option lists HR09 (Activity Codes) and HR10 (Employee Status). Salary Administration option lists begin with the letters 'SA', and so forth.

Advanced option list processing

In addition to supplying a list of standard options, option lists can also contain items that have calculation or relational editing logic. Calculation and relational editing logic are written in the Cyborg Scripting Language.

Calculation option lists

When an option list has calculation logic attached to it, it is called a calculation option list. For example, Appraisal Ratings (HR16) is a calculation option list. Logic is embedded for each rating, identifying the maximum position in range attainable by an employee if he or she receives the performance rating specified.

Modification of the calculation logic requires knowledge of the Cyborg Scripting Language.

Relational option lists

When an option list has relational logic associated with it, it is called a relational option list. It contains embedded Cyborg Scripting Language code that relates specific conditions to the values of the option list.

Modification of the relational editing logic requires knowledge of the Cyborg Scripting Language.

Option list documentation

Option list documentation can be viewed online. In addition, the One-Stop Document for each component of the system contains information on the specific option lists used for that component. For example, the Using Salary Administration manual contains an appendix covering each option list used in Salary Administration processing.

Apply the Concept

Based on your understanding of the option list types and naming conventions as explained in this concept, which of these two option lists would contain values that could be used by all organizations, even delivered test organizations—HR04 or HR459?

Option List Editor (CSUPDT)

You can use the Option List Editor (CSUPDT) to maintain existing option lists. You can add a new item to an existing option list, change information about an existing item, or delete an item. To create a new option list or delete an option list, you must use the Edit Utility (EDIT).

☞ *Refer to the Cyborg Scripting Language Programming documentation for details on adding and deleting option lists.*

You can use the Option List Editor (CSUPDT) for the following types of option lists:

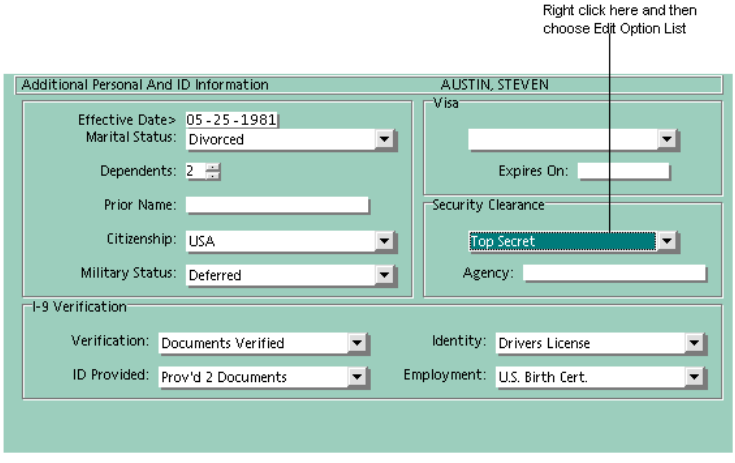
- Universal
- Type 9
- Organization-specific

Universal, type 9, and organization-specific option lists can contain calculation or relational logic. You will always use the Edit Utility (EDIT) to edit an option's calculation or relational logic, or to add documentation. You will use the Option List Editor (CSUPDT) to edit the option list's items.

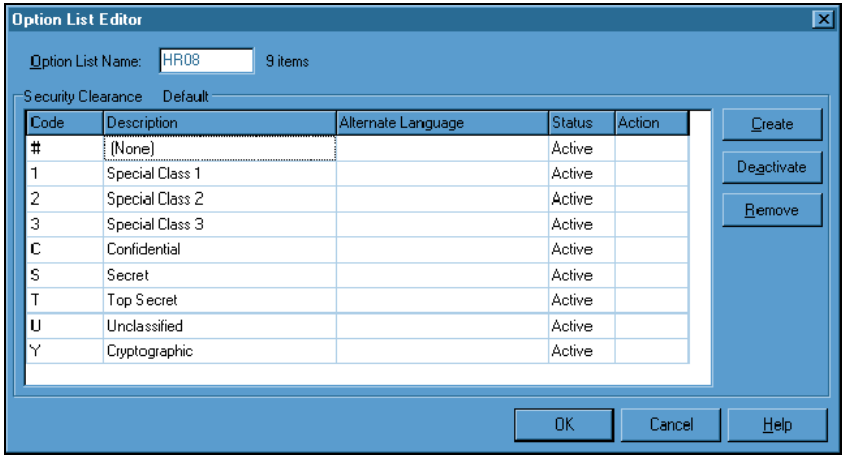
Option List Editor access

You can access the Option List Editor (CSUPDT) from a list box, the Navigator, or from the menus.

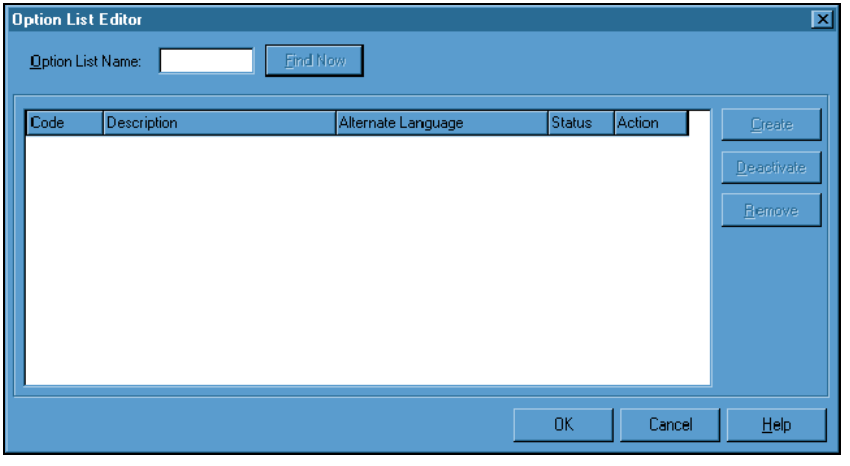
The simplest and quickest way to access the Option List Editor (CSUPDT) is by right-clicking on a list box. The system automatically displays the detailed information for the option list used for that list box. For example, if you access the Option List Editor (CSUPDT) from the Security Clearance list box on the Additional Personal And ID Information form (02-SCR)...



… the resulting display will look like this, showing the options in code order:



If you access the Option List Editor (CSUPDT) from the Navigator or from the menus, you need to supply the name of the option list. Accessed from the Navigator or the menus, the dialog box looks like this:



Note: *If you set the Options dialog to include technical details, the five-position option list name is displayed in the status bar when the pointer is clicked in a list box.*

See also:

- Accessing the Option List Editor from a list box ***(on page 38)***
- Accessing the Option List Editor from the Navigator ***(on page 39)***

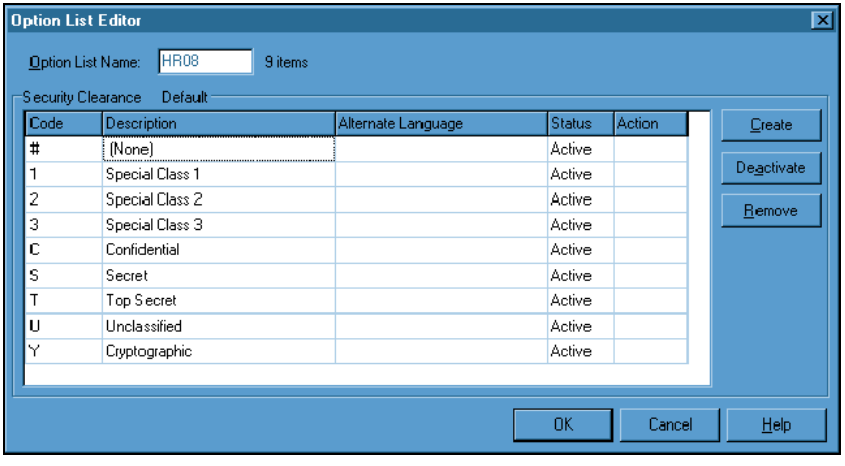
For detailed instructions for accessing the Option List Editor (CSUPDT).

Information displayed in the Option List Editor

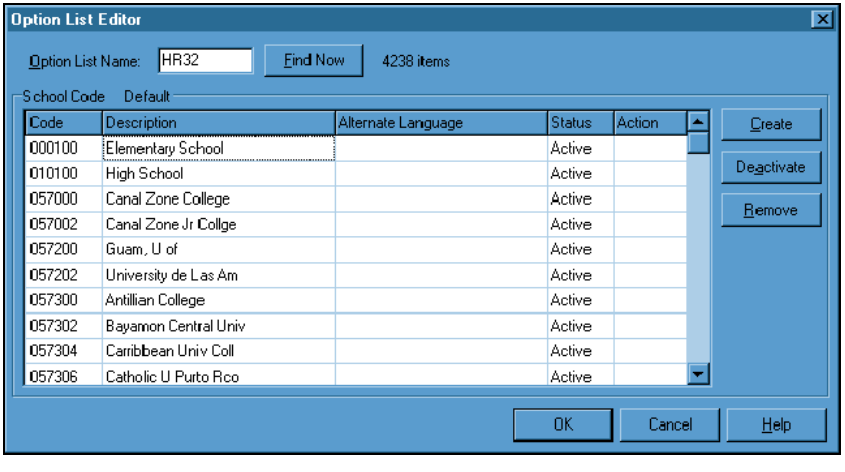
For universal and type 9 option lists, the Option List Editor (CSUPDT) displays the following information:

- Name of the option list
- Number of items in the list
- Title of the option list
- Default (or country label for a variant option list)
- Code (sorted by numeric and then alphabetic values)
- Description—the alphanumeric description of the code
- Alternate Language—if defined, the translation of the description
- Status—Active or Inactive
- Action—filled in by the system when you choose Create or Remove

The following is an example of the Option List Editor (CSUPDT) display for the Security Clearance option list (HR08):

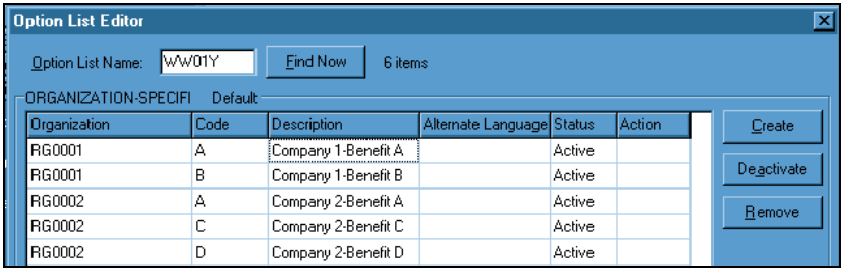


If there are more items than can be shown at once, a vertical scroll bar is displayed, as shown in the following figure of the School Code option list (HR32):

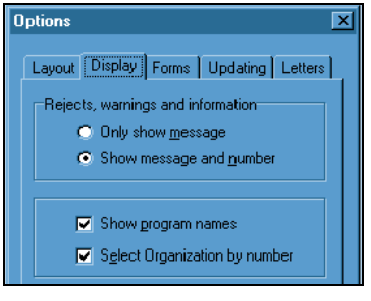


Note: *Type 9 option lists (those with a 9 in the fifth position of the option list name) will only display universal values. Test organization values will not be displayed in the Option List Editor dialog (CSUPDT).*

Information displayed for an organization-specific option list is the same as for universal and type 9 option lists, with the addition of the organization. This is shown in the following example of an organization-specific option list:



To show only the organization number in the Organization column, verify that the 'Select Organization by number' check box is checked on the Display tab of the Options dialog box (accessed through the Change Options task within the User Tools process of the User Tools component of the Navigator). If this box is not checked, both the organization name and number are displayed:



Information required to add an item to an option list

The rules for adding an item to an option list depend on the option list type.

Rules for universal and type 9 option lists

To add an item to a universal or type 9 option list, you must have the following information:

- Code—the value to be stored in a record
- Description—the alphanumeric description of the code that will display in the drop-down list box
- Alternate Language—if you are using more than one language in the system, this is the description in the alternate language

Note: If you want to add a test organization-specific option to a type 9 option list, you must use the Edit Utility (EDIT).

See also:

- Adding an item to a universal option list ***(on page 40)***

For detailed instructions for adding an item to a universal option list.

Rules for organization-specific option lists

Options in an organization-specific option list must always be associated with an organization. This allows a different group of options to be associated with each organization while still using the same option list. When you access a list box tied to an organization-specific option list, its drop-down list contains only those descriptions associated with the organization for the current employee.

Suppose you defined an option list called 1234Y with the following values:

Organization	Code	Description
111111	A	Company 1-Benefit A
111111	B	Company 1-Benefit B
222222	A	Company 2-Benefit A
222222	C	Company 2-Benefit C

Based on these definitions, when you process a form, the drop-down list for option list 1234Y will be as follows:

Current Organization	This list displays
111111	Company 1-Benefit A Company 1-Benefit B
222222	Company 2-Benefit A Company 2-Benefit C

See also:

- Adding an item to an organization-specific option list ***(on page 42)***

For detailed instructions for adding items to an organization-specific option list.

Modification of option list items

Using the Option List Editor (CSUPDT), you can modify the description, alternate language, and status for an item. You can not change the code itself. If you need to modify a code, you must delete the item and then add it again with the correct code.

☞ *Refer to Using the EXPORT utility in the Technical Administration guide to learn how to use the EXPORT utility to obtain a printable version of the entire contents of an option list.*

Status

Option list items have an active or inactive status. Items with an active status can be selected by users.

Using the Option List Editor (CSUPDT), you can change an item's status from active to inactive. An item with an inactive status does not display in the list, and therefore can not be selected. It does, however, remain in any records that already contain it. Inactive items display in a different color than active items.

A caution when removing option list items

Exercise caution when removing items from an option list. If you are not sure that it is still in use, consider changing an item's status to inactive rather than removing it.

If you are certain that no employee records contain the item, you can safely delete it. However, if you delete an item from an option list and the option still exists in employee records, problems can occur. These problems will surface when a form is opened that accesses the option list for an employee whose record still contains the now-invalid code. The drop-down list in the list box using the option list will appear blank, suggesting that it contains no value. You must select an option to replace the code in the employee's record.

Impact of option list maintenance

When you finish editing an option list, both the System Control Repository and the Client Data File on your workstation are updated immediately. You may verify option list contents at any time by using the Option List Display/Report form (CDLIST). Other users will see the option list changes the next time they press Enter.

See also:

■ Modifying an item's description ***(on page 43)***
For detailed instructions for modifying an item's description.

■ Modifying an item's status ***(on page 44)***
For detailed instructions for modifying an item's status.

■ Removing an item from an option list ***(on page 45)***
For detailed instructions for removing an item.

■ Displaying an option list ***(on page 46)***
For detailed instructions for displaying an option list.

Apply the Concept

Based on your understanding of the Option List Editor (CSUPDT) functionality as explained in this concept, indicate which of the following tasks you can complete after accessing it:

Add a new item to an existing option list
Add a new option list
Change information about an existing item
Delete an item
Delete an option list

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Accessing the Option List Editor from a list box 38
Accessing the Option List Editor from the Navigator 39
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Accessing the Option List Editor from a list box

To access the Option List Editor (CSUPDT) from a list box, follow these steps:

1. Position the pointer in the list box

Position the pointer in the list box that uses the option list to be edited.

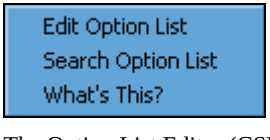
Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Additional Personal And ID Information

2. Right-click

Right-click the list box to display the selection dialog.

3. Choose Edit Option List

Select Edit Option list from the options that are displayed.



The Option List Editor (CSUPDT) displays the detailed information for the requested option list.

See also:

- Option List Editor access ***(on page 31)***

For more information on accessing the Option List Editor (CSUPDT).

Accessing the Option List Editor from the Navigator

To access the Option List Editor (CSUPDT) from the Navigator, follow these steps:

1. Access the Option List Editor (CSUPDT)

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

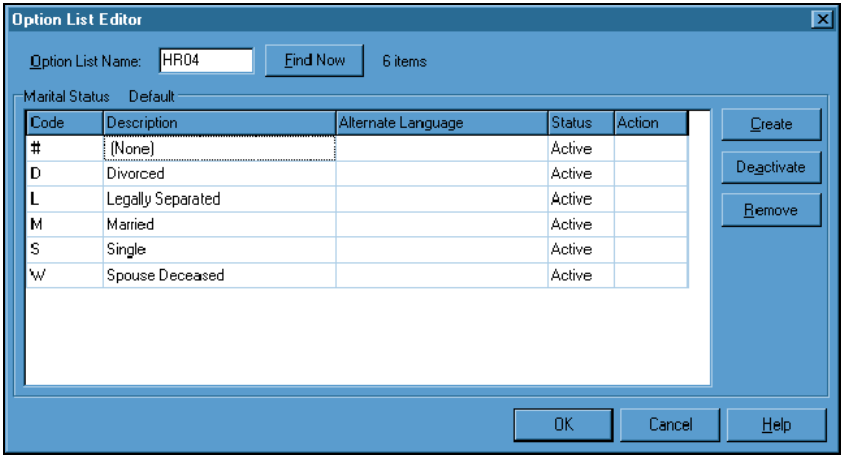
2. Enter the Option List Name

Type the name of the option list to be edited.

3. Click Find Now

The system displays the detailed information for the requested option list.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



See also:

- Option List Editor access ***(on page 31)***

For more information on accessing the Option List Editor (CSUPDT).

Adding an item to a universal option list

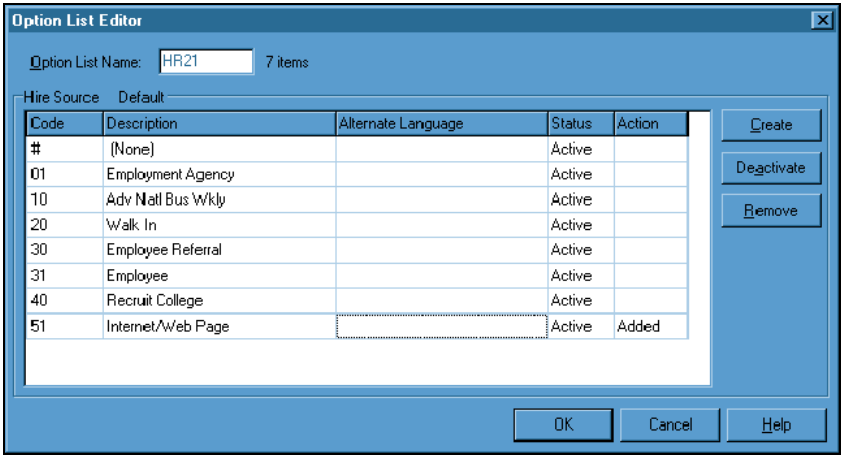
Access this form by making the following selections from the Navigator:

Component:	Employee Resourcing
Process:	Maintain Basic Employee Details
Task:	Telephone/Previous Applicant Info

To add an item to a universal option list, follow these steps:

1. **Access the Option List Editor (CSUPDT)**
   Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).
2. **Click Create**
   A blank line is inserted, allowing you to add the new item.
3. **Enter the Code**
   Type a unique code or value. The length of the code depends on the particular option list with which you are working.
4. **Enter the Description**
   Type a description of up to 20 characters for the code. This is the description that will be displayed in the drop-down list box.
5. **Enter the Alternate Language**
   If an alternate language is being used, type the description for the code in that language.

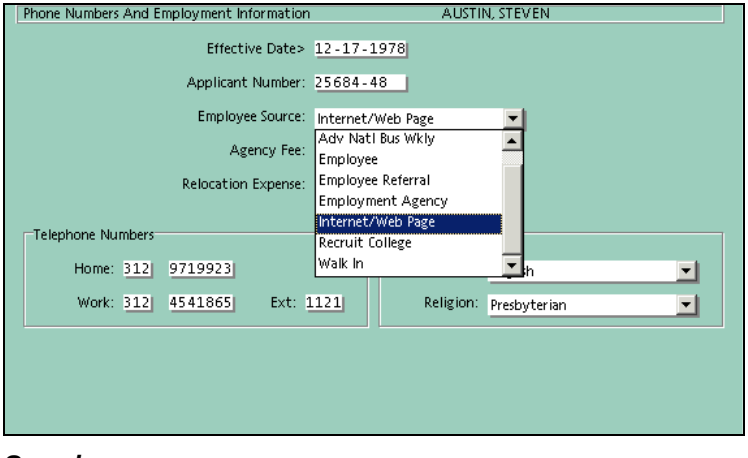
If you completed the previous steps, the resulting dialog should look similar to the example that follows:



6. Click OK or press Enter

No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed

If you completed the previous step, the contents of the option list should look similar to the example that follows:



See also:

- Information required to add an item to an option list ***(on page 35)***

For more information on adding items to an option list

Adding an item to an organization-specific option list

To add an item to an organization-specific option list, follow these steps:

1. Access the Option List Editor (CSUPDT)

Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

The Option List Editor dialog (CSUPDT) is displayed. Only non-test organization values are shown.

2. Click Create

A blank line is inserted, allowing you to add the new item. The organization number defaults to the organization that is displayed on the Status bar.

3. Enter the Code

Type a unique code or value. This value, together with the organization number, will be stored in the database.

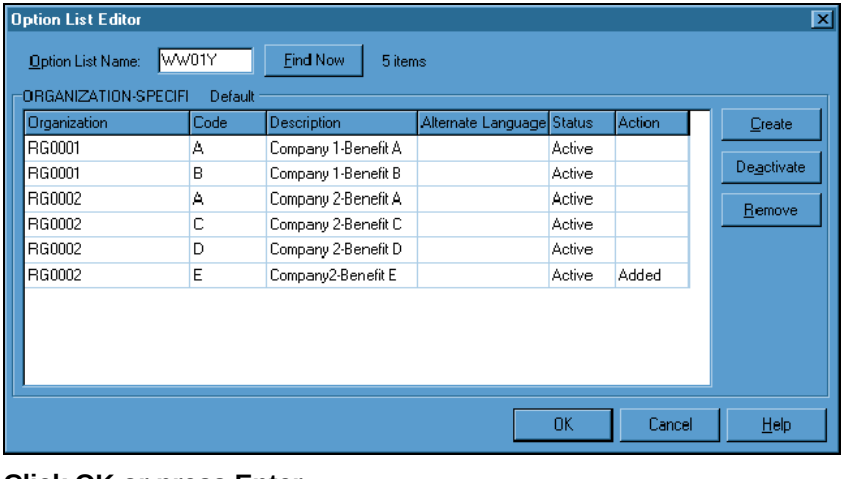
4. Enter the Description

Type a description of up to 20 characters for the code. This is the description that will be displayed in the drop-down list for the list box.

5. Enter the Alternate Language

If an alternate language is being used, type the description for the code in that language.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



6. Click OK or press Enter

No items are added to the option list until you click OK. When you click OK, the additions are made immediately. No confirmation message is displayed.

See also

■ Information required to add an item to an option list ***(on page 35)***

For more information on adding items to an option list

Modifying an item's description

To modify an item's description, follow these steps:

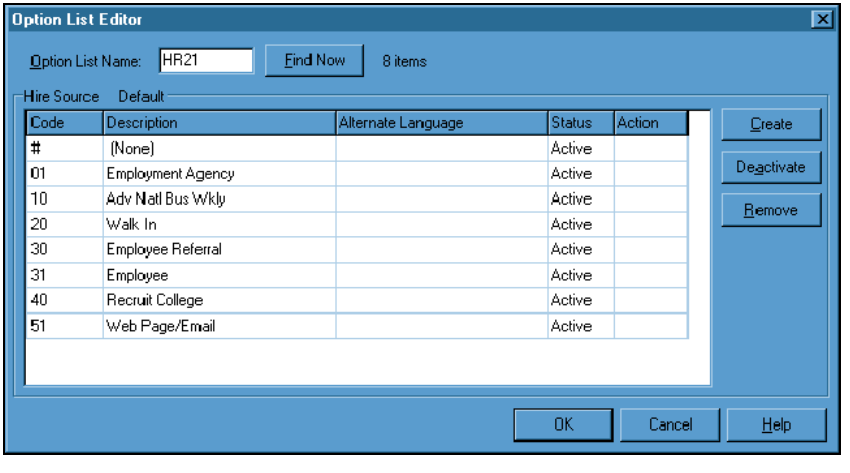
1. Access the Option List Editor (CSUPDT)

Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

2. Modify the description

To change a description, double-click on its text box and then type over the information displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



3. Click OK or press Enter

No changes are made to the option list until you click OK. When you click OK, the changes are made immediately. No confirmation message is displayed.

See also:

■ Modification of option list items ***(on page 36)***

For more information on modifying option lists.

Modifying an item's status

To modify an item's status, follow these steps:

1. Access the Option List Editor (CSUPDT)

Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

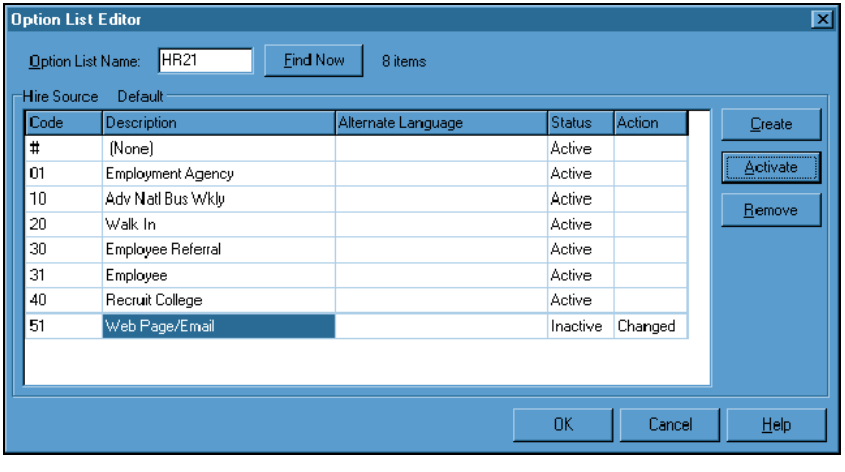
2. Position the pointer on the line of the item to be modified

Click on the line for the item that is to be changed. Note that you can not position the pointer in the Code, Status, or Action text box.

3. Click Deactivate or Activate

Depending on the item's current status, either the Deactivate or Activate button is displayed. If the item's current status is Active, click Deactivate to change the status to Inactive. If the item's current status is Inactive, click Activate to change its status to Active.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click OK or press Enter

The changes are made immediately. No confirmation message is displayed.

See also

- Modification of option list items ***(on page 36)***

For more information on modifying option lists.

Removing an item from an option list

To remove an item from an option list, follow these steps:

1. Access the Option List Editor (CSUPDT)

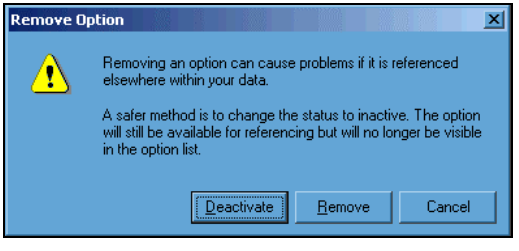
Access the Option List Editor (CSUPDT) from a ***list box*** (see "Accessing the Option List Editor from a list box" on page 38) or the ***Navigator*** (see "Accessing the Option List Editor from the Navigator" on page 39).

2. Position the pointer on the line of the item to be removed

Click on the line for the item that is to be removed. You may not position the pointer in the Code, Status, or Action text box.

3. Click Remove

Click Remove in the Option List Editor dialog (CSUPDT). After you click Remove, the system displays a Remove Option warning message dialog, asking you to confirm the deletion.



4. Click Remove

If you want to remove the item, click Remove in the Remove Option dialog. The item is not removed yet. Its action changes to 'Removed'.

If you have started the process of removing an option list item and you change your mind after clicking Remove, you may reverse the action by clicking on the Reinstate button that is displayed on the Option List Editor dialog (CSUPDT).

5. Click OK

Confirm the deletion by clicking OK. The item is removed from the option list.

See also:

- Modification of option list items ***(on page 36)***

For more information on removing option list items.

Displaying an option list

To display an option list, follow these steps:

1. Access the Option List Display/Report form (CDLIST)

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

Component: Development Tools
Process: Option Lists
Task: Display

2. Enter the Option List name

Type the exact name of the option list. This entry is case-sensitive. Use '=' as a wildcard.

To display all option lists alphabetically by name, type '=' in all positions of this text box. To display only the name and title of all option lists, type '=' in all positions of this text box and 'N' in the remaining text boxes.

3. Enter a Code values preference

If you want the code values to be displayed, leave this text box blank (the default is 'Y') or type 'Y'. If you do not want code values to be displayed, type 'N'.

4. Enter a Documentation preference

If you want the documentation displayed, type 'Y'. Otherwise, leave this text box blank.

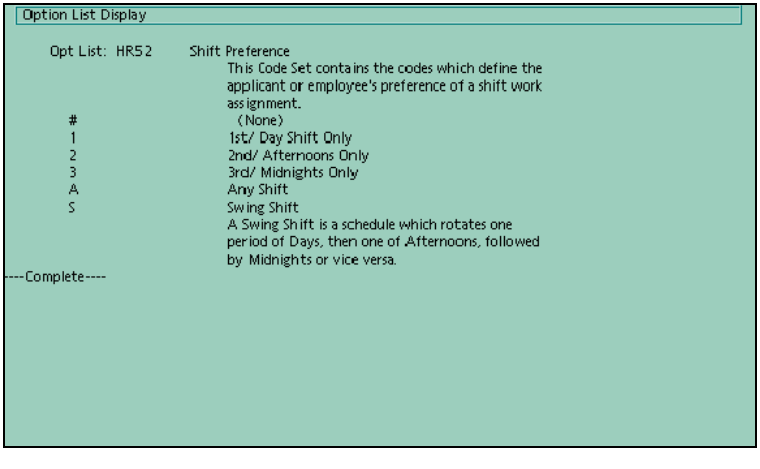
5. Enter a Calculations preference

If you want the calculation used to be displayed, type 'Y'. Otherwise, leave this text box blank.

6. Press Enter

Press Enter to generate and display the requested information.

If you completed the previous steps, the resulting form should look similar to the example that follows:



See also:

■ Modification of option list items ***(on page 36)***

For information on displaying option lists.

Extended Practice

Your company has purchased laptop computers for your consulting staff, and you have been asked to add this item to the Company Property option list (HR24). Using the Option List Editor, add code 'P1' to option list HR24 and give it a description of 'Laptop Computer'.

After the new entry has been made, access the Company Personal Property form (22-SCR) for Jerry Jones, employee 1111 in Organization 999999, and record his newly assigned laptop computer. Access this form from the Navigator by making the following selections:

Component: Employee Resourcing
Process: Maintain Additional Employee Details
Task: Company Property

Review of Questions Answered

1. What are the different types of option lists?

2. What is the Option List Editor (CSUPDT) and what is its purpose?

CHAPTER 4

Designing a Business Process

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Introduction

Recording and maintaining employee information requires many tasks. You may use several forms to complete these tasks, entering and displaying various employee information. This section describes how you use checklist feature to design business processes that utilize the forms required to record and maintain employee information.

Tasks

The following tasks are discussed in this section:

- Creating a checklist
- Modifying a checklist
- Removing a checklist

Prerequisites

Before you can begin designing a business process using a checklist, you must be signed on to The Solution Series and have the authority to create checklists.

Questions answered

The following questions are answered in this section:

1. What is a checklist?
2. What are the differences between a personal checklist and a universal checklist?
3. What tool do you use to create a checklist?
4. What tool do you use to delete a checklist?
5. What tool do you use to control checklists?

Business processes

Your organization follows various processes to record, maintain, and manage employee information. When a new employee is hired, for example, your organization follows several business processes that ensure the employee's personal, benefit, and payroll information is entered in a timely manner. These processes could be documented in a procedure manual or summary form.

The Solution Series uses a tool, called a checklist, which you can use to design, create, and maintain business processes that use the forms required to maintain employee information. When used, checklists ensure that all the items that are part of a business process are presented and tracked for completion.

See also:

- Creating a personal checklist ***(on page 71)***
- Creating a universal checklist ***(on page 81)***

For detailed directions on creating a checklist.

Checklists

Checklists can link forms, dialogs, report groups, and other checklists within the system to guide you through a business process. Checklists help you identify the steps you need to complete and track your progress. Checklists can also be used to trigger emails and letters.

You can add a report group to a user-defined checklist, so that launching the report is part of a business task accomplished online. Report groups that are added to a user-defined checklist must already exist on the menu.

If you have not implemented checklists yet, you may want to consider creating some to complement the Interactive Workforce process. For example, you could create a new hire checklist that includes all the core forms you need to complete before you give the new employee access to Interactive Workforce

There are two types of checklists:

- Personal checklists
- Universal checklists

Personal checklists

Personal checklists are created by you; only you have access to them. Personal checklists are stored on your computer with an LCL filename extension.

See also:

- Creating a personal checklist ***(on page 71)***

For detailed directions on creating a personal checklist.

Universal checklists

Universal checklists are available to everyone. They are stored in the System Control Repository. The system assigns all universal checklists a number as they are created. They are identified in the System Control Repository with a record ID beginning with MML and followed by a six-digit number. The number indicates who created the checklist. Numbers 000000 through 499999 identify checklists created by anyone in your organization, and numbers 500000 through 999999 identify checklists delivered with The Solution Series.

Checklists are assigned numbers in descending order. Whenever a checklist is created, the system takes the last assigned number, subtracts one and assigns the next number to that checklist.

A feature unique to universal checklists is that they can be linked to up to six other checklists. For example, after completing the checklist that records basic employee information, the checklist could present the option to access another checklist that records benefits, salary, or Position Administration information.

See also:

- Creating a universal checklist ***(on page 81)***

For detailed directions on creating a universal checklist.

Accessing a checklist

Checklists can be added to and accessed from the Bookmarks menu, Favorites toolbar, or the menus and Navigator. When you create a personal checklist, it is automatically added to your Bookmarks menu and Favorites toolbar. Universal checklists must be added manually to the menus and Navigator.

User profile considerations

You must have the proper authorization to create and modify checklists. Depending on your user profile authorization, you will be able to create and modify one of the following:

- Only personal checklists
- Only universal checklists
- Both personal and universal checklists
- No checklists

Note: Contact your Security Officer regarding your user profile.

Design considerations

Before you use the system to create a checklist, you should be aware of the capabilities and options that can affect the way checklists work.

Consider the following options and capabilities when designing checklists:

- Decision dialogs
- Special new hire processing
- Selecting the same effective date
- Identify items that are mandatory
- Identify forms that can not be re-entered
- Assign dependencies

The first three options listed are at the checklist level. The last three apply to one or more items within a checklist.

Decision dialogs

You can link a universal checklist to up to six other checklists through decision dialogs. Decision dialogs are displayed on completion of a checklist. You can create a checklist that uses forms to complete one business process and then displays the option to link to other checklists that complete other business processes.

You can also create a checklist that uses no forms but offers the option to link to other checklists. Designing a checklist in this manner allows you to display a decision dialog before using any form dialogs.

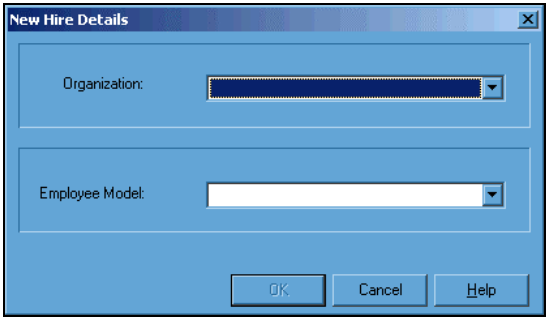
Using decision dialogs allows you to modularize your checklists so that common steps can be grouped in one checklist and unique steps in separate checklists. For example, if your organization has both union and non-union employees, you may have some steps that are common to both groups and others that are unique to each group. You can group the common steps together in one checklist, and link to two other checklists; one that is unique to union employees, and one that is unique to non-union employees.

New Hire checklist

You use templates called logical employee models when processing new hires. Each logical employee model contains default information to make the process more efficient. Your organization can have many logical employee models. When you process a new hire, you must identify the organization and which logical employee model is to be used.

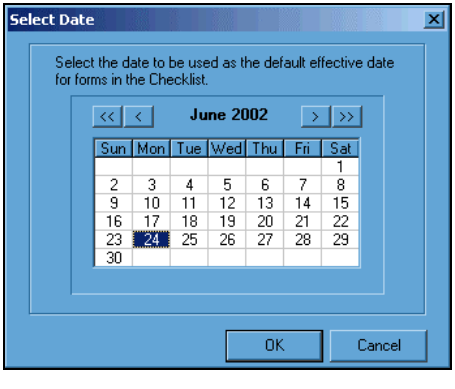
If you create a checklist that processes new hire information, you must identify it as such. Doing so causes special processing to occur that allows the person using the checklist to select the organization and logical employee model to use with the new hire.

When you identify a checklist as a new hire checklist, a New Hire Details dialog box similar to the following displays first when the checklist is accessed.



Same Effective Date

You can elect to use the same effective date for all items in a checklist. When you select this option, the Select Date dialog box will be displayed with the current date already selected when the checklist is accessed. The date that is selected from this dialog box will be used to populate the effective date for every item in the checklist.



Mandatory items

Some steps in your business process may be mandatory, others optional. You can select those forms that are mandatory. When the checklist is accessed, mandatory steps are identified with an arrow and must be completed before the checklist can be successfully finished.

Until the mandatory steps are complete, the Finish Checklist control will be displayed in red. The Finish Checklist control is displayed in green when all mandatory steps have been completed.

If the Finish Checklist control is available, the checklist can be stopped even though all mandatory items have not been completed. Stopping a checklist before mandatory items have been completed, however, cancels all further processing. A special option can be set that makes the Finish Checklist control unavailable until all mandatory items have been completed.

Forms that can not be re-entered

If a form in a checklist creates a record or sends a message, you may not want that form to be accessed more than once. The Employee Transfer form (ET-SCR), for example, is used to transfer records from one organization to another and would not be re-entered.

When you design a checklist, you can select which forms can not be re-entered. Selecting forms that can not be re-entered prevents the person using the checklist from accessing the form again after the step that uses that form has been completed.

Dependencies

Some steps in your checklist may be dependent upon the completion of another step. If this is the case, you can identify these relationships when the checklist is created. Dependent steps can not be accessed until the step on which they are dependent has been completed.

Example checklist

An example checklist called 'Hire a New Employee' is delivered. Although it displays as one checklist on the Navigator and menus, it is actually five universal checklists working together. These checklists use many of the options available to you when you create your checklists. Consider looking at how these are constructed and how they work before creating your own. They can give you an idea of how checklists work in general and how the options you select affect how checklists work.

The delivered checklists can be viewed using the Checklist wizard.

The Checklist wizard

The Checklist wizard is the tool you use to create checklists. The Checklist wizard walks you through the tasks and options necessary to create a checklist step-by-step.

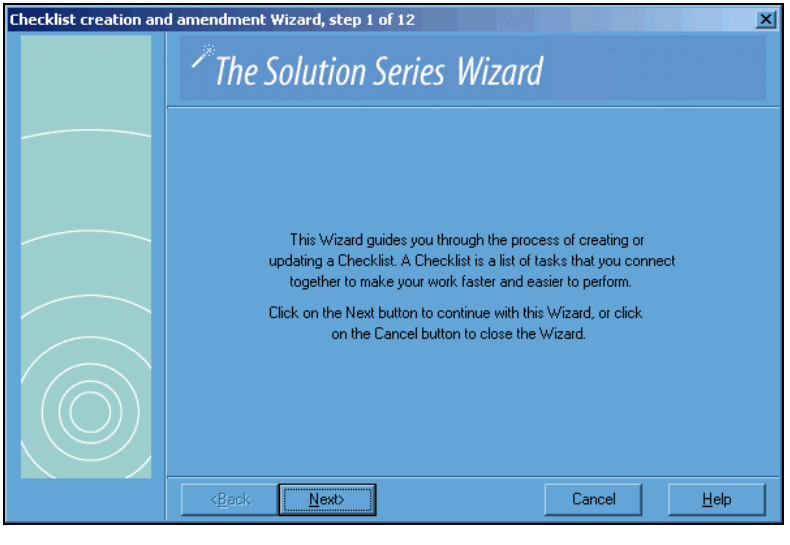
Creating a checklist can take up to 12 steps. The following is a summary of each step:

1. Welcome
2. Identify checklist type
3. Name the checklist
4. Add items to the checklist and identify their sequence
5. Indicate if it is a new hire checklist and if the same effective date should be applied to every item
6. Change the description of the items (if desired)
7. Select items that are mandatory
8. Finish the checklist or select additional advanced features (Steps 9–11)
9. Assign items that can not be re-entered
10. Assign dependencies
11. Build links to other checklists (universal checklists only)
12. Finish

The Checklist wizard will guide you through each step, one-by-one. It may skip one or more steps, depending on your user profile, the type of checklist you are creating, and the options you select. For example, if your user profile only allows you to create personal checklists, the wizard will skip Step 2.

As you progress through the steps of creating a checklist, the Checklist wizard indicates which step you are on in its title bar.

The following example shows the first step of the Checklist wizard:



Note: When you create a universal checklist, the number assigned to the checklist will also display in the title bar.

See also:

- Creating a personal checklist ***(on page 71)***
- Creating a universal checklist ***(on page 81)***

For detailed directions on using the Checklist wizard to create a checklist.

- Modifying a personal checklist ***(on page 87)***
- Modifying a universal checklist ***(on page 92)***

For detailed directions on using the Checklist wizard to modify a checklist.

Navigating the Checklist wizard

There are three buttons that you can use to navigate through the Checklist wizard:

- Back—moves you backwards one step
- Next—moves you forward one step
- Cancel—exits the wizard

When appropriate, the Next button is replaced by a Finish button. The checklist is not created until you click Finish. Until you do so, you will be able to use the Back and Next buttons to move back and forth between the steps and make changes before the checklist is actually created.

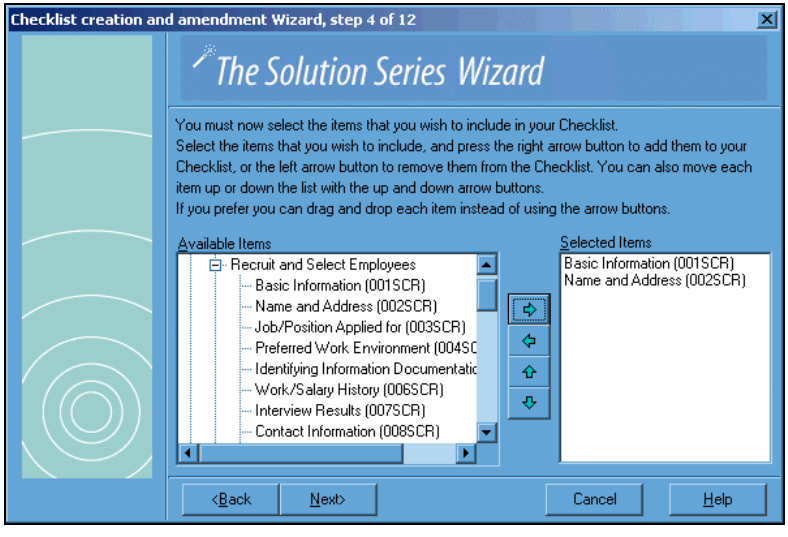
Naming the checklist

When you create a checklist, you name it in Step 3 of 12 of the Checklist wizard. Use a name of up to 30 characters. The name you use will be shown on the Bookmarks menu and Favorites toolbar for personal checklists and on menus and the Navigator for universal checklists, if added.

Selecting and renaming checklist items

You select items for your checklist in Step 4 of 12 of the Checklist wizard. You can have up to 999 items in a single checklist.

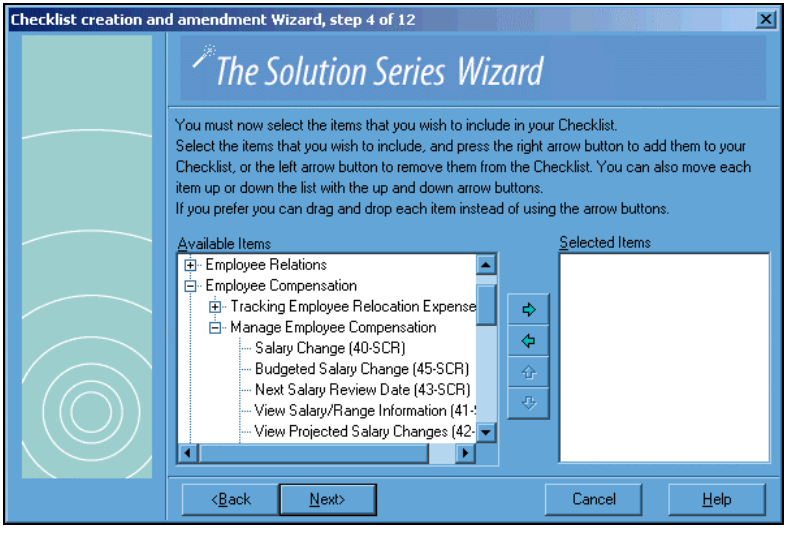
The following example shows Step 4 of the Checklist wizard.



Navigation in the Available Items pane

You select items or forms from the Available Items pane. Forms are at the lowest level of the tree in the pane. If you are familiar with using the Windows Explorer, navigating through the Available Items pane will be familiar to you. If an item has forms below it that are not displayed, it will have a '+' next to it. When an item is expanded, its '+' sign is changed to a '-' sign. Forms are shown without either symbol.

In the following example, 'Employee Compensation' and 'Manage Employee Compensation' have been expanded. The forms under 'Manage Employee Compensation' can be added to a checklist. Items such as 'Employee Relations' and 'Tracking Employee Relocation Expenses' have sub-items that are not displayed. In other words, they are 'collapsed'.



The following navigation and display options are available.

- To expand a particular item, click the '+' sign next to the item.
- To collapse a particular item and its sub-items, click the '-' sign next to the parent item.

Adding, moving, and deleting checklist items

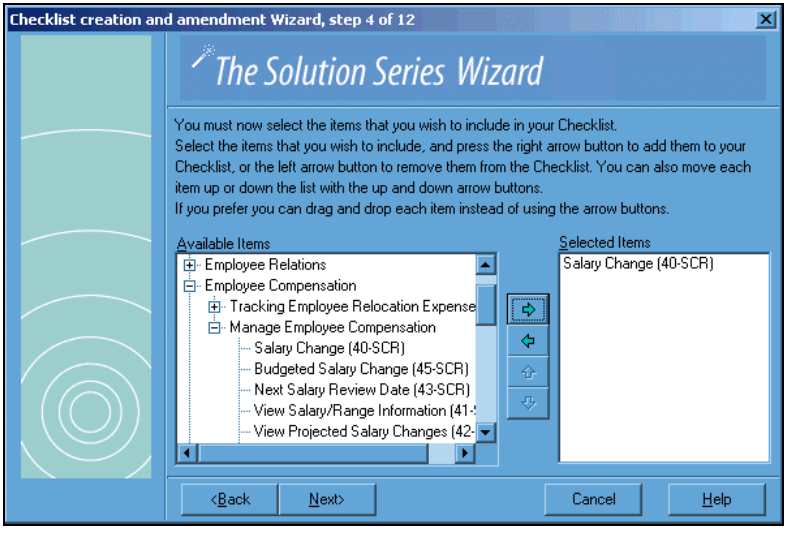
There are two ways that you can add, move, or delete checklist items:

- Drag them
- Use the arrow buttons

You can add items by dragging them from the Available Items pane to the Selected Items pane. If you want to delete an item that you have added, drag the item back to the Available Items pane. After you have added several items, you can change the order by dragging an item before or after other items within the Selected Items pane.

The items in the Available items pane are the same as those displayed on your Navigator. You can select any form listed.

The example below shows the Salary Change form (40-SCR) has been added to the Selected Items pane.



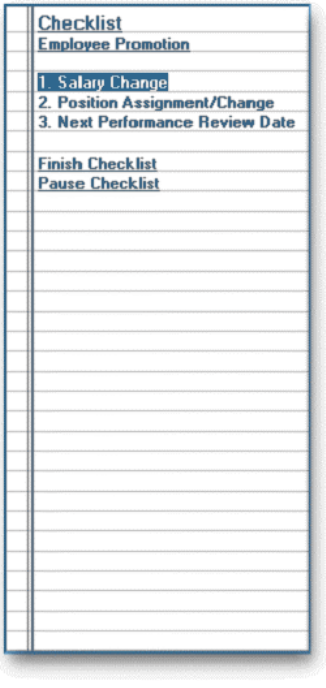
If you do not want to drag items, you can use the arrow keys to add, move, and delete items. To use any of the arrow keys, you must first select an item. To add an item, you would select it in the Available Items pane, and then click the right arrow button. After an item is in the Selected Items pane, you can select it and use the left arrow button to delete it or the up and down arrow buttons to move it before or after other items.

Note: *The order in which items display in the Selected Items pane determines the sequence in which they are listed when the checklist is accessed.*

Changing the description of an item

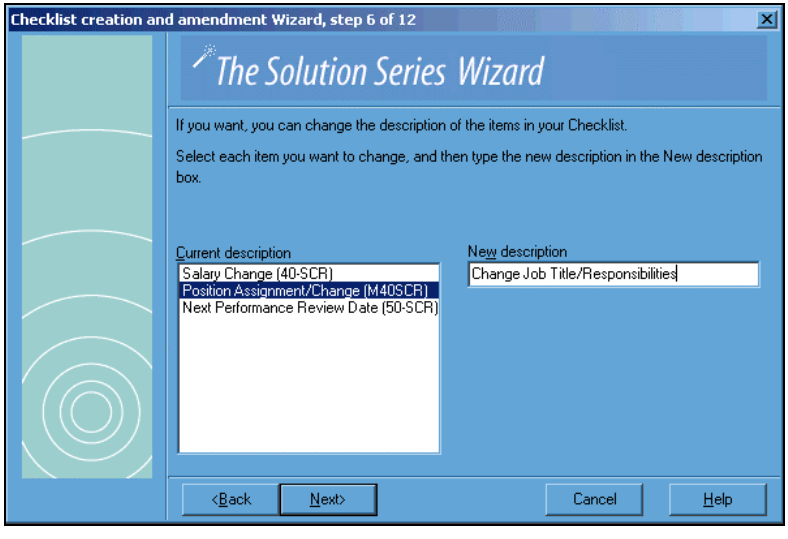
The forms that you select in Step 4 of 12 of the Checklist wizard display as steps in the Navigator when the checklist is accessed. By default, the description you see when you select an item will be shown in the checklist. The description also displays as a ToolTip for the previous and next buttons on the Checklist toolbar.

The following example shows the default descriptions of items selected for a checklist used to record employee promotion information.



In Step 6 of 12 of the Checklist wizard, you have the option of changing the default description of any item in the checklist. You can enter a description of up to 40 characters.

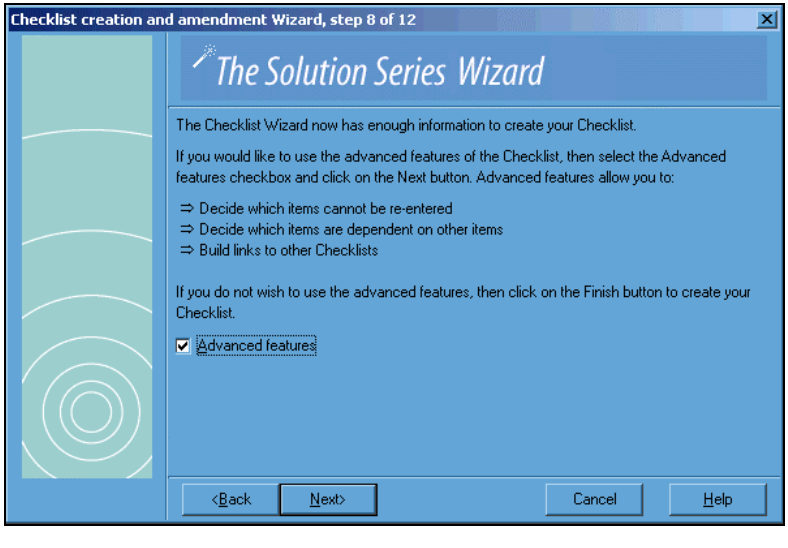
The second item in the example below, 'Position Assignment/Change', is being renamed to 'Change Job Title/Responsibilities':



Advanced features

In Step 8 of 12 of the Checklist wizard, you are given the option to finish the checklist you are creating or go on to select advanced features. Advanced features include selecting items that can not be re-entered, assigning dependencies, and for universal checklists, building links to other checklists.

There follows an example of Step 8 of 12 of the Checklist wizard:

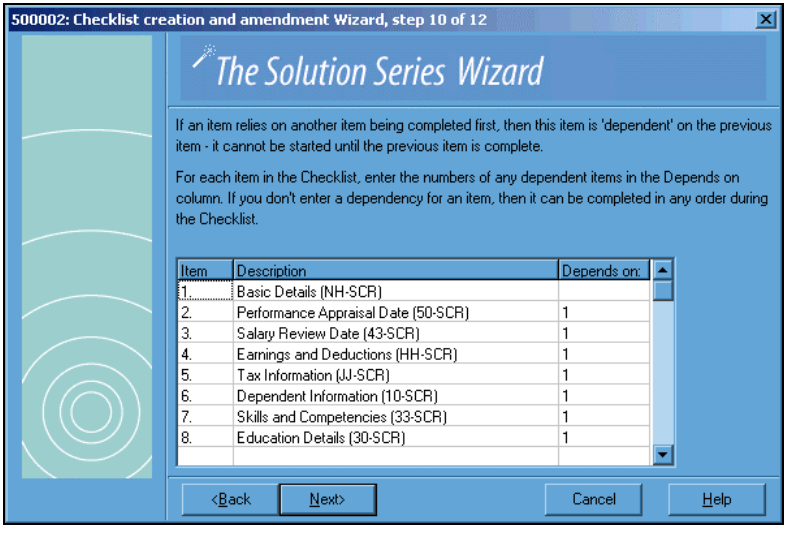


By default, 'Advanced features' is not checked and the 'Finish' button is displayed. If you want to use one or more of the advanced features, click Advanced features. When this check box is checked, the 'Finish' button is replaced by a 'Next' button, allowing you to continue on to the advanced features.

Assigning dependencies

In Step 10 of 12 of the Checklist wizard, you can assign dependencies. Dependencies identify steps that must be completed before others can be accessed. You do so by entering the number of the step that must be completed in the Depends On column.

The following example shows that Steps 2 through 8 of the delivered 'New Hire' checklist are dependent on the completion of Step 1:



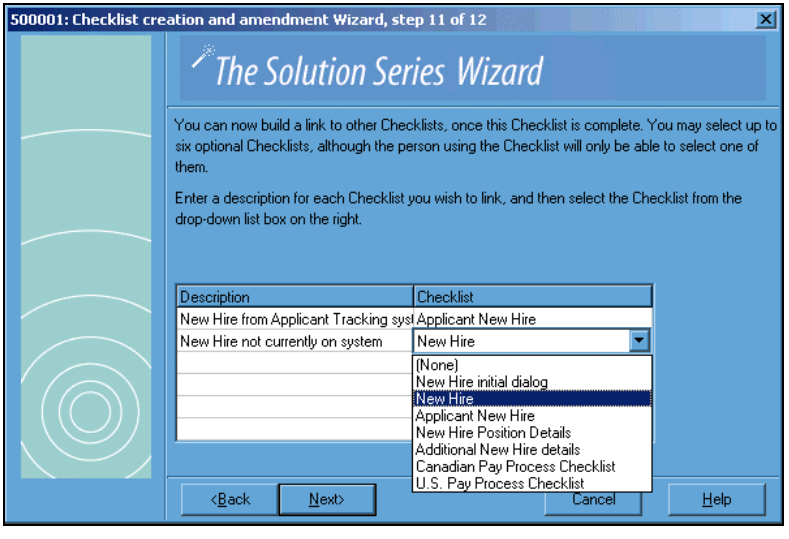
Links to other universal checklists

In Step 11 of 12 of the Checklist wizard, you can build links to other universal checklists. You can build links to up to six other universal checklists. When the checklist that you are creating is accessed and completed, the links to other universal checklists that you identify in this step are presented in a dialog of option buttons.

Note: *An option of 'None' is automatically included along with the other links that you specify. This gives the user of the checklist the option of completing the checklist without linking to another checklist.*

To create a link, you must enter a description and select the universal checklist from an option list. The universal checklist that you want to link to must already be created. The description that you enter displays in the dialog of options when the checklist is accessed and completed.

The following example shows the delivered New Hire initial dialog checklist linked to the Applicant New Hire and New Hire checklists.



Canceling the Checklist wizard

You can cancel the Checklist wizard at any time. When you do, you will lose any additions or changes that you have made in any of the steps. A warning message will remind you that your changes will be lost.

See also:

- Creating a personal checklist ***(on page 71)***
- Creating a universal checklist ***(on page 81)***

For detailed directions on creating a checklist.

Checklist maintenance

As your business processes change, you will need to maintain the checklists that address those processes. You can modify and delete checklists.

Checklist modification

Modifying a checklist is similar to creating one. To modify a checklist, you use the Checklist wizard. You will be guided through steps that are similar to those used to create a checklist.

When you modify a personal checklist, you will be presented with the option to add the checklist to the Favorites toolbar. If the checklist is already on the Favorites toolbar and you select this option, the checklist will be added again.

See also:

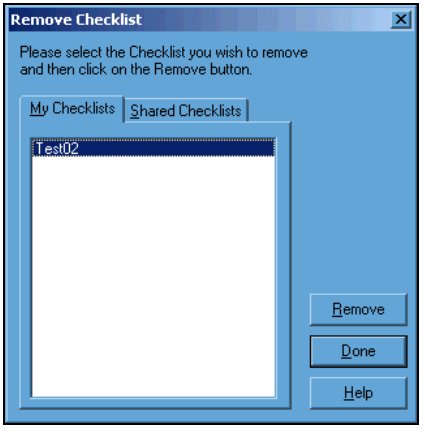
- Modifying a personal checklist ***(on page 87)***
- Modifying a universal checklist ***(on page 92)***

For detailed directions on using the Checklist wizard to modify a checklist.

Checklist removal

When you no longer need a checklist, you can remove it.

You use the Remove Checklist dialog box to remove a checklist. As shown below, there are two tabs on the Remove Checklist dialog box. Personal checklists are listed on the My Checklists tab and universal checklists on the Shared Checklists tab.



Removing a checklist does not automatically delete the checklist entry from the Bookmarks menu, Favorites toolbar, or custom menus. To remove a checklist entry from these parts of the system, you must manually delete it.

See also:

- Removing a personal checklist ***(on page 96)***
- Removing a universal checklist ***(on page 97)***

For detailed directions on removing a checklist.

☞ *Refer to* **Maintaining Menus** *(on page 101) for information on deleting a checklist from the menus or navigator.*

Checklists and communication events

As part of your business process, you may want to automate communication that should take place within your organization when checklists are used. For example, if you use a checklist to create the forms required for a new hire, you might want to automatically generate a letter welcoming a new employee to the company when the checklist has been completed. To accomplish this, after you have created a checklist, you would create a communication event for that checklist.

A communication event can be in the form of a letter or an email. Using the Communication Event Manager, you can set up a letter or email to be automatically generated when any of the following occur:

- A checklist is finished and all of the mandatory steps have been completed
- A checklist is finished and all of the mandatory steps have not been completed
- A checklist is paused

Controlling checklists using Edit

Most checklist options can be set using the Checklist wizard. There are, however, several options that can only be set using the Edit Utility (EDIT):

- The name of the Cyborg Scripting Language program to execute on finish
- Suppressing the summary dialog
- Disabling the Finish Checklist control until all mandatory items have been completed
- Clearing all forms the first time they are presented

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Creating a personal checklist....71
Creating a universal checklist....81
Modifying a personal checklist....87
Modifying a universal checklist....92
Removing a personal checklist....96
Removing a universal checklist....97

Creating a personal checklist

There are two types of checklists—personal and universal.

Note: *To create a personal or universal checklist, you must have the proper authority. If you do not have the authority to create checklists, the system will direct you to see your administrator to change your user profile.*

To create a universal checklist, follow the steps in ***Creating a universal checklist*** (on page 81).

To create a personal checklist, follow these steps.

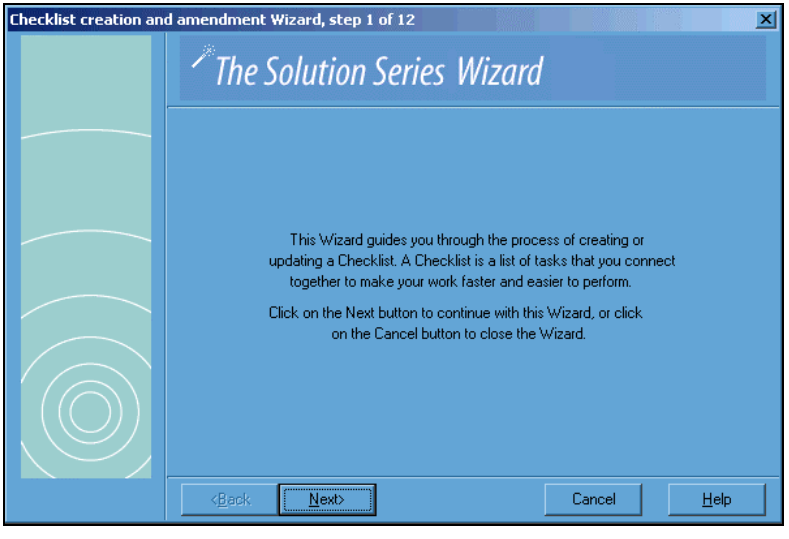
Note: *To create a personal checklist, you will use the Checklist wizard. Depending on your user profile and the options you select, the wizard may skip one or more steps.*

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Create/Modify a Checklist

If you completed the previous step, the resulting dialog should look similar to the example that follows:



Welcome (1 of 12)

2. Click Next

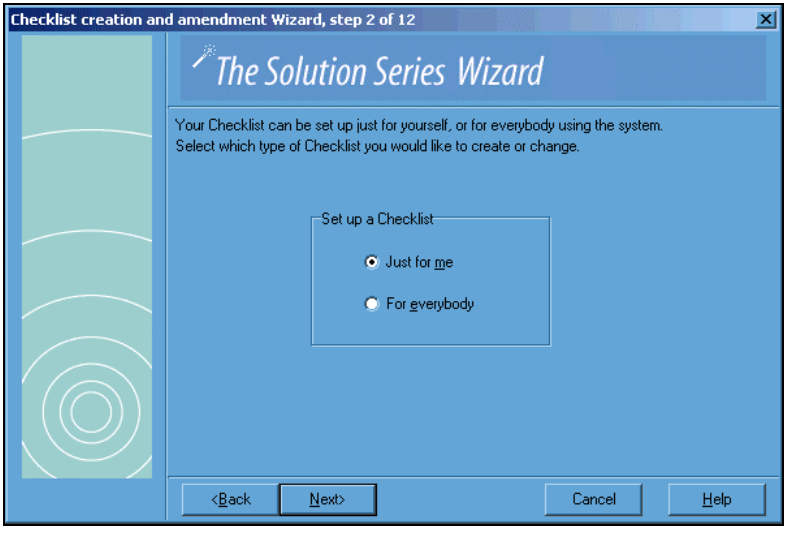
Click Next to continue creating a checklist.

Checklist type (2 of 12)

3. Select 'Just for me'

Select 'Just for me' to create a personal checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue creating a checklist.

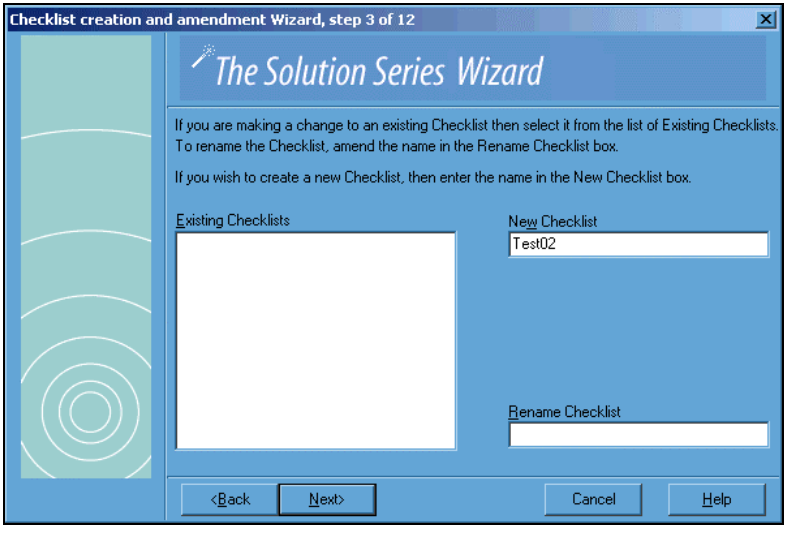
Checklist name (3 of 12)

5. Position the pointer in the New Checklist text box

The insertion pointer displays in the New Checklist text box.

6. Enter the checklist name

Enter a name of up to 30 characters for the checklist.



7. Click Next

Click Next to continue creating a checklist.

Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

Fully expand the tree view in the Available Items pane.

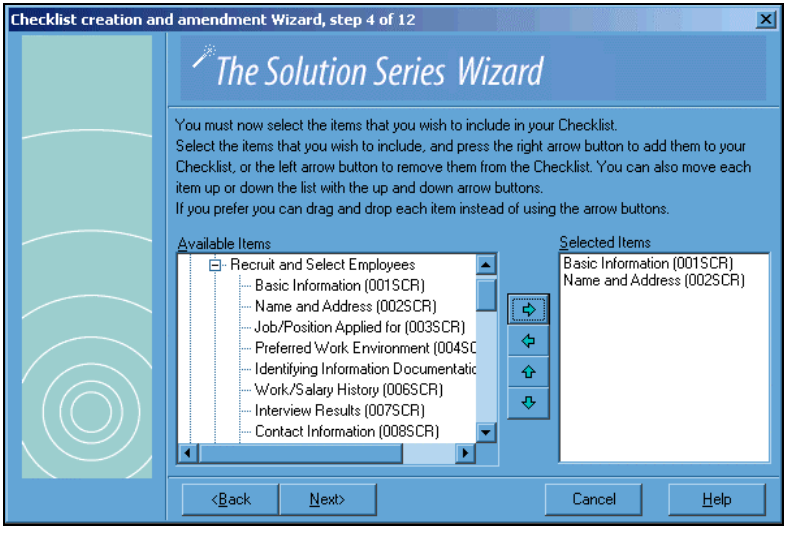
To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item that you have added, drag the item from the Selected Items pane back to the Available Items pane.

The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

The item is added to the Selected Items pane. Repeat this step to add more items to your checklist.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



9. Click Next

Click Next to continue creating a checklist.

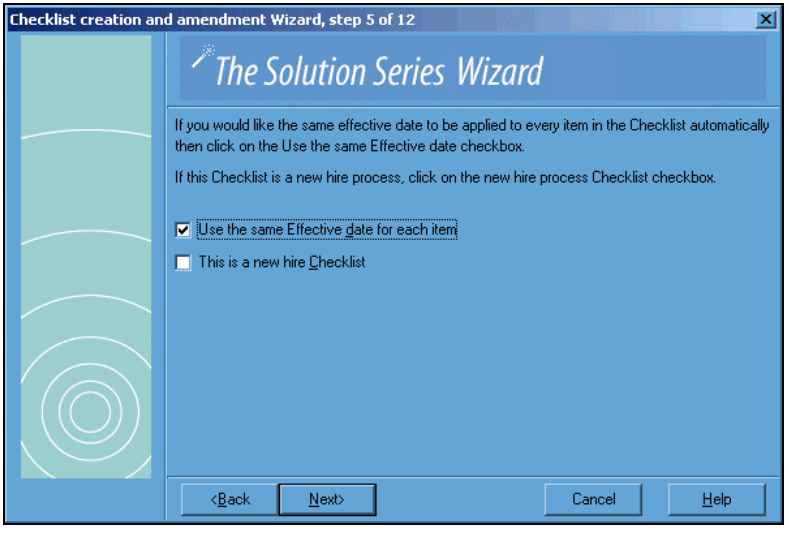
Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.



12. Click Next

Click Next to continue creating a checklist.

Item descriptions (6 of 12)

13. Select an item to change

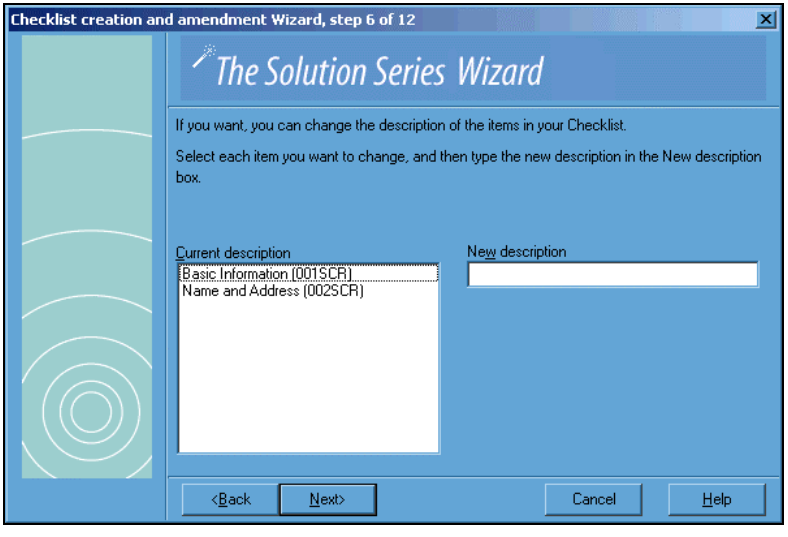
If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

14. Enter a New description

Enter a new description of up to 40 characters.

Repeat Steps 13 and 14 to change any other description.



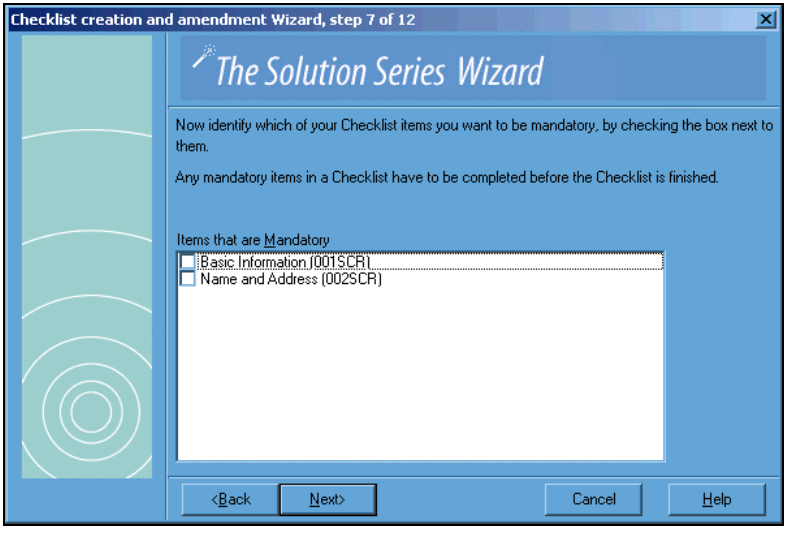
15. Click Next

Click Next to continue creating a checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.



17. Click Next

Click Next to continue creating a checklist.

Finish or request advanced features (8 of 12)

18. Select Advanced features

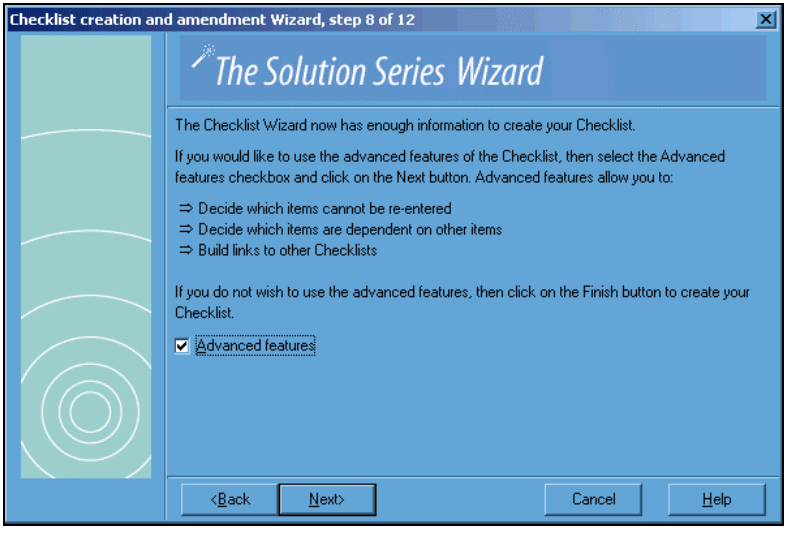
If you want to select advanced features which include identifying items that can not be re-entered and identifying items that are dependent on others, click the Advanced features check box.

Note: Building links to other checklists are for universal checklists only.

If you do not want to select advanced features, continue with Step 24.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



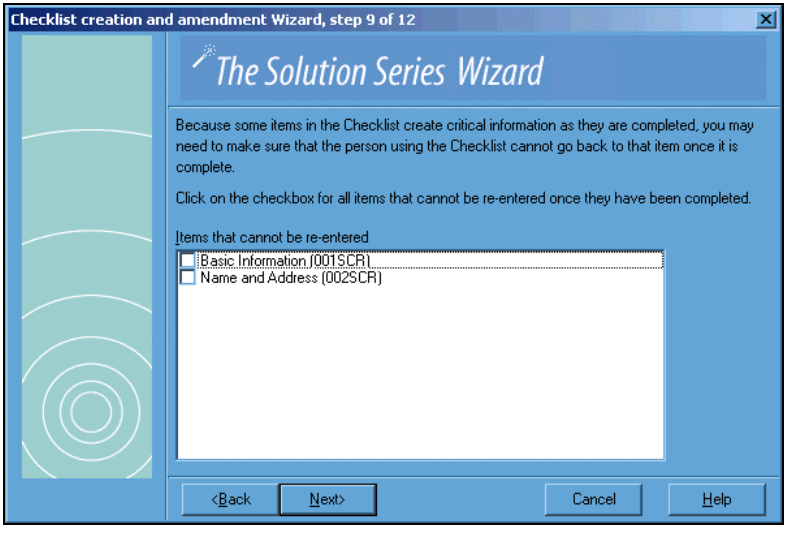
19. Click Next

Click Next to continue creating a checklist.

Assign items that can not be re-entered (9 of 12)

20. Select Items that can not be re-entered

Click the check box of any item in the checklist that can not be re-entered. A check mark indicates the item can not be re-entered.



21. Click Next

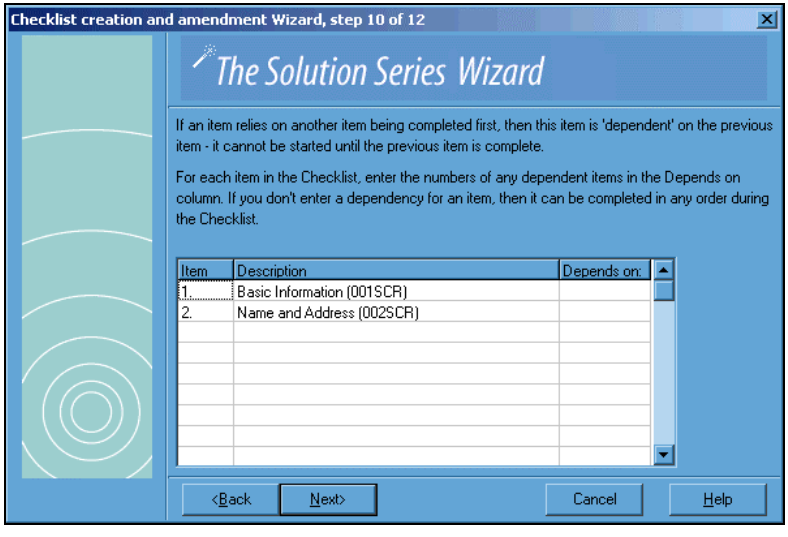
Click Next to continue creating a checklist.

Assign dependencies (10 of 12)

22. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before item 3 is performed, you would enter '1' in the Depends on text box for item 3.

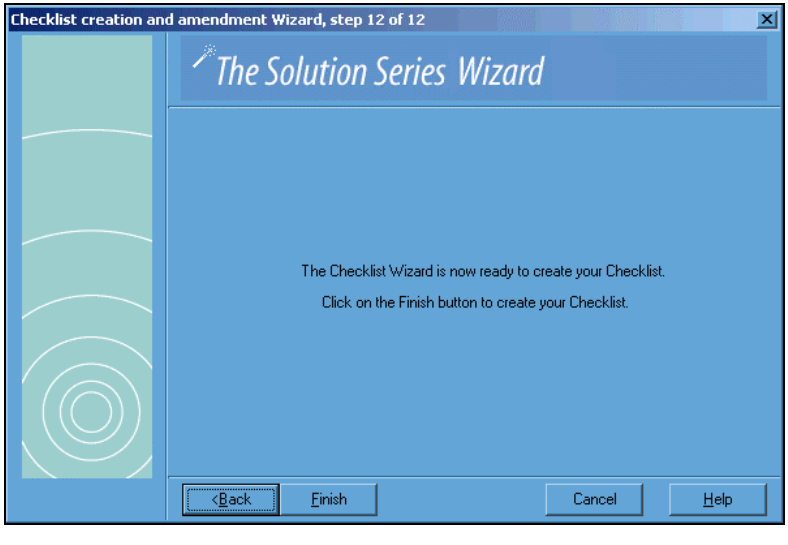
Repeat this step for any other item that depends on another.



23. Click Next

Click Next to continue creating a checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



Finish (12 of 12)

24. Click Finish

Click Finish to create the checklist.

The checklist is added to the Bookmarks menu and Favorites toolbar.

See also:

- The Checklist wizard ***(on page 58)***

For more information on creating personal checklists.

Creating a universal checklist

There are two types of checklists—personal and universal.

Note: To create a personal or universal checklist, you must have the proper authority. If you do not have the authority to create checklists, the system will direct you to see your administrator to change your user profile.

To create a personal checklist, follow the steps in ***Creating a personal checklist*** (on page 71).

To create a universal checklist, follow these steps.

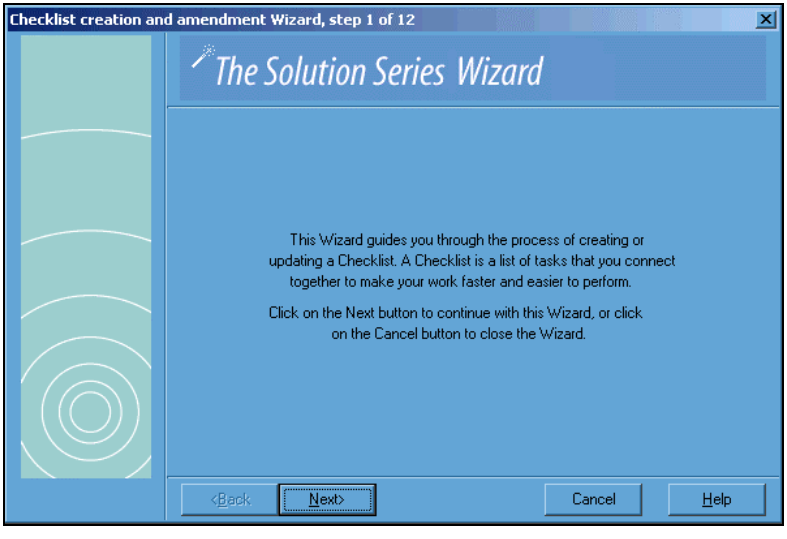
Note: To create a universal checklist, you will use the Checklist wizard. Depending on your user profile and the options that you select, the wizard may skip one or more steps.

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component:	User Tools
Process:	User Tools
Task:	Create/Modify a Checklist

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



Welcome (1 of 12)

2. Click Next

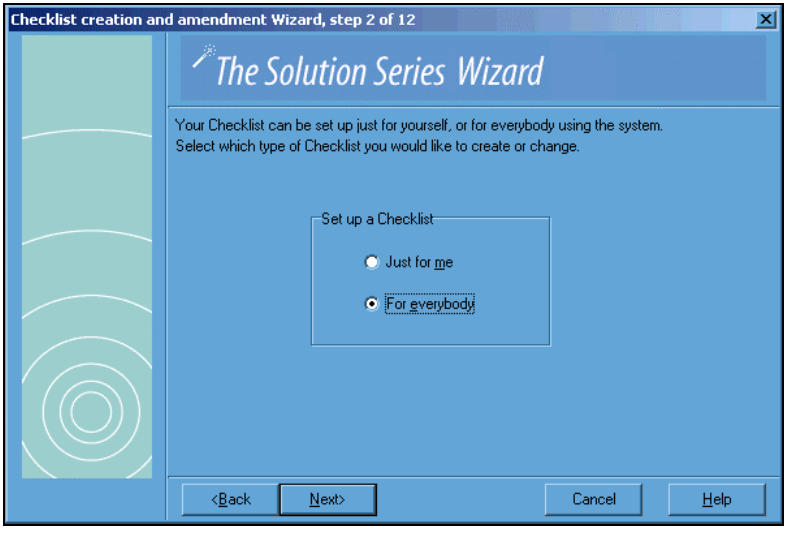
Click Next to continue creating a checklist.

Checklist type (2 of 12)

3. Select 'For everybody'

Select 'For everybody' to create a universal checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue creating a checklist.

Checklist name (3 of 12)

5. Position the pointer in the New Checklist text box

The insertion pointer displays in the New Checklist text box.

6. Enter the checklist name

Enter a name of up to 30 characters for the checklist.

7. Click Next

Click Next to continue creating a checklist.

Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

Fully expand the tree view in the Available Items pane.

To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item that you have added, drag the item from the Selected Items pane back to the Available Items pane.

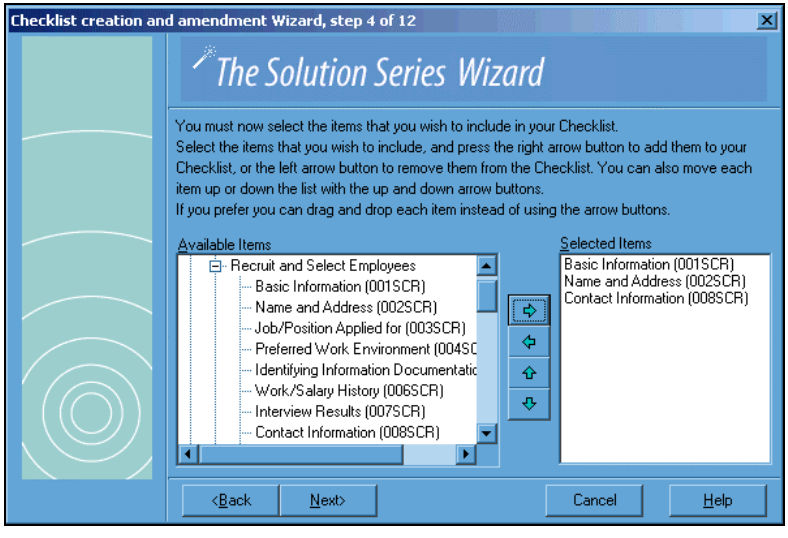
The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

Note: If you want to create a checklist that only presents links to other checklists, do not select any items. Continue with Step 9.

The item is added to the Selected Items pane. Repeat this step to add more items to your checklist.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



9. Click Next

Click Next to continue creating a checklist.

Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.

12. Click Next

Click Next to continue creating a checklist.

Item descriptions (6 of 12)

13. Select an item to change

If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

14. Enter a New description

Enter a new description of up to 40 characters.

Repeat Steps 13 and 14 to change any other description.

15. Click Next

Click Next to continue creating a checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.

17. Click Next

Click Next to continue creating a checklist.

Finish or request advanced features (8 of 12)

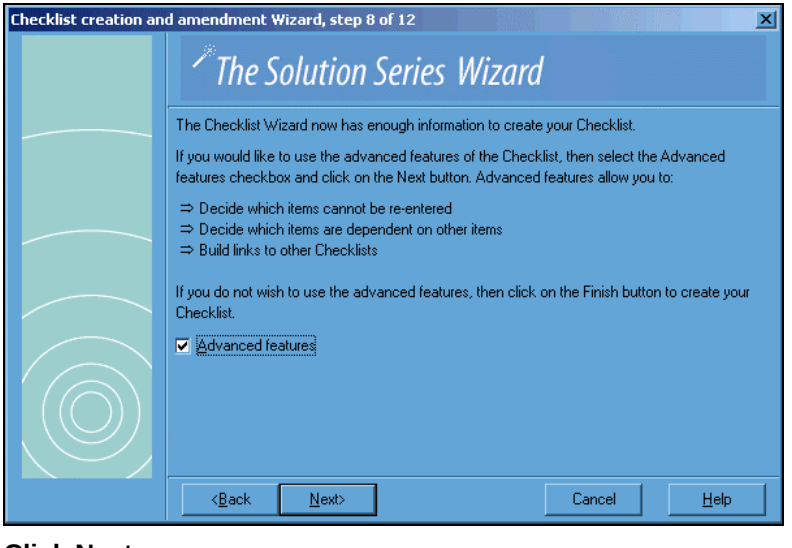
18. Select Advanced features

If you want to select advanced features which include identifying items that can not be re-entered, identifying items that are dependent on others, and building links to other checklists, click the Advanced features check box.

If you do not want to select advanced features, continue with Step 27.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



19. Click Next

Click Next to continue creating a checklist.

Assign items that can not be re-entered (9 of 12)

20. Select Items that can not be re-entered

Click the check box of any item in the checklist that can not be re-entered. A check mark indicates the item can not be re-entered.

21. Click Next

Click Next to continue creating a checklist.

Assign dependencies (10 of 12)

22. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before Item 3 is performed, you would enter '1' in the Depends on text box for item 3.

23. Click Next

Click Next to continue creating a checklist.

Build links to other checklists (11 of 12)

24. Enter a Description

Enter a description of up to 40 characters. The description will be displayed as an option to link to another checklist when this checklist is executed.

25. Select a checklist

Select a checklist from the list box to link to after this checklist is executed.

Note: In order to build a link to another checklist, that checklist must already exist.

Repeat Steps 24 and 25 to build links to up to six checklists.

26. Click Next

Click Next to continue creating a checklist.

Finish (12 of 12)

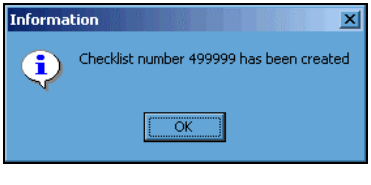
27. Click Finish

The checklist is created. The universal checklist can now be added to menus and the Navigator so users can access it.

An information dialog will display confirming that the checklist has been created.

28. Click OK

Click OK on the information dialog.



See also:

- The Checklist wizard ***(on page 58)***

For more information on creating universal checklists.

Modifying a personal checklist

There are two types of checklists—personal and universal.

Note: *To modify a personal or universal checklist, you must have the proper authority. If you do not have the authority to modify checklists, the system will direct you to see your administrator to change your user profile.*

To modify a universal checklist, follow the steps in ***Modifying a universal checklist*** (on page 92).

To modify a personal checklist, follow these steps.

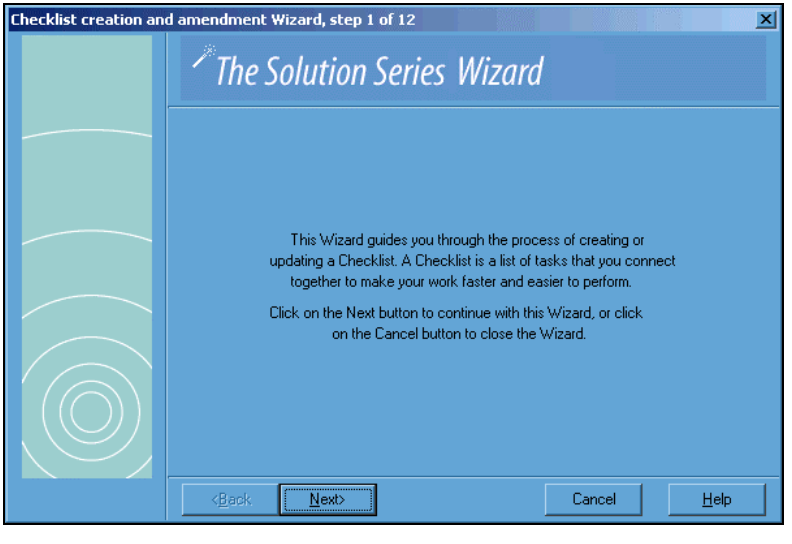
Note: *To modify a personal checklist, you will use the Checklist wizard. Depending on your user profile and the options that you select, the wizard may skip one or more steps.*

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Create/Modify a Checklist

If you completed the previous step, the resulting dialog should look similar to the example that follows:



Welcome (1 of 12)

2. Click Next

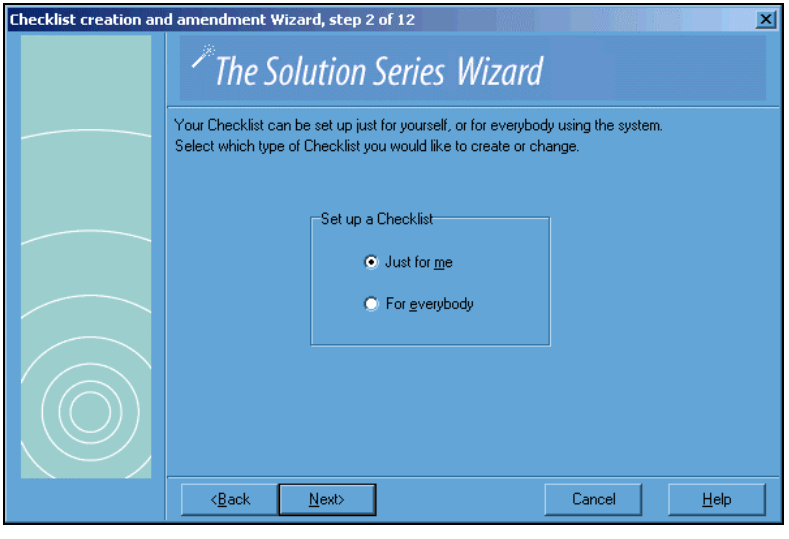
Click Next to continue modifying a checklist.

Checklist type (2 of 12)

3. Select 'Just for me'

Select 'Just for me' to modify a personal checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue modifying the checklist.

Checklist name (3 of 12)

5. Select the checklist to be modified

The checklist is highlighted and the name is displayed in the Rename Checklist text box.

6. Modify the checklist name

If you want to modify the name of the checklist, enter a name of up to 30 characters in the Rename Checklist text box.

7. Click Next

Click Next to continue modifying the checklist.

Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

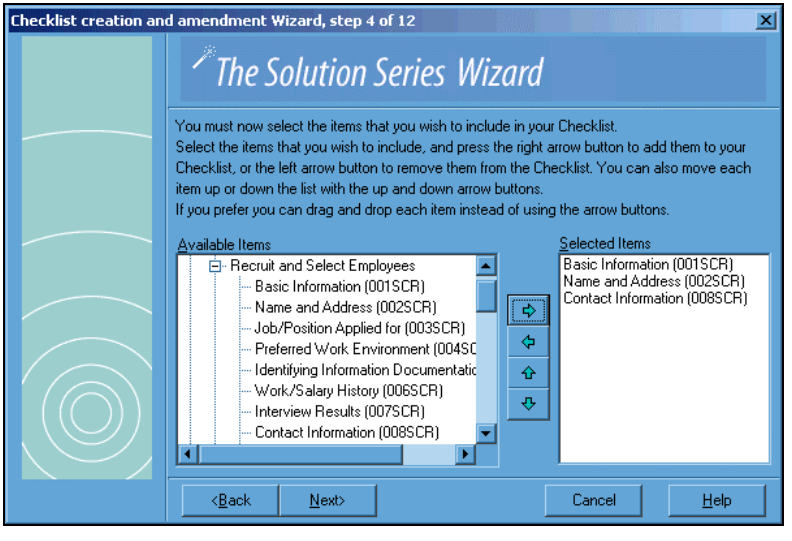
Fully expand the tree view in the Available Items pane.

To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item, drag the item from the Selected Items pane back to the Available Items pane.

The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane. If you change the order or delete an item which has dependencies set, the system will display a warning message informing you that the dependencies will be lost if you continue with the change.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



9. Click Next

Click Next to continue modifying the checklist.

Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box. If you do not want the same effective date to be applied, clear the check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.

12. Click Next

Click Next to continue modifying the checklist.

Item descriptions (6 of 12)

13. Select an item to change

If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

14. Enter a New description

Enter a new description of up to 40 characters.

Repeat Steps 13 and 14 to change any other description.

15. Click Next

Click Next to continue modifying the checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.

17. Click Next

Click Next to continue modifying the checklist.

Add to favorites and Advanced features (8 of 12)

18. Select Add to favorites

If you want to add the checklist to the Favorites toolbar, click the Add to **f**avorites check box.

Note: If the checklist is already on the Favorites toolbar and you click the Add to favorites check box, the checklist will be added again.

19. Select Advanced features

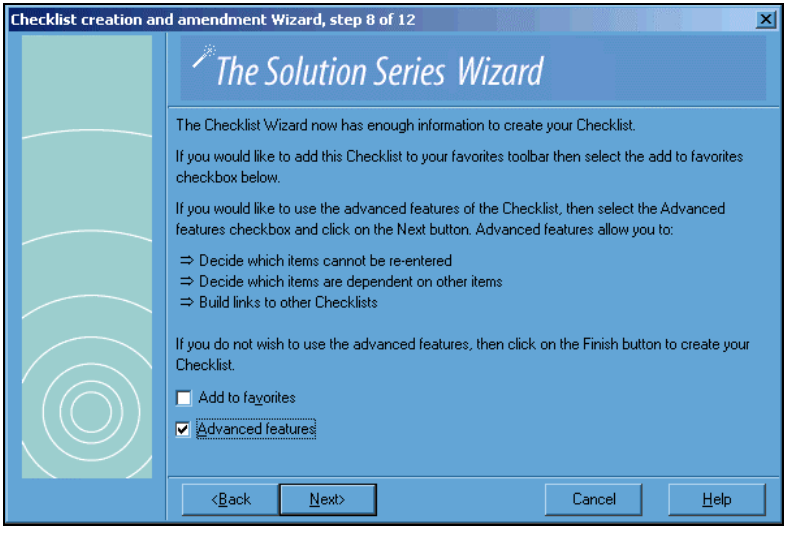
If you want to select advanced features which include identifying items that can not be re-entered and identifying items that are dependent on others, click the **A**dvanced features check box.

Note: Building links to other checklists are for universal checklists only.

If you do not want to select advanced features, continue with Step 25.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



20. Click Next

Click Next to continue modifying the checklist.

Assign items that can not be re-entered (9 of 12)

21. Select Items that can not be re-entered

A check mark indicates the item can not be re-entered. Click the check box of any item in the checklist that can not be re-entered. Clear the check box of any item that can be re-entered.

22. Click Next

Click Next to continue modifying the checklist.

Assign dependencies (10 of 12)

23. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before item 3 is performed, you would enter '1' in the Depends on text box for item 3.

Repeat this step for any other item that depends on another.

24. Click Next

Click Next to continue modifying the checklist.

Finish (12 of 12)

25. Click Finish

Click Finish to save your modifications.

See also:

- Checklist modification ***(on page 67)***

For more information on maintaining checklists.

Modifying a universal checklist

There are two types of checklists—personal and universal.

Note: *To modify a personal or universal checklist, you must have the proper authority. If you do not have the authority to modify checklists, the system will direct you to see your administrator to change your user profile.*

To modify a personal checklist, follow the steps in ***Modifying a personal checklist*** (on page 87).

To modify a universal checklist, follow these steps.

Note: *To modify a universal checklist, you will use the Checklist wizard. Depending on your user profile and the options that you select, the wizard may skip one or more steps.*

1. Access the Checklist creation and amendment Wizard

Access this wizard by making the following selections from the Navigator:

Component: User Tools
Process: User Tools
Task: Create/Modify a Checklist

Welcome (1 of 12)

2. Click Next

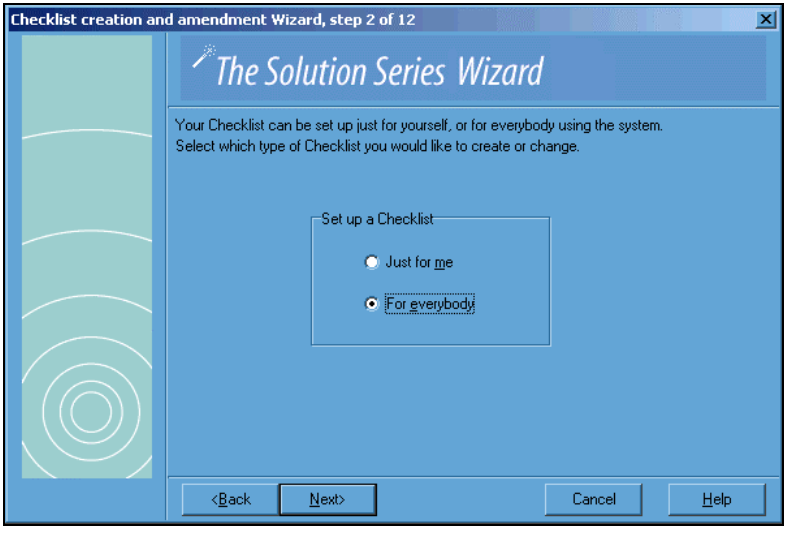
Click Next to continue modifying a checklist.

Checklist type (2 of 12)

3. Select 'For everybody'

Select 'For everybody' to modify a universal checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Next

Click Next to continue modifying the checklist.

Checklist name (3 of 12)

5. Select the checklist to be modified

The checklist is highlighted and the name is displayed in the Rename Checklist text box.

6. Modify the checklist name

If you want to modify the name of the checklist, enter a name of up to 30 characters in the Rename Checklist text box.

7. Click Next

Click Next to continue modifying the checklist.

Checklist items and sequence (4 of 12)

8. Drag an item to the Selected Items pane

Fully expand the tree view in the Available Items pane.

To add an item as part of your checklist, drag it from the Available Items pane to the Selected Items pane. To delete an item that you have added, drag the item from the Selected Items pane back to the Available Items pane.

The items in the Available items pane are the same as those displayed on your Navigator minus checklists and dialogs.

Note: The order in which items are displayed in the Selected Items pane determines the order in which they appear when you execute the completed checklist. You can change the order by moving an item within the Selected Items pane.

9. Click Next

Click Next to continue modifying the checklist.

Same effective date and new hire checklist (5 of 12)

10. Select Use the same Effective date for each item

If you want the same effective date to be automatically applied to every item in the checklist, click this check box. If you do not want the same effective date, clear this check box.

11. Select This is a new hire Checklist

If this is a new hire process, click this check box. This will invoke special processing when the checklist is executed.

12. Click Next

Click Next to continue modifying the checklist.

Item descriptions (6 of 12)

13. Select an item to change

If you want to change an item's description, select the item in the Current description pane. The description displays as a step name in the checklist and in a ToolTip for the next and previous buttons on the Selection toolbar when the item is the next or previous item in the checklist sequence.

The current description is displayed in the New description text box for you to edit.

14. Enter a New description

Enter a new description of up to 40 characters.

Repeat Steps 13 and 14 to change any other description.

15. Click Next

Click Next to continue modifying the checklist.

Mandatory items (7 of 12)

16. Select Items that are Mandatory

Click the check box of any item that must be completed before the checklist can be successfully finished. A check mark indicates the item is mandatory.

17. Click Next

Click Next to continue modifying the checklist.

Finish or request advanced features (8 of 12)

18. Select Advanced features

If you want to select advanced features which include identifying items that can not be re-entered, identifying items that are dependent on others, and building links to other checklists, click the Advanced features check box.

If you do not want to select advanced features, continue with Step 27.

Note: When Advanced features is checked, the Finish button is replaced with a Next button.

19. Click Next

Click Next to continue modifying the checklist.

Assign items that can not be re-entered (9 of 12)

20. Select Items that can not be re-entered

Click the check box of any item in the checklist that can not be re-entered. A check mark indicates the item can not be re-entered.

21. Click Next

Click Next to continue modifying the checklist.

Assign dependencies (10 of 12)

22. Enter Depends on

If an item can not be performed until another has been completed, enter the item number on which this item is dependent in the Depends on text box. For example, if item 1 must be complete before item 3 is performed, you would enter '1' in the Depends on text box for item 3.

23. Click Next

Click Next to continue modifying the checklist.

Build links to other checklists (11 of 12)

24. Enter a Description

Enter a description of up to 40 characters. The description will be displayed as an option to link to another checklist when this checklist is executed.

25. Select a checklist

Select a checklist from the list box to link to after this checklist is executed.

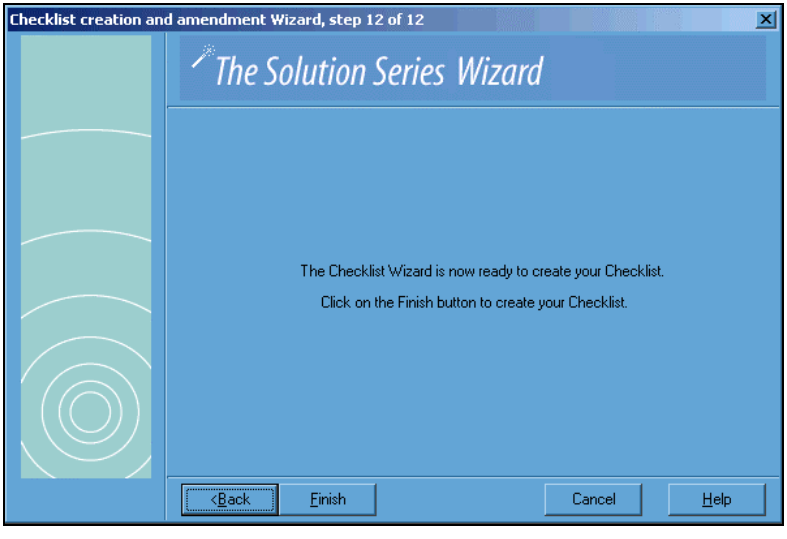
Note: In order to build a link to another checklist, that checklist must already exist.

Repeat Steps 24 and 25 to build links to up to six checklists.

26. Click Next

Click Next to continue modifying the checklist.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



Finish (12 of 12)

27. Click Finish

The checklist is modified.

See also:

- Checklist modification ***(on page 67)***

For more information on maintaining checklists.

Removing a personal checklist

To remove a universal checklist, follow the steps in ***Removing a universal checklist*** (on page 97).

To remove a personal checklist, complete the following steps:

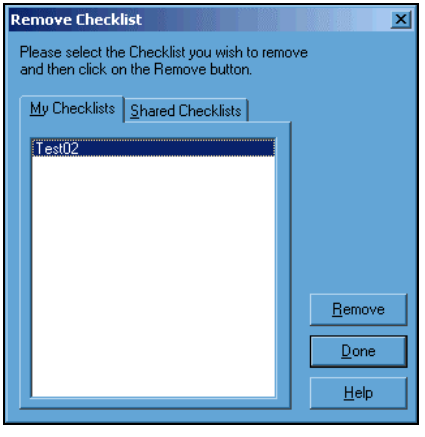
1. Access Remove a Checklist dialog box

Access this dialog box by making the following selections from the Navigator:

Component:	User Tools
Process:	User Tools
Task:	Remove a Checklist

2. Select the checklist

Select the checklist to be removed. The checklist is highlighted and the Remove button is enabled.



3. Click Remove

The checklist is removed from the Remove Checklist dialog box.

Repeat Steps 2 and 3 to remove other checklists.

4. Click Done

The Remove Checklist dialog box is closed.

Note: The checklist is not automatically removed from the Bookmarks menu or Favorites toolbar. You must remove it manually.

See also:

- Checklist removal ***(on page 67)***

For more information on removing checklists.

- Deleting a menu item ***(on page 125)***

For detailed directions on removing a checklist from a menu.

Removing a universal checklist

To remove a personal checklist, follow the steps in ***Removing a personal checklist*** (on page 96).

To remove a universal checklist, complete the following steps:

1. Access Remove Checklist dialog box

Access this dialog box by making the following selections from the Navigator:

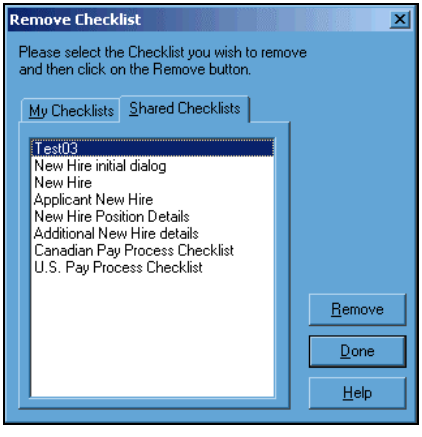
Component: User Tools
Process: User Tools
Task: Remove a Checklist

2. Click Shared Checklists

Click the Shared Checklists tab. Universal checklists are displayed.

3. Select the checklist

Select the checklist to be removed. The checklist is highlighted and the Remove button is enabled.



4. Click Remove

The checklist is removed from the Remove Checklist dialog box.

Repeat Steps 3 and 4 to remove other universal checklists.

5. Click Done

The Remove Checklist dialog box is closed.

See also:

- Checklist removal ***(on page 67)***

For more information on removing checklists.

- Deleting a menu item ***(on page 125)***

For detailed directions on removing a checklist from a menu.

Review of Questions Answered

1. What is a checklist?

2. What are the differences between a personal checklist and a universal checklist?

3. What tool do you use to create a checklist?

4. What tool do you use to delete a checklist?

5. What tool do you use to control checklists?

CHAPTER 5

Maintaining Menus

In This Chapter

Introduction 102
Menus 103
Menu Editor.....107
Detailed Directions 118
Extended Practice 131
Review of Questions Answered.....132

Introduction

Maintaining menus provides another way to customize the system to meet the needs of your organization. Using the Menu Editor, you can edit any of the delivered application menus to show only those items you will use, change the order of items, or replace items.

Tasks

This section explains the following:

- Adding a menu item
- Defining a shortcut key for a menu item
- Changing the order of menu items
- Modifying a menu item
- Deleting a menu item
- Adding a report group to the menu

Prerequisites

Before you can maintain menus, you must be logged on to The Solution Series and have the authority to maintain menus.

Questions answered

The following questions are answered in this section:

1. What types of menus are delivered with the system?
2. What is the relationship between the menu structure and the Navigator?
3. What is the Menu Editor and how is it used?

Menus

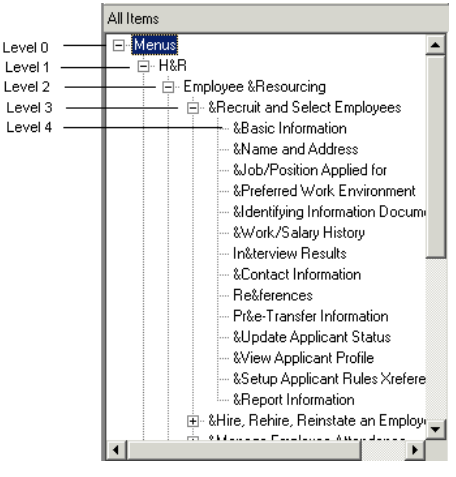
The delivered menu bar contains two types of menus—function menus and application menus:

- Function menus (File, Edit, View, Bookmarks, Actions, Go, and Help)
- Application menus (HR, Benefits, Payroll, TA (Time and Attendance), and Tools)

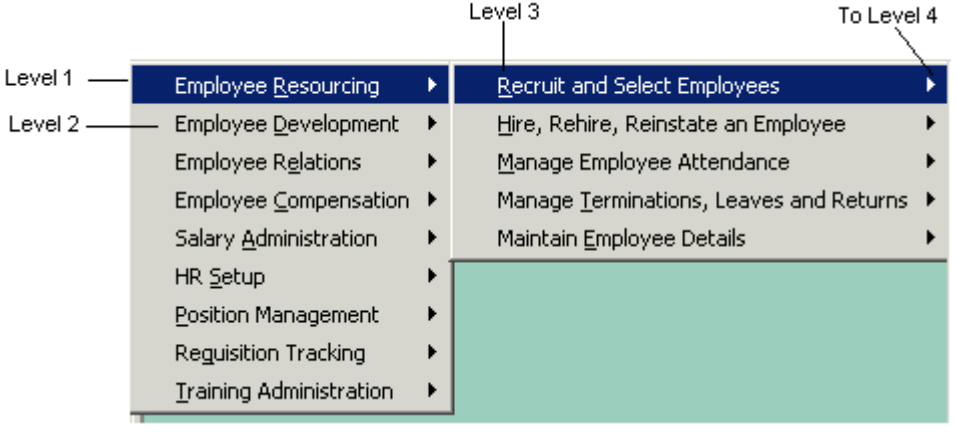
Application menus provide access to the business components of the administrative solutions and to its tools and utilities. You can edit only the application menus. You can not edit the function menus. Changes made to menus are available to all users.

Menu levels

Menus and submenus are assigned level numbers that correspond to their level in the menu hierarchy. The following figure illustrates menu levels:

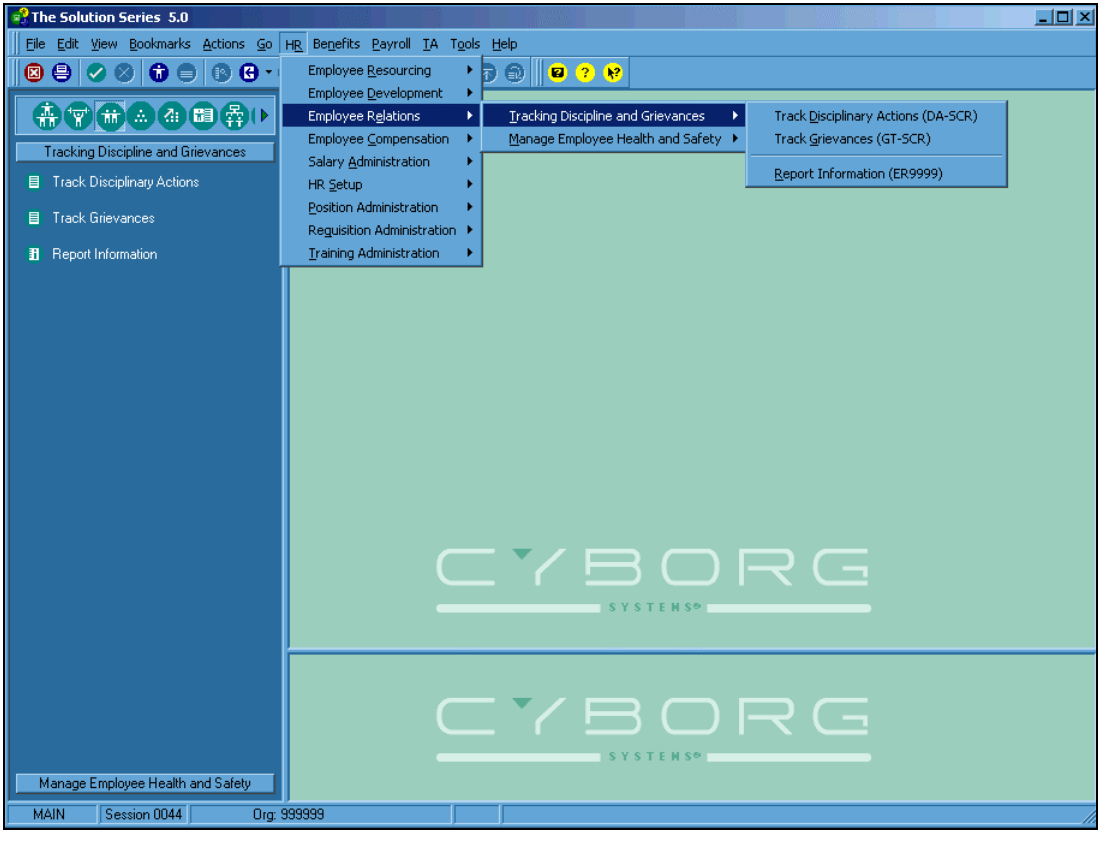


- Menu level-0, Menus, defines a starting point for the menus. It is not displayed on the Work Area, and it can not be deleted.
- Menu level-1 is the item displayed on the menu bar. This is an application.
- Menu level-2 represents the first submenu. This is a component of an application.
- Menu level-3 represents the second submenu. This is a process.
- Menu level-4 represents the third (last) submenu. This level links you to forms, checklists, and dialogs. You can not define a menu beyond level 4.



Relationship of the menu structure and the Navigator

The menu structure is mirrored in the Navigator. Menu levels two through four are shown in the Navigator. The following figure shows both the HR menu structure for accessing the Tracking Discipline and Grievances tasks and the corresponding Navigator access path. As you can see, Employee Relations (level two), Tracking Discipline and Grievances (level three), and Track Disciplinary Actions, Track Grievances, and Report Information (level four), are duplicated in the Navigator.



Because of this relationship between the menus and the Navigator, any changes made to the menus are automatically reflected in the Navigator. There is no additional work required.

Apply the Concept
Based on your understanding of the menu structure as explained in this concept, which level of the menu would you need to modify if you were adding a new form to the menu structure?

Apply the Concept
Would you also need to modify the Navigator to include the new form?

Menu Editor

The Menu Editor is used to add, modify, and delete menu items. You can edit the delivered application menus and add your own menus. The Menu Editor is accessed from the Development Tools component and the System Control Repository Utilities process.

In addition to adding forms and checklists, you can use the Menu Editor to add your report groups to the menu. This will allow you to launch the report groups from the Navigator or menu. Report groups that are to be launched from the menus must have names that end in 'RG'.

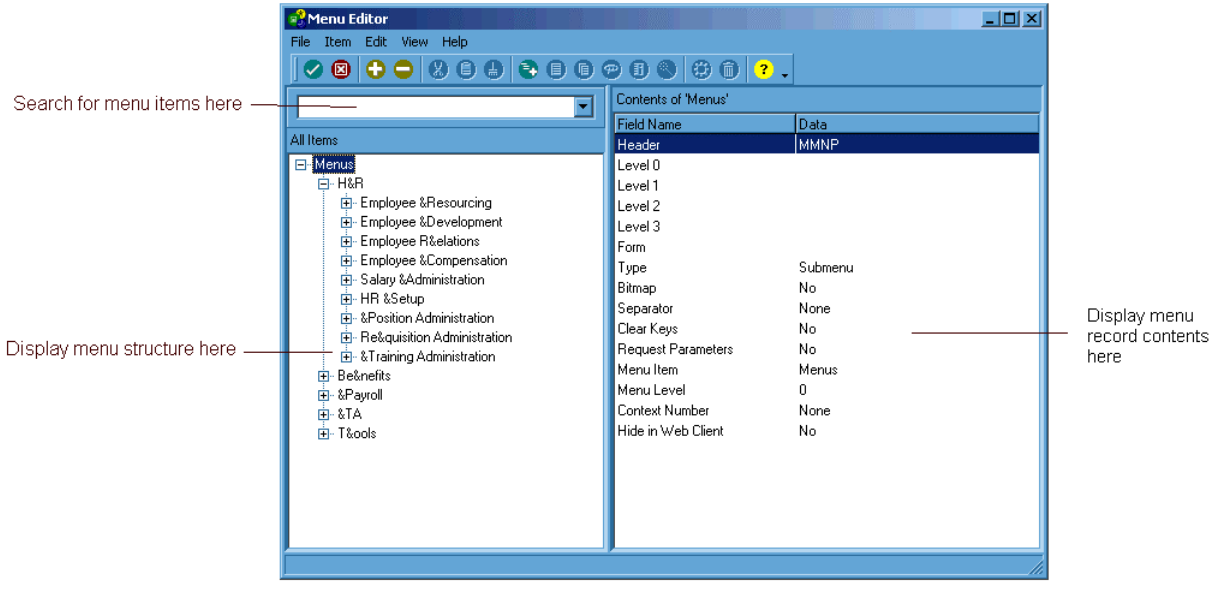
☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more information about report groups.*

See also:

- Adding a report group to the menu ***(on page 126)***

For detailed instructions for adding a report group to the menu.

The Menu Editor contains a toolbar for initiating actions, a drop-down list for searching for menu items, and two panes for displaying menu information.



The left pane, titled 'All Items', shows a 'tree view' of the existing menu structure. You use the left pane for working. For example, you use the tree view to indicate what level of information you want to see, to select items to add to or modify, and to select items for which you want to view detail in the right pane.

The right pane, titled 'Contents of xxx', shows the detail of the menu record for the selected menu item. Using this display, you can verify the definition of a menu item.

If the selected item was the New Hire checklist, the right pane would look like this:

Contents of 'Hire a New Employee'

Field Name	Data
Header	MMNP
Level 0	0
Level 1	00
Level 2	01
Level 3	00
Form	500001
Type	Checklist
Bitmap	No
Separator	None
Clear Keys	Yes
Request Parameters	No
Menu Item	&Hire a New Employee
Menu Level	4
Context Number	None
Hide in Web Client	No

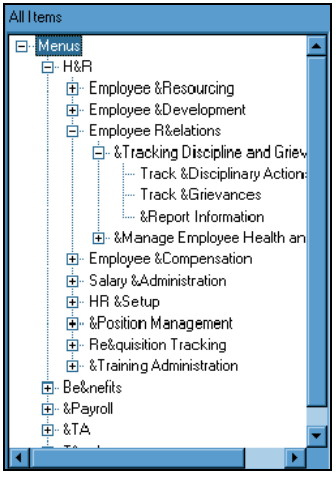
The information displayed in the left pane is explained in the following table:

Field Name	**Data**
Header	Will always be MMNP
Level 0–Level 3	The level in which the item resides
Form	Form name; only applies to level 4
Type	Item type
Bitmap	Image name
Separator	Indicates if the item has a separator
Clear Keys	Indicates if the key and additional key information is cleared before the form is displayed
Request Parameters	Indicates if parameters are requested before the form is displayed
Menu Item	The name of the menu item
Menu Level	Level of the item (0–4)
Context Number	Help topic ID
Hide in Web Client	Indicates if this option is visible in the Web Client

The information in the right pane is for display only; you can not enter or modify information in the right pane.

Navigation in the left pane

If you are familiar with using the Windows Explorer, navigating through the left pane will be familiar to you. If a menu item has items below it that are not displayed, it will have a '+' next to it. When a menu item is expanded, its '+' sign is changed to a '-'. In the following figure, items such as 'Menus' and 'H&R' have been expanded. Items such as 'Employee &Resourcing' and 'Employee &Development' contain sub-items that are not displayed. In other words, they are 'collapsed'.



The following navigation choices are available:

- Expand and collapse item displays
- Search for menu items

Expand and collapse item displays

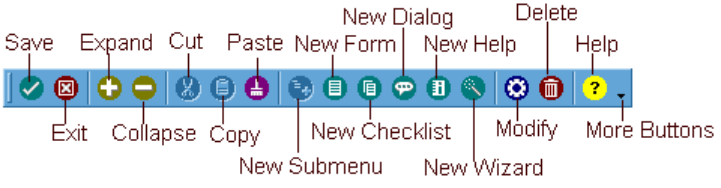
- To expand a particular item, click the '+' sign next to the item.
- To collapse a particular item and its sub-items, click the '-' sign next to the parent item.
- To expand all items, click the Expand button in the toolbar.
- To collapse all items, click the Collapse button in the toolbar.

Search for menu items

To quickly display information about a menu item, select it from the drop-down list box, located just above the left pane. This drop-down list contains only level-two menu items.

Menu Editor toolbar

The Menu Editor toolbar contains the controls you use to initiate actions. To initiate an action, click a toolbar button. The following figure shows the actions you can take:



The 'new' options available depend on the level to which you are adding an item. If you are working at levels one and two, only the New Submenu button will be active. If you are working at level three, all of the buttons, excluding New Submenu, will be active. No buttons will be active at level four. You can not add an item below this level.

New items

To add a new item, you click the 'parent' item, then select the button for the type of item being added. You can add the following types of items to the menus:

- Universal checklists
- Forms
- Help
- Submenus
- Wizards
- Dialogs

All types of menu items are added using the Add 'item' dialog.

Note: *New menu items must have all four levels before they will appear on the menu or Navigator.*

Options for forms

When adding a form item to a menu, you can set options to:

- Clear keys—clear the key and additional key text boxes before displaying the form.
- Request parameters—display a form requesting parameters to be entered before displaying the details on the form. The record key is created from the parameters and used to display the appropriate information.

By default, options are set to 'Neither'.

Separator lines

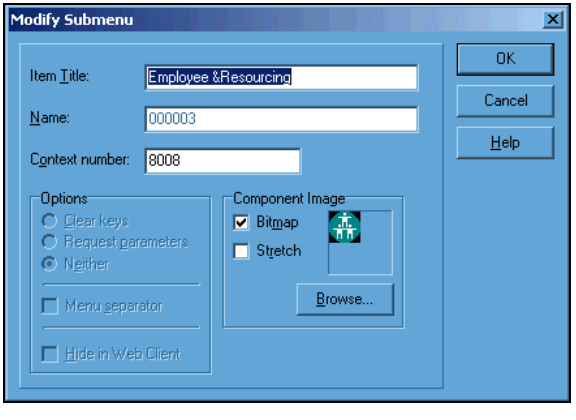
To visually mark a logical group of menu items, use a separator line. This figure shows a separator line used to group tasks and report information.

Component images

If you are adding a level-two menu—a component in the Navigator—you have the option of showing a bitmap for the component in the Navigator and having the bitmap stretched to fit the square in which it is displayed.

When using a bitmap image to represent the component, the Item Title will be used as the ToolTip. If you do not assign a bitmap image to a component, a default image will be used.

This figure shows the Modify Submenu dialog box for the 'Employee &Resourcing' component. This component uses the bitmap displayed:



Note: *If you assign a bitmap to a menu item and do not select the Hide in Web Client option, the image shown against the new component in the Web Client will be the default one:*

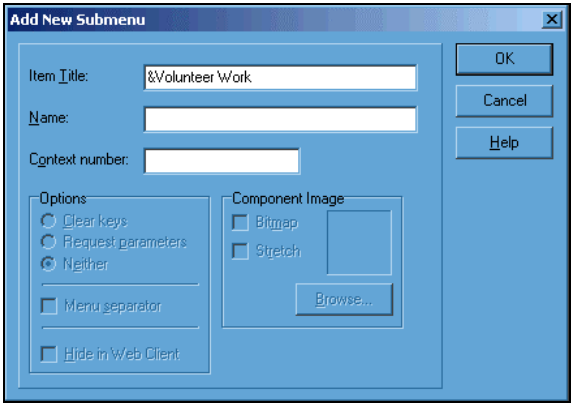
If you would like to have the images showing as the same in both clients, you would need to save your chosen bitmap image as a CompuServe Graphics Interchange (.gif) format, with the transparency set as appropriate, then copy that new graphic file to your webserver.*

Help for components

When you add a component menu item, you have the option of displaying 'What's This?' help for the component. If your organization wants to assign help to an item and connect the component to the help topic, then you must enter the help topic ID in the Context number text box.

Example

Suppose you wanted to add a new submenu (level 3) under Employee Development (level 2) to track employee volunteer work. You would like to call the item 'Volunteer Work' and you would like the shortcut key to be the 'V' in Volunteer. The Add New Submenu dialog could look like this:



See also:

- Adding a menu item ***(on page 118)***

For detailed instructions for adding a menu item.

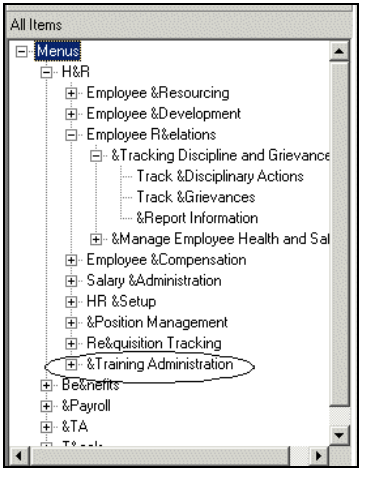
☞ *Refer to* **Shortcut keys and menu items** *(on page 113) for more information on shortcut keys.*

Order of menu items

You can easily change the order of menu items by dragging them to new locations. When you move a menu item to a new location, any submenu items are also moved.

You can only drag items to the same level in the menu structure. Refer to the following figure. You could move '&Training Administration' anywhere along the vertical line on which it resides.

For example, you might move it just below 'Salary &Administration'. However, you can not move it to a lower or higher level in the menu structure.



See also:

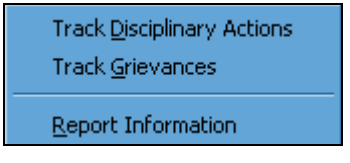
■ Changing the order of menu items ***(on page 123)***

For detailed instructions for changing the order of menu items.

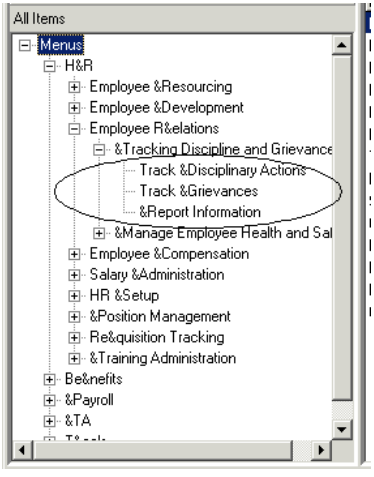
Shortcut keys and menu items

Shortcut keys provide an alternate method for accessing commands. Each delivered menu item has an underlined letter that indicates the keyboard shortcut key for choosing the menu item. Using the Menu Editor, you can define your own shortcut keys for event menu items. The shortcut keys you define will be used in combination with the ALT key.

To define a shortcut key for a menu item, you type an ampersand (&) before the letter to be used as part of the shortcut key combination. In this figure, you can see that the shortcut keys are the D in Disciplinary, the G in Grievances, and the R in Report:



In the Menu Editor, the definitions for these menu items look like this:



Note: *The system does not check for duplicate shortcut keys; you need to manually track the assignment of shortcut keys.*

See also:

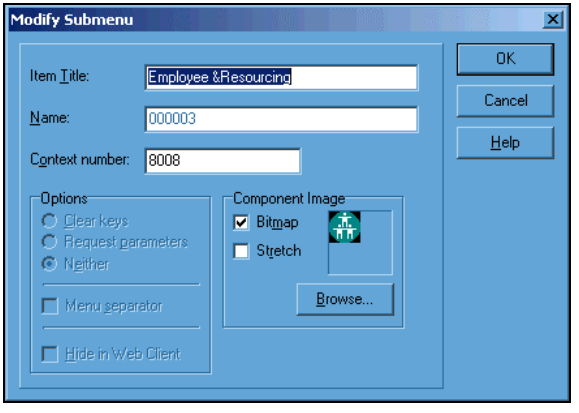
- Defining a shortcut key for a menu item ***(on page 122)***

For detailed instructions for creating shortcut keys.

Apply the Concept
Based on your understanding of shortcut keys as they are used in the menu structure, what letter would be defined as a shortcut key in the item 'Re&quisition Tracking'?

Menu item changes

Changing a menu item is similar to adding one. Access the Menu Editor, select the item to modify, and click the Modify button on the toolbar. If you select the menu item 'Employee &Resourcing' to edit, the Modify Submenu dialog box will look like this:



Notice that even though 'Employee &Resourcing' is a level-two menu, the Name text box contains a value. All non-form items are automatically assigned a number that reflects their position in the menu hierarchy. In this example, 'Employee &Resourcing' is the third item below the zero level item, Menus.

See also:

- Modifying a menu item ***(on page 125)***

For detailed instructions for modifying a menu item.

Menu item deletion

You can delete any menu item, excluding level-0. To delete an item, you select it, and then click the Delete button on the toolbar. All dependent menu items will also be deleted.

See also:

- Deleting a menu item ***(on page 125)***

For detailed instructions for deleting a menu item.

Result of menu maintenance

When you finish editing a menu, the System Control Repository is updated immediately. Users will see the menu changes the next time they log on to the system when the client file (menu.dat) on their PCs is updated. If they are already logged on to the system they would need to log off and log back on again to see the changes.

Menu record lock safety protection

If for any reason the system is disabled during the editing of the menu records, a locked flag can be left on the MMN header record. The locked flag is a safety feature that prevents any other user from accessing the record. To manually unlock records under these circumstances, the Unlock Menu Records utility (FIXMMN) must be used to reset the flag.

Access this utility by making the following selections from the Navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Unlock Menu Records

Menu items and the Web Client

You have the option to prevent an item from being displayed in the Web Client interface of eCyborg. You would want to do this if, for example, it is not possible to perform the action from a web browser (if the process requires any action on the user's PC, for instance), or if you consider the task inappropriate for Web Client access.

To prevent an item from displaying in the Web Client you would select the Hide in Web Client option.

Menu items and user profiles

Access to level-two menu components, can be restricted through user profiles. By selecting the components with which a user can work, you can determine the components that will show in the Navigator and appear in the menus.

Apply the Concept
Based on your understanding of menu maintenance as explained in this concept, when would you expect to see the changes you have made to a menu structure?

Design Tips

When creating or maintaining menus, consider the following guidelines. We recommend these guidelines for usability and consistency:

- Group items in a way to minimize the number of clicks needed to get to another task.
- Always consider the business process and structure tasks logically for it.
- Place the most frequently used process at the bottom of the list. Because the Navigator displays the tasks for the last process in the list, placing the most frequently used process at the bottom will help the user.
- Try to keep the number of items on a process or task list under nine. More than nine may make the process or task appear cumbersome to the user. For example, if you have 12 tasks, you may consider creating two processes to make the grouping more manageable.
- Avoid creating a list of processes or tasks that requires scrolling. For example, on a 800 x 600 resolution screen, with five process bars, you can have 14 tasks.
- If used, place a report information task at the bottom of the list for consistency.
- Avoid using abbreviations.
- Any task that calls a dialog that requires additional information to proceed should be followed with an ellipsis (…), which you must enter manually.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Adding a menu item 118
Defining a shortcut key for a menu item 122
Changing the order of menu items 123
Modifying a menu item 125
Deleting a menu item 125
Adding a report group to the menu 126

Adding a menu item

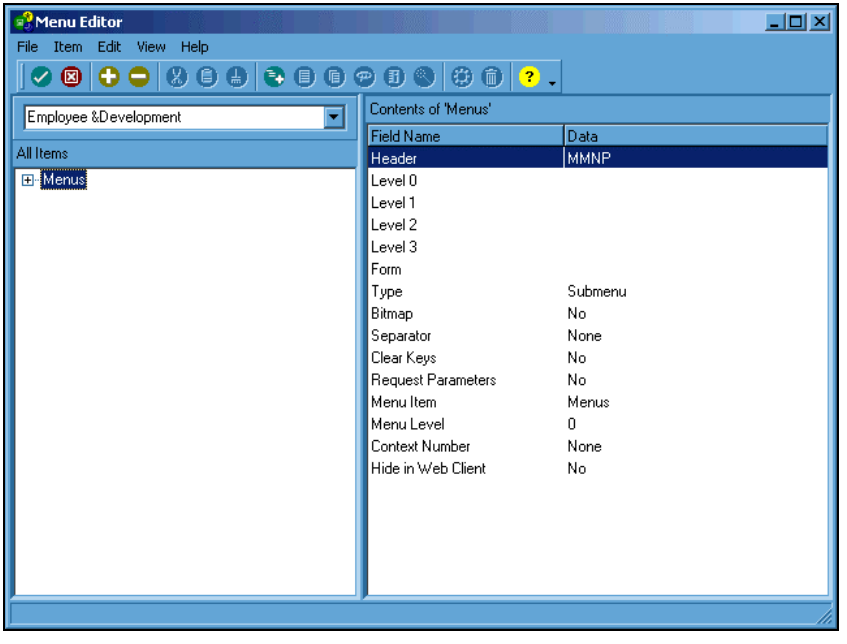
To add a menu item, follow these steps

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Customize Menus

If you completed the previous step, the dialog that is displayed should look similar to the example that follows:

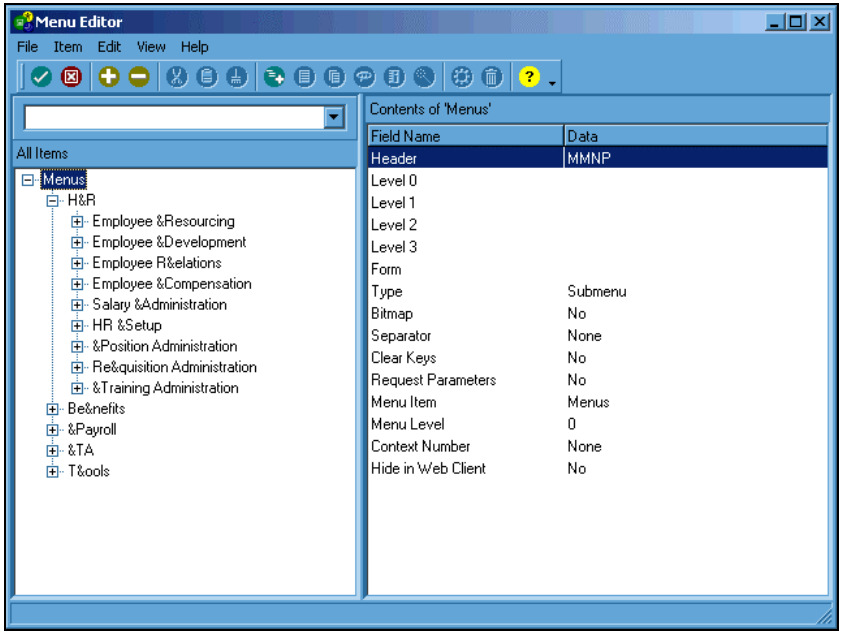


2. Select the parent item to receive the new item

Click the parent item in the tree view in the left pane.

If the item is not displayed, use the expand function or the menu search function.

If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



3. Select the type of item to add

Click the appropriate button on the toolbar. The Add dialog box appears.

4. Enter the Item Title

Type the name that should appear on the menu. This name can be up to 38 alphanumeric characters.

5. Enter the Name

Type the name of the task. This option is only available for level-four items (tasks).

6. Enter the Context number (optional)

Type the four-position context number for the help topic. Values must be numeric and within the range 8000–8999.

This option is only available for components.

7. Select Options

If you are adding a form item, these options will be active. By default, 'Neither' is selected.

- Choose 'Clear Keys' if you want the key and additional key information to be cleared before the form is displayed.
- Choose 'Request parameters' if you want a form to appear requesting key information before the actual form is displayed.

8. Select Menu separator

Select this check box if you want a line to be drawn above the menu item's position in the menu list. Separators logically group related items.

9. Select Hide in Web Client

Select this check box if you do not want this menu item to appear in the Web Client.

10. Select Component Image Bitmap

If you are defining a level-two menu, a component, you can specify that an icon be associated with it in the Navigator.

11. Click Browse

To assign a bitmap file for a component image, click Browse and then locate the file using the standard Windows Browse dialog box.

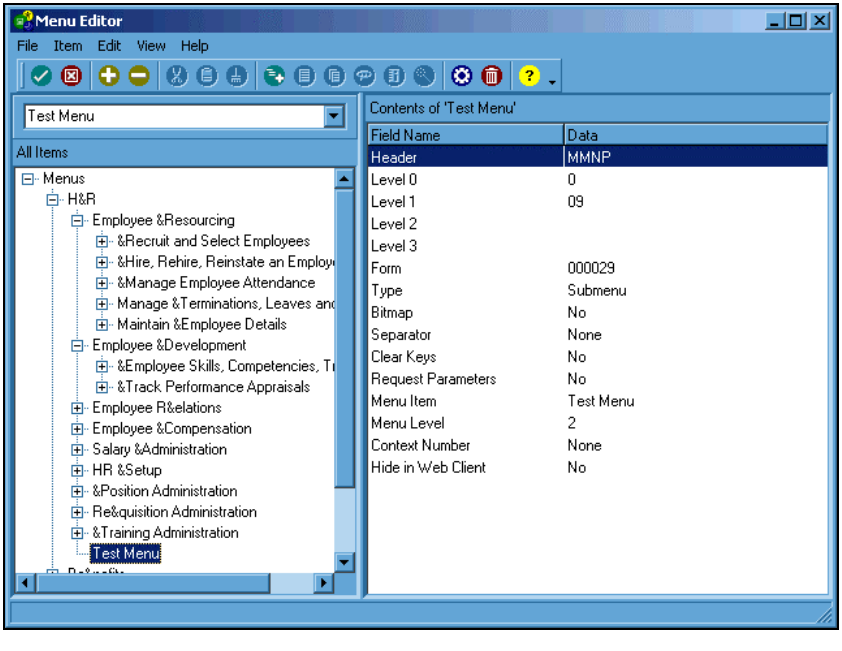
12. Select Component Image Stretch

If you are defining a level-two menu, a component, you can specify that an icon be sized to fit the square in which it is displayed.

13. Click OK or press Enter

If you are satisfied with your entries, confirm this by clicking OK or pressing Enter.

If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



14. Click Save

Click the Save button on the toolbar to save the new menu record.

15. Click Exit

Click the Exit button on the Menu Editor toolbar.

If you close the dialog box without saving, a save dialog box will be displayed, asking you if you want to save your changes to the menu structure.

Note: Changes made to menu items lower than level three will only be displayed in the Menu bar.

See also:

- Menu Editor ***(on page 107)***

For more information about adding a menu item.

Defining a shortcut key for a menu item

To define a shortcut key, follow these steps:

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component:		Development Tools
Process:		System Control Repository Utilities
Task:		Customize Menus

2. Select the item

Click the item in the tree view.

If the item is not displayed, use the expand function or the menu search function.

3. Display the Add or Modify dialog box

- If you are defining a new item, click the parent item and click the Add button on the toolbar.
- If you are modifying an item, click the item and then click the Modify button on the toolbar.

4. Point to Item Title

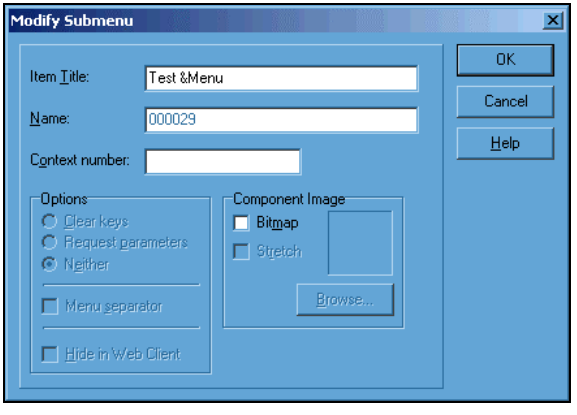
Point to the name of the item and click in the text box for the next step of adding the shortcut designation.

5. Enter an ampersand (&) before the character used as a shortcut key

Type an ampersand (&) immediately before the character to be used as a shortcut key.

Note: The system does not edit for duplicate shortcut keys. You will have to manually track your use of shortcut keys.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



6. Click OK

Click OK to activate the shortcut on the menu.

See also:

- Shortcut keys and menu items ***(on page 113)***

For more information about shortcut keys.

Changing the order of menu items

To change the order of menu items, follow these steps:

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Customize Menus

2. Select the item to be relocated

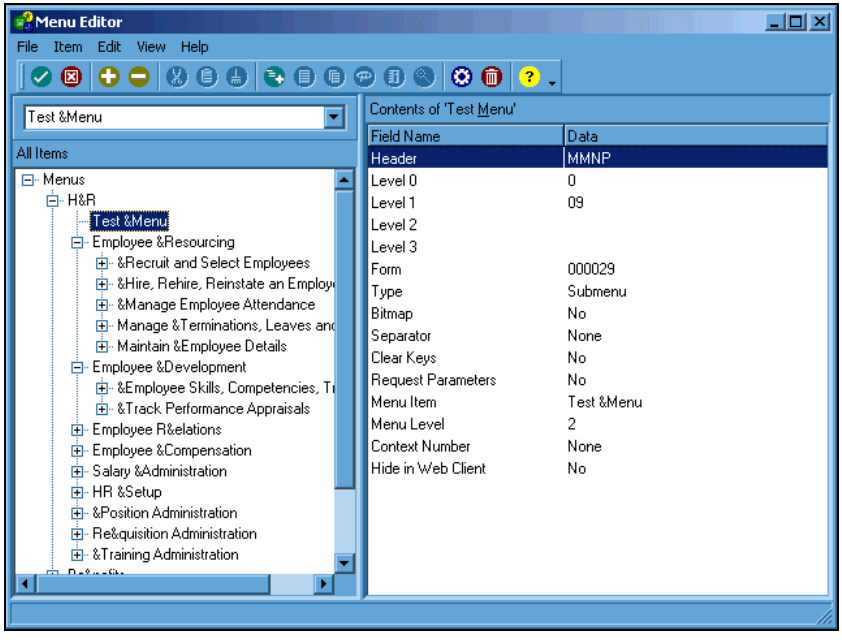
In the tree view in the left pane, point to the item.

If the item is not displayed, use the expand function or the menu search function.

3. Drag the item to its destination

Hold down the mouse key and move the item. You can only drag the item to the same level within the menu structure.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Save

Click the Save button on the toolbar to save the new menu record.

5. Click Exit

Click the Exit button on the Menu Editor toolbar.

See also:

- Order of menu items ***(on page 112)***

For more information about changing the order of menu items.

Modifying a menu item

To modify a menu item, follow these steps:

1. **Access the Menu Editor**

   Access this dialog by making the following selections from the Navigator:

   Component: Development Tools
   Process: System Control Repository Utilities
   Task: Customize Menus

2. **Select the item to be modified**

   In the tree view in the left pane, click the item to be modified.

   If the item is not displayed, use the expand function or the menu search function.

3. **Click Modify**

   Click the Modify button on the toolbar. The Modify dialog box is displayed for the type of item selected.

4. **Make the modifications**

   Make the required changes.

5. **Click OK or press Enter**

   If you are satisfied with your changes, confirm this by clicking OK or pressing Enter.

6. **Click Exit**

   Click the Exit button on the Menu Editor toolbar.

See also:

- Menu item changes ***(on page 114)***

For more information about modifying a menu item.

Deleting a menu item

To delete a menu item, follow these steps:

1. **Access the Menu Editor**

   Access this dialog by making the following selections from the Navigator:

   Component: Development Tools
   Process: System Control Repository Utilities
   Task: Customize Menus

2. **Select the item to be deleted**

   Highlight the item to be deleted.

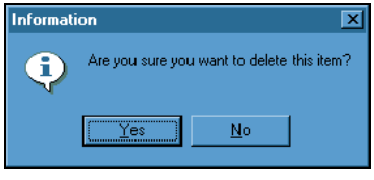
If the item is not displayed, use the expand function or the menu search function.

3. Click Delete

Click the Delete button on the toolbar. A dialog box appears, asking you to confirm your action.

4. Click Yes

Click Yes to confirm the deletion. The item, along with its associated sub-items, is immediately deleted.



5. Click Exit

Click the Exit button on the Menu Editor toolbar.

See also:

- Menu item deletion ***(on page 115)***

For more information about deleting a menu item.

Adding a report group to the menu

To add a report group to the menu, follow these steps:

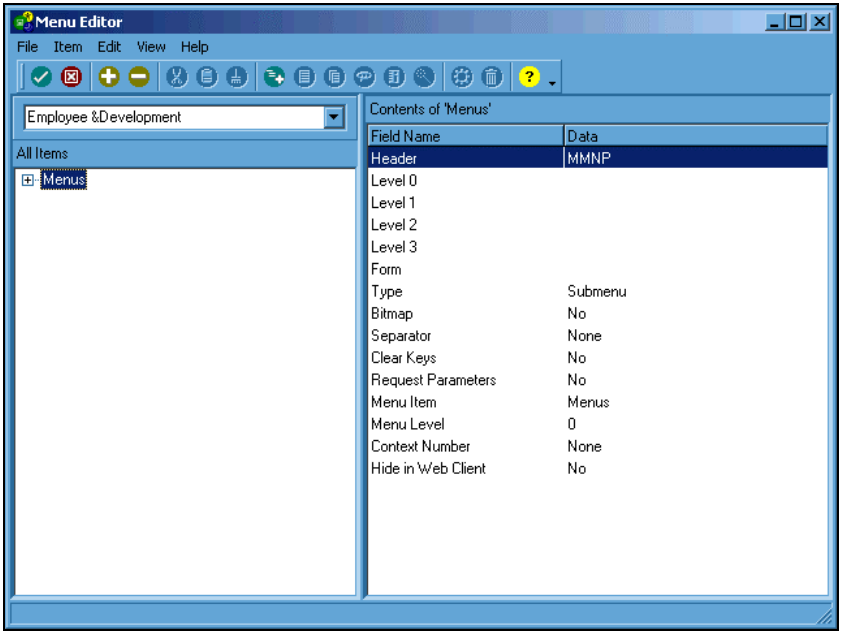
Note: Prior to adding a report group to the menu and using that item to launch a report group, you must add the report group to the system using the Report Group Activities form (RGMSTR). The name of the report group must end in 'RG' if it is to be launched online.

1. Access the Menu Editor

Access this dialog by making the following selections from the Navigator:

Component:	Development Tools
Process:	System Control Repository Utilities
Task:	Customize Menus

If you completed the previous step, the dialog that is displayed should look similar to the example that follows:



2. Expand the 'Menus' item

Click the plus sign (+) to the left of the 'Menus' item in the tree view in the left pane.

3. Expand the 'T&ools' parent item

Click the plus sign (+) to the left of the 'T&ools' parent item in the tree view in the left pane.

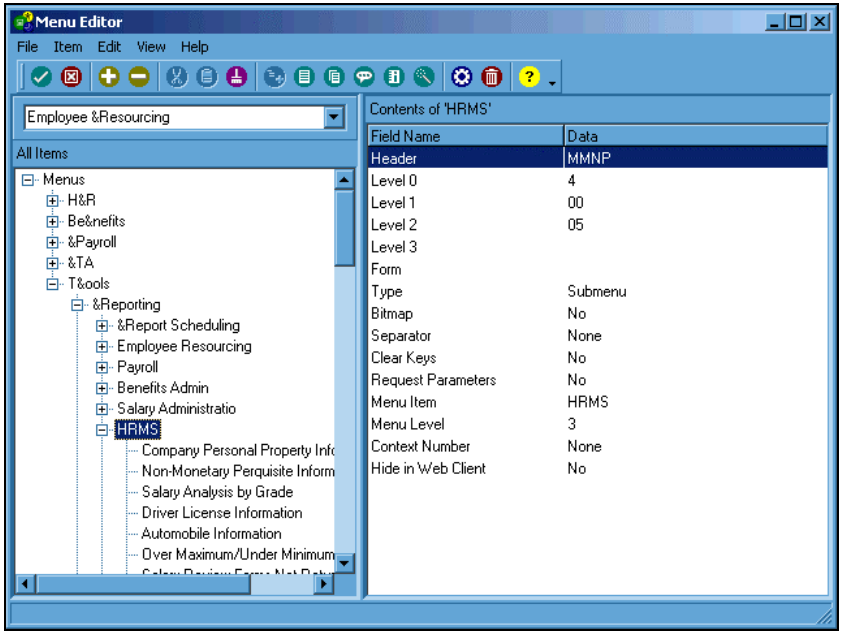
4. Expand the '&Reporting' submenu

Click the plus sign (+) to the left of the '&Reporting' submenu in the tree view in the left pane.

5. Select the report category to receive the new item

Click the report category below the Reporting submenu in the tree view in the left pane.

If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



6. Click the New Form icon

Select the type of item to add by clicking the New Form icon on the toolbar. The Add New Form dialog appears.

7. Enter the Item Title

Type the report group title that should appear on the menu. This name can be up to 38 alphanumeric characters. This must match the title that was entered on the Add Report Group form (RGADD).

8. Enter the Name

Type the name of the report group. This must be the report group name that was entered on the Add Report Group form (RGADD).

9. Enter the Context number (optional)

Type the four-position context number for the help topic. Values must be numeric and within the range 8000–8999.

This option is only available for components and may be left blank when adding a report group.

10. Select Options (optional)

If you are adding a form item, these options will be active. By default, 'Neither' is selected. No change in selection is required for a report group item.

11. Select Menu separator (optional)

Select this check box if you want a line to be drawn above the menu item's position in the menu list. Separators logically group related items. No entry is required for a report group item.

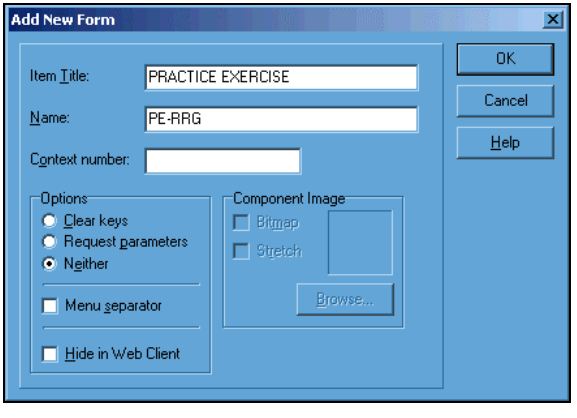
12. Select Hide in Web Client (optional)

Select this check box if you do not want this report group option to appear in the Web Client.

13. Bypass the Component Image selections

These items are not active for a report group item. You may bypass these selections.

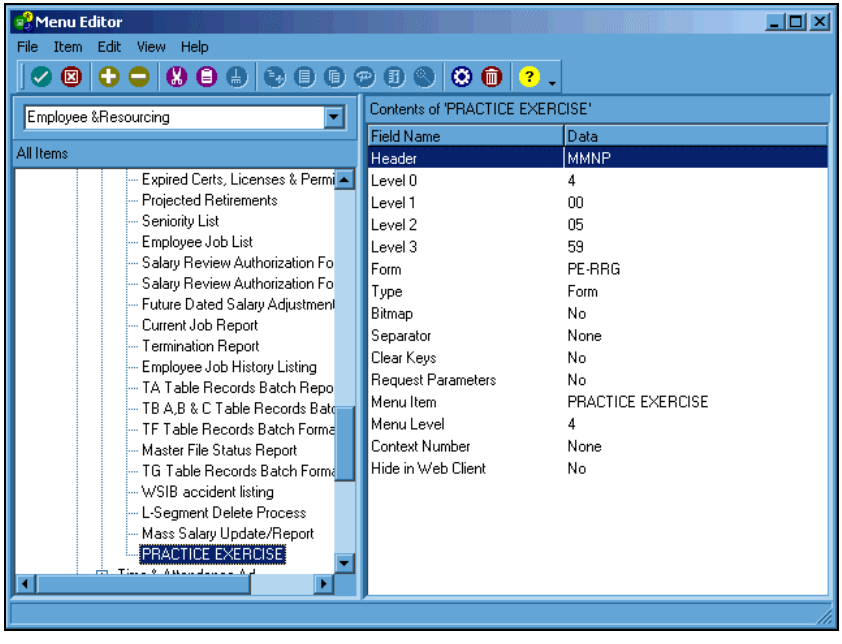
If you completed the previous steps, the dialog that is displayed should look similar to the example that follows:



14. Click OK or press Enter

If you are satisfied with your entries, confirm this by clicking OK or pressing Enter.

If you completed the previous step, the dialog that is displayed should look similar to the example that follows:



15. Click Save

Click the Save button on the toolbar to save the new menu record.

16. Click Exit

Click the Exit button on the Menu Editor toolbar. The new report group is now available on the Navigator and the menu.

If you close the dialog without saving, a Save dialog will be displayed, asking you if you want to save your changes to the menu structure.

See also:

- Menu Editor ***(on page 107)***

For more information about adding a report group to the menu.

Extended Practice

Using the Employee Resourcing submenu, add a submenu (level 3) named 'Maintain Company Property'. Assign a shortcut key to this item.

Then add two forms to the level 3 submenu with item names of 'Company Property' (form name 22-SCR) and 'Automobiles' (form name 24-SCR). Assign shortcut keys to each new form.

Save your changes. View your changes online.

Review of Questions Answered

1. What types of menus are delivered with the system?

2. What is the relationship between the menu structure and the Navigator?

3. What is the Menu Editor and how is it used?

PART 3

Integrating Desktop Applications and Data

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CHAPTER 6

Exporting and Importing Data

In This Chapter

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Introduction

The ability to retrieve data from the administrative solutions, perform calculations or manipulate that information, and then import that enhanced data to update company and employee records allows your organization to reap the highest benefits from your system. This section introduces you to the export process and describes how to use the import feature to design and process imports that will update your company and employee records.

Tasks

This section explains the following:

- Creating a data extract using Reporting Administration
- Creating an import profile
- Renaming an import profile
- Modifying an import profile
- Starting an import
- Stopping an import
- Restarting an import
- Viewing the Import Message Log
- Removing an import profile
- Including and excluding target forms

Prerequisites

Before you can use the import functionality, The Solution Series must be installed, you must have the access to the data to be imported, and you must be familiar with the system's forms.

Questions answered

The following questions are answered in this section:

1. What tools can be used to export data?
2. What is the Import Profile Manager and what purpose does it serve?
3. What functions are provided by the Import wizard?
4. What control options are available for the import process?

The export process

Several tools are provided to help you extract and report on information about your organization, employees, benefits, and payroll. These tools are suited for different purposes, and you will achieve the best results by using the tool that suits your extract requirement.

Options for obtaining extract data include:

- Reporting Administration
- Using ISQL or another tool to query a relational database implementation of the system
- Packaged reporting
- Solution View (create an extract)

Reporting Administration

Using Reporting Administration functionality is the easiest way to manipulate data. As delivered, Reporting Administration provides a means of extracting a great deal of information from the administrative solutions. By reviewing the data that is already delivered, you may determine that the data you want to extract is already defined. Then the task of manipulating data and importing it back into your system could be as simple as creating an Impromptu report, saving its content in comma delimited format, altering the data, and using the Import feature to apply the manipulated data. If this is the case, you need to verify that a fresh extraction has been performed before creating your Impromptu report.

☞ *Refer to the Reporting Administration Data Mart Data Model and/or the Catalog to Field cross reference spreadsheet delivered with Reporting Administration to determine if the data you want to manipulate is already defined in Reporting Administration.*

If the data you want to manipulate is defined in Reporting Administration, but you do not want to perform a full extraction of all defined data, you can define a separate data mart and perform a mini extraction. This course of action requires database administrative skills. To learn how to do this, attend the Customizing Reporting Administration class.

If the data you want to manipulate is not defined in Reporting Administration, but you want to use the functionality of this reporting tool, you must create additional extract programs, either customize the data mart or create a new data mart, and customize the delivered catalogs or create new/additional catalogs. This course of action requires Cyborg Scripting Language skills and database administrative skills. To learn how to do this, attend the Customizing Reporting Administration class.

Note: You will be able to do an extract only if your organization is licensed to use Administration. The full process requires additional software elements. The specific data elements represented in the extract are detailed in the Reporting Administration Data Mart Data Model documentation.

See also:

■ Creating a data extract using Reporting Administration ***(on page 166)***
For detailed instructions for creating a data extract.

ISQL or another tool

If you have a relational system, you can use ISQL or another tool to run queries directly from the relational tables of your system. You can then save the query content in comma delimited format, alter the data, and use the Import feature to reload in the manipulated data.

This is only an option for the most technical users who have detailed knowledge of the data format and table definitions within the relational version of the system.

Packaged reporting

We deliver hundreds of reports that have been developed using the Cyborg Scripting Language. You can use these reports in their delivered form or customize them to report on specific data.

You can also use Cyborg Scripting Language to create your own program that could be run offline to extract data.

Once the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

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

Solution View

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

- Query Writer—to write programs that are run online by the QUERY program
- Report Writer—to write programs that are run in batch

The Report Writer in Solution View can be used to create an extract file from your data. After the data is extracted and formatted in delimited files, you can manipulate the data and use the Import feature to apply the manipulated data.

☞ *Refer to the Using Solution View documentation for details on how to create an extract file.*

The extract data

Regardless of the method used to extract the data, the report or file must be converted to a delimited file or placed in an Excel spreadsheet to create the import file. This file is the one used by the Import functionality to update company and employee information.

Apply the Concept
Based on your understanding of the export options as explained in this concept, which one or more of the solutions will best suit the needs of your organization?

The import process

The import process moves data from an external source to any company or employee form. All you need is the authority to access the import data file.

The import feature is not a replacement for the Batch Transaction Layout function, which is a batch-only program that produces a report showing batch transaction layouts for application form entries. The report is called the Batch Layout Report (BATCHL). It contains form-specific literals, field information, and comments associated with the entry fields. The Batch Layout Report (BATCHL) can be very helpful when you design conversion and/or interface programs. This feature is specifically suitable for high volume movement of data for installation, conversion, and maintenance purposes.

What is an import profile

An import profile sets up the relationship between the import data and the form to which it will be imported, and is independent of the actual data. Import profiles are specific to each user. Once created, an import profile can be used for multiple imports from different data files, provided the same columns of data still exist.

To create an import profile, you must already have an import file that contains data that can be used to populate the system's forms. You will then select the form on which the import data will be recorded, and specify a one-to-one mapping of import data items to form data items. You also have the option of specifying a header record in the import data file, as well as the file delimiters and text qualifier that were used in the import data file.

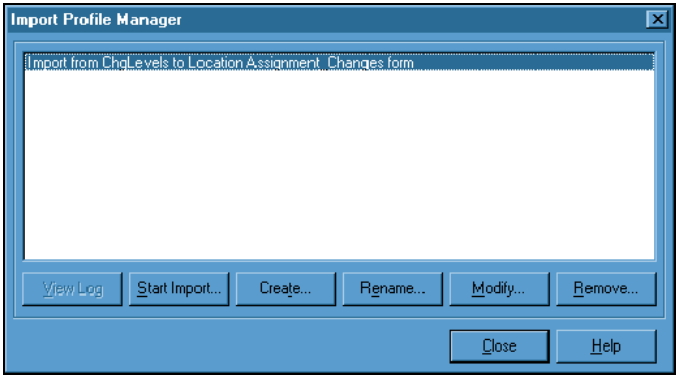
After import profiles are established, they can be shared by copying the local files from one PC to another. It is not possible to store import profiles on the server.

What is the import process

After an import profile is set up, the import process can be started. After you specify how the import will handle errors and whether the import records will generate communication events, field validation takes place. You may stop the import and correct the errors. When all the fields validate with no errors, the posting of import data begins. When all the data has been recorded in your system, you may view an Import Message Log that provides error and warning information, as well as import record totals.

The Import Profile Manager

The Import Profile Manager is the tool that allows you to easily create, modify, rename, and remove an import profile, as well as start the import and view the resulting message log. You may use the Import Profile Manager if you have been given access on your user profile or if you are the Security Officer.



The Create or Modify options on the Import Profile Manager launch the Import Creation and Amendment wizard. This wizard guides you, step by step, through the tasks and options necessary to create or modify an import profile.

Import data sources

The Import Profile Manager is used to import data on a form by form basis. For instance, a department manager may use spreadsheet software to calculate and manipulate staff position and salary information. After this is done, and the new salary budget has been approved, the spreadsheet data can be imported into your system. The manager can apply the data to as many forms as required, one at a time.

Import data can be extracted from any source, including the administrative solutions.

Allowable import files

You can use a Microsoft Excel 97 (or higher version) spreadsheet to calculate and manipulate information. That data can then be applied to one or more system form.

You may also use any extracted application data that can be saved as a delimited file.

General import data file rules

Whether you import a file that has been created using an Excel spreadsheet, or an extracted application file, you must ensure that you understand what will occur when you import data to an employee's record.

It is a common practice to select the Clear Fields menu option to blank out the existing data on a form before keying new data. This prevents any copying of information from the prior occurrence if it does not apply to the new segment. If the employee record to which you are going to import data already has a form with existing data, any field that is not applied by the import will retain its prior value. Import does not blank out fields to which data is not imported.

To clear a field, a hash symbol (#) or a 'none' selection in an option list must be used in the Import data file cell or keyed directly into the form field during the mapping process. This is the recommended method of blanking out existing information in fields that will not be mapped to a form in the Import Profile.

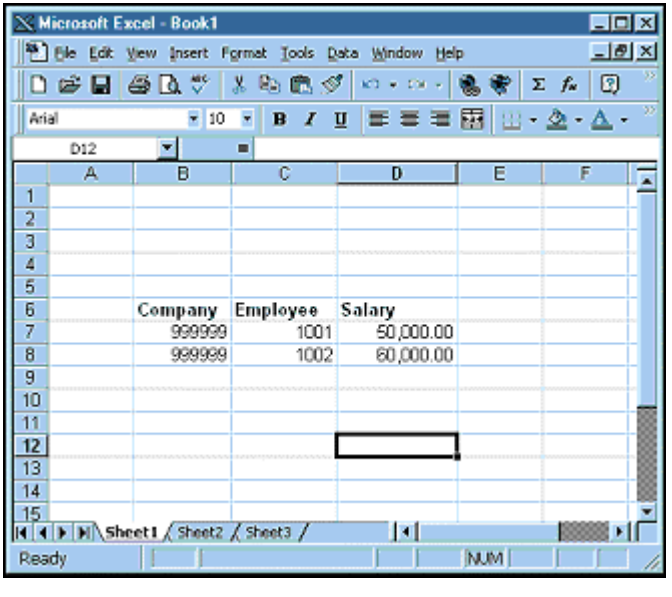
Excel spreadsheet rules

If data is being imported from an Excel spreadsheet, it is important that the following assumptions are known and that the rules are followed to prevent the accidental import of invalid data:

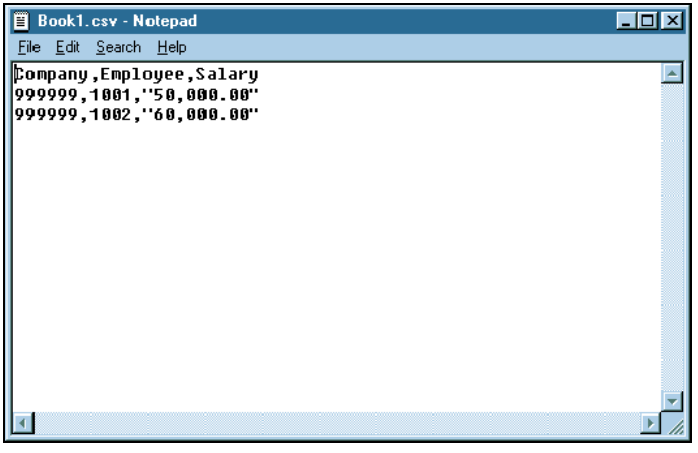
- The spreadsheet data must be contained within 'sheet1'.
- The import process saves the file in a comma-delimited format that automatically ranges the data from the first and last used rows and columns. Leading and trailing blank columns and rows are ignored. Any blank rows or columns that appear in the ranged part of the spreadsheet are saved. When an import is processed and an empty row is encountered within the ranged part of the spreadsheet, the following rows are ignored.
- If the 'First record is a heading' check box is activated in Step 5 of the import setup wizard, it is assumed that the first row of data is the heading row. The import assumes only one heading row.
- Any total lines must be removed from the spreadsheet or pasted into a new sheet 1 before importing.

Note: *An entry typed with leading zeros in an Excel spreadsheet will display without the leading zeros in the cell. If the field on the target form requires leading zeros, the entry in Excel must be preceded by a single quote ('005).*

The following Excel spreadsheet displays an example of an original import file.



The following example shows how the imported file would be converted.



Delimited files

The second option for an import file is one that has been developed in another application and extracted for use as an import file. This type of file uses delimiters and text qualifiers to separate where one item of data ends and another begins.

The delimiter may be a comma, semicolon, space, tab, or other alphanumeric character of your choice.

If the use of a text qualifier is required to define items within a delimiter, it may be a double quote or single quote.

Apply the Concept

Based on your understanding of the import sources as explained in this concept, would your organization be able to import a tab-delimited file that has been supplied by an insurance company?

Target forms

You may easily import data into any form to which you have access, as defined by your user profile that has been set up by your Security Officer. If your profile allows access to only ten forms, then you will be able to import to those ten forms.

If your user profile allows display-only access to a form, you will not be able to update that form with import data.

Position Management fields may be the target of import data. Position information may be imported.

Forms that can not be used with the import function do not appear in the form browse during the import profile creation. If your organization wants to exclude import to specific forms, this can be done using the Browse Forms - Import option list (SC52). Forms in this option list can not be used as targets for the import function. This option list can also be used to include forms that are not employee or company forms, but should be used within import, such as time entry forms.

☞ *Refer to* **Maintaining Option Lists** *(on page 27) for information about using the Option List Editor (CSUPDT) and displaying option lists.*

See also:

- Including and excluding target forms ***(on page 183)***

For detailed instructions for including and excluding target forms.

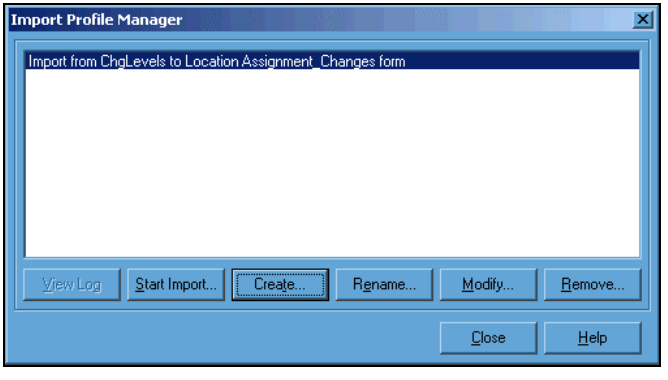
The Import wizard

The Import Creation and Amendment wizard provides you with an easy method of setting parameters for importing data into your system. The wizard takes you through the creation of the import profile that is required prior to processing the import.

The wizard allows the setup of parameters for one form at a time. If you need to import data into more than one form, run the wizard one time for each form. Then run the import program one time for each form for which you have created an import profile.

Navigating the Import wizard

The Import Creation and Amendment wizard is activated by selecting Create from the Import Profile Manager, as shown in the following dialog:



There are four buttons that you can use to navigate through the Import wizard:

- Back—Moves you backwards one step
- Next—Moves you forward one step
- Cancel—Exits the wizard and returns you to the Import Profile Manager
- Help—Displays online information about the wizard

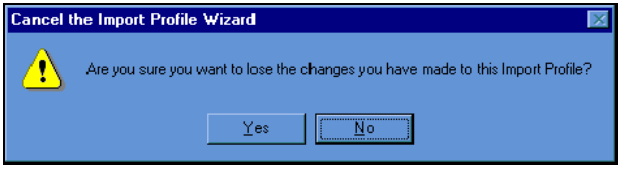
When appropriate, the Next button is replaced by a Finish button. The import profile is not created until you click Finish. Until you do so, you will be able to use the Back and Next buttons to move back and forth between the steps and make changes before the profile is actually created.

Wizard overview

The wizard guides you through the completion of the profile creation. The import profile must be set up prior to processing the import. The following tasks are included in the setup of an import profile:

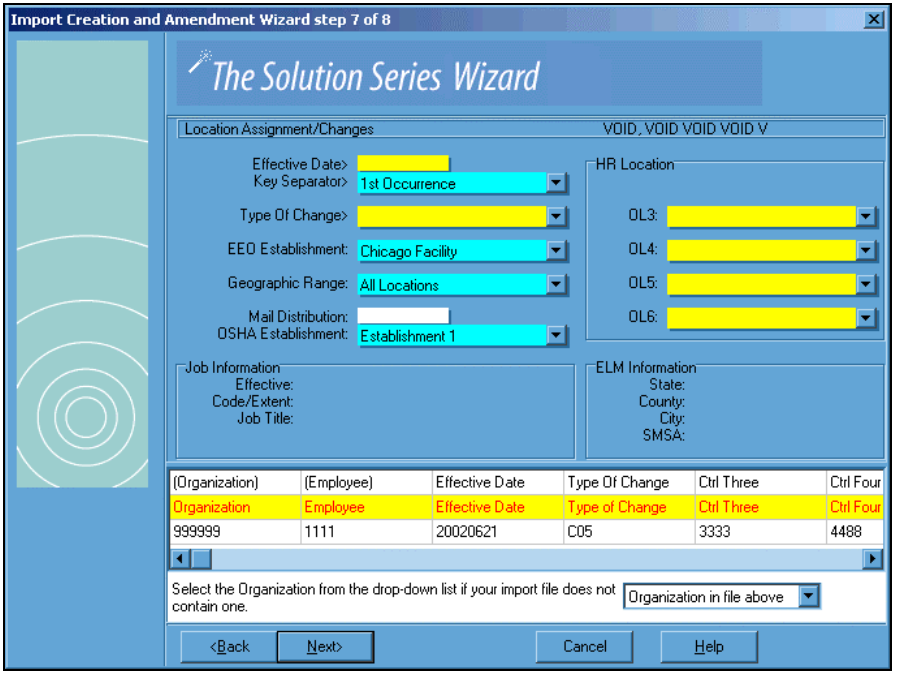
- Select the target form
- Specify the import data file
- Select import file delimiters and text qualifier (if not an Excel file)
- Specify if a header record is included in the import data file
- Map the relationship between the import data items and the form data items

If, at any time during the wizard process, you select 'Cancel', the following dialog is displayed:



File-to-form relationships

You will use the form and import data that displays in Step 7 of the Import wizard to map, or link, the data from the import file to the destination form. The form uses the currently displayed organization's Logical Employee Model as the employee for the form. The form area may only be used for mapping purposes. While you are processing Step 7, you will be prevented from linking to other forms, viewing history records, and saving the form.



Default values

If some of the form data is the same for all employees, you may choose to exclude that data from the import file and enter it directly on the form during the mapping process. Default values can be entered directly on the form, in exactly the same way that data would be recorded. Entries made directly on the form apply to all employees in the import.

To clear an existing field on the target form, a hash symbol (#) must be keyed directly into the form field. This is the recommended method of blanking out existing information in fields that will not be mapped to a form in the Import Profile.

Use of a variable date

As an alternative to entering a default date within a date field or mapping to a column in the data, you can also type the word 'Today' or the letter 'T'. This causes the current date to be used when the import occurs. These entries are not case-sensitive.

Days can also be added or subtracted from today's date by entering 'T+n' or 'T-n' (where n is a number in the range of 1 to 99). As an abbreviation for the fuller statement, the entry '-

n' or '+n' can be entered. This is useful if the same import is to be used repeatedly. This option will also be available as a context sensitive item on the form (right-click on the date text box).

Effect of organization assumption

Because the wizard relies on its ability to display the form for a specific Logical Employee Model, the following logic is applied when a target form is selected. This logic will ensure that the form can be called:

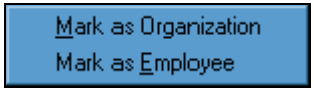
- Logical Employee Model '00' will be called for the currently selected Organization.
- If the Logical Employee Model '00' does not exist, the LMODEL option list (SC42Y) will be examined, and the first Logical Employee Model number for the Organization will be used.
- If this fails, an error message is presented.

Mapping methods

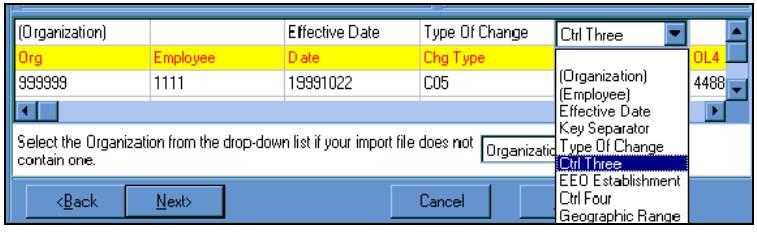
Fields may be mapped, or linked, from the import data to the form data by one of two methods:

- Selecting the field name from the drop-down list at the top of the import data column
- Dragging and dropping an import data column onto the field to which it will be mapped

Right-clicking on a grid column allows a column to be assigned to an Organization or Employee:



If you use the method of selecting the field name from the drop down list at the top of the data column, each form field name displays in the drop down list. As shown in the following illustration, a blank value also exists in the drop-down list to allow the removal of values if an error is made:



Alternatively, you may drag a column and drop it onto the field to which it is to be mapped. As this is done, the top row of the column is updated to reflect the field name.

Each column of data can only be mapped to a single data field on the form. All key fields on the displayed form must be mapped or manually entered. If the Next button is selected before all of the key values have been mapped or manually entered, an error message is presented.

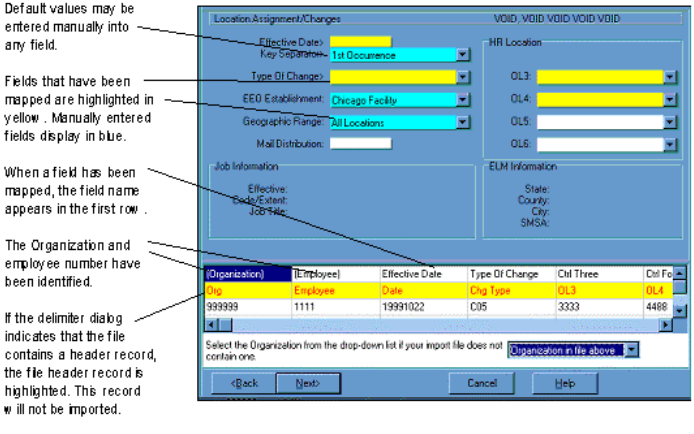
The Import Wizard will try to automatically match the Organization. If the Organization has been mapped from the import file, the Organization list will be set to 'Organization in the file above'. If an Organization is selected from the list, any column mapped to the Organization is cleared.

When mapping to a list box, either the description or the code can be mapped to the option list. During the import, the system will scan both for a match. If the same value is matched in the code and description during the import, the code will be used.

Import data for option buttons must match the option button caption or code. For example, for the Sex option button, the import data must be M, F, Male, or Female. You may use the selection method or the drag-and-drop method for mapping to an option button group.

If a column is dragged to a field that already has a mapping, the old mapping is removed and the new mapping takes its place. If a field is already manually entered, and then a column is dragged to it, the manual entry is cleared.

If you indicated in Step 5 of the wizard that the first row of import data was a header record, then the header information is highlighted in the display in Step 7. This record is not processed by the import.



@

Field color changes

Action	Color of field
Mapping is done by selecting a field from the drop-down list or by dragging the column to a field	Yellow to indicate that the field has been mapped
Manual entry is made in a field on the form	Blue to indicate that the value in the field will be defaulted to all records generated by the import
Field is manually entered, and then a column of import data is dragged to it	Blue changes to yellow after manual entry is cleared
Column of data is mapped to option buttons	Yellow in all of the buttons to indicate that a mapping has taken place
Manual entry is made in an option button group	Blue in all of the buttons, and the button selected will display a black selected mark

Removal of mapped fields

Two methods are available for removing mapped fields if an error is made:

- Select the blank value in the import column option list.
- Right-click the field on the form and click the Remove Link option on the resulting dialog to remove the mapping.

See also:

- Creating an import profile ***(on page 166)***

For detailed instructions for creating an import profile.

Apply the Concept

Based on your understanding of the Import wizard as explained in this concept, how would you determine by looking at the display in Step 7 that all of the desired import items have been mapped to the target form?

Import profile conventions and maintenance

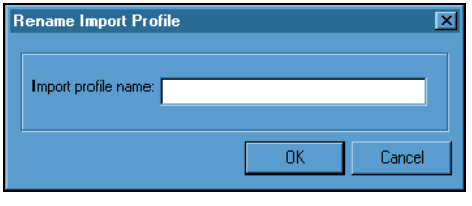
As your business needs change, you may need to maintain the import profiles that simplify your everyday tasks. You can rename, modify, and remove import profiles.

Import profile naming conventions

The name of the profile is derived from the input file name and the form name. Any illegal characters that may occur in the file name, such as '/', are replaced by an underscore, as shown in the following example:

> If the import file name is *review 1999.xls*
> and the form is *Salary Assignment/Changes*,
> then the import profile will be titled *Import from review 1999 to Salary Assignment_Changes form*.

You may change an import profile name if necessary. The Import Profile Manager provides a Rename option that allows you to see the existing name and make any changes. The resulting Rename Import Profile dialog displays the current name and allows you to change it to any other value of up to 100 alphanumeric characters:



If the name that is automatically generated, or entered manually using the Rename Import Profile dialog, is not unique, the system will add a sequence number to the end of the name. For example:

- Import from review 1999 to Salary Assignment_Changes form
- Import from review 1999 to Salary Assignment_Changes form (1)
- Import from review 1999 to Salary Assignment_Changes form (2)

See also:

- Renaming an import profile ***(on page 176)***

For detailed instructions for renaming import profiles.

Import profile storage

When the final step of the Import wizard has been completed, the import profile is saved as a .IMP file on your local PC. It is stored in the following path and location:

```
<Install Directory>\Environments\<Environment Name>\Imports
```

You can view a list of existing import profiles by displaying the Import Profile Manager dialog or by using Windows Explorer to search for all files with an extension of .IMP.

Import profile copies

Because import profiles are stored on your local PC, other users can not access them or run imports using their parameters. However, you may share import profiles by copying the .imp file to a diskette or CD-ROM, or attaching the file to an email. The import data file may also need to be made available to the user, if the same import data is to be used or modified. Alternatively, a template of the import data file can be provided and used with new import data.

Import profile modification and removal

The Modify option on the Import Profile Manager dialog allows you to use the wizard to modify any of your existing import profiles. The profile data that you previously entered will be displayed and you may make any changes that are required.

Import profiles may also be removed by highlighting a specific profile and then selecting the Remove option on the Import Profile Manager. A Remove Import Profile dialog is displayed that allows you to verify your intention to remove the profile.

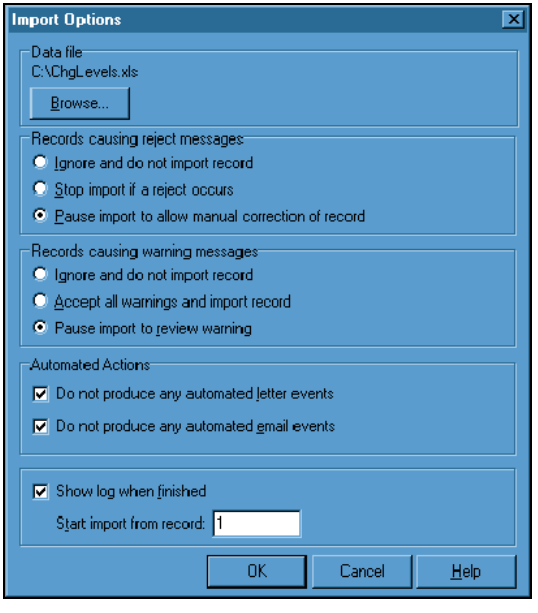
See also:

■ Modifying an import profile ***(on page 176)***
For detailed instructions for modifying import profiles.

■ Removing an import profile ***(on page 182)***
For detailed instructions for restarting import record processing.

Control options for importing data

After an import file on the Import Profile Manager has been selected and the Start Import button has been clicked, you can specify how the import handles errors and specify automated options by making selections on the Import Options dialog. After this dialog is completed, the pre-import validation begins.



Change import files

A Browse button provides the opportunity to change import files prior to beginning the import process. The changed file must have the same column structure as the original. File. This could be used if you created your field mappings from a dated import file and want to substitute current data at the time of import. For instance, the original import file might be 'JanuaryBudget.xls' and you want to run the 'FebruaryBudget.xls' file in the current Import run. Also, if an import file is shared (the .IMP file copied from one PC to another), you may need to reference a different import file.

Automated options and error handling

Depending on the number of records being processed by the import, you may choose to handle rejects and warnings in different ways.

Records causing reject and warning messages

For rejects, you may choose one of the following actions:

- Ignore and do not import the record
- Stop import if a reject occurs
- Pause import to allow manual correction of record

Note: Pausing the import for each reject may not be advisable when a large number of import records are being processed.

You may choose one of the following options for handling warnings:

- Ignore and do not import record
- Accept all warnings and import record
- Pause import to review warning

Automated actions

When the import is run and forms are updated, all communication events related to the form will occur unless the special defaults on the Import Options dialog are activated.

If the 'Do not produce' options are not activated, all letters produced by the form generation during the import are queued. If letter events are triggered, you will be able to view or print them after the import has finished.

Depending on the number of import records, a large number of communication events may be triggered. Consider the effect of large volumes of emails and letters on your network environment.

Emails are sent without the option to receive a preview dialog. If multiple recipients are found for a position, the email is sent to all of them. If emails are triggered, it may cause the email system to request an email password. This suspends the import process until the password is entered.

Import message log

After an import is completed, a log file is produced. If you set the option on the Import Options dialog to display the log file when the import has been completed, then the file will be automatically opened in Microsoft Notepad or the application assigned to text files on the PC.

Alternatively, if you leave this option unselected, you may view the message log by selecting the View Log button on the Import Profile Manager dialog.

See also:

- Viewing the Import Message Log ***(on page 181)***

For detail directions for viewing the import message log.

Record starting point

In case you need to stop the import, or a network failure or power problem occurs while import is being processed, you have the option of restarting the import from a specific record. In a restart situation, the Import Options dialog defaults to the aborted record number. Alternatively, you may type the record number to be processed when you restart an import.

See also:

- Starting an import ***(on page 177)***

For detailed instructions for processing import records.

- Restarting an import ***(on page 180)***

For detailed instructions for restarting import record processing.

Apply the Concept

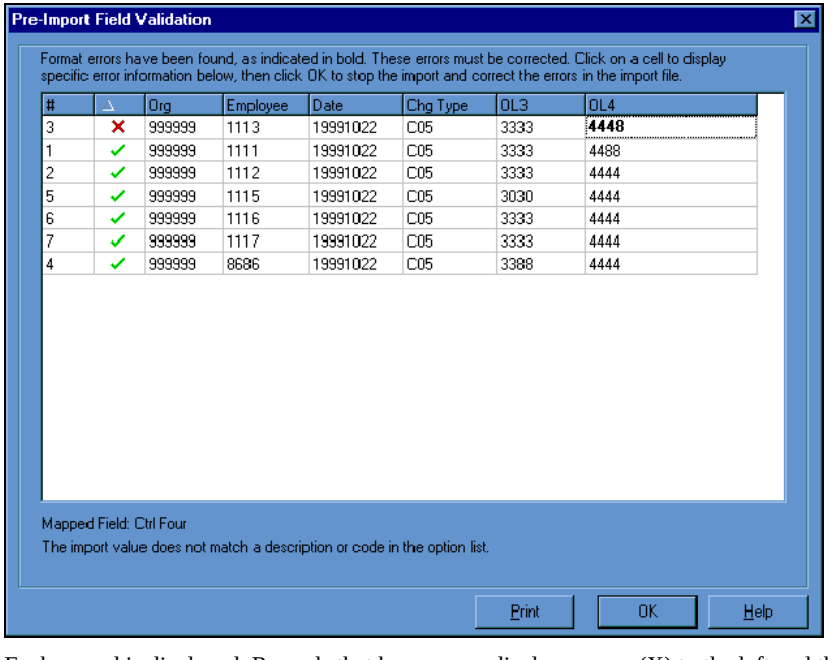
Based on your understanding of the import options as explained in this concept, which option would you choose for rejects and warnings if your organization was processing an import file that contained 75 records?

Pre-import validation

After the import options have been selected, field validation takes place. The following are some of the validation checks that are conducted before any records are actually imported:

1. The form must exist. If it does not, an error message is displayed and the process is stopped.
2. The import file must exist. If it does not, an error message is displayed and the process is stopped.
3. The import file must contain records. If it does not, an error message is displayed and the process is stopped.
4. The fields to be imported must be complete and in a valid format. For instance, a date field entry must be formatted correctly.

If field errors are found, the following Pre-Import Field Validation dialog is displayed:



#	Δ	Org	Employee	Date	Chg Type	OL3	OL4
3	✗	999999	1113	19991022	C05	3333	**4448**
1	✓	999999	1111	19991022	C05	3333	4488
2	✓	999999	1112	19991022	C05	3333	4444
5	✓	999999	1115	19991022	C05	3030	4444
6	✓	999999	1116	19991022	C05	3333	4444
7	✓	999999	1117	19991022	C05	3333	4444
4	✓	999999	8686	19991022	C05	3388	4444

Each record is displayed. Records that have errors display a cross (X) to the left and the field in error is in bold. Records without errors display a check to the left. Initially, all error records are sorted at the top. Clicking on any column heading cell will sort the data in the column.

If you select a cell with a validation error, a validation error message and the name of the mapped field will be displayed at the bottom of the dialog. The Print button may be used to print validation errors to the default printer in the following format:

Record Number	Mapped Field	Column Name or Number	Cell data	Error Message

The following validation messages will display at the bottom of the dialog when a cell in error is selected:

Error message	**Explanation**
Invalid Date	■ The number of days added or subtracted from Today's date can not exceed 99. ■ The import value is not a valid date or Windows short date.
Invalid Number	■ The import value is too large for the numeric field. ■ The import value has too many decimal places for the numeric field. ■ The import value is not numeric.
Invalid Alphanumeric	■ The import value has too many characters for the alphanumeric field.
Invalid Name	■ The import value is not a valid name; it does not have a comma followed by a space. ■ The import value has too many characters for the name field.
Invalid Option List Value	■ The import value does not match a description or code in the option list.
Invalid Position Administration Table Value	■ Can not locate the Position Administration control number for the Organization. ■ The import value does not match a description or code in the Position Administration table.
Invalid Check Box Type	■ The import value is not a valid Yes or No type.
Invalid Employee ID	■ The import value is not a valid Employee ID; it must have between one and ten characters.
Invalid Organization ID	■ The import value does not match a description or code in the Organization option list.
Invalid Time	■ The import value is not a valid time format. Use the format: HH:MM where HH is hours (00-23) and MM is minutes (00-59). ■ The import value for hours is invalid. Hours must be within the range of 00 to 23. ■ The import value for minutes is invalid. Minutes must be within the range of 00 to 59.
Invalid Option Button Value	■ The import value does not match the option button label or option list code.

Although this dialog displays the errors, it may not be used for error correction. You must make your corrections in the import file.

You may stop the import by clicking OK, allowing you the time you need to correct the errors. All errors must be corrected in the import file prior to continuing the import process. After the errors are corrected, the import process can be started again and the validation checks will be repeated.

If all fields validate with no errors, the import process begins.

See also:

■ Starting an import ***(on page 177)***
For detailed instructions for processing import records.

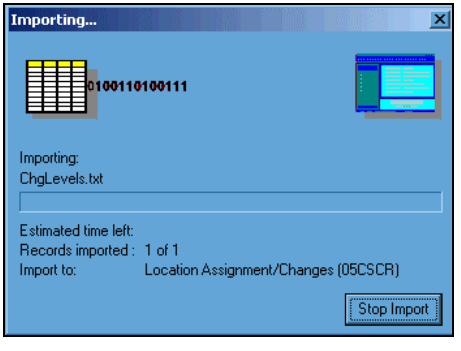
■ Restarting an import ***(on page 180)***
For detailed instructions for restarting import record processing.

Running the import

After the import options are entered, all the validation checks are performed, and all errors are corrected in the import file, the import of employee data can begin.

If the system identifies that the format of the import data has changed, an Invalid Import File dialog is displayed. A change to the import file may include such conditions as a mismatch in the number of data elements per record, for example, a mapped value in the import that no longer exists. The import stops and must be restarted after the error has been corrected.

While the import is in progress, the following dialog is displayed:



You may monitor this dialog to see the progress of the import run, or you may start another session of the system and perform other tasks while import is running. However, if you have chosen the option to pause the import process for errors, your attendance during the import run is required to address each error that is encountered.

See also:

- Starting an import ***(on page 177)***

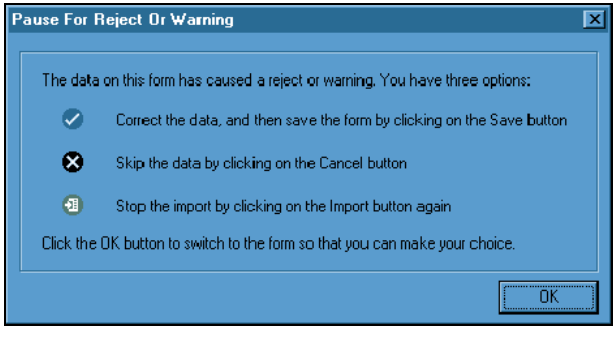
For detailed instructions for processing import records.

- Restarting an import ***(on page 180)***

For detailed instructions for restarting import record processing.

Import pauses for form rejects or warnings

If you selected either of the 'Pause the import' options on the Import Options dialog, the following dialog is displayed when an error occurs:

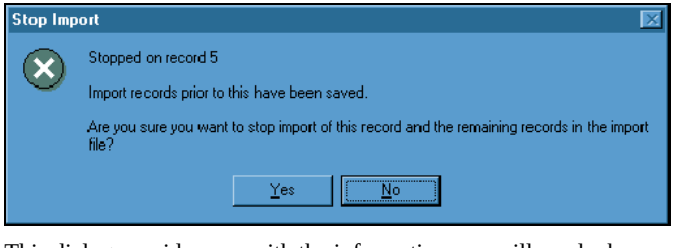


Three options are displayed in the dialog to address an error. After clicking OK on this dialog to switch to the form, you may perform one of the following actions by clicking the specified toolbar button:

- Save—Read the error message and then amend the data or accept the warning on the form being displayed; then click Save. The import continues.
- Cancel—Skip the data, bypassing the import record. No update is recorded; this record will be recorded in the log file as an uncorrected error. The import continues. Pressing Enter also cancels the record.
- Import—Stop the import (perhaps this error reveals a larger problem that must be resolved). The Stop Import dialog is then displayed with a Yes or No option.

Import interruptions

If, for any reason, you need to stop the import, you may do so by clicking the Stop Import button on the Importing dialog. As an alternative, you may click on the Import button on the toolbar, which changes to 'Stop Import' during an import. The following Stop Import dialog is displayed:



This dialog provides you with the information you will need when you restart the import. It also provides you with the alternative of continuing the import. The restart record number will also be recorded on the Import Options dialog and the Import message log if you choose to stop the import at this point.

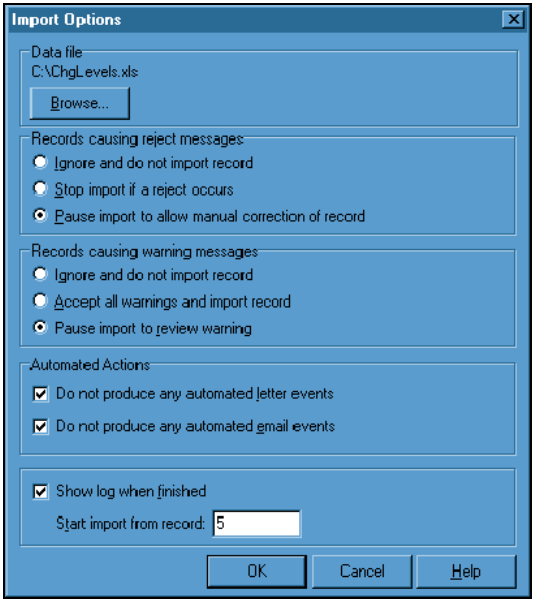
See also:

- Stopping an import ***(on page 179)***

For detailed instructions for stopping import record processing.

Import restarts

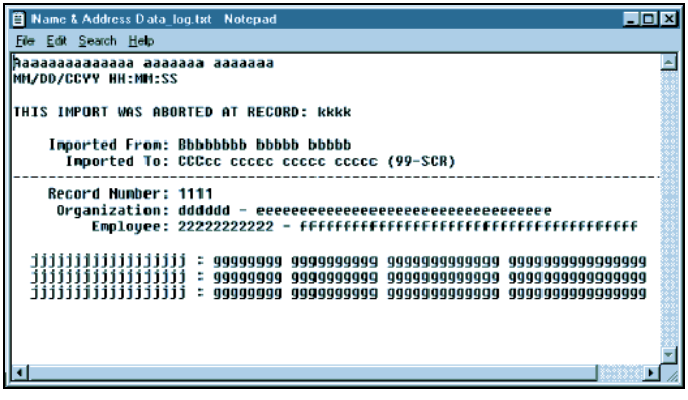
Using the information provided by the Stop Import dialog, you can restart the import from a specific record using the Import Options dialog:



Message log

If you set the option on the Import Options dialog to show a message log when the import has been completed, then the log file will be automatically opened in Microsoft Notepad or other text view assigned on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

The log contains error and warning information that is presented in the format shown in the following example:



The log text will be displayed as follows:

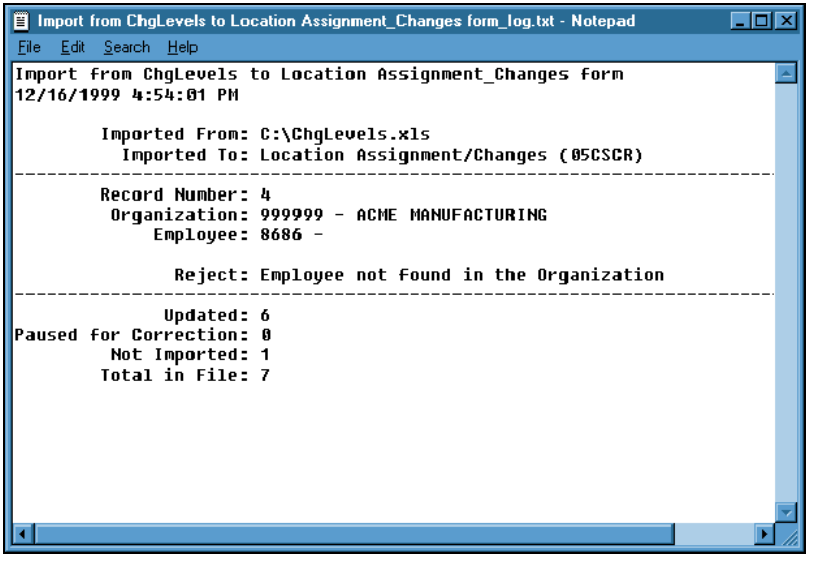
Aaa...	Import title
MM	Month
DD	Day
CCYY	Century and year
HH	Hours
MM	Minutes
SS	Seconds
kkkk	Aborted record number (if import aborted)
Bbb...	Import file name
CCCc...	Form name
99-SCR	Program number
1111	Record number of file
dddd	Organization number
eeeee	Organization name
222…	Employee number
ffff…	Employee name
jjjj...	Type of message (Reject, Ignored Message, or Accepted Message)
gggg...	Error message, with or without error numbers

Note: The date format is derived from the local PC setting. The date is displayed in Windows short date format, defined in the regional settings control panel dialog.

As well as Cyborg Scripting Language rejects and warnings, the following errors will also produce a reject message and be displayed on the log:

- 'Employee not found in the Organization'—when the employee can not be found
- 'Record Locked - Update Bypassed'—when another user is updating the employee record
- 'The import form does not contain any entry fields'—when the user has display-only security
- 'The form contains a different layout from when the import profile was created'—when the import profile is defined for a form that changed
- 'You are not authorized to access this employee'—when a security violation occurs

The following is an example of a message log file:



The last lines of the report display a record count for the following items:

- Updated—Records applied (including records that had warnings that were accepted)
- Paused for Correction—Records that had warnings or errors that were manually fixed or cancelled by the user
- Not Imported—Records not imported due to warnings or errors
- Total in File—Total records in the import file (excluding header record)

The message log file will have the same name as the profile but with a '_log.txt' suffix. Each time a new import is completed, the prior log is replaced with current message log information. The current log for each import is stored in the following path and location on your local PC:

```
<Install Directory>\Environments\<Environment Name>\Imports
```

Note: *If you renamed an import profile, the associated message log is not renamed. However, it can be viewed by accessing Windows Explorer and searching for the file under its original import profile name. If you want to keep additional log history, you may rename and relocate logs as they become available.*

See also:

- Viewing the Import Message Log ***(on page 181)***

For detailed instructions for viewing the message log.

Apply the Concept

Based on your understanding of import run as explained in this concept, what control procedures would you implement to ensure that all import records are posted to your system?

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Information and prerequisites before practicing the following detailed directions 166
Creating a data extract using Reporting Administration 166
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Information and prerequisites before practicing the following detailed directions

The Wizard dialogs shown in the first task may not match your own data. They do, however, represent the resulting dialog in each wizard step.

An import file must be present on your local PC before starting the following detailed directions. It is suggested that you turn on the Office integration toolbar so you can access the Import Manager button.

Access the toolbar by making the following selections from the menus:

View ▶ Customize Toolbars

Then click the Toolbars tab, select Office integration, and click Close.

Creating a data extract using Reporting Administration

To create a data extract using Reporting Administration, follow these steps:

1. **Review the defined Reporting Administration data to see if it is already exported during a Administration extract process.**
2. **If yes:**
   Use Impromptu to create a sample report.
   Save the report as a comma delimited file.
3. **If no:**
   Attend the Customizing Reporting Administration training course to learn how to create your own data mart.

See also:

- The export process ***(on page 137)***

For more information about creating import profiles.

Creating an import profile

To create an import profile using the Import Creation and Amendment wizard, follow these steps:

1. **Access the Import Profile Manager**

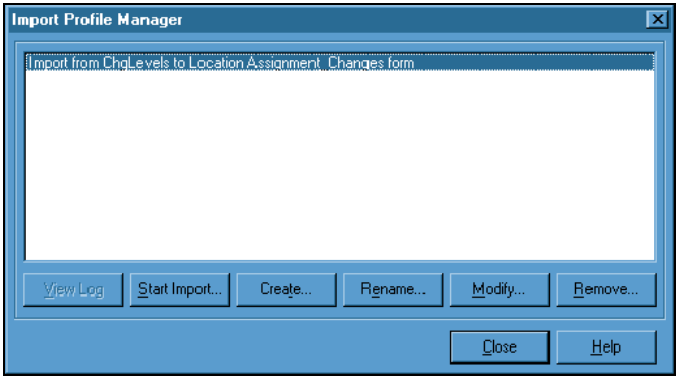
   Access this dialog by selecting the Import Manager icon from the toolbar:

   Alternatively, make the following selections from the menu:

   Actions ▶ Office Integration ▶ Import

   The Import Profile Manager dialog is displayed.

If you completed the previous step, the resulting dialog should look similar to the example that follows:



2. Select Create

Click Create to activate the Import Creation and Amendment wizard.

If you completed the previous step, the resulting dialog should look similar to the example that follows:

Welcome (1 of 8)

This dialog displays a brief description of import profile's purpose—to define the relationship between the data in your file and the data on a form, for the organization currently being displayed.

3. Click Next

Click Next to continue creating an import profile.

Choose form (2 of 8)

This dialog allows you to select the form currently being displayed or a form that you select by using a Browse button on the dialog.

4. Click Browse (optional)

If you want to import data to the form being displayed, you do not need to select a form. Skip to Step 7 of the detailed directions.

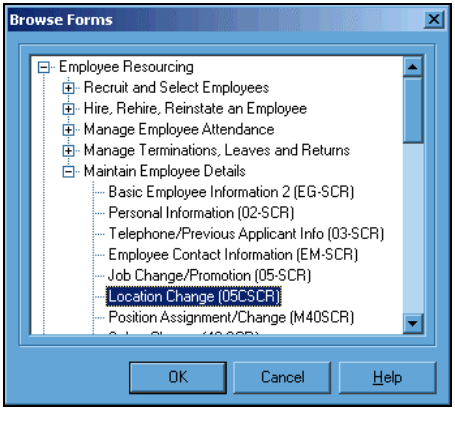
If the form being displayed is one that can not be used with the import functionality, then this dialog functions as if no form is displayed.

If the form displayed in the dialog is not the form to be selected for import, or if no form is being displayed, click Browse to view a list of available forms. This list contains only those forms you are authorized to access. Forms that can not be used with the import functionality are not displayed.

The Browse Form dialog is displayed.

5. Select a task

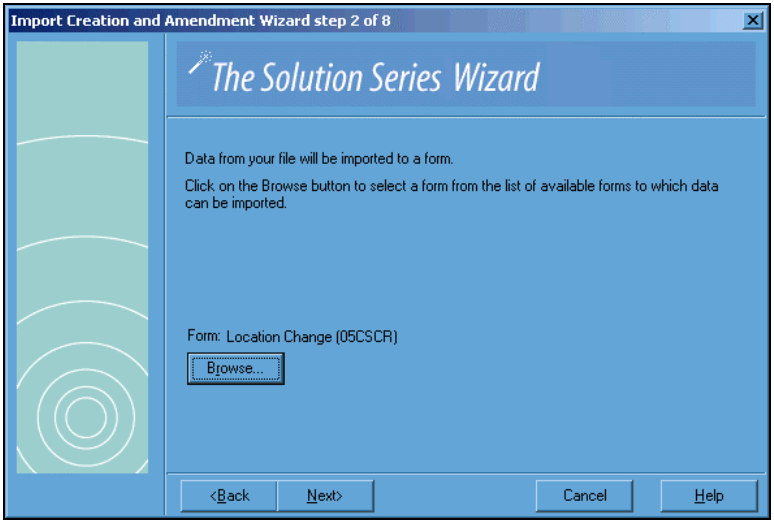
Fully expand the tree view in the same way that you would use the Navigator to locate a form. Highlight the task representing the form that is to receive the import data.



6. Click OK

Click OK to select the form. The form title and name are displayed on the Choose form dialog (2 of 8).

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



7. Click Next

Click Next to continue creating an import profile.

Choose file (3 of 8)

This dialog provides a Browse button to select the import file to be used. The following file types display in the open file dialog:

File extension	File type	Note
.***	All files	
.TXT	Text files	
.XLS	Excel	Default file type Will not use Step 4 of 8
.XLT	Excel template	Will not use Step 4 of 8
.CSV	CSV comma delimited	Will not use Step 4 of 8

8. Click Browse

Click Browse to view the directory contents of your local PC.

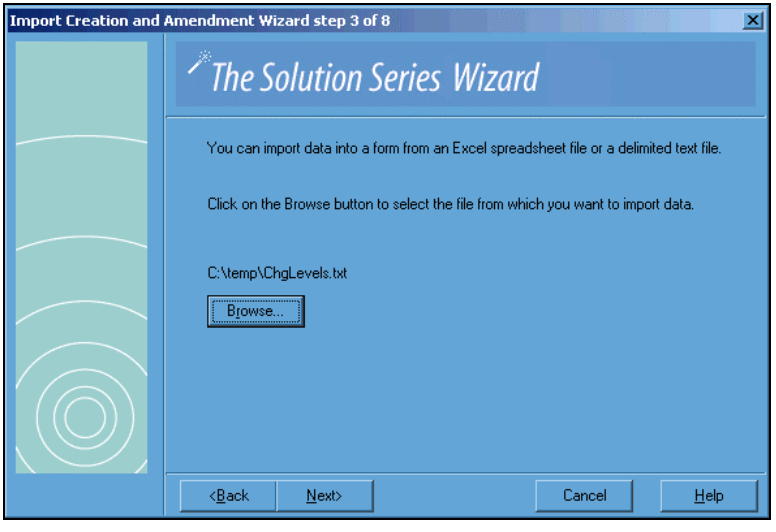
9. Locate and select the import file

A standard Windows Open dialog is displayed, from which you can locate the import file. You may use the Windows Search feature to find the file by name or by extension. When you locate the file, highlight it.

10. Click Open

Click Open to select the import file for this import profile. The file name is displayed in the Choose file dialog.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



11. Click Next

Click Next to continue creating an import profile.

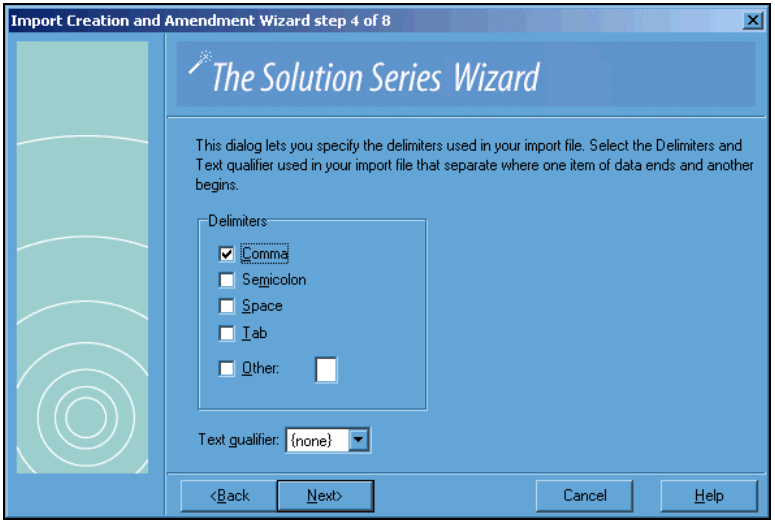
Select delimiter (4 of 8)

This step is not shown if an Excel file is chosen or the file type defines the delimiter. This dialog lets you specify the delimiters and text qualifier (if any) used in your import file.

12. Select a delimiter and text qualifier (optional)

The delimiter, used to specify where one item of data ends and another begins, may be a comma, semicolon, space, tab, or other symbol of your choice. If you choose 'Other' and specify your own delimiter, the character can not be in the ranges a–z or 0–9.

The text qualifier, which acts as a separator within a delimited item, may be a double quote ("), single quote ('), or none.



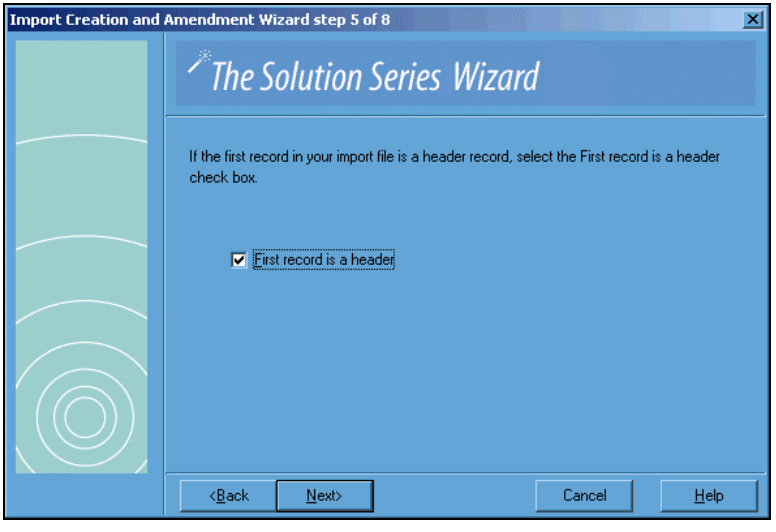
Header record (5 of 8)

This dialog provides a check box to indicate whether or not the first record of the import file is a header.

13. Select the check box (optional)

If you specify that a header record is present in the import data file, the first line of data is identified as the header and subsequently not imported.

The input file must have at least two records, if one record is a header. If you wish to set up a dummy file to create import mapping, this rule must be followed. If no header is included, only one data record is required.



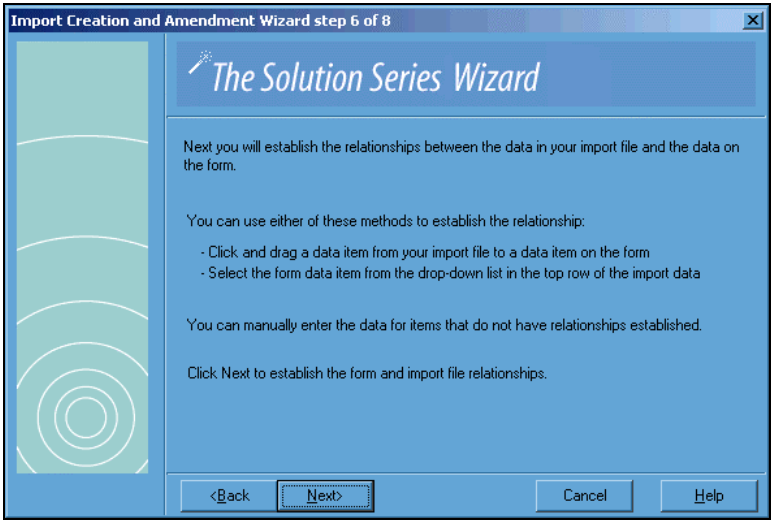
14. Click Next

Click Next to continue creating an import profile.

Map message (6 of 8)

This dialog displays an explanation of Step 7.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



15. Click Next

This is an information message only. In the next step, you will establish the relationships between the data in your import file and the data on the target form.

Click Next to continue creating an import profile.

Form and fields (7 of 8)

You will use this dialog to establish the relationship between your import data items and the form data items, as well as indicate whether or not the import file contains Organization information.

16. Map the import-to-form relationship

This dialog allows you to view the target form as part of the wizard dialog and view the first lines of the import file below it. All key fields on the displayed form must be mapped or manually entered. Use one of the following methods to complete the mapping:

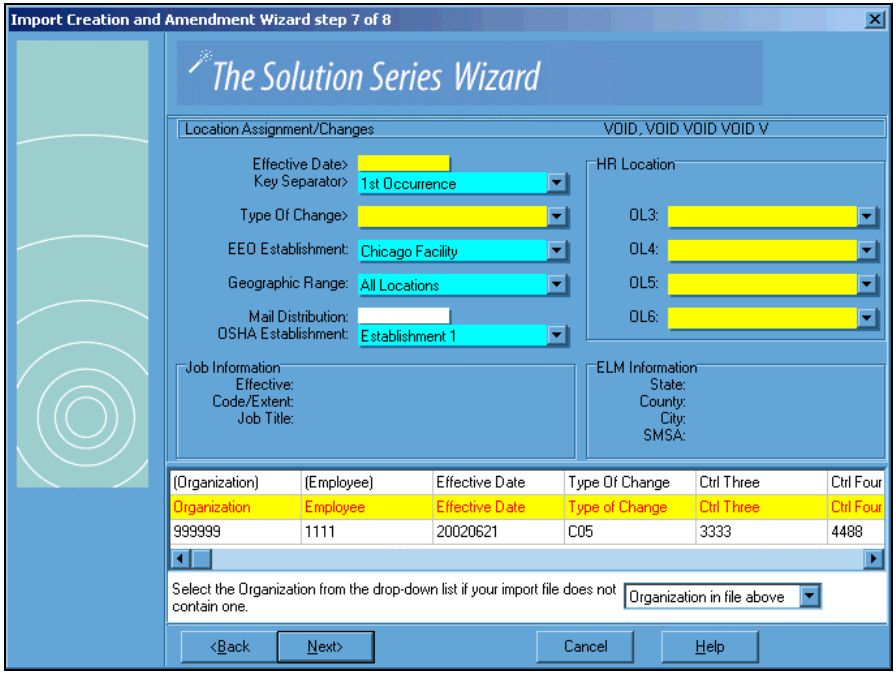
- Select the field name from the drop-down list at the top of the import data column by clicking the column header.
- Drag and drop an import column onto the field to which it will be mapped.
- Make an entry directly into a form field. This entry will be applied to all records that are updated by the import file.

Note: Clicking at the top of a partially displayed column will scroll the grid to the right. A second click will display the drop-down field list.

To remove a mapped field, use one of these methods:

- Select the blank value in the import column option list.
- Right-click the field on the form to remove its mapping.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



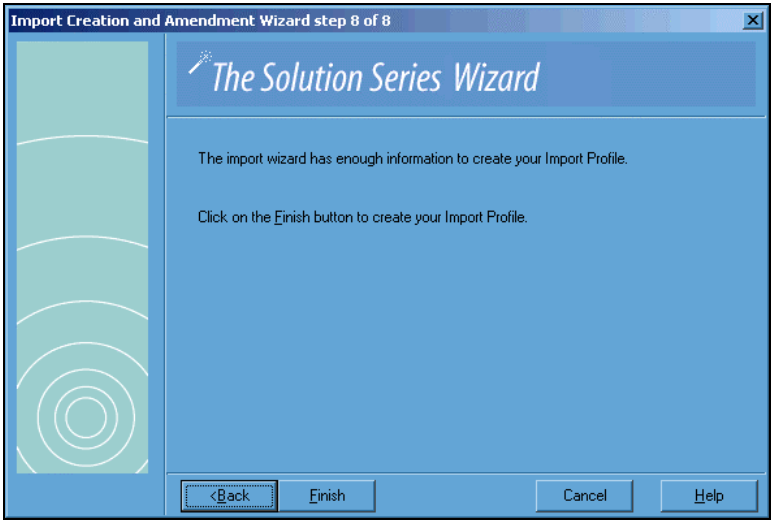
17. Click Next

Click Next to continue creating an import profile.

Summary information (8 of 8)

This dialog confirms that the necessary steps for creating an import profile have been completed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



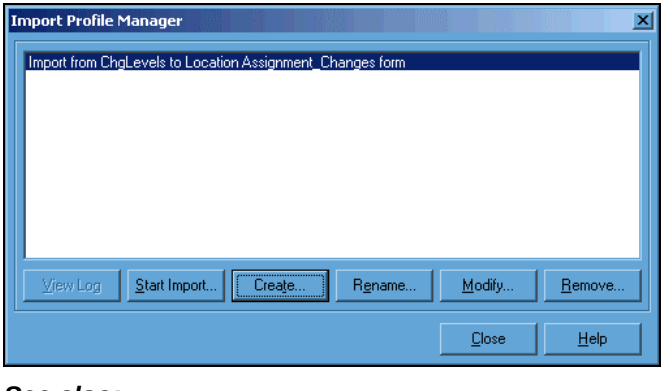
18. Click Finish

Click Finish to create your import profile.

After you click the Finish button, the import profile name is assigned and the import profile is saved on your PC. At this point, you have only a profile—no import has taken place.

The Import Profile Manager dialog is displayed, showing the import profile name.

Note: After import profiles are established, they can be shared by copying the local files from one PC to another. It is not possible to store import profiles on the server.



See also:

- The Import wizard ***(on page 14)***

For more information about creating import profiles.

Renaming an import profile

To rename an import profile using the Import Profile Manager, follow these steps:

1. **Access the Import Profile Manager**
   Access this dialog by selecting the Import Manager icon from the toolbar:

   Alternatively, make the following selections from the menu:

   Actions ► Office Integration ► Import

   The Import Profile Manager dialog is displayed.

2. **Select the import profile to be renamed**
   From the list of existing import profiles, highlight the one to be renamed.

3. **Select Rename**
   Click Rename to display the Rename Import Profile dialog.

4. **Type the new profile name**
   Use up to 100 alphanumeric characters to rename the import profile.

5. **Click OK**
   Click OK to rename the import profile and return to the Import Profile Manager dialog. The file is displayed with the revised name.

See also:

- The Import wizard ***(on page 14)***

For more information about renaming import profiles.

Modifying an import profile

To modify an import profile using the Import Profile Manager, follow these steps:

1. **Access the Import Profile Manager**
   Access this dialog by selecting the Import Manager icon from the toolbar:

   Alternatively, make the following selections from the menu:

   Actions ► Office Integration ► Import

   The Import Profile Manager dialog is displayed.

2. **Select the import profile to be modified**
   From the list of existing import profiles, highlight the one to be modified.

3. **Select Modify**
   Click Modify to activate the Import Creation and Amendment wizard.

4. Change the required entries

All steps of the wizard are displayed with the import profile's current entries. Make changes to the information as needed.

5. Click Finish

Click Finish on the last step of the wizard to save the import profile changes.

See also:

- The Import wizard ***(on page 14)***

For more information about modifying import profiles.

Starting an import

To start an import using the Import Profile Manager dialog, follow these steps:

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

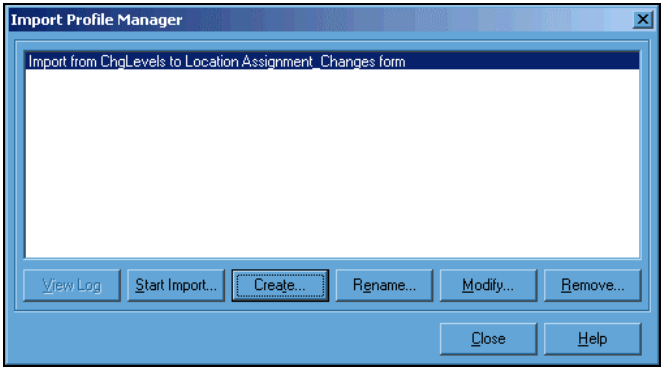
Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

2. Select the import profile to be run

From the list of existing import profiles, highhighlight the one to be run.



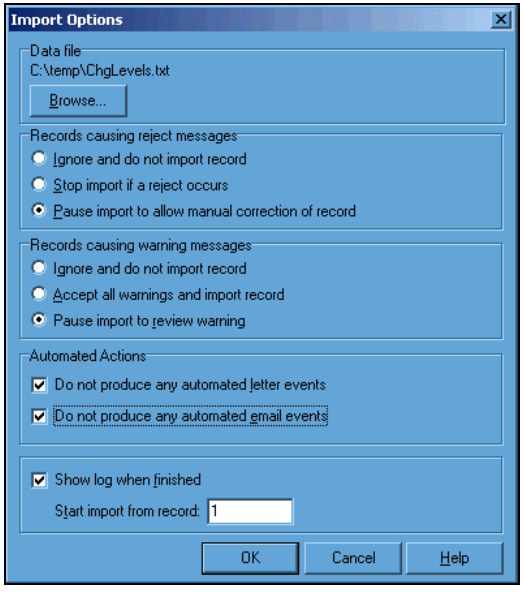
3. Select Start Import

Click Start Import to start the data import. The Import Options dialog is displayed.

4. Select import options

This dialog allows you to specify how the import will handle errors and automated options.

- Select an alternate import file using the Browse option. (Optional)
- Choose an option for handling records that cause reject messages.
- Choose an option for handling records that cause warning messages.
- Choose to produce or not produce automated letters and emails.
- Select the check box to view the message log after the import is finished.
- Alter the starting record number (used mainly under restart conditions; should remain at '1' for a normal import run).



5. Click OK

Click OK to continue the import.

Pre-import validation takes place and a dialog is displayed. If there are any format errors, the import will stop so you can correct the errors. No import data has been posted to the system at this point. You must then restart the import from record 1.

If no format errors are encountered, the posting of import records to the system begins.

The Importing dialog is displayed while the import is active.

If, at any time, you need to stop the import, you may do so by clicking the Stop Import button on the Importing dialog or the Import button on the toolbar.

If you set the option on the Import Options dialog to show a message log when the import has been completed, then the log file will be automatically opened in Microsoft Notepad or the application assigned to text files on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

See also:

- Control options for importing data ***(on page 153)***

For more information about handling import record errors.

- Pre-import validation ***(on page 156)***

For more information about error detection prior to posting import records.

- Running the import ***(on page 159)***

For more information about processing import records.

Stopping an import

To stop the processing of import data after the import process is running, follow these steps:

1. Click Stop Import on the Importing dialog

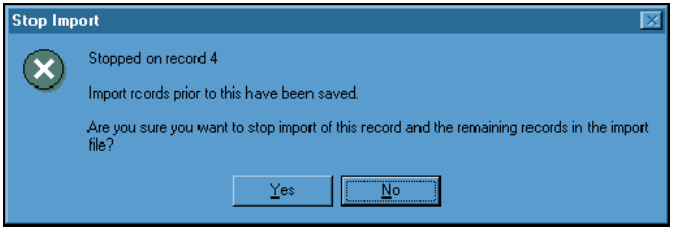
Click Stop Import on the Importing dialog while the import is being processed.

Alternatively, click the Import button on the toolbar to stop the import.

The Stop Import dialog is displayed and provides you with the record number of the last data to be processed before the import was stopped.

2. Click Yes

A No response to the 'Are you sure' statement on the Stop Import dialog allows the import to resume its processing. Clicking Yes stops the import.



See also:

- Running the import ***(on page 159)***

For more information about interrupting an import run.

Restarting an import

To restart an import using the Import Profile Manager dialog, follow these steps:

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

2. Select the import profile to be restarted

From the list of existing import profiles, highlight the one to be restarted.

3. Select Start Import

Click Start Import to start the data import. The Import Options dialog is displayed.

4. Select import options

This dialog allows you to specify how the import will handle errors and automated options:

- Select an alternate import file using the Browse option. (Optional)
- Choose an option for handling records causing reject messages.
- Choose an option for handling records causing warning messages.
- Choose to produce or not produce automated letters and emails.
- Select the check box to view the message log after the import is finished.
- Verify the starting record number (updated when the last import was stopped and now displays the next record to be processed on a restart).

5. Click OK

Click OK to continue the import.

Pre-import validation takes place and a dialog is displayed. If there are any format errors to be corrected, the import will stop so you can correct the errors. No import data has been posted to the system at this point. You must then restart the import.

If no format errors are encountered, the posting of import records to the system begins.

The Importing dialog is displayed while the import is active.

If, at any time, you need to stop the import, you may do so by clicking the Stop Import button on the Importing dialog or the Import button on the toolbar.

If you set the option on the Import Options dialog to show a message log when the import has been completed, then the log file will be automatically opened in Microsoft Notepad or the application assigned to text files on the PC. Alternatively, you may return to the Import Profile Manager and select View Log.

See also:

- Control options for importing data ***(on page 153)***

For more information about handling import record errors.

- Pre-import validation ***(on page 156)***

For more information about error detection prior to posting import records.

- Running the import ***(on page 159)***

For more information about processing import records.

Viewing the Import Message Log

To view the Import Message Log using the Import Profile Manager dialog, follow these steps:

Note: If you renamed an import profile, the associated message log is not renamed. However, it can be viewed by accessing Windows Explorer and searching for the file under its original import profile name. If you want to keep additional log history, you may rename and relocate logs as they become available.

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

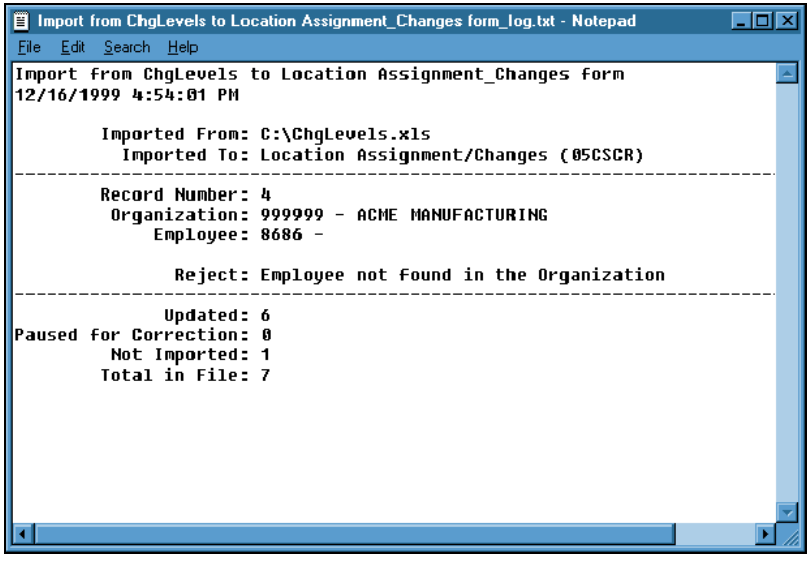
2. Select the import profile

From the list of existing import profiles, highlight the one for which a log is to be displayed.

3. Click View Log

Click View Log to display the Import Message Log for the profile. The Import Message Log is displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



See also:

- Running the import ***(on page 159)***

For more information about Import Message Logs.

Removing an import profile

To remove an import profile using the Import Profile Manager dialog, follow these steps:

1. Access the Import Profile Manager dialog

Access this dialog by selecting the Import Manager icon from the toolbar:

Alternatively, make the following selections from the menu:

Actions ▶ Office Integration ▶ Import

The Import Profile Manager dialog is displayed.

2. Select the import profile to be removed

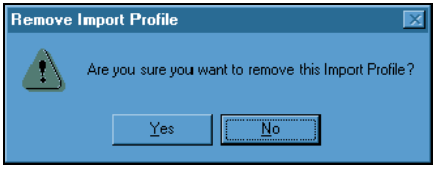
From the list of existing import profiles, highlight the one to be removed.

3. Select Remove

Click Remove to display the Remove Import Profile dialog.

4. Click Yes

This dialog allows you to proceed with the profile deletion or cancel the action. Click Yes to delete the import profile. Click No to cancel the action.



See also:

- Import profile conventions and maintenance ***(on page 151)***

For more information about removing an import profile.

Including and excluding target forms

To include or exclude forms in the Browse Forms - Import option list (SC52) using the Option List Editor (CSUPDT), follow these steps:

1. Access the Option List Editor (CSUPDT)

Access this dialog by making the following selections from the Navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

2. Enter the Option List Name

Type the name of the option list to be edited—'SC52'.

3. Click Find Now

The system displays the detailed information for the requested option list.

4. Click Create

A blank line is inserted, allowing you to add the new item.

5. Enter the Code

Type the program name of the form to be included or excluded, such as 'EF-SCR'.

6. Enter the Description

Type 'E' to indicate that this form is to be excluded. Type 'I' to indicate that a form is not an employee or company form but should be used within import, such as a time entry form.

As-delivered items in this option list may have one of the following entries in this location:

Entry	Definition
'I' or 'i'	Form is not an employee or company form, but should be used within import.
Any other character, including spaces	Excludes the form from import.

7. Click OK or press Enter

No items are updated in the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

Note: *If the form to be included or excluded is already in the option list, an error message will be displayed. Instead of adding a new entry, make a correction to the existing entry to include or exclude it.*

See also:

- Target forms ***(on page 144)***

For more information about including and excluding forms.

Extended Practice

Using Excel, create the following import data and save the Excel file as C:\Practice.xls. The first row is header information:

	Emp #	Date	Chg Type	OL3	OL4
999999	1111	20000101	C05	3333	4444
999999	1112	20000101	C05	3030	4040
999999	1113	20000104	C05	3338	4448
999999	1114	20000110	C05	3333	4444
999999	1115	20000112	C05	3338	4448
999999	1116	20000115	C05	3030	4040
999999	1117	20000116	C05	3333	4444

Then create a new import profile to move this data to the Location Assignment/Change form (05CSCR). Complete all of the necessary steps in the Import wizard:

- Select the form by expanding the Employee Resourcing component, and then expand the Maintain Basic Employee Details process. Then click the Location Change (05CSCR) task.
- Map each of the import items to its corresponding form item.
- Manually select '1st Occurrence' as the Key Separator, 'New York Office' as the EEO Establishment, and 'All Locations' as the Geographic Range.
- Finish the import profile.

Resolve any pre-import validation errors and run the import to a successful conclusion.

View the message log.

Review of Questions Answered

1. What tools can be used to export data?

2. What is the Import Profile Manager and what purpose does it serve?

3. What functions are provided by the Import wizard?

4. What control options are available for the import process?

CHAPTER 7

Setting Up a Communication Event

In This Chapter

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Introduction

In addition to recording employee information in the administrative solutions, your workflow process requires that some of that information be communicated to the employee or other areas of your organization. A communication events tool is provided that can be set up to send emails and print letters automatically or manually when employee data is created, updated, or deleted in the system.

Tasks

The following tasks are covered in this section:

- Creating a form trigger letter communication event
- Creating a form trigger email communication event
- Creating a checklist trigger letter communication event
- Creating a checklist trigger email communication event
- Changing to a different frequently used field list
- Adding a new field to a frequently used field list
- Creating a custom frequently used field list
- Copying a communication event
- Modifying a communication event
- Removing a communication event
- Adding forms to the exclusions option list

Launching a document from the Document Explorer

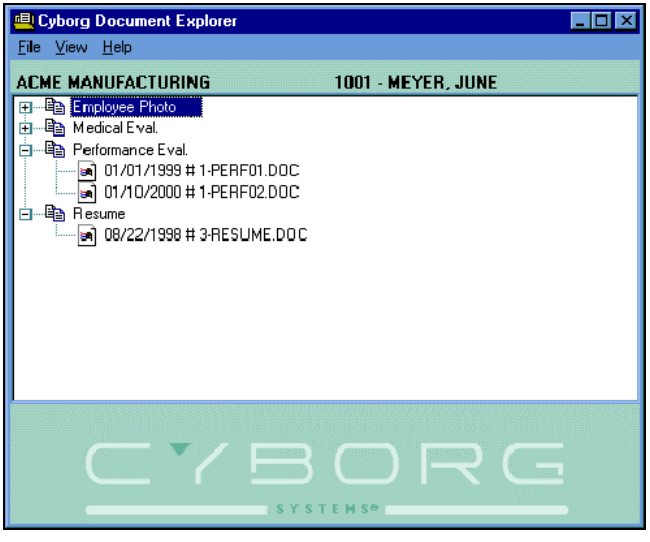
To launch a document from the Document Explorer, follow these steps:

1. Click the Document Explorer button

To launch the Document Explorer, click the Document Explorer button on the Launch toolbar while displaying any Solution Series form for the employee.

The Document Explorer displays each document type for which the employee has linked documents.

The resulting dialog may look similar to the example that follows:



2. Select the document type

Double-click the document type you are interested in. This expands the view to display the list of documents for that type. The document types are listed in alphabetical order.

Alternatively, select:

View ▶ Expand all

to expand the tree view to display all documents in all document types.

3. Launch the application and open the document

The documents are listed in date order. Double-click a document you want to see. This will launch it in the application indicated by the file extension.

If a Windows file association does not exist for the file extension, the Windows standard 'Open with' dialog will be displayed. Select the appropriate application.

If the file does not exist, a dialog will open giving you the option to create the file.

Note: *If the document is a Microsoft Word document, Word is then launched with the newly-created document. A dialog may appear asking if you want to convert the document. In this case you may need to install a converter. The Microsoft Office website has the required converters—which converter you will need will depend on the version of Word you have installed.*

See also

- Overview of the Document Management Facility ***(on page 255)***

For more information on the document explorer.

- Document Explorer button ***(on page 260)***

For more information on the Document Explorer toolbar button.

Prerequisites

Before you can use communication events, The Solution Series must be installed, and you must have the authority to set up communication events.

Questions answered

The following questions are answered in this section:

1. What is a communication event?
2. What are the types of communication events?
3. What is a communication event trigger?
4. What types of triggers are available?

Using communication events

Information recorded in the system becomes even more valuable when you have an automated tool to distribute that information to the employee and other need-to-know areas of your organization.

Business process considerations

Workflow management can be substantially enhanced when you implement communication events to replace the cumbersome task of communicating manually. Coupled with the impressive speed of email to reach recipients at your location and around the world, keeping people informed about updates to the employee database through automated events can help to improve the overall performance of your organization.

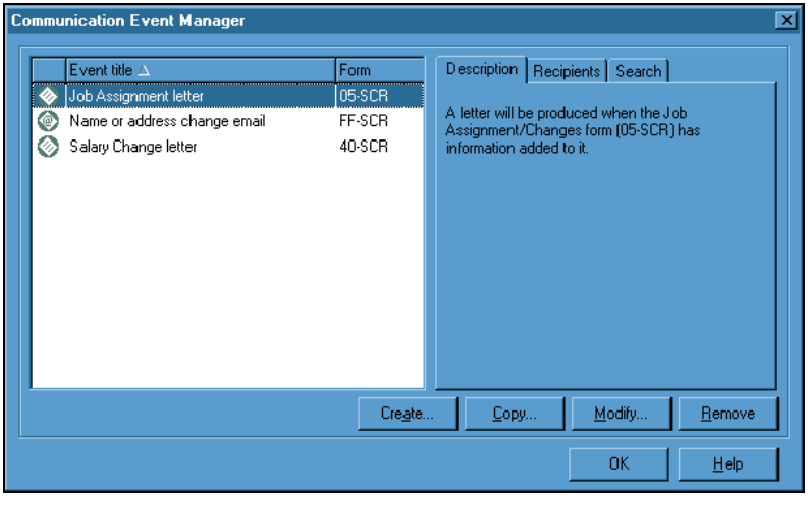
Communication events in the workflow

After it has been set up by an administrator, a communication event is system-wide and available to all system users. However, each user can specify unique options to provide departmental flexibility. Consider the following examples of ways to use the communication event process to improve workflow and communications capabilities throughout your organization:

- Email notifications to managers about applicants or candidates
- Welcome letters based on new hire information
- Email confirmations of employee job and location changes
- Congratulatory letters for employee promotions
- Email notifications of employee transfers or leaves of absence
- Scheduling confirmations for annual reviews
- Salary and salary range change notifications
- Tax information change confirmations
- Direct deposit setup or change notifications
- Bonus, commission, and perquisite notifications
- Company property assignment notifications
- Certificate, license, and permit notifications
- Email confirmations of physical exams
- Disciplinary action and grievance communications
- Benefit plan enrollment confirmations
- Dependent and beneficiary change confirmations
- Savings bond setup confirmation
- Badge assignment or deletion notification
- Schedule assignment confirmation
- Email notifications of training course refund information

Communication event types

The Communication Event Manager is the controller of this functionality. It allows you to create, copy, modify, and remove communication events:



Events are displayed in ascending order by title in the Event title list. By clicking on the arrow icon, you can toggle the display to show titles in descending alphanumeric order . By clicking on the Form heading, the events will be displayed, sorted by the form's system identifier.

There are three tabs—one that provides a description of the event, one that displays any email recipients defined to receive notification when the event occurs, and one that provides a means of searching for an event based on the email recipient's address. The search option is useful where a large number of events have been created (hundreds) and specific email addresses have been entered. By searching, the user can identify all emails that would automatically have been sent to somebody who, for instance, has changed departments or left the organization.

Using the Communication Event Manager dialog, you may set up parameters for the automatic and manual generation of two types of communication events—email and letter. Data to be contained within the email or letter comes from the form being used as well as delivered lists of frequently used fields. After communication event parameters are set up, the event can be modified, copied, and deleted.

Email communication events use your automated email software package.

Letter communication events use Microsoft Word 97 or any newer version. Letters can be created using its templates and mail merge features.

Server-based events

You can choose to have the form trigger event executed on the Web server. This will allow the event functionality to be supported by the Web client. As the event functionality occurs on the server, users do not need to have Microsoft Word and MAPI set up.

Note: *If you set up and manage communication events, then you will need to have Word and MAPI set up.*

When a communication event letter is created, the templates associated with the letter event are stored in the location specified on the System Options form (SCOPTS). This location should be accessible to all users. When you install the server-based events, you enter this same Template Path on the Environment Settings dialog. The paths must be the same.

☞ *Refer to Configure the eCyborg Event Service section of the Installing and Configuring eCyborg documentation for information on installing server events.*

It is likely that if you choose to use server-based events, you will wish to set all form trigger events as server-based events. However, if you wish to combine client and server-based events it is advised that only client-based events exist for a particular form. If both client-based and server-based events exist for a particular form, profiling must be set up and used as a filter in the the server-based event profiling conditions. This will stop the server-based event from being triggered if using the Administrative Client.

☞ *Refer to* **Form trigger profile** *(on page 197) for information on using user profiles in form trigger events.*

Another consideration of having both client-based and server-based form trigger events on your system is that it may be confusing to a user who uses both the Web Client and the Administrative Client as they would need to look in two areas for batches of queued letters.

Note: *The options 'Trigger when selected from toolbar' and 'Suppress if a form is in a checklist' are not supported with server events.*

If you do not select the server events option, the event will be triggered and processed on the client PC within the Administrative client.

Client/Server event comparison

The following table shows a comparison between Client-based and Server-based events:

Feature	Client-based event	Server-based event
Trigger from all clients (including Checklist events for Administrative and Web clients)	No	Yes
Email user options (such as Preview)	Yes	No
Letter dialog with options to Preview/Queue/Print	Yes	No
Generation of queued mail merge data (downloaded via the use of the Web Application for letters)	No	Yes
Manually execute an event from the toolbar	Yes	No
Option to suppress an event assigned to a form if it is in a checklist	Yes	No

Communication event triggers

Event triggers allow you to set up the parameters that will cause a communication event. There are two types of communication event triggers within the Communication Event Manager—form and checklist.

See also:

■ Creating a form trigger letter communication event ***(on page 219)***
For detailed instructions for creating a letter communication event

■ Creating a checklist trigger letter communication event ***(on page 232)***
For detailed instructions for creating a letter communication event

■ Creating a checklist trigger email communication event ***(on page 236)***
For detailed instructions for creating an email communication event

Form trigger options

A form trigger can be set up to occur when you:

- Add information to a form
- Change information on a form
- Delete an existing form from the employee record

Example: The Payroll department wants a letter to be generated when a new salary is assigned to an employee. The letter would congratulate the employee on the increased salary. This would be defined as a communication event to occur when information is added to the Salary Assignment/Changes form (40-SCR).

An additional parameter allows you to suppress the form trigger if the form is in a checklist, thereby preventing multiple events from being triggered from a single checklist.

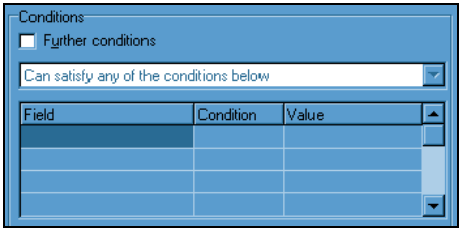
Because forms can change at the organization level, an option is provided that allows a communication event to only be triggered for a specific organization. For instance, different organizations may have different country codes or different functionality active, such as Position Administration—in which case the forms may have different fields displayed.

As well as an automatic trigger, you also have the option to manually generate letters and email when data is created for an employee. A manual trigger option allows you to generate a communication event by using a button on the toolbar when working with a form that has no automatic trigger.

When a manual trigger is available for a specific form, the Select an Email or Select a Letter button will be available on the toolbar. When you select one of these buttons, a selection dialog is displayed.

Form trigger conditions

You can specify additional conditions that must be satisfied before a specific form can trigger a communication event. For one or more text boxes on the form, you may define a condition and a value to be met.



The conditions available are dependent on the type of information. The following chart details the available conditions and the resulting value options for each type:

Field type	Conditions	Value
Alphanumeric	=, <>, >, <, =>, =< 'changed'	An alphanumeric value must be entered unless the condition of 'changed' is chosen.
Check box or Option button	=, <> 'changed'	The value field becomes a drop-down list that contains the values 'Yes' and 'No'.
Date	=, <>, >, <, =>, =< 'changed'	If these conditions are chosen, the date can be entered in any of the following formats. A right-click on the grid allows the option to display on the standard calendar. You can enter 'Today', 'Today+n', or 'Today-n', where n is a number in the range 1 to 99. This can be entered in any case, with or without spaces. The abbreviation of '+n' and '-n' can also be entered as an abbreviation for the full statement. The calculation is performed on actual days, not working days.
Numeric	=, <>, >, <, =>, =< 'changed'	A numeric value must be entered. Decimal points (.) must be entered. Optionally, separators can be entered, for example, 1234.56 or 1,234.56 are both valid.
Option list	=(description) =(code) <>(code) >(code) <(code) =>(code) =<(code) 'changed'	The value field becomes a drop-down list that displays all descriptions or codes, depending on the condition chosen. A code of 'none' is treated as zero (0) and will trigger an event if all conditions are met. For example, if the condition is =<200 and 'none' is the code, then the condition is satisfied.

Note: The default condition is '=' (is equal to) until you change it. For Option Lists, the default is '=(description)' (is equal to description).

Example: The Payroll manager wants to be informed if anybody receives a salary increase of over 50,000.00 as this is likely to be a mistake. An additional condition is entered on the Salary Assignment/Changes form (40-SCR), which specifies [Amount Change > 50,000.00]. If this condition is satisfied because an employee is given an increase of more than 50,000.00, an email will be sent.

Form trigger profile

If form triggers need to be restricted to a particular group of users, a user profile condition can be set to include or exclude a person or group.

Note: User profiles define the system options available to a user or group of users. User profiles are created and maintained by your organization's security officer.

Note: An email or letter will only be produced if the form trigger, field condition, and profile condition are satisfied.

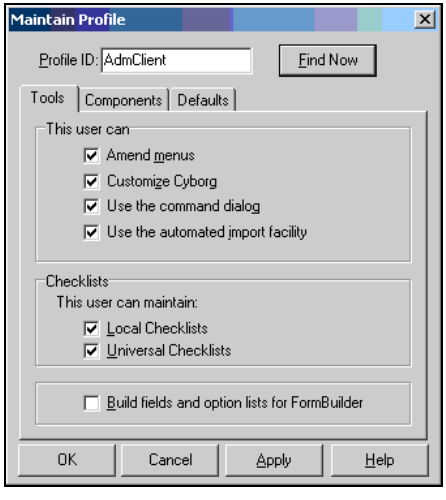
Example: The Payroll manager wants to know when a HR staff member makes a salary change, but does not want to know if a Payroll staff member makes a change. The condition could be set up to generate a communication event only if an HR profile or User ID triggered the form.

The opposite formula could be defined, and the event could be set up not to generate a communication event by supplying a list of Payroll profiles or User IDs.

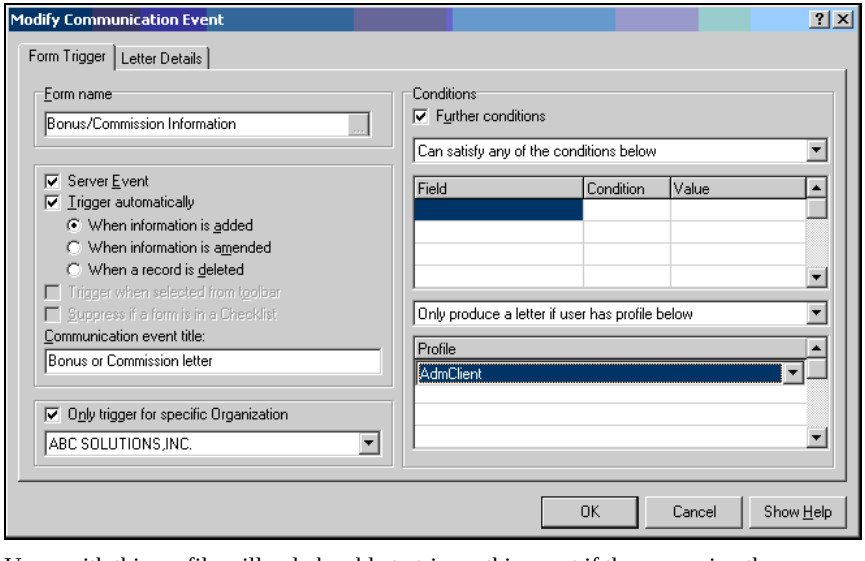
You can also use user profiles to suppress Interactive Workforce or Web Collaboration event triggers for any chosen events.

Example: Profile to allow Administrative client only triggered events

As an example, you could set up a profile that would allow users to trigger an event only from the Administrative client. This profile could be called 'AdmClient', for example:

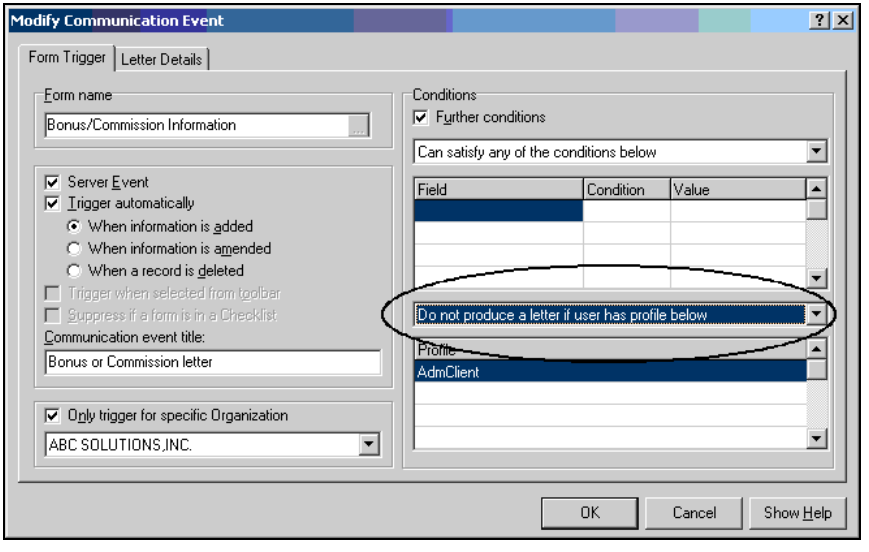


This profile would then be used as a condition for the event trigger:



Users with this profile will only be able to trigger this event if they are using the Administrative client.

You could use this profile as a filter to only process events triggered from a source other than the Administrative client:

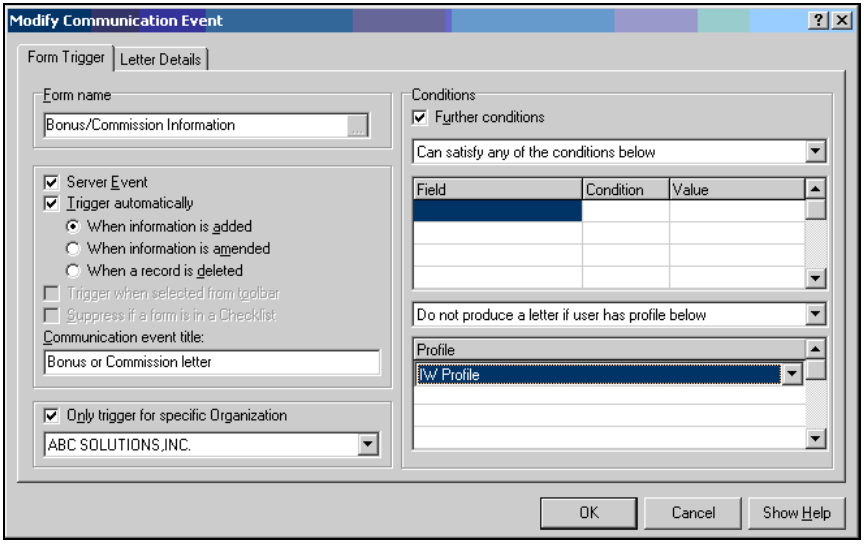


Example: Profile to prevent triggers processed by Interactive Workforce

You could set up a profile, say 'IW Profile', and assign this to the Interactive Workforce user.

☞ *Refer to the Interactive Workforce: The Administrators' Guide documentation for the Interactive Workforce user details.*

Using this profile as a condition of the event trigger, you could ensure that the event is not triggered by an Interactive Workforce process.



A similar profile could be used to prevent triggered events being processed from Web Collaboration.

Checklist trigger options

The checklist trigger options allow the checklist feature to be a powerful embedded workflow. A checklist trigger can be set up to occur when a user is working through a checklist and activates one of the following options:

- Finish Checklist after completing all the mandatory steps
- Finish Checklist without completing all the mandatory steps
- Pause Checklist

Example: The HR department wants to generate a new hire letter welcoming all new employees to the company. This can be generated after all the mandatory forms have been created within the checklist.

The HR manager would like to receive an email if a checklist is finished, but not all mandatory steps have been completed. This is important because the absence of some information may prevent an employee from receiving a salary.

Trigger events defined for a standalone form still occur if the form is part of a checklist. You must select the 'Suppress if a form is in a Checklist' option on the form trigger to prevent this.

Once you have created a communication event, you will not be able to change the type or trigger. If either one is incorrect, you must delete the communication event and create a new one with a corrected type or trigger.

Checklist trigger profile

The checklist trigger profile is identical to the ***form trigger profile*** (on page 197), and follows the same rules.

If checklist triggers need to be restricted to a particular group of users, a profile condition can be set to include or exclude a person or group. An email or letter will be produced only if the checklist trigger and the profile condition are satisfied.

Excluded form triggers

Only employee forms and checklists can be used to trigger communication events. Non-employee and company forms are filtered out of the form browse dialog.

If there are specific forms that you want to exclude from the list of available triggers, you may add them to the Browse Forms - Email/Letters option list (SC50). Forms that appear in this option list are filtered out of the trigger list.

☞ *Refer to* **Maintaining Option Lists** *(on page 27) for information about using the Option List Editor (CSUPDT) and displaying option lists.*

Cyborg Scripting Language changes can be made to table forms so that they can be used with event triggers. Contact Professional Services for assistance if your organization requires these changes.

See also:

- Adding forms to the exclusions option list ***(on page 250)***

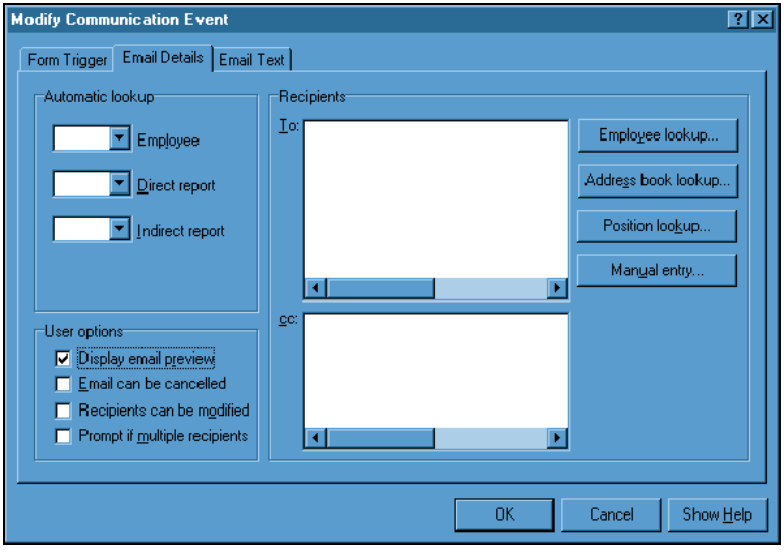
For detailed instructions for excluding forms.

Apply the Concept
Based on your understanding of the communication event triggers as explained in this concept, which business tasks in your organization require some employee or inter-office communication that could be triggered instead by a communication event?

Apply the Concept
In what cases are letters or memos being generated when emails could be more effective?

Email communication event details

An email communication event provides your company with more capabilities than standard email software. You will be provided with multiple methods for specifying the email recipient:



In addition, you will be able to insert data from the system forms into the text, so that employee-specific information can be automatically displayed.

See also:

- Creating a form trigger email communication event ***(on page 225)***
- Creating a checklist trigger email communication event ***(on page 236)***

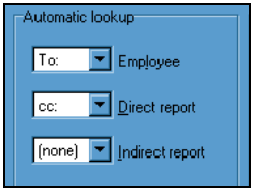
For detailed instructions for creating a email communication event.

Recipients

There are several avenues for the lookup and selection of email recipients. You may send the email to the address of the employee for whom the data was recorded. You may also designate recipients other than the employee for whom the information was recorded.

Automatic lookup

The automatic lookup feature allows you to direct the email to the address of the employee for whom the data was recorded, as shown in the following example:



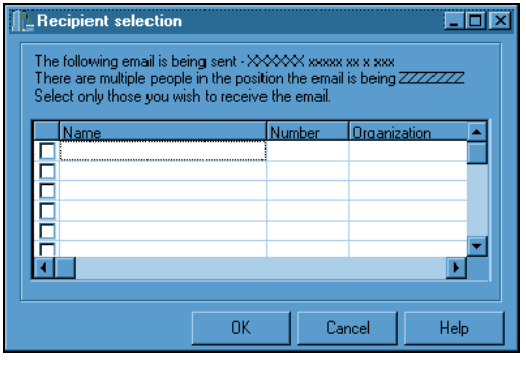
Either a 'To:' or 'cc:' choice can be made by using the drop-down list for each of the following options:

- Employee
  This method sends the email to the employee for whom the data is being recorded. An email address is located on the Employee Contact Information form (EM-SCR). If no email address is recorded on this form, then one is created from the information that is recorded on the Employee Name And Address (FF-SCR) and the Company Name And Address (AA-SCR) forms, for example, john_smith@hewitt.com.

- Direct report
  This option is only available to Position Administration users. The system locates the position record of the employee whose data is being recorded and, from that record, the position to which it reports (direct or indirect) can be found. The incumbents who hold that position, along with their email addresses, can then be identified.

  If there are multiple incumbents for a position, the system will either send email to all of them or prompt you at run time to choose an incumbent. This is dependent on the 'Prompt if multiple recipients' user option setting on the Email Details tab within the Modify Communication Event dialog.

  The following example shows the prompt displayed when this option is checked:



- Indirect report
  This option is only available to Position Administration users. This works in the same way as the direct report option.

You may customize the Cyborg Scripting Language to tailor the location of the email address or provide an alternative method of formulating it.

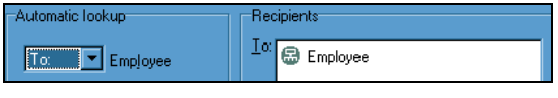
Note: *When no recipients can be found, which may occur if the recipient has no email address recorded or if the position has no incumbancy, no error will be displayed. If options have been set to display the preview dialog, this will be displayed and, if no recipient exists, the user will be allowed to add 'To' and 'cc' recipients, regardless of the options that were set.*

Address types

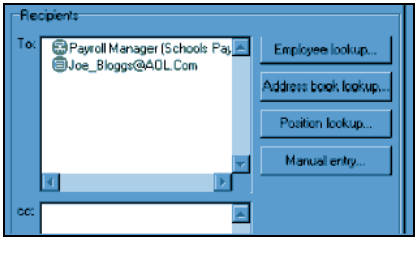
Depending on the method you choose to locate the email address of a recipient, one of the following four icons will display next to each recipient in the Recipients list box to identify the address type:

Employee Lookup	Position Lookup
Address Book Lookup	Manual Entry

If 'Employee', 'Direct report', or 'Indirect report' are selected, the items selected will appear in the disabled Recipients 'To' and 'cc' list boxes. The Position lookup icon will be used for each of these items. The word 'Employee', 'Direct report', or 'Indirect report' will be displayed to the right of the icon as shown in the following representation:



You may not type directly into the Recipients lists. Entries are made by selecting recipients through the automatic lookup option or the additional options provided on the Email Details tab within the Modify Communication Event dialog:



Lookup options

Several methods are available for finding email addresses of a recipient other than the person for whom the data was recorded. The following methods allow you to search several different areas of your system:

- Employee Lookup
  This method attaches an employee number as the recipient. To look up an employee, a name search allows you to type three or more characters of the employee's last name. The system then performs a search and displays a list of employee names that start with those characters. If you continue to type more characters, the search stops until you pause. It then continues to refine the list.

- Address book lookup
  The Address Book dialog will be supplied from your organization's email application. If you are already logged onto an email system, this will be used for the address book lookups and to send the email. If you are not logged onto the email system, the email password dialog will be presented.

- Position lookup
  This option is only available to Position Administration users. With this method, a position is assigned to the recipient. When the email is ready to be sent, the incumbents for the position are found and their email addresses are identified.

- Manual entry
  This method offers a dialog into which an email address can be manually entered. You must first select the Manual entry button and then type the email address for each recipient. If email addresses are entered directly, they must be monitored in the event that the addressee leaves the organization, so they can be redirected at that time.

Note: You can remove unwanted names from the Recipients list by highlighting the name and pressing the Delete key on your keyboard.

User options for email

Four user options allow you to fine-tune the email process after the recipient(s) and the text are recorded. You may choose to activate one or more of the following options on the Email Details tab within the Modify Communication Event dialog:

- Display email preview
  If this option is active, the user will be informed that the email is about to be sent, but no cancellation is allowed unless the next option is active as well.

- Email can be cancelled
  If this option is active, the user will be given the same dialog as in the first option, but a Cancel button will be available.

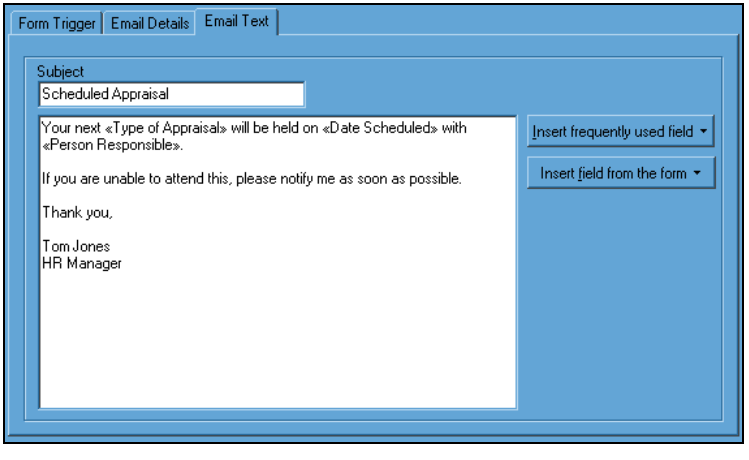
- Recipients can be modified
  If this option is active, the user will be able to add to and delete from the recipient list at execution time.

- Prompt if multiple recipients
  If this option is active, a dialog will display at execution time and the user may select the required recipient if a position had multiple recipients. If this option is not active and multiple recipients are encountered, the email is automatically sent to all recipients in the selected position.

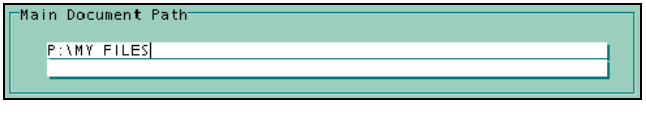
Email text

Standard text formatting is available for the email content. The text auto wraps, but is reformatted when it is sent to the email package. The Enter key inserts a line break. Tabs are also supported. Two buttons allow you to insert system fields. Inserted fields are shown as field names within guillemets, for example, <<Address 2>>.

In the following example, an employee is being notified about a forthcoming appraisal:



The text for the email is saved as a *.txt file. The file will be named the same as the event. The path for that file is defined on the System Options form (SCOPTS) in the Main Document Path text box:



If the Copy option has been used to create an event, then the text will also be copied from the original event.

See also:

■ Copying a communication event ***(on page 246)***
For detailed instructions for copying a communication event.

■ Modifying a communication event ***(on page 247)***
For detailed instructions for modifying a communication event.

■ Removing a communication event ***(on page 249)***
For detailed instructions for removing a communication event.

Apply the Concept

Based on your understanding of the email communication event as explained in this concept, what method(s) would you use to determine the recipients and content of an email communication event in your organization?

Letter communication event details

A letter communication event provides your company with the ability to automatically generate customized letters based on specific trigger parameters.

Letters allow the same manual options as email events. For example, if a letter is manually triggered by a form, a Select a Letter button will be available on the toolbar. When you select the Select a Letter button, a letter selection dialog is displayed.

Microsoft Word template and merge features are included in the letter communication event process. All the functionality will work as described by Microsoft while creating the letter text. In addition, you will be able to insert fields from system forms into the text, so that employee-specific information can be automatically displayed.

If the Copy option has been used to create an event, then the text will also be copied from the original event.

See also:

- Creating a form trigger letter communication event ***(on page 219)***
- Creating a checklist trigger letter communication event ***(on page 232)***

For detailed instructions for creating a letter communication event.

Working with Word templates

When you are ready to create the letter text, you will be presented with the template selection dialog provided by Microsoft Word. Templates may be added and changed within Word. After you have selected a template, a new document is created.

A floating toolbar will automatically be placed within the window, offering options from which to select fields to be inserted. You may select from a list of fields contained on the trigger form. Alternatively, you may select fields from two delivered frequently-used-field lists containing selected extract fields.

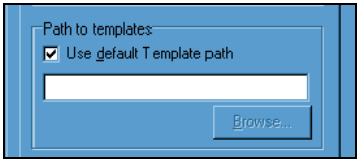
The following example could be the text of a letter that is sent to an employee who has been awarded a bonus or commission:

```
Congratulations ,
You have been awarded a  in the amount of $.
You will receive this amount on .
Sincerely,
G. Zarmin
Vice President, HR
```

Letter templates location

When a communication event letter is created, the templates associated with the letter event are stored in the location specified on the System Options form (SCOPTS). This location applies to all users.

The Path to templates group box on the Options dialog tells the system where to look for letter templates that have already been created when you trigger a letter communication event. When the 'Use default Template path' check box is checked, the system looks for the templates in the location specified on the System Options form (SCOPTS):



You can override where the system first looks for existing templates by leaving the Use default Template path check box unchecked and entering a location (drive and path) in the text box. This override location only applies to letter communication events triggered from your computer. Overriding the default location may be useful if the templates are stored on a network drive to which you temporarily do not have access.

The letter templates must be copied from the location specified on the System Options form (SCOPTS) to the location you specify on your Options dialog. When a letter communication event is triggered, the system first looks for the templates in the override location specified on the Options dialog. If the templates are not found, the system then looks in the location specified on the System Options form (SCOPTS). If the templates are still not found, an error message is displayed.

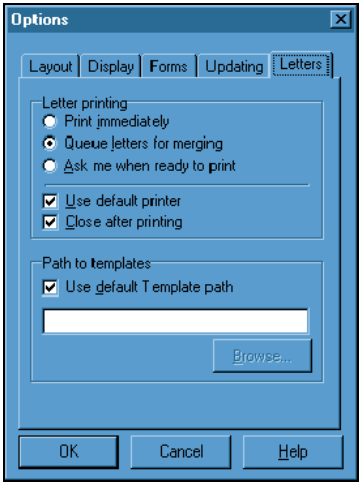
See also:

- Changing to a different frequently used field list ***(on page 242)***

For detailed instructions for changing to a different field list.

Letter printing

Letters can be viewed and modified prior to printing. If you choose to print the letter after a communication event is triggered, either manually or automatically, the Options dialog settings for Letters on your computer will control the printing:



Using the options on the Letters tab, you can control when and how letters are printed:

- Printed immediately, queued for later printing, or prompt before printing
- Use the default printer
- Close the word-processing application after printing

You can also specify where letter templates that have already been set up are located.

☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more information on selecting preferences in the Options dialog.*

Immediate printing

When you select 'Print immediately', the letter is sent directly to the printer.

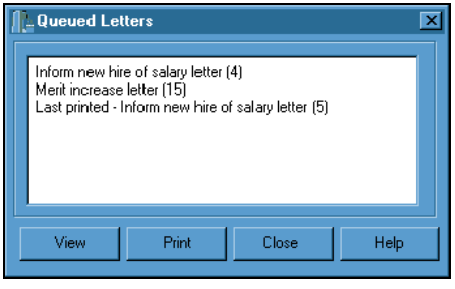
Note: *Letter events generated during an import will always be queued.*

Queued printing

Selecting 'Queue letters for merging' sends generated letters to a queue, which you can later access at any time from the Office Integration toolbar in the Administrative Client, or from the Bookmarks in the Web Client. From the queue, you can view, edit, and print the letters at a time that is convenient for you. Multiple occurrences of the same type of communication event letter are merged into one document.

Administrative Client

If you select the option to queue letters, a 'Show Queued Letters List' toolbar button ( ) in the Administrative Client will allow you to display a list of queued letters:



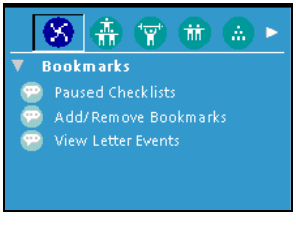
Note: *Changing or removing an event could cause problems with letters that are already generated but not printed.*

☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more information on launching the Office Integration toolbar to display this toolbar button.*

Queued letters are grouped by type, so that each type can be printed individually if required. The option to delete will only be available if you chose the option to cancel the letters at generation time.

Web Client

The Solution Series automatically generates communication event letters and queues them on the server. You access the queued letters through the View Letter Events bookmark on your browser.



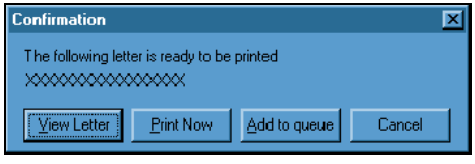
The Queued Letter Events page lists all of the letters queued for printing. The letters are grouped by your ID. To print the letters you must download both the Template (.dat file) and Data (.doc file) files for the letter from the page that displays when you View Letter Events. You use the Microsoft mail merge feature to generate the letter. Downloading and viewing the letters gives you the capability of editing and printing them using the functions and tools in Microsoft Word.

Note: *The mail merge function works differently based on your version of Microsoft Word.*

Prompted printing

Selecting 'Ask me when ready to print' allows you to decide what to do with the letter when it is generated. When the letter is generated, you are given the option to view it, print it, or add it to the queue.

If you choose the option to 'Ask me when ready to print', a letter confirmation dialog is displayed. This dialog gives you control of the disposition of the letter:



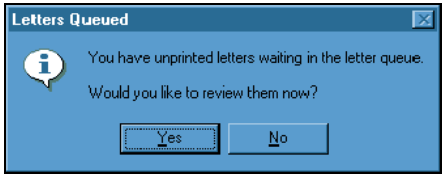
If you choose 'View Letter', Word is opened automatically, the data is merged, and the letters can be seen as a single word document. From this display, you can modify the letters, save them, or print them.

If you choose 'Add to queue', the letters are added to the mail merge queue. This option allows you to batch letters and print them all at one time.

Last printed file

The system maintains one 'last printed' file. This means that after letters have been viewed or printed, they are moved to a 'last printed' list at the bottom of the queued letters. This acts as a backup in the event that letters need to be reprinted. The 'last printed' list is replaced each time a new letter is generated. If letter 'A' was printed, and then letter 'B' was printed, there would be one last printed file for letter 'B'.

You will also be reminded and offered the opportunity to take action on queued letters when you exit The Solution Series. When you exit the system, you will be prompted with the following dialog:



Note: *If data fields in a letter are going to be changed, care must be taken to ensure that users do not already have queued letters for that event. This can result in queued letter files that contain different record layouts, which in turn will result in Word errors when the queued letter is viewed or printed. To be certain this will not happen, the existing event should be copied to a new name and the existing event disabled.*

Apply the Concept

Based on your understanding of the letter communication event as explained in this concept, what would be the advantage of queuing letters for printing later or being prompted when a letter is ready?

Inserting fields

The letter or email text may include specific data values from forms within the system. Making use of this option allows you to insert the most current and accurate information possible into the text of your email or letter. The following options are available for your use:

- Insert frequently used field
- Insert field from this form

Frequently used field list

When the 'Insert frequently used field' button is selected, a popup menu of the most popular fields is presented. You will have the ability to select a different list of fields from a drop-down list while setting up the communication event.

The following two lists are delivered in the system:

- Basic employee details (Position Administration)
  This list contains employee details such as name, address, salary information, position, job, and organization.
- Basic employee details (non Position Administration)
  This list contains employee details such as name, address, and salary information.

You may insert fields from only one frequently used field list. If you change to another list and use the same field(s), you must clear from your letter any fields that you inserted from the original list.

See also:

- Changing to a different frequently used field list ***(on page 242)***

For detailed instructions for changing to a different field list.

Alternative frequently used field lists

Only one frequently used field list can be used by a single event and, once in use, the list should not be changed without evaluating the effect on existing events.

However, you may add new fields to an existing list or create alternative lists. The Cyborg Scripting Language allows advanced validation conditions to be added as well.

Adding a new field

To add a new field to an existing frequently used field list, the Cyborg Scripting Language for the associated form (assuming all of the fields on the list originate from the same form) has to be edited and the field added to the form. If the field to be added does not currently exist on the associated form, then a custom list from a new Cyborg Scripting Language form may be needed.

See also:

- Adding a new field to a frequently used field list ***(on page 244)***

For detailed directions for using alternative frequently used field lists.

Creating a custom list from a new form

To create a frequently used field list from the fields contained on more than one form, you must create a new form that contains all the fields. To keep the process as simple as possible, the form can be created using FormBuilder and the added fields can be display-only fields.

After the new form has been created and named, it must be added to the Frequently used fields form option list (SC51). You can then select the new list from the Change Frequently Used Field List dialog for a form-triggered email or letter.

See also:

- Creating a custom frequently used field list ***(on page 245)***

For detailed directions for creating a frequently used field list.

- Adding a custom frequently used field list to the option list ***(on page 245)***

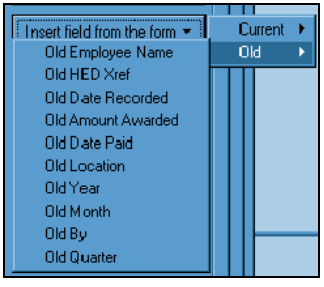
For detailed directions for adding a field list to the option list.

Fields on system forms

When the 'Insert field from the form' button is selected, a popup menu of available fields for the specified form is presented. The following example shows the fields that are displayed when the Bonus/Commission Information form (26-SCR) triggers the event:

The field names will be the same as those that appear on the form. If the automatic form trigger has been set to 'When information is amended', then all fields within the list will have a 'current' and 'old' value.

As shown in the following example, the text 'Old' is used as a prefix to the appropriate fields to designate them as the prior value of the field:



The 'Insert field from this form' option will not be available if the event is being created for a checklist.

Apply the Concept

Based on your understanding of inserting fields as explained in this concept, what benefits can be derived from using system fields as part of your email and letter text?

Technical notes

Directory changes and changes to the Cyborg Scripting Language can be made that allow advanced functionality and conditions in the communication event features.

Default file location for communication event documentation

Newly-created email and letter events are stored on a common network drive as defined by the 120-character alphanumeric entry on the System Options form (SCOPTS):

If an override has been set up, the defined directory is checked for either the letter or email text. If the file is not found, the network directory is then checked.

Override files may be used in the following circumstances:

- When the user does not have access to the network directory, but still wants to produce letters or emails. It is up to the user to copy all letters and emails to the override directory. The user is also responsible for keeping them updated. The system does not attempt to maintain synchronization with the network directory.

- When the user wants to personalize a common (to all users) letter. It is the user's responsibility to maintain synchronization.

Changes to the document path do not take effect until the user logs off and back on again. Override files should be used with caution.

Alternative email address formats

When an email communication event is triggered, the Email Address for Position or Employee program (EM-POS) provides an email address for a position code or an employee number. It first looks at the Employee Contact Information form (EM-SCR) for the recorded email address. If no email address is available, then an email address is formulated using the employee name on the Employee Name And Address form (FF-SCR) and the company name on the Company Name And Address form (AA-SCR). The delivered format for this is:

First_Last@Organization.com

If your organization requires an alternative formula, the Cyborg Scripting Language may be altered at paragraph 700 of the Email Address for Position or Employee program (EM-POS):

```
70000   P700-FIND-EMAIL-ADDRESS.
70010   @
70020   @ If no email address is recorded on EM-SCR an address will
70030   @ be generated by the following code. The example format is
70040   @
70050   @          firstname_lastname@company.com
70060   @
70070   @ This must be changed to your correct format.
70080   @
70100     MOVE '_'    TO W6-01-220.  @ Name join character.
70110     MOVE '@'    TO W6-01-221.  @ Organization join character.
70120     MOVE '.COM' TO W6-04-222.  @ Extension.
70190   @
```

Advanced conditions

As well as allowing you to amend the fields that appear on the frequently used fields list, the communication event programs can also include advanced validation. This allows many records to be searched and complex conditions to be introduced. If after performing this validation, the email or letter generation is to be suppressed, a method of setting an 'Override' flag is provided. This flag, when set, prevents the generation of this communication event.

The Cyborg Scripting Language verb 'OVERRIDE-EVENTS' can be used to replace the value held on line 2, position 7, with an 'O' to prevent an update from taking place. This is the same location as the Add, Change, Delete indicator.

```
OVERRIDE-EVENTS.
or
SET SCREEN TO :88.
MOVE 'O' TO SCREEN.
```

Frequently used field list from more than one form

Although for the majority of situations, a single frequently used fields form is sufficient to hold all the data needed for a letter or email, it is possible that occasionally you will need a larger number.

An ideal example of this is to produce a letter detailing all the benefit plans in which an employee is enrolled, including the dependents and beneficiaries.

To do this, functionality has been included that will allow a primary frequently used fields form to call other forms. The calls can not be nested more than one level. In other words, the primary form must list all the subsequent forms to call.

The field labels should be unique within a frequently used fields form. If the primary form calls other forms, field labels in the primary form and called forms should be unique, as all of these labels are to be grouped together. If duplicate labels exist, a suffix is included in the field label. For example:

- Annual Salary
- Annual Salary (1)

To invoke multiple forms to be called, line 00000 of the Screen Appearance Table record should be edited and each called form added. Multiple forms should be separated with a comma (or alternatively a space), as shown in the following example:

SRRCCWL	TLS	Field	Label
00000		XX-SCR,YY-SCR,ZZ-SCR	

This multiple form list on line zero is only called by the Graphical User Interface and is not used by the Cyborg Scripting Language. This facility should be used sparingly, because multiple form calls will introduce an obvious degradation in performance.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Before practicing the following detailed directions

Prior to starting the detailed directions, it is suggested that you turn on the Office Integration toolbar so you can access the communication event buttons.

Access the toolbar by making the following selections from the menus:

View ▶ Customize Toolbars

Then click the Toolbars tab, select Office integration, and click Close.

Creating a form trigger letter communication event

To create a letter communication event triggered by a form, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog is displayed.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Letter

By default, Letter is the communication event Type selected when the dialog is first displayed. Verify that Letter is selected.

5. Select Form

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Verify that Form is selected.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Form name

Select the form on which this communication event will be triggered by clicking the ellipsis (…) on the right side of the Form name list box. The Browse Forms dialog will display the menu structure from which you can select a form by drilling down through the menus, or

you could type the program name of the form (such as EF-SCR) in the text box. Click OK after you make the selection.

The form name is displayed in the text box.

8. Select Server Event

If you wish to allow an event to be triggered by the Web client, Interactive Workforce, and Web Collaboration, click Server Event. The event will then be processed on the event server, and not on the user's client machine.

Leaving this blank will allow the event to be processed only by an Administrative client user on the client machine.

9. Select the automatic trigger conditions (optional)

Select 'Trigger automatically' and then select one of the following conditions to automatically trigger the communication event when the selected condition is met:

- When information is added
- When information is amended (updated)
- When a record is deleted

10. Select manual trigger (optional)

Select 'Trigger when selected from toolbar' to allow users the ability to trigger this communication event manually using the 'Select a Letter' button on the toolbar when working with the selected form:

If 'Trigger when selected from toolbar' is not selected, this communication event will only occur if the conditions specified on the Form Trigger tab are met.

This option is only available for the automatic trigger of 'When information is added'.

11. Select Suppress if a form is in a Checklist (optional)

Select 'Suppress if a form is in a Checklist' if you do not want the communication event to occur when the form is part of a checklist workflow.

Check this option if the form you selected is part of a checklist and you would prefer to produce one letter that summarizes all of the information entered during the checklist, instead of sending out multiple letters that are triggered by specific forms within the checklist.

12. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

13. Select Only trigger for specific Organization

If you want this communication event to be triggered for only one Organization, select 'Only trigger for specific Organization'. Then click the down arrow and select the Organization to which this communication event applies.

14. Select Further conditions (optional)

To specify field or profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

15. Specify field conditions (optional)

The Further conditions check box must be selected for any condition to be in effect. Field, Condition, and Value collectively specify a condition that must be met to trigger this communication event.

If more than one condition (row of Field, Condition, and Value) is specified, the selection from the list box above the conditions determines whether one or all conditions must be met to trigger the communication event.

Use the arrow keys or point and click to navigate between the cells of the grid.

- Field
  Double-click the field cell to list all fields by their identifying labels on the form. If a label is not specified by the form code, the system name for the field will be displayed.

Note: If the form contains option lists, the option list code and the option list description are treated as separate fields.

- Condition
  Double-click the condition cell to display a list of conditions. When you select a field from the list of field labels, this list box is populated by an equal sign (=) to signify a condition. You may change this default condition by selecting an option from the drop-down list box. The conditions displayed will depend on the trigger and field type.

- Value
  When you select a field from the list of field labels and select a condition, you must enter a value to complete the condition. When entering a numeric value, specify the decimal point if appropriate.

  If you want to include a future or past date within a range of days, type 'today+n' or 'today-n' where n is the number of days in the range of 1 to 99. For example, 'today+14' would include the current date through 14 days forward.

  If an option list description is selected, you can choose the value from a drop-down list.

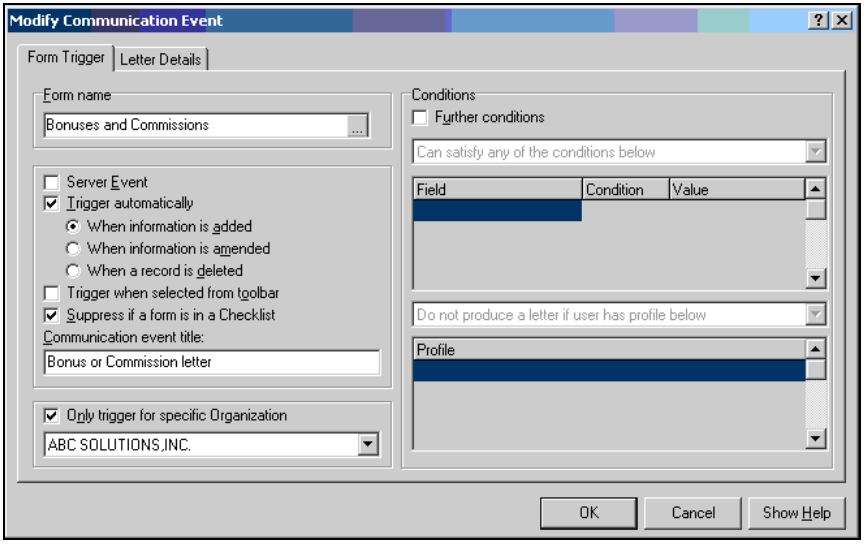
16. Specify profile conditions (optional)

To have the profile or user ID of the person using the form affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:

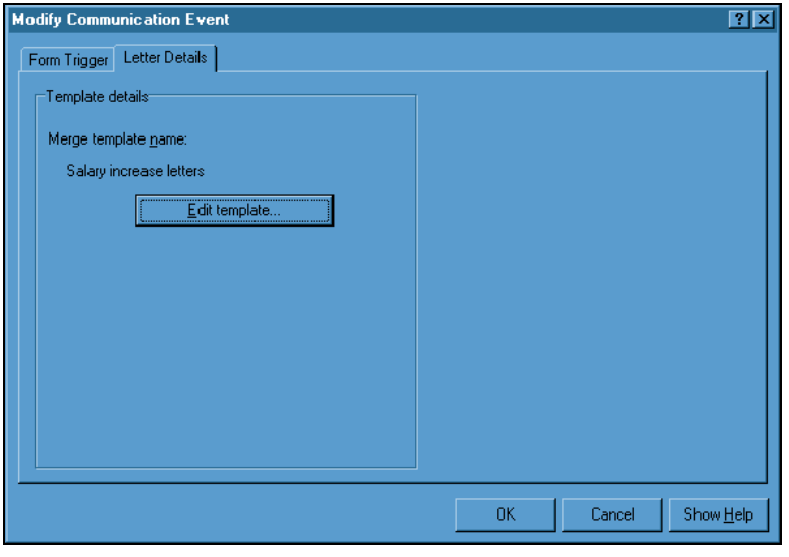


17. Select the Letter Details tab

Select the Letter Details tab to create or modify the letter for this communication event.

The Letter Details dialog is displayed.

If you completed the previous step, the resulting dialog should look similar to the example that follows:



18. Click Edit template

Click Edit template to create a template for the letter communication event.

The system will launch Microsoft Word 97 (or higher version).

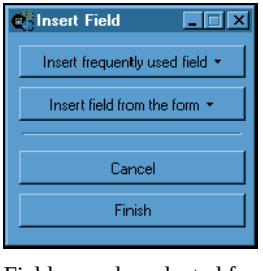
19. Select the template

Select the template to be used for this letter communication event.

20. Type the letter

Type the body of the letter for this communication event in Word.

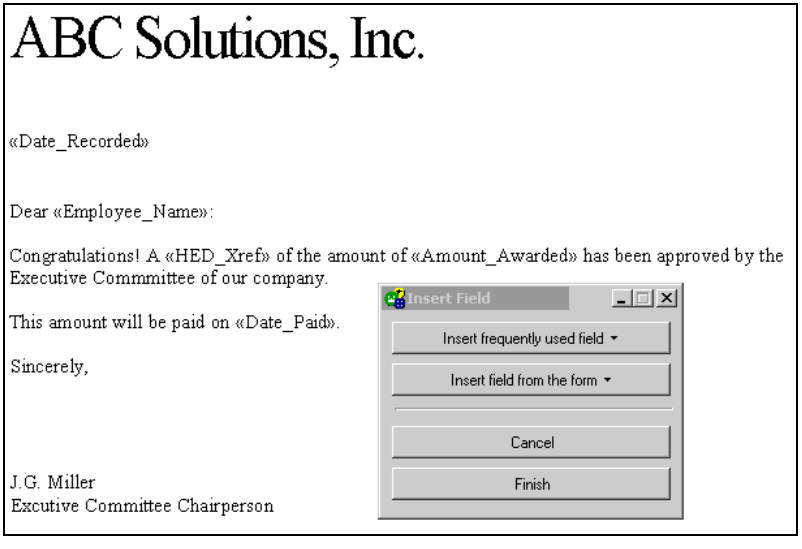
To insert fields into the letter, select the 'Insert frequently used field' or 'Insert field from the form' option from the floating window.



Fields may be selected from both the frequently used fields and the form fields for the same event. However, you may not select fields from more than one frequently used field list for the same event.

Note: The position code and position description are listed in the frequently used fields only. The form fields contain only the position code.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



21. Select Finish

Select Finish on the floating window to save the document and close Word.

22. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

A letter will be produced when the Bonus/Commission Information form (26-SCR) has information added to it.

See also:

- Communication event triggers **(on page** *195***)**

For more information on communication event triggers.

- Letter communication event details ***(on page 208)***

For more information on letter communication events.

Creating a form trigger email communication event

To create an email communication event triggered by a form, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog displays.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Email

By default, Letter is the communication event Type selected when the dialog is first displayed. Select Email by clicking on its option button.

5. Select Form

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Verify that Form is selected.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Form name

Select the form on which this communication event will be triggered by clicking the ellipsis (…) on the right side of the Form name list box. The Browse Forms dialog will show the menu structure from which you can select a form by drilling down through the menus. Click OK after you make the selection.

The form name is displayed in the text box.

8. Select Server Event

If you wish to allow the event to be triggered by the Web client, Interactive Workforce, and Web Collaboration, click Server Event. The event will then be processed on the event server, and not on the user's client machine.

Leaving this blank will allow the event to be processed only by an Administrative client user on the client machine.

9. Select the automatic trigger conditions (optional)

Select 'Trigger automatically' and then select one of the following conditions to automatically trigger the communication event when the selected condition is met:

- When information is added
- When information is amended
- When a record is deleted

10. Select manual trigger (optional)

Select 'Trigger when selected from toolbar' to allow users the ability to trigger this communication event manually using the 'Select an Email' button on the toolbar when working with the selected form:

If 'Trigger when selected from toolbar' is not selected, this communication event will only occur if the conditions specified on the Form Trigger tab are met.

This option is only available for the automatic trigger of 'When information is added'.

11. Select Suppress if a form is in a Checklist (optional)

Select 'Suppress if a form is in a Checklist' if you do not want the communication event to occur when the form is part of a checklist workflow.

Check this option if the form you selected is part of a checklist and you would prefer to produce one letter that summarizes all of the information entered during the checklist, instead of sending out multiple letters that are triggered by specific forms within the checklist.

12. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

13. Select Only trigger for specific Organization

If you want this communication event to be triggered for only one Organization, select 'Only trigger for specific Organization'. Then click the down arrow and select the Organization to which this communication event applies.

14. Select Further conditions (optional)

To specify field or profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

15. Specify field conditions (optional)

The Further conditions check box must be selected for any condition to be in effect. Field, Condition, and Value collectively specify a condition that must be met to trigger this communication event.

If more than one condition (row of Field, Condition, and Value) is specified, the selection from the list box above the conditions determines whether one or all conditions must be met to trigger the communication event.

Use the arrow keys or point and click to navigate between the cells of the grid.

- Field
  Double-click the field cell to list all fields by their identifying labels on the form. If a label is not specified by the form code, the system name for the field will be displayed.

Note: If the form contains option lists, the option list code and the option list description are treated as separate fields.

- Condition
  Double-click the condition cell to display a list of conditions. When you select a field from the list of field labels, this list box is populated by an equal sign (=) to signify a condition. You may change this default condition by selecting an option from the drop-down list box. The conditions displayed will depend on the trigger and field type.

- Value
  When you select a field from the list of field labels and select a condition, you must enter a value to complete the condition. When entering a numeric value, specify the decimal point if appropriate.

  If you want to include a future or past date within a range of days, type 'today+n' or 'today-n' where n is the number of days in the range of 1 to 99. For example, 'today+14' would include the current date through 14 days forward.

  If an option list description is selected, you can choose the value from a drop-down list.

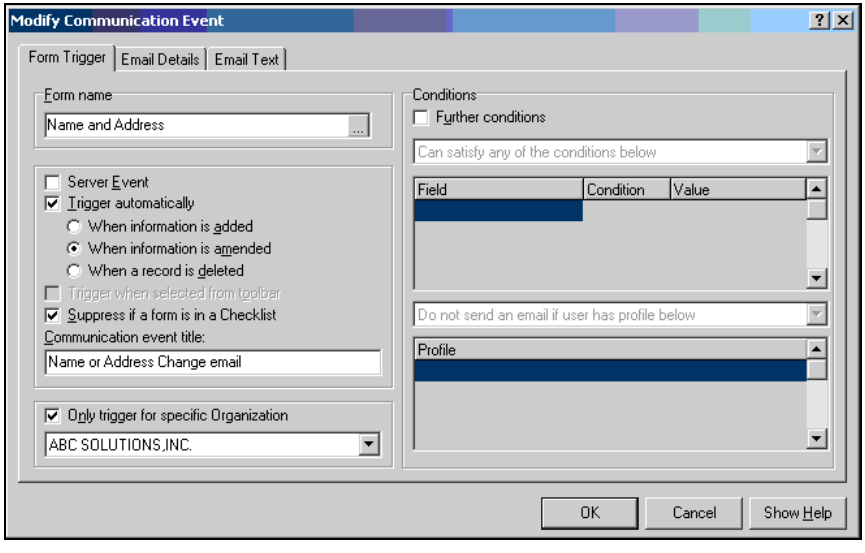
16. Specify profile conditions (optional)

To have the profile or user ID of the person using the form affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



17. Select the Email Details tab

Select the Email Details tab to create or modify information for this communication event.

The Email Details dialog is displayed.

18. Select the Automatic lookup options

Use these options to have the system automatically look up and send the communication event, as a To: or cc:, to the employee for whom the form or checklist is recorded. If Position Administration is in use, choose the automatic lookup to send the communication event to the direct report and indirect report.

19. Select the User options

Choose the option(s) that will allow you to interact with the email communication event:

- Display email preview
  When checked, a preview of the email will display when this communication event is triggered. If not checked, the email generated by this communication will be sent without the opportunity to preview it.

- Email can be cancelled
  When checked, this option allows the email created by this communication event to be cancelled before it is sent.

- Recipients can be modified
  When checked, the To: and cc: fields in the email created by this communication event can be modified when the email is generated. Recipients may be added or deleted.

Checking this option also causes the option 'Prompt if multiple recipients' to be checked.

- Prompt if multiple recipients
  When checked, the user will be prompted to select the recipients of the email if the position (within Position Administration has more than one recipient. If this option is not checked, the email will be sent to all incumbents in the reports to position.

20. Select Recipients

Use these options to select recipients other than the employee for whom the form or checklist was recorded:

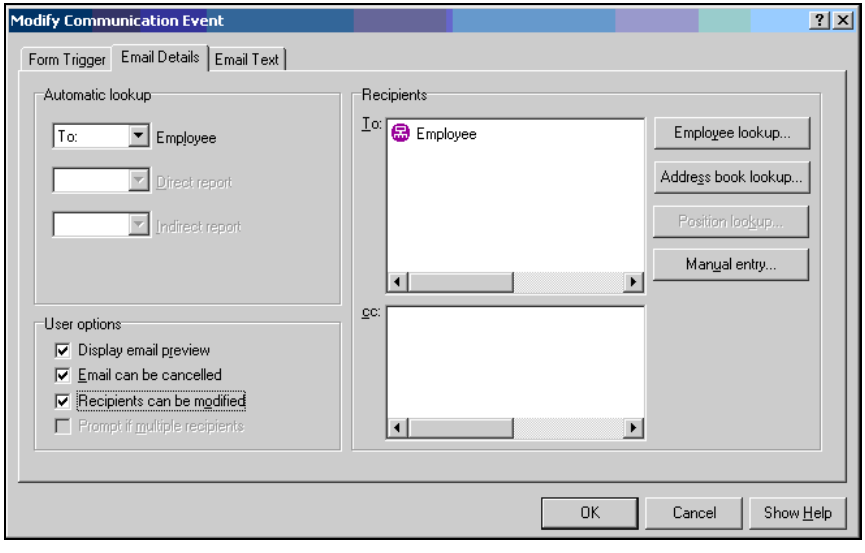
- Employee lookup
  Click to display a list of employees. You may select one or multiple employees as To: and cc: recipients of the email. Type the first few characters of the name, and the system will present an alphabetic list containing names matching your entry.

- Address book lookup
  Click to display a list of addresses from those already configured within your company's email application. You may select one or multiple employees as To: and cc: recipients of the email. If you have multiple address books, you can change the address book from which you make your selection.

- Position lookup
  Click to display a list of positions (as configured by Position Administration). You may select one or multiple positions as To: and cc: recipients of the email. Drill through the organization units until you find the one you want. All positions within that organization unit will then be listed. Select the position you want, and then press the To: or cc: button.

- Manual entry
  Click to display an entry dialog that allows you to type in a specific email address, for example, S_Austin@cyborg.com.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



21. Select the Email Text tab

Use this tab to create or modify the subject and text for the communication event.

The Email Text tab dialog is displayed.

22. Enter the Subject

This text box contains the title for the email. It is the title that the recipients of the email will see in their inbox.

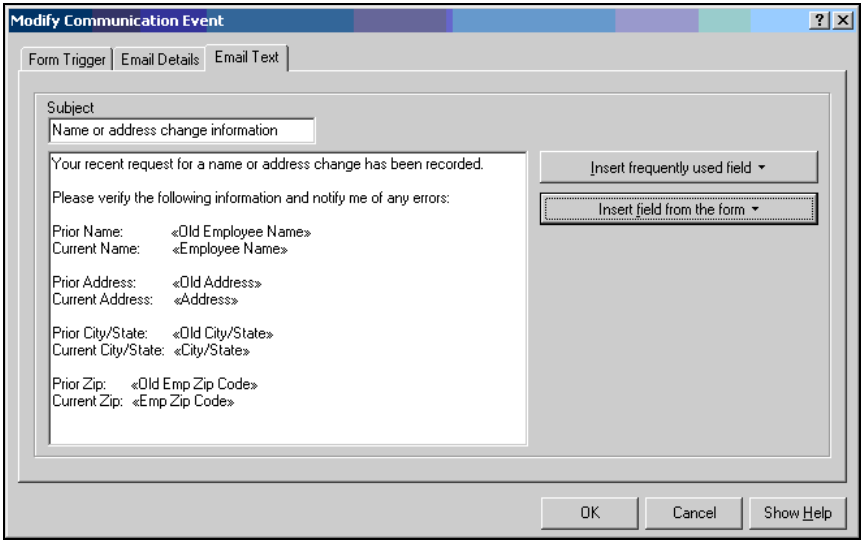
23. Enter the email text

This text box contains the body of the email. To insert a line break in your text, press Enter. You can insert fields from the frequently used field list or from the form by clicking the button. These fields will then be replaced by the actual data when the email is created.

Fields may be selected from both the frequently used fields and the form fields for the same event. However, you may not select fields from more than one frequently used field list for the same event. The frequently used field list can be tailored to include fields that you may want to use, but are not currently in the list.

Note: The position code and position description are listed in the frequently used fields only. The form fields contain only the position code.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



24. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

An email will be sent to the employee when changes are made to the Employee Name And Address form (FF-SCR).

See also:

- Communication event triggers ***(on page 195)***

For more information on communication event triggers.

- Email communication event details ***(on page 202)***

For more information on email communication events.

Creating a checklist trigger letter communication event

To create a letter communication event triggered by a checklist, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component:	Administrator Tools
Process:	Administrator Tools
Task:	Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog displays.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Letter

By default, Letter is the communication event Type selected when the dialog is first displayed. Verify that Letter is selected.

5. Select Checklist

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Select Checklist.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Checklist name

Click on the Checklist name down arrow to select the checklist that will trigger this communication event. The checklist name is displayed in the text box.

Note: If you create a communication event that uses the delivered New Hire checklist as a trigger, you may not specify the 'New Hire initial dialog' item (500001) as the trigger checklist. This is a dialog that navigates to other checklists. Checklist events may only be assigned to checklists with forms.

8. Select the automatic trigger condition

Select one or more of the three conditions listed in the Letter Triggered when a Checklist group box to specify when this communication event should occur.

- Finished - all mandatory steps complete
  Select this option to trigger the communication event only if all of the mandatory steps have been completed when the person working through the checklist clicks the Finish Checklist control. 'Finished - mandatory steps not complete' should not be selected.

- Finished - mandatory steps not complete
  Select this option to trigger the communication event when the person working through the checklist clicks the Finish Checklist control. Mandatory steps do not have to be complete in order to trigger the communication event.

- Checklist paused
  Select this option to trigger the communication event when the person working through the checklist clicks the Pause Checklist control.

9. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

10. Select Further conditions (optional)

To specify profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

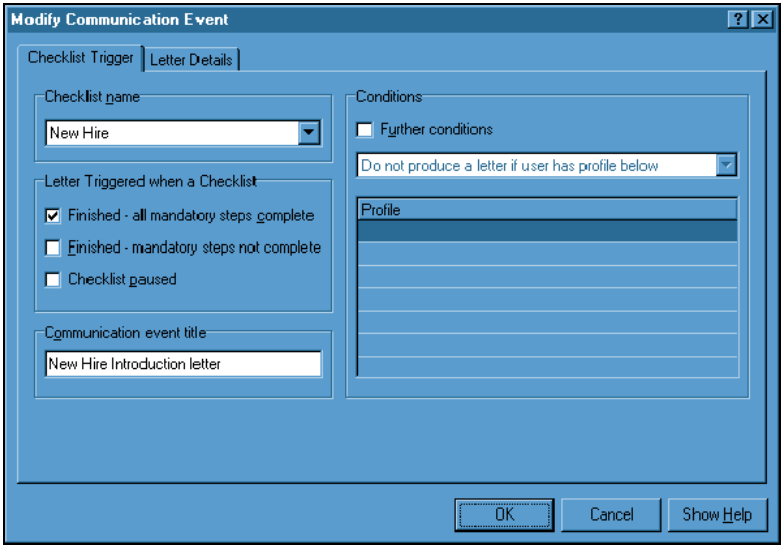
11. Specify Profile conditions (optional)

To have the Profile or user ID of the person using the checklist affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



12. Select the Letter Details tab

Select the Letter Details tab to create or modify the letter for this communication event.

The Letter Details dialog is displayed.

13. Click Edit template

Click Edit template to create a template for the letter communication event.

The system will launch Microsoft Word 97 (or higher version).

14. Select the template

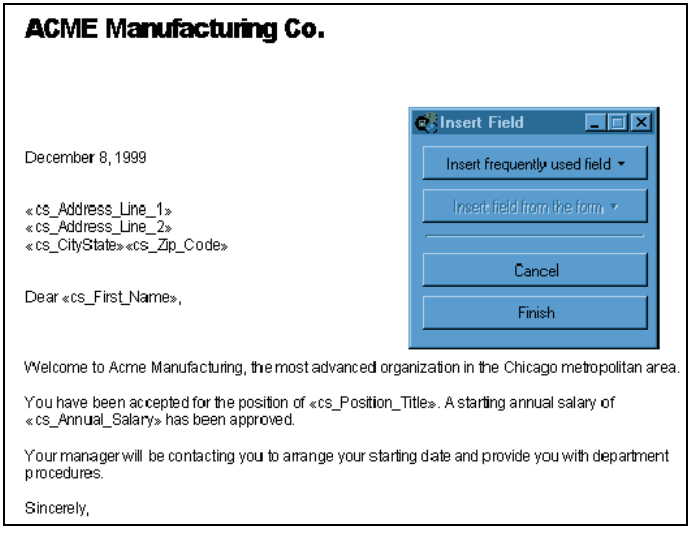
Select the template to be used for this letter communication event.

15. Type the letter

Type the body of the letter for this communication event in Word.

To insert fields into the letter, select the 'Insert frequently used field' option from the floating window.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



16. Select Finish

Select the Finish option on the floating window to save the document and close Word.

17. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

A letter will be produced when the New Hire Checklist is finished and all mandatory steps have been completed.

See also:

- Communication event triggers ***(on page 195)***

For more information on communication event triggers.

- Letter communication event details ***(on page 208)***

For more information on letter communication events.

Creating a checklist trigger email communication event

To create an email communication event triggered by a checklist, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component:	Administrator Tools
Process:	Administrator Tools
Task:	Manage Events

The Communication Event Manager dialog is displayed.

2. Click Create

Click Create to add a new communication event.

The Create Communication Event dialog displays.

3. Enter a Title

Type a unique title, up to 40 characters, for this communication event.

4. Select Email

By default, Letter is the communication event Type selected when the dialog is first displayed. Select Email.

5. Select Checklist

By default, Form is the communication event Trigger type selected when the dialog is first displayed. Select Checklist.

6. Click OK

Click OK to create the communication event.

Note: You can not change the Type or Trigger type after clicking OK on the Create Communication Event dialog.

The Modify Communication Event dialog is displayed.

7. Select the Checklist name

Click on the Checklist name down arrow to select the checklist that will trigger this communication event. The checklist name is displayed in the text box.

Note: If you create a communication event that uses the delivered New Hire checklist as a trigger, you may not specify the 'New Hire initial dialog' item (500001) as the trigger checklist. This is a dialog that navigates to other checklists. Checklist events may only be assigned to checklists with forms.

8. Select the automatic trigger condition

Select one or more of the three conditions listed in the Email triggered when a Checklist group box to specify when this communication event should occur.

- Finished - all mandatory steps complete
  Select this option to trigger the communication event only if all of the mandatory steps have been completed when the person working through the checklist clicks the Finish Checklist control. 'Finished - mandatory steps not complete' should not be selected.

- Finished - mandatory steps not complete
  Select this option to trigger the communication event when the person working through the checklist clicks the Finish Checklist control. Mandatory steps do not have to be complete in order to trigger the communication event.

- Checklist paused
  Select this option to trigger the communication event when the person working through the checklist clicks the Pause Checklist control.

9. Rename the Communication event title (optional)

Enter a name in the Communication event title text box only if you want to change the title of this communication event.

10. Select Further conditions (optional)

To specify profile conditions that must be met in order to trigger this communication event, select the Further conditions check box.

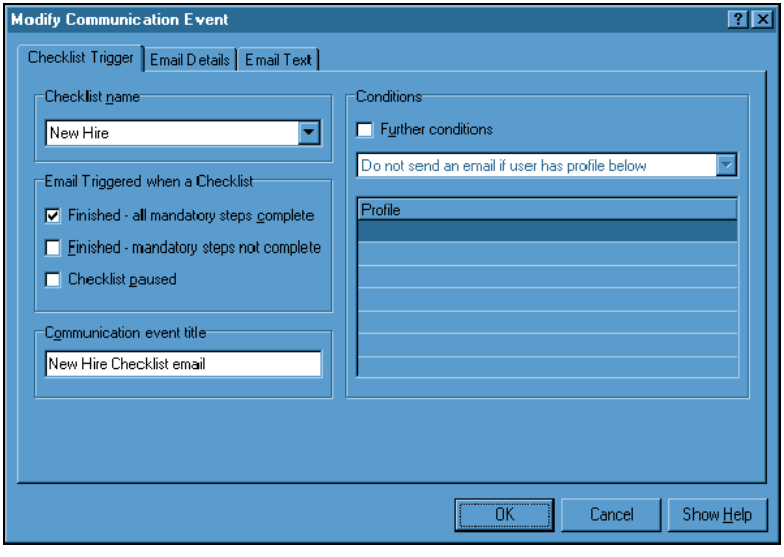
11. Specify Profile conditions (optional)

To have the profile or user ID of the person using the checklist affect whether the communication event occurs, specify an ID or profile in the Profile text box and make a selection in the list box above it.

Whether these users are excluded or included will depend on the selection in the drop-down list box.

Note: The Further conditions check box must be selected for the profiles to be in effect.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



12. Select the Email Details tab

Select the Email Details tab to create or modify information for this communication event.

The Email Details dialog is displayed.

13. Select the Automatic lookup options

Use these options to have the system automatically look up and send the communication event, as a To: or cc:, to the employee for whom the form or checklist is recorded. If Position Administration is in use, choose the automatic lookup to send the communication event to the direct report and indirect report.

14. Select the User options

Choose the option(s) that will allow you to interact with the email communication event:

- Display email preview
  When checked, a preview of the email will display when this communication event is triggered. If not checked, the email generated by this communication will be sent without the opportunity to preview it.

- Email can be cancelled
  When checked, this option allows the email created by this communication event to be cancelled before it is sent.

- Recipients can be modified
  When checked, the To: and cc: fields in the email created by this communication event can be modified when the email is generated. Recipients may be added or deleted.

Checking this option also causes the option 'Prompt if multiple recipients' to be checked.

- Prompt if multiple recipients
  When checked, the user will be prompted to select the recipients of the email if the position (within Position Administration) has more than one recipient. If this option is not checked, the email will be sent to all incumbents in the reports to position.

15. Select Recipients

Use these options to select recipients other than the employee for whom the form or checklist was recorded:

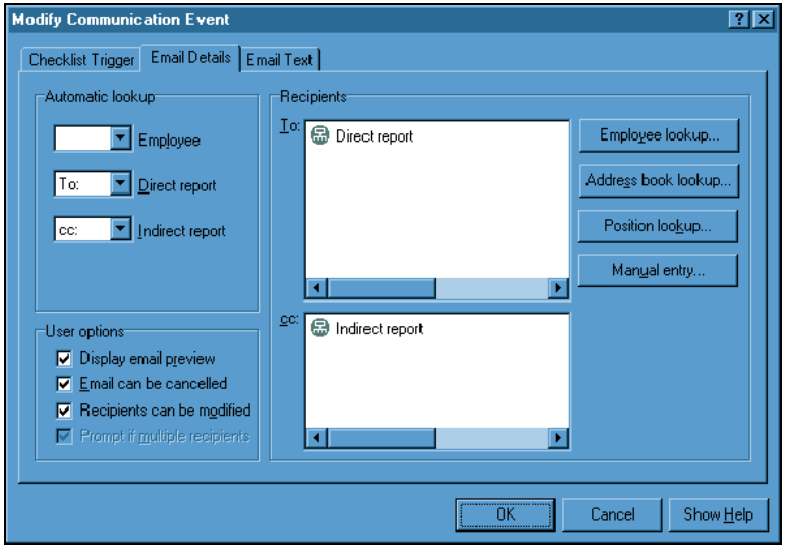
- Employee lookup
  Click to display a list of employees. You may select one or multiple employees as To: and cc: recipients of the email. Type the first few characters of the name, and the system will present an alphabetic list containing names matching your entry.

- Address book lookup
  Click to display a list of addresses from those already configured within your company's email application. You may select one or multiple employees as To: and cc: recipients of the email. If you have multiple address books, you can change the address book from which you make your selection.

- Position lookup
  Click to display a list of positions (as configured by Position Administration). You may select one or multiple positions as To: and cc: recipients of the email. You can drill through the organization units until you find the one you want. All positions within that organization unit will then be listed. Select the position you want, and then press the To: or cc: button.

- Manual entry
  Click to display an entry dialog that allows you to type in a specific email address, for example, S_Austin@hewitt.com

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



16. Select the Email Text tab

Use this tab to create or modify the subject and text for the communication event.

The Email Text tab dialog is displayed.

17. Enter the Subject

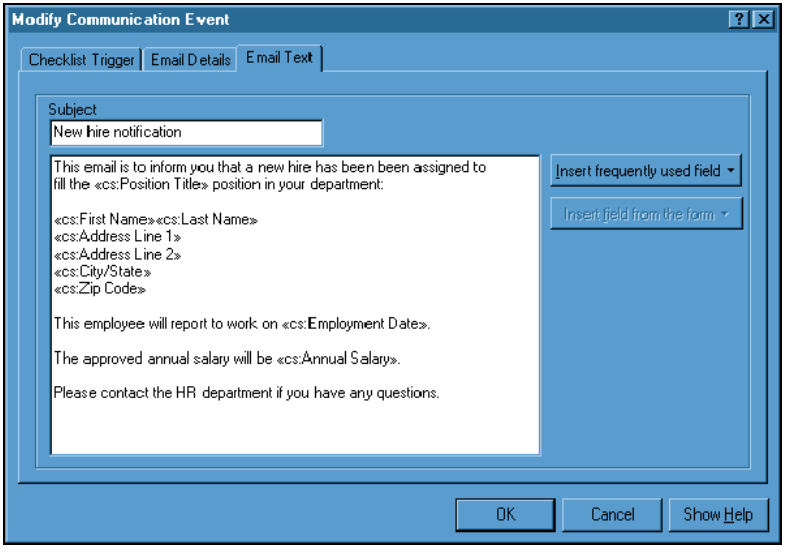
Type the title for the email. This is the title that the recipients of the email will see in their inbox.

18. Enter the email text

This text box contains the body of the email. To insert a line break in your text, press Enter. You can insert fields from the frequently used field list by clicking the button. These fields will then be replaced by the actual data when the email is created.

The frequently used field list can be tailored to include fields that you may want to use, but are not currently in the list.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



19. Click OK

Click OK to save the communication event and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed. The Communication Event will take place when the event conditions are satisfied.

An email will be sent to the direct and indirect reports when the New Hire checklist is finished and all mandatory steps have been completed.

See also:

- Communication event triggers ***(on page 195)***

For more information on communication event triggers.

- Email communication event details ***(on page 202)***

For more information on email communication events.

Changing to a different frequently used field list

To change to a different frequently used field list, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Select an event

Select a communication event by clicking on it.

The communication event is highlighted.

3. Click Modify

Click Modify to change the selected communication event.

The Modify Communication Event dialog is displayed.

4. Click the Email Text tab or Letter Details tab

If the communication event is an email event, click the Email Text tab. If the communication event is a letter, click the Letter Details tab.

The tab is displayed.

5. Click Edit Template (letter only)

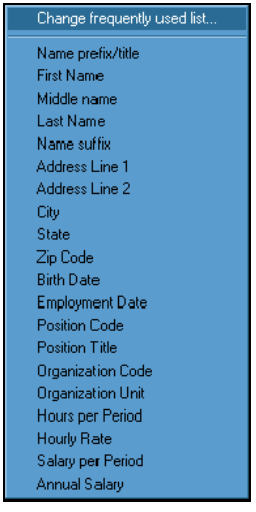
If the communication event is a letter, click the Edit Template button.

If the communication event is an email, skip this step.

6. Click Insert frequently used field

Click Insert frequently used field to display a list of frequently used fields.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:

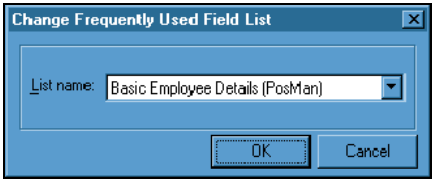


7. Select Change frequently used list

Select Change frequently used list option.

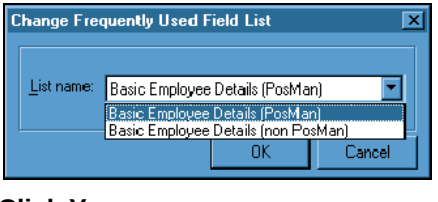
The Change Frequently Used Field List dialog is displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



8. Select a List name

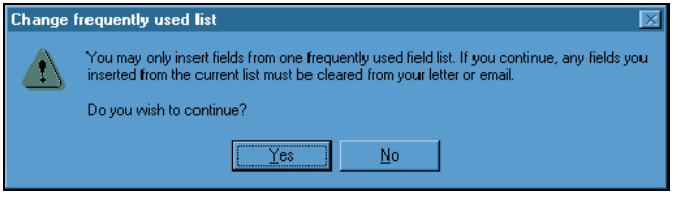
Select a different field list from the List name list box.



9. Click Yes

Because you may only insert fields from one frequently used field list, a warning message is displayed.

If you click Yes, the new list may be used, but you must clear all prior frequently used fields from the letter or email.



If you click No, the Email Text dialog is displayed with no change in the frequently used list that was used for the text.

10. Click OK

Click OK to change the field list and close the Change Frequently Used Field List dialog.

11. Click Insert frequently used field

Click Insert frequently used field to display the new field list.

The new frequently used field list is displayed and you may make your selections for the letter or email text.

The Basic Employee Details (non PosMan) list is displayed.

See also:

- Inserting fields ***(on page 213)***

For more information on options available for inserting fields into email and letter text.

Adding a new field to a frequently used field list

To add a new field to a frequently used field list, follow these steps:

1. Copy the Solution Series Form Appearance Table (GETSAT)

2. Use Form Builder to add the new field and label to the Solution Series Form Appearance Table

3. Alter the Cyborg Scripting Language that supports the Solution Series Form Appearance Table to locate the new data item (optional)

4. Load the amended Screen Appearance Table (PUTSAT)

5. Change to this frequently used list in the Modify Communication Event dialog

6. Select the new field from the frequently used field list

See also:

- Inserting fields ***(on page 213)***

For more information on using alternative frequently used field lists.

Creating a custom frequently used field list

To create a custom frequently used field list, follow these steps:

1. **Use FormBuilder to create a new Screen Appearance Table and add its fields and labels**

2. **Write new Cyborg Scripting Language code to support the new form and locate its associated data fields**

3. **Load the new Screen Appearance Table (PUTSAT)**

4. **Add the new frequently used field list program name to the Frequently used fields form option list (SC51)**

5. **Change to this frequently used list in the Modify Communication Event dialog**

6. **Select fields from the new frequently used field list**

See also:

- Inserting fields ***(on page 213)***

For more information on using alternative frequently used field lists.

Adding a custom frequently used field list to the option list

To add a custom frequently used field list to the option list using the Option List Editor (CSUPDT), follow these steps:

1. **Access the Option List Editor (CSUPDT)**

   Access this dialog by making the following selections from the Navigator:

   Component: Development Tools
   Process: Option Lists
   Task: Edit

2. **Enter the Option List Name**

   Type the name of the option list to be edited.

3. **Click Find Now**

   The system displays the detailed information for the requested option list.

4. **Click Create**

   A blank line is inserted, allowing you to add the new item.

5. **Enter the Code**

   Type the new frequently used field list program name, such as 'FUFSCR'. This identifies the form from which the fields will be displayed in the frequently used field list.

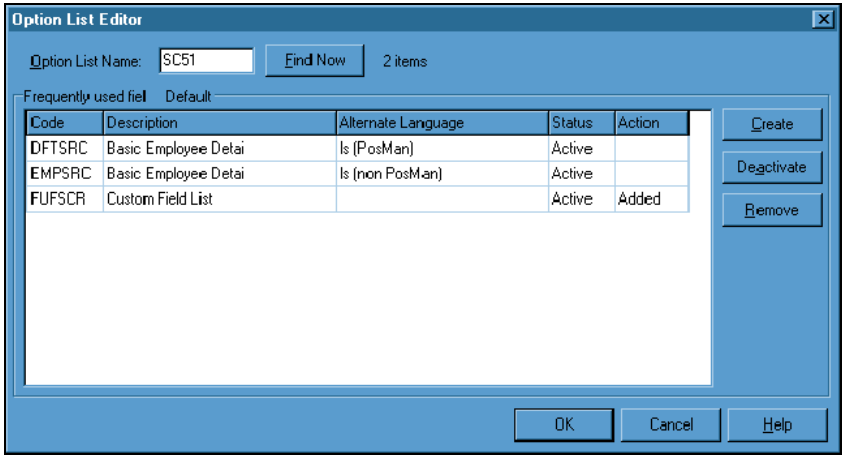
6. Enter the Description

Type a description of up to 20 characters for the code. This is the description that will be displayed in the Change Frequently Used Field List dialog List name drop-down list box.

7. Enter the Alternate Language

If an alternate language is being used, type the description for the code in that language.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



8. Click OK or press Enter

No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

See also:

- Inserting fields ***(on page 213)***

For more information on alternative frequently used field lists.

Copying a communication event

To create a new communication event by copying an existing one, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component:	Administrator Tools
Process:	Administrator Tools
Task:	Manage Events

The Communication Event Manager dialog is displayed.

2. Select an event

Select the communication event by clicking on it.

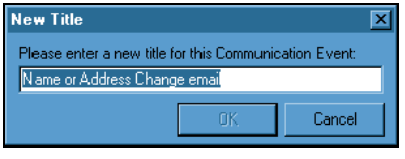
The communication event is highlighted.

3. Click Copy

Click Copy to create a duplicate of the selected communication event.

The New Title dialog is displayed with the name of the original communication event.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Enter a title

Type a unique title, up to 40 characters, for the new communication event.

5. Click OK

Click OK to save the copied communication event. A communication event is created with the new title.

The Modify Communication Event dialog is then displayed to allow changes to the copied event.

6. Click OK

Make modifications, if any, and click OK to save the communication event changes and close the Modify Communication Event dialog.

The Communication Event Manager dialog is displayed.

See also:

- Using communication events ***(on page 191)***

For more information on the communication event functionality.

Modifying a communication event

To change the details of a communication event, follow the steps below:

Note: You can not change the communication event type (letter or email) or trigger (form or checklist).

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Select an event

Select the communication event by clicking on it.

The communication event is highlighted.

3. Click Modify

Click Modify to change the selected communication event.

The Modify Communication Event dialog is displayed.

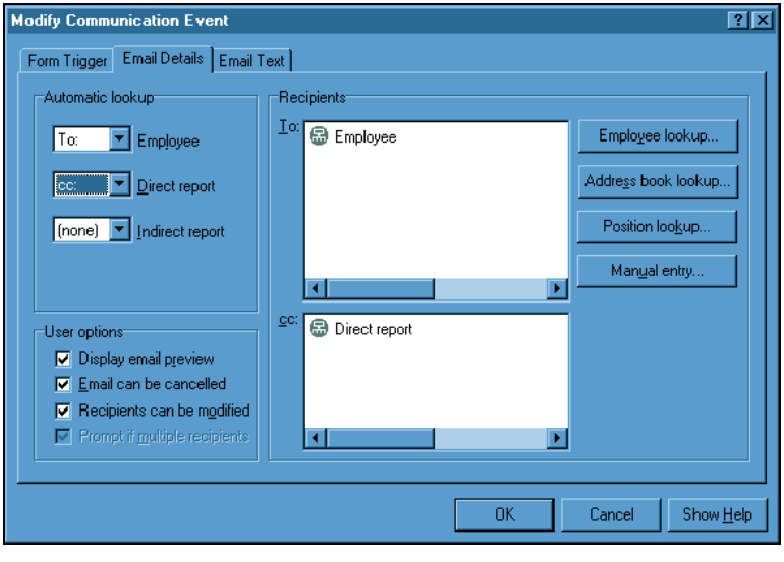
4. Make the changes

Make changes to the communication event.

Modifying a communication event is similar to creating an event. Access the desired tabs by clicking on them.

To delete a value, select it and then press the Delete key.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



5. Click OK

Save your changes by clicking OK.

The Communication Event Manager dialog is displayed.

See also:

- Using communication events **(on page** *191***)**

For more information on the communication event functionality.

Removing a communication event

To remove a communication event, follow these steps:

1. Access the Communication Event Manager dialog

Access this dialog by making the following selections from the Navigator:

Component: Administrator Tools
Process: Administrator Tools
Task: Manage Events

The Communication Event Manager dialog is displayed.

2. Select an event

Select the event by clicking on it.

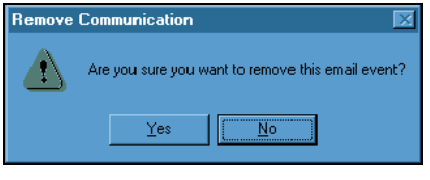
The event is highlighted.

3. Click Remove

Click Remove to delete the selected communication event.

The Remove Communication dialog is displayed.

If you completed the previous steps, the resulting dialog should look similar to the example that follows:



4. Click Yes

Click Yes to remove the communication event.

The selected communication event is removed.

See also:

- Using communication events ***(on page 191)***

For more information on the communication event functionality.

Adding forms to the exclusions option list

To add forms to the Browse Forms - Email/Letters option list (SC50) using the Option List Editor, follow these steps:

1. **Access the Option List Editor (CSUPDT)**
   Access this dialog by making the following selections from the Navigator:

   Component: Development Tools
   Process: Option Lists
   Task: Edit

2. **Enter the Option List Name**
   Type the name of the option list to be edited—'SC50'.

3. **Click Find Now**
   The system displays the detailed information for the requested option list.

4. **Click Create**
   A blank line is inserted, allowing you to add the new item.

5. **Enter the Code**
   Type the program name of the form to be excluded, such as 'EF-SCR'.

6. **Enter the Description**
   Type 'E' to indicate that this form is to be excluded as an event trigger. This indicator prevents the specified form from being displayed by the form browser.

7. **Click OK or press Enter**
   No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

See also:

- Communication event triggers ***(on page 195)***

For more information on communication event triggers.

Extended Practice

Create a form-triggered email event that will notify an employee when a physical exam appointment has been recorded. The event may be automatically triggered, or you may select a manual trigger. You may select the form name by expanding the Employee Relations component, then expanding the Manage Employee Health and Safety process, and selecting the Physical Exams Scheduled/Completed (18-SCR) task.

Set up the event so that it is triggered when information is added to the form. Set the option to preview or cancel the email. Create the appropriate email text and insert fields from the form to describe items such as the appointment date and physician. After you complete the event parameters, execute the form for a 999999 organization employee (such as Jerry Jones, employee number 1111) and preview the email.

Review of Questions Answered

1. What is a communication event?

2. What are the types of communication events?

3. What is a communication event trigger?

4. What types of triggers are available?

CHAPTER 8

Document Management Facility

In This Chapter

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Document security 259
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Review of Questions Answered 269

Introduction

Additional desktop integration functionality provides the means to link documents such as resumes, performance appraisals, photos, and so forth, to employee records and then review and launch those documents from within The Solution Series.

Tasks

This section explains the following:

- Defining document types
- Linking documents to an employee record
- Viewing document links
- Launching a document from the Document Maintenance form
- Launching a document from the Document Explorer

Prerequisites

Before you can use the Document Launcher, you must install The Solution Series. Also, to implement the Document Management Facility, you need to run a program (.exe) that comes with the Installation Media for Solution Series. The directions for running the program are in the Installing The Solution Series/ST document.

Questions answered

The following questions are answered in this section:

1. What option list must be edited to support the Document Management Facility?
2. What tasks must be performed to link documents to employee records?
3. How do you launch a document?
4. What security can be associated with this functionality?

Overview of the Document Management Facility

The Document Management Facility gives you the ability to attach files and documents to an employee record in your system. The file could be a picture such as an identification photo, a document such as a performance review, or a certificate such as a qualification certificate. Maintaining documents in this way provides an easy-to-use electronic filing system from which retrieval is only a few clicks away.

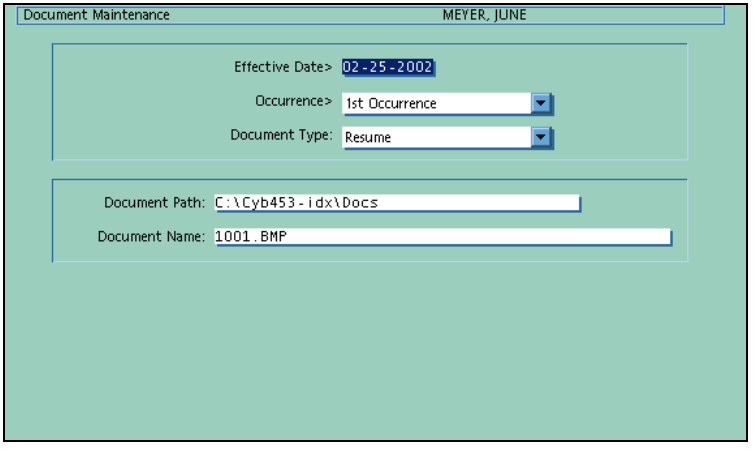
After you have installed the necessary files, the only setup required is to specify the document types you wish to store. These specifications are stored in the Document Definitions option list (SC55).

See also:

- Document types ***(on page 258)***

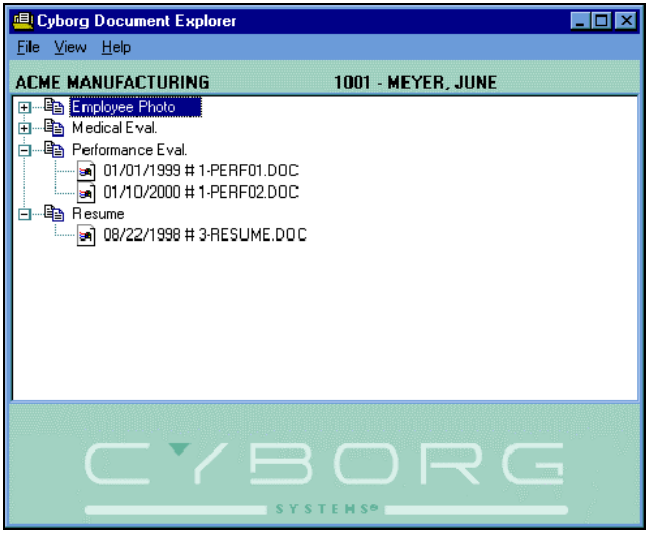
For more information about this option list, its use, and implementation considerations.

To link a file or document to an employee's record, you use the Document Maintenance form (DR-SCR):



This employee form allows you to specify the details of the document, including the path to the document location. The document can be stored locally or on the network. It does not have to be stored on the system server.

To view a specific document, you can access the Document Explorer to display, by document type, all of the documents attached to an employee record:



You launch the document by clicking the Launcher button:

The Document Explorer and Launcher buttons are available on the Launch toolbar.

Note: *This functionality is available in Windows and Unix environments only.*

Alternatively, you can double-click the document to launch it.

The document is launched in the appropriate software, based on the file properties. For example, a .doc file will be launched in Word, and a .gif file will be launched in your browser. If a Windows file association does not exist for the file extension, the Windows standard 'Open with' dialog will be displayed.

If the file does not exist, a dialog will open giving you the option to create the file.

Note: *If the document does not exist and it is a Microsoft Word document, Word is then launched with the newly-created document. A dialog may appear asking if you want to convert the document. In this case you may need to install a converter. The Microsoft Office website has the required converters—which converter you will need will depend on the version of Word you have installed.*

See also:

- Linking documents to an employee record ***(on page 264)***

For detailed directions for using the Document Maintenance form (DR-SCR).

- Viewing document links ***(on page 266)***

For detailed directions for viewing all document management records on file for an employee.

- Launching a document from the Document Explorer ***(on page 188)***

For detailed directions for using the Document Explorer.

Document types

The Document Definitions option list (SC55) is used to specify the different document types you want to attach to employee records. Each document type that you define in this option list contains the default file extension and default file location, to make accessing the documents easier. Using this option list to define document types also reduces the amount of information you have to set up for each document, since the defaults for that document type can be used.

Several document types are delivered. You can edit these and add your own document types as well. The following table displays the delivered document types and their option list entries. The characteristics for each document type are listed. The table headings include the maximum number of characters allowed for each item.

Code (2)	Document Type (20)	Default Extension (3)	Default directory (27)
IM	Employee Photo	BMP	C:\Docs\Images
ME	Medical Eval.	DOC	C:\Docs\Meds
PE	Performance Eval.	TXT	P:\Evals
RE	Resume	WPD	\\Product\Documents

Note: Solution Series does not come with pre-defined directory paths. The table above provides possible examples.

You can specify as many document types as you need. You can be as specific or as general as you want when determining your document types. For example, you may choose to specify one document type for Performance Evaluations, or you may want to specify a performance evaluation for each year, such as 'Perform Ev 2000'. Keep in mind that the code identifier for each document type is only two characters long and each code must be unique.

Although you specify a default directory in the option list, there is opportunity to specify a location for each file if you want to. The same is true for the file extension. Although you may have specified a default file extension for a word processing file as .doc (that is MS Word), you could use a WordPerfect file. At the time that you attach the WordPerfect file to the employee record, you can indicate its specific file type by adding a document extension to the file name.

When using the Document Explorer feature, the documents for an employee will be displayed in Document Type order. In this sequence, it will be easy for you to review the documents that you have linked to an employee record, or find the another file you are looking for. Being specific with your document types can make finding documents easier in the future.

See also:

■ Defining document types ***(on page 262)***

For detailed directions for maintaining the Document Definitions option list (SC55).

Document security

Documents can be stored in any directory, either local or on a network. They do not have to be stored in only one location. The path can be specified for each individual document.

Consult your Security Officer to discuss the ways you can secure the documents:

- Network and server security to restrict access to where the files are stored
- Security to restrict access to the Document Maintenance form (DR-SCR) and Document Explorer

Summary of interface options

The following interface options relate to this functionality:

- Launcher button
- Document Explorer button
- Document Maintenance bookmark

Launcher button

When you are displaying a document link on the Document Maintenance form (DR-SCR) this button launches a document in the application that is indicated by the file extension. It is located on the Launch toolbar.

See also:

- Launching a document from the Document Maintenance form ***(on page 268)***

For detailed directions for using the Launcher button.

Document Explorer button

This button launches the Document Explorer for the current organization and employee. It is located on the Launch toolbar.

See also:

- Launching a document from the Document Explorer ***(on page 188)***

For detailed directions for using the Document Explorer button.

Document Maintenance bookmark

This bookmark is used to access the Document Maintenance form (DR-SCR) for the current employee. It is an option on the Bookmarks list and can be added to your Favorites toolbar.

See also:

- Viewing document links ***(on page 266)***
- Launching a document from the Document Maintenance form ***(on page 268)***

For detailed directions on viewing and launching documents from the Document Maintenance form.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

Before practicing the following detailed directions 262
Defining document types 262
Linking documents to an employee record 264
Viewing document links 266
Launching a document from the Document Maintenance form 268

Before practicing the following detailed directions

Only the tasks for ***Defining document types*** (on page 262), ***Linking documents to an employee record*** (on page 264), and ***Viewing document links*** (on page 266) include detailed directions for practice purposes. The remaining tasks require that documents already be stored and available on your server or local drive. In a classroom setting, the instructor may provide documents for your use in completing the tasks for ***Launching a document from the Document Maintenance form*** (on page 268) and ***Launching a document from the Document Explorer*** (on page 188).

Defining document types

To edit the Document Definitions option list (SC55) and define the document types, use the Option List Editor (CSUPDT) and follow these steps:

1. Access the Option List Editor (CSUPDT)

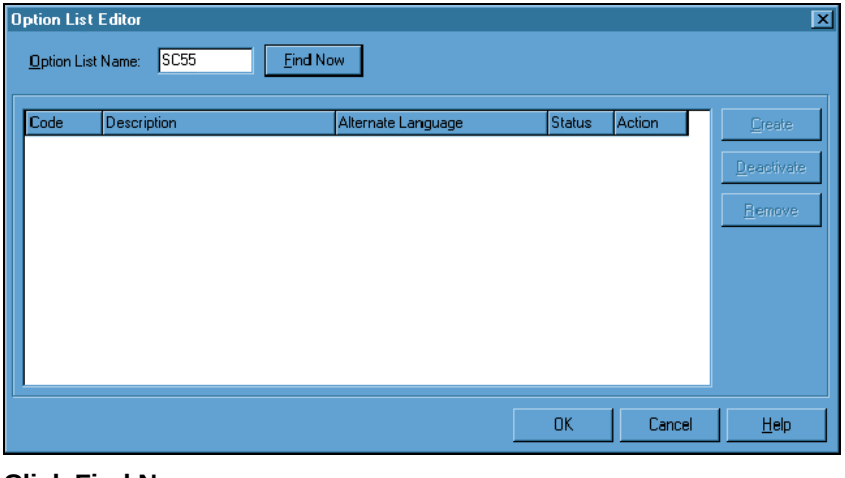
Access this dialog by making the following selection from the Navigator:

Component: Development Tools
Process: Option Lists
Task: Edit

2. Enter the Option List Name

Type the name of the option list to be edited, 'SC55'.

If you completed the previous steps, the resulting form should look similar to the example that follows:



3. Click Find Now

A list of the existing document type entries will be displayed.

4. Review the delivered default document type entries

5. To add a new entry, click Create

A blank line is inserted, allowing you to add the new item.

6. Enter a two-character code

Use a unique two-character code to identify this document type.

7. Enter the Document Type description

Type the document type description in the Description text box using a maximum of 20 characters.

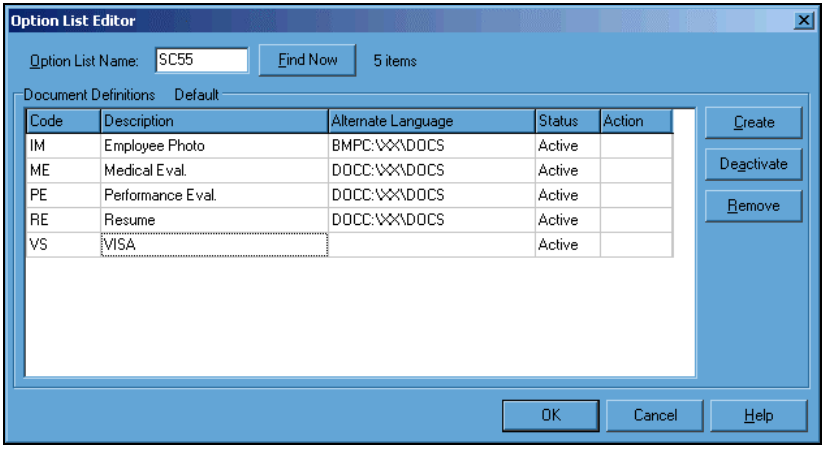
8. Enter the default file extension and directory

For the Alternate Language text, type the default three-character file extension followed by the default directory path that specifies where this document type will be stored. The directory path can total up to 27 characters.

9. Click OK to update the option list

No items are added to the option list until you click OK. When OK is clicked, the new item is immediately added to the option list. No confirmation message is displayed.

If you completed the previous steps, the resulting form should look similar to the example that follows:



Note: To add more than one entry to the Document Definitions option list (SC55), repeat steps 4–8 until all entries have been made.

See also:

- Document types ***(on page 258)***

For more information about the Document Definitions option list (SC55).

Linking documents to an employee record

To link a document to an employee record using the Document Maintenance form (DR-SCR), follow these steps:

1. Access the Document Maintenance form (DR-SCR)

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

Component: User Tools
Process: Add/Maintain Document Links
Task: Link Documents to Employees

Or use the Document Maintenance bookmark.

2. Enter employee details

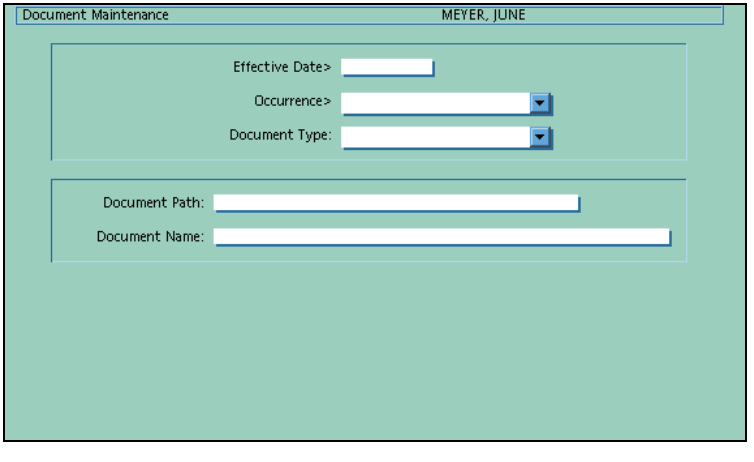
Enter employee number, name, or Social Sec number of the employee you want to use in the Employee Selection dialog box.

3. Click OK

The most recent occurrence of the record is displayed.

Note: If document links have already been set up for an employee, the most recent record will be displayed when you access this form. You may find it helpful to clear the text boxes before entering values for a new document link. To do this, click the Clear Fields button.

If you completed the previous steps, the resulting form should look similar to the example that follows:



4. Enter the Effective Date

Type the effective date of the document. Enter the date in the format MM-DD-CCYY or CCYYMMDD (US and Canada, excluding Quebec) or DD-MM-CCYY or CCYYDDMM (elsewhere).

5. Select the Occurrence

This entry allows a range of 1st to 10th Occurrence. Options for this list box are provided by the Key Separator Value option list (HR70).

An employee can have up to ten linked documents per Effective Date.

6. Select the Document Type

The Document Type is a required entry. Options for this list box are provided by the Document Definitions option list (SC55).

7. Enter the document path (optional)

The Document Path is an optional text box that specifies the path where the document is stored.

If the document is stored at the default location, as specified in the Document Definitions option list (SC55) for this document type, there is no need to enter the path. The default will be assumed.

If the document is not stored at the default location, enter the specific path.

8. Enter the Document Name

This is the file name for the document. This entry is appended to the Document Path to create a complete file name.

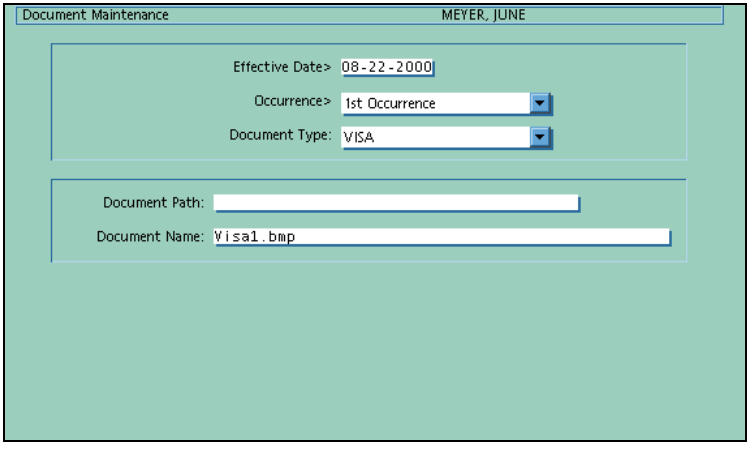
This entry must be completed to ensure that the document is linked to the employee.

If no extension is specified, the default extension will be assumed as defined in Document Definitions option list (SC55) for this document type.

9. Press Enter to save the record

Press Enter to add the document link to the employee record.

If you completed the previous steps, the resulting form should look similar to the example that follows:



Note: *You may set up another document link so that the next detailed directions task,* **Viewing document links** *(on page 266), can be completed. The second document link is for a performance evaluation dated December 1, 1998.*

See also:

- Overview of the Document Management Facility ***(on page 255)***

For more information about the Launcher and Document Explorer programs.

- Document Maintenance bookmark ***(on page 260)***

For more information on the Document Maintenance bookmark.

Viewing document links

To view all document links on file for an employee by displaying the selection list of the Document Maintenance form (DR-SCR), follow these steps:

Note: *This task requires that more than one document link exists for the employee.*

1. Access the Document Maintenance form (DR-SCR)

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

Component: User Tools
Process: Add/Maintain Document Links
Task: Link Documents to Employees

2. Enter employee details

Enter employee number, name, or Social Sec number of the employee you want to use in the Employee Selection dialog box.

3. Click OK

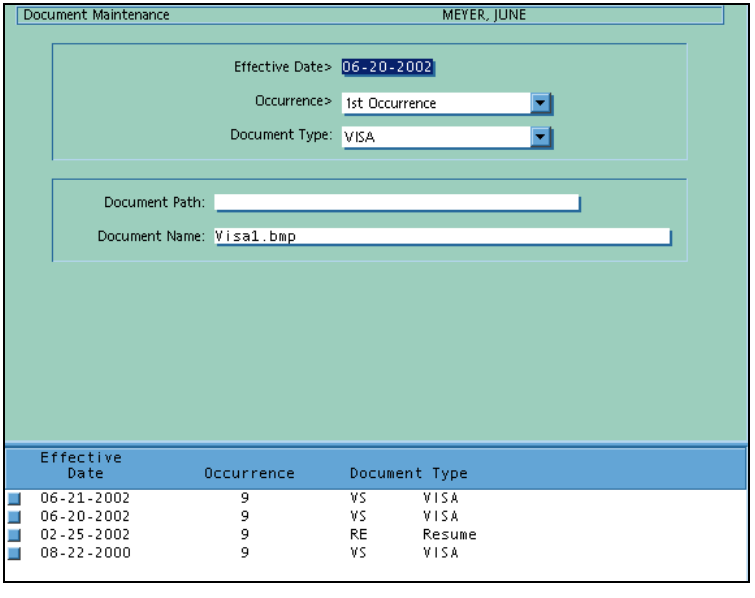
The most recent occurrence of the record is displayed.

4. Click the Refresh Selection List button

Click the Refresh Selection List button on the Selection Menu toolbar.

The Selection List is displayed in date order, showing the most recent occurrence at the top.

If you completed the previous steps, the resulting form should look similar to the example that follows:



5. Click the record you wish to view

Select the record occurrence from the selection list by clicking the button to the left of the selection.

The selected record displays.

See also:

- Overview of the Document Management Facility ***(on page 255)***

For more information about the Document Maintenance form (DR-SCR).

Launching a document from the Document Maintenance form

In order to launch a specific document, you must specify which organization, employee, and document you want. To launch a document from the Document Maintenance form (DR-SCR), follow these steps:

1. Access the Document Maintenance form (DR-SCR)

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

Component: Reporting
Process: Add/Maintain Document Links
Task: Link Documents to Employees

Or use the Document Maintenance bookmark.

2. Enter employee details

Enter employee number, name, or Social Sec number of the employee you want to use in the Employee Selection dialog box.

3. Click OK

The most recent occurrence of the record is displayed.

4. Click the Refresh Selection List button to view all document links

Click the Refresh Selection List button on the Selection Menu toolbar:

The Selection List is displayed in date order, showing the most recent occurrence at the top.

5. Select the document link

While viewing the Selection list, click the button to the left of the document link you wish to view.

6. Click the Launcher button

To launch the selected document, click the Launcher button on the Launch toolbar.

The document is launched in the application indicated by the document file extension.

Note: This functionality is available Windows and Unix environments only.

See also:

- Document types ***(on page 258)***

For more information on document types.

- Summary of interface options ***(on page 260)***

For more information on the toolbar buttons used for document management.

Review of Questions Answered

1. What option list must be edited to support the Document Management Facility?

2. What tasks must be performed to link documents to employee records?

3. How do you launch a document?

4. What security can be associated with this functionality?

PART 4

Appendices

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APPENDIX A

Practice and Review Answers

In This Appendix

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Introduction

This appendix provides answers for the Apply the Concept, Extended Practice, and Review of Questions Answered that are included in the instructional chapters.

Maintaining Option Lists

Apply the Concept

1. Based on your understanding of the option list types and naming conventions as explained in this concept, which of these two option lists would contain values that could be used by all organizations, even delivered test organizations—HR04 or HR459?

   Universal option lists have five-position names, with a blank in the fifth position. So the correct answer is HR04, because there is a blank in the fifth position. Universal option lists are delivered with the system and are populated. These option lists are available to all organizations, including the delivered test organizations.

2. Based on your understanding of the Option List Editor (CSUPDT) functionality as explained in this concept, indicate which of the following tasks you can complete after accessing it:
   Add a new item to an existing option list
   Add a new option list
   Change information about an existing item
   Delete an item
   Delete an option list

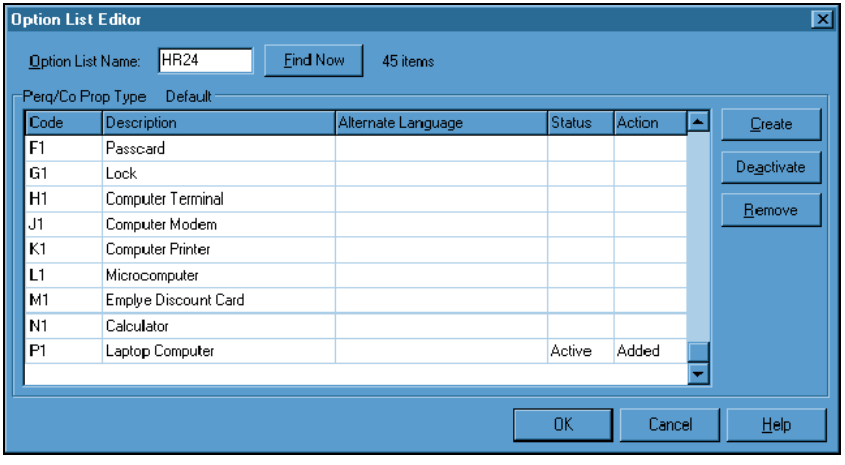
   You can use the Option List Editor (CSUPDT) to maintain existing option lists. You can add a new item to an existing option list, change information about an existing item, or delete an item. To create a new option list or delete an option list, you must use the Edit Utility (EDIT).

Extended Practice

Your company has purchased laptop computers for your consulting staff, and you have been asked to add this item to the Company Property option list (HR24). Using the Option List Editor (CSUPDT), add code 'P1' to option list HR24 and give it a description of 'Laptop Computer'.

After the new entry has been made, access the Company Personal Property form (22-SCR) for Jerry Jones, employee 1111 in Organization 999999, and record his newly assigned laptop computer.

Your option list entry should look similar to the example that follows:



Review of Questions Answered

1. What are the different types of option lists?

   Universal option listed are delivered with the system and are populated. They are available to all organizations. Type 9 option lists are delivered and populated. They are available only to the test companies and used for testing purposes. Organization-specific option lists must be defined. They are used to provide specific codes to specific organizations.

2. What is the Option List Editor (CSUPDT) and what is its purpose?

   The Option List Editor(CSUPDT) is used to maintain existing option lists. You can add a new item, change information about an existing item, or delete an item.

Designing a Business Process

Apply the Concept

1. Based on your understanding of checklists as explained in this concept, what processes in your organization would be most suitable for a checklist application? (Have you considered the termination process or the salary review and authorization process?)

   This response will be specific to your organization. Consider any business processes that require at least one mandatory form and more than one optional form.

2. Based on your understanding of the checklist wizard as explained in this concept, how could you benefit from examining the construction of the delivered universal checklists?

   An example checklist called 'Hire a New Employee' is delivered. Although it displays as one checklist on the Navigator and menus, it is actually five universal checklists working together. These checklists use many of the options available to you when you create your checklists. Consider looking at how these are constructed and how they work before creating your own. They can give you an idea of how checklists work in general and how the options you select affect how checklists work.

Extended Practice

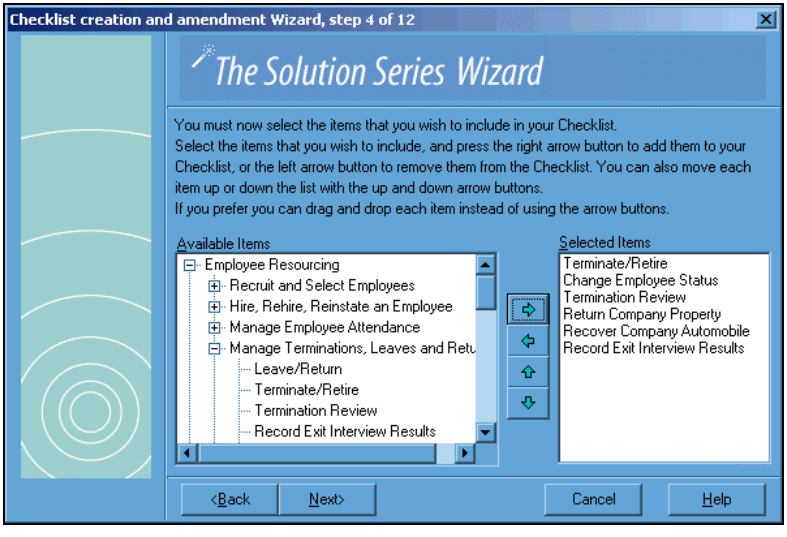
You have just been assigned the task of creating a universal checklist named 'Employee Termination Process'. Six forms will be included in the checklist. These can be selected from the 'Manage Terminations, Leaves and Returns' process of the Employee Resourcing component:

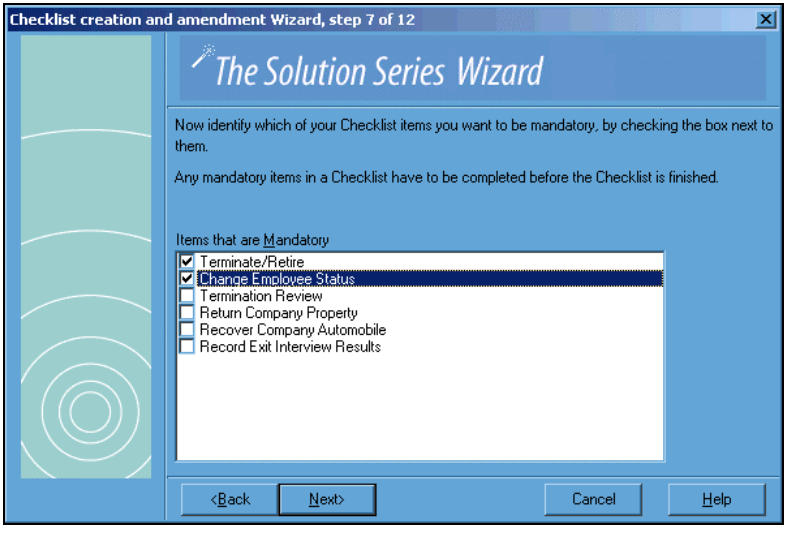
- Terminate/Retire
- Change Employee Status
- Termination Review
- Return Company Property
- Return Company Automobile
- Record Exit Interview Results

Select items 1 and 2 as mandatory. At your discretion, select or skip advanced features.

Remember that this checklist must be added to the menus before users can access it. You may add this checklist to the 'Manage Terminations, Leaves and Returns' process on the menus after you have reviewed the procedure in the next section.

Your checklist parameters should look similar to the examples that follow:





Review of Questions Answered

1. What is a checklist?

   A checklist is a list of tasks to be performed in sequence, within the Navigator. Checklists allow you to link tasks and even other checklists together to perform work flow functions.

2. What are the differences between a personal checklist and a universal checklist?

   Personal checklists are stored on your computer and only available to you; universal checklists are stored in the System Control Repository and available to everyone. Only universal checklists can be linked to up to 6 other universal checklists.

3. What tool do you use to create a checklist?

   You use the Checklist wizard to create a checklist.

4. What tool do you use to delete a checklist?

   You use the Remove Checklist dialog box to remove a checklist.

5. What tool do you use to control checklists?

   You use the Edit Utility (EDIT) to control a few options that can not be set using the Checklist wizard.

Maintaining Menus

Apply the Concept

1. Based on your understanding of the menu structure as explained in this concept, which level of the menu would you need to modify if you were adding a new form to the menu structure?

   The answer is menu level 4. Menu level 4 represents the third (last) submenu. This level links you to the system forms. You can not define a menu beyond level 4.

2. Would you also need to modify the Navigator to include the new form?

   The menu structure is mirrored in the Navigator. Because of this relationship between the menus and the Navigator, any changes made to the menus are automatically reflected in the Navigator. There is no additional work required.

3. Based on your understanding of shortcut keys as they are used in the menu structure, what letter would be defined as a shortcut key in the item 'Re&quisition Tracking'?

   The 'q' in Requisition is the shortcut key. To define a shortcut key for a menu item, you type an ampersand (&) before the letter to be used as part of the shortcut key combination.

4. Based on your understanding of menu maintenance as explained in this concept, when would you expect to see the changes you have made to a menu structure?

   When you finish editing a menu, both the System Control Repository and the Client Data File on your workstation are updated immediately. Other users will see the menu changes the next time they sign on to the system.

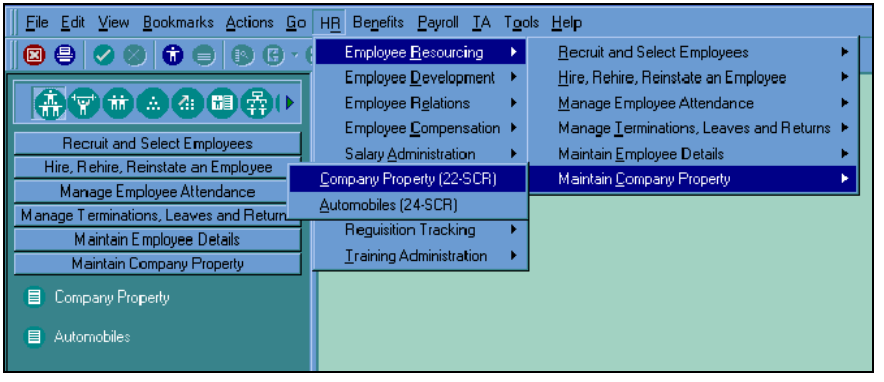
Extended Practice

Using the Employee Resourcing submenu, add a submenu (level 3) named 'Maintain Company Property'. Assign a shortcut key to this item.

Then add two forms to the level 3 submenu with item names of 'Company Property' (form name 22-SCR) and 'Automobiles' (form name 24-SCR). Assign shortcut keys to each new form.

Save your changes. View your changes online.

Your menus and Navigator should look similar to the image that follows:



Review of Questions Answered

1. What types of menus are delivered with the system?

   There are two types of menu delivered: function, such as File, Edit, and View, and application, such as HR, Benefits, and Payroll.

2. What is the relationship between the menu structure and the Navigator?

   The menu structure is mirrored in the Navigator. Menu levels two through four are shown in the Navigator, providing another way to access information.

3. What is the Menu Editor and how is it used?

   The Menu Editor is used to add, modify, and delete menu items. You can edit the delivered application menus and add your own menus.

Setting Up a Communication Event

Apply the Concept

1. Based on your understanding of the communication event triggers as explained in this concept, which business tasks in your organization require some employee or inter-office communication that could be triggered instead by a communication event?

   This response will be specific to your organization. You may consider tasks that involve the relay of training information, salary data, budget planning, or personal employee information updates.

2. In what cases are letters or memos being generated when emails could be more effective?

   This response will be specific to your organization. Consider any communication that relays non-confidential information, such as class scheduling or other communications that do not require a response.

3. Based on your understanding of the email communication event as explained in this concept, what method(s) would you use to determine the recipients and content of an email communication event in your organization?

   This response will be specific to your organization. You may choose automatic lookup of the employee, direct report, or indirect report, as well as lookups by employee name, address book, position, and manual entry.

4. Based on your understanding of the letter communication event as explained in this concept, what would be the advantage of queuing letters for printing later or being prompted when a letter is ready?

   These options are useful in situations when the printer is not in the same room or when letters need to be printed on different paper stock.

5. Based on your understanding of inserting fields as explained in this concept, what benefits can be derived from using system fields as part of your email and letter text?

   Making use of this option allows you to insert the most current and accurate information possible into the text of your email or letter.

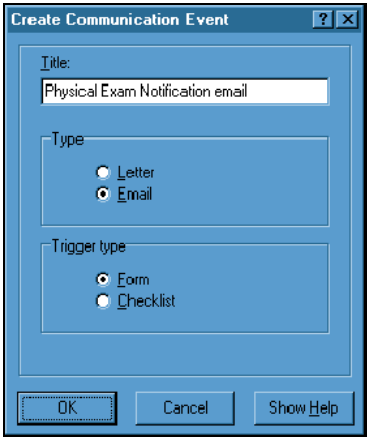
Extended Practice

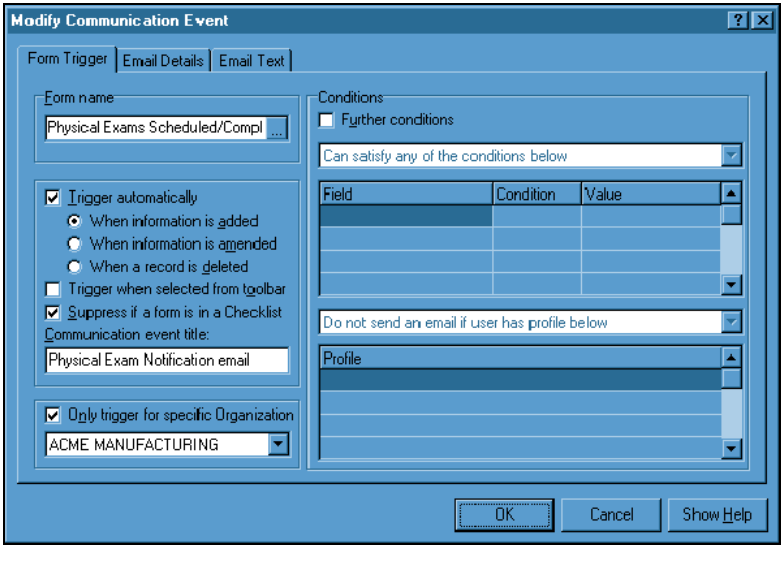
Create a form-triggered email event that will notify an employee when a physical exam appointment has been recorded. The event may be automatically triggered, or you may select a manual trigger. You may select the form name by expanding the Employee Relations component, then expanding the Manage Employee Health and Safety process, and selecting the Physical Exams Scheduled/Completed (18-SCR) task.

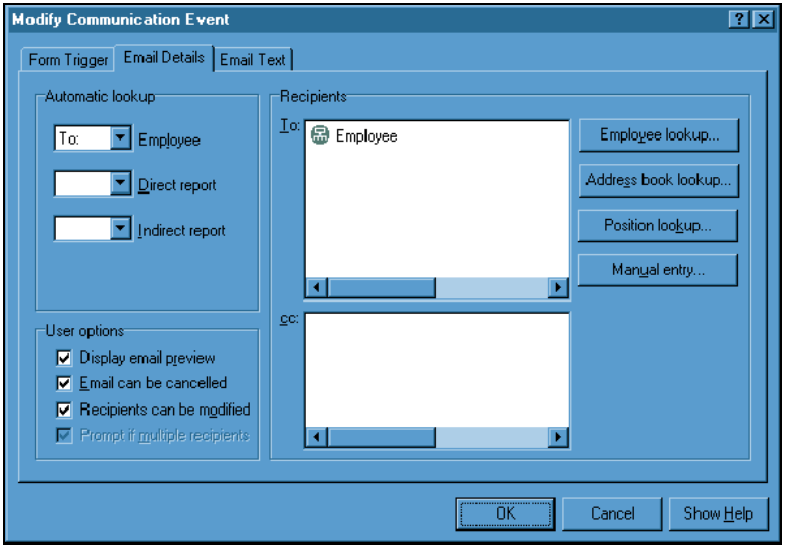
Set up the event so that it is triggered when information is added to the form. Set the option to preview or cancel the email. Create the appropriate email text and insert fields from the form to describe items such as the appointment date and physician.

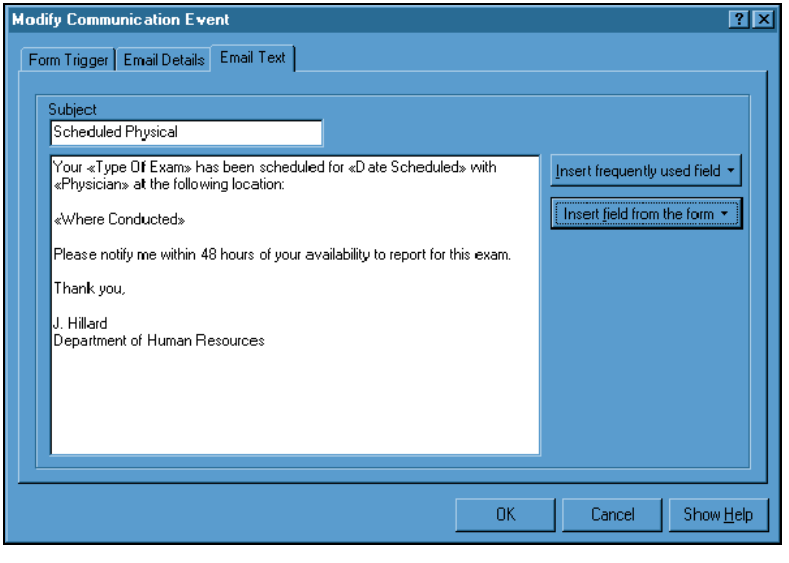
After you complete the event parameters, execute the form for a 999999 organization employee (such as Jerry Jones, employee number 1111) and preview the email.

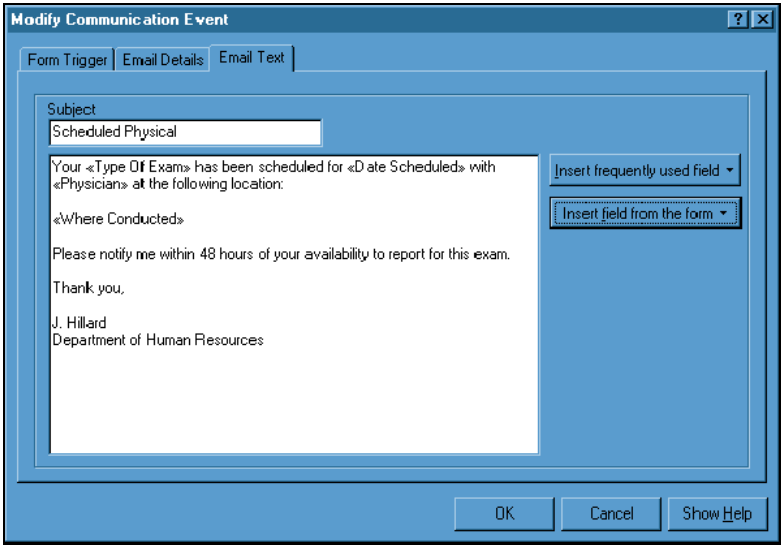
Your event parameters and email preview should look similar to the examples that follow:


Create Communication Event
Title:
Physical Exam Notification email
Type
Letter
Email
Trigger type
Form
Checklist
OK
Cancel
Show Help


Modify Communication Event
Form Trigger
Email Details
Email Text
Form name
Physical Exams Scheduled/Compl
Trigger automatically
When information is added
When information is amended
When a record is deleted
Trigger when selected from toolbar
Suppress if a form is in a Checklist
Communication event title:
Physical Exam Notification email
Only trigger for specific Organization
ACME MANUFACTURING
Conditions
Further conditions
Can satisfy any of the conditions below
Field
Condition
Value
Do not send an email if user has profile below
Profile
OK
Cancel
Show Help


Modify Communication Event
Form Trigger
Email Details
Email Text
Automatic lookup
To:
Employee
Direct report
Indirect report
Recipients
To:
Employee
Employee lookup...
Address book lookup...
Position lookup...
Manual entry...
cc:
User options
Display email preview
Email can be cancelled
Recipients can be modified
Prompt if multiple recipients
OK
Cancel
Show Help


Modify Communication Event
Form Trigger
Email Details
Email Text
Subject
Scheduled Physical
Your «Type Of Exam» has been scheduled for «Date Scheduled» with «Physician» at the following location:
«Where Conducted»
Please notify me within 48 hours of your availability to report for this exam.
Thank you,
J. Hillard
Department of Human Resources
Insert frequently used field
Insert field from the form
OK
Cancel
Show Help



Review of Questions Answered

1. What is a communication event?

   A communication event is the tool that can be used to send emails and print letters automatically or manually when employee data is created, updated, or deleted in the system.

2. What are the types of communication events?

   Using the Communication Event Manager dialog, you may set up parameters for the automatic and manual generation of two types of communication events—email and letters. Data to be contained within the email or letter comes from the form being used as well as delivered lists of frequently used fields. After communication event parameters are set up, the event can be modified, copied, and deleted.

3. What is a communication event trigger?

   Event triggers allow you to set up the parameters that will cause a communication event.

4. What types of triggers are available?

   There are two types of communication event triggers—form and checklist.

Exporting and Importing Data

Apply the Concept

1. Based on your understanding of the export options as explained in this concept, which one or more of the solutions will best suit the needs of your organization?

   This response will be specific to your organization. However, your choice may be influenced by whether or not your system is relational or whether you have purchased Reporting Administration.

2. Based on your understanding of the import sources as explained in this concept, would your organization be able to import a tab-delimited file that has been supplied by an insurance company?

   Yes. A tab-delimited file meets the requirements for a file that can be used as an import file.

3. Based on your understanding of the Import wizard as explained in this concept, how would you determine by looking at the display in Step 7 that all of the desired import items have been mapped to the target form?

   The top row of the import data column is updated to reflect the field name of each mapped item, regardless of the method chosen to create the mapping. Verify that all items to be mapped to the target form display a field name in the top row of the import data.

4. Based on your understanding of the import options as explained in this concept, which option would you choose for rejects and warnings if your organization was processing an import file that contained 75 records?

   Depending on the importance and sensitivity of the data, your best choice would be to pause the import to allow manual correction of the record. If correction required other resources or indicated more serious problems with the import data, you may prefer to stop the import and review the import file before restarting the import.

5. Based on your understanding of import run as explained in this concept, what control procedures would you implement to ensure that all import records are posted to your system?

   This response will be specific to your organization. However, you may consider an import control log that lists the number of records in the import file compared to the total number of import records as reported by the import message log. The number of updated records plus the number of corrected records should equal the total number of records in the import file.

Extended Practice

Using Excel for Office 97 (or higher version), create the following import data and save the Excel file as C:\Practice.xls. The first row is header information:

Org	Emp #	Date	Chg Type	OL3	OL4
999999	1111	20000101	C05	3333	4444
999999	1112	20000101	C05	3030	4040
999999	1113	20000104	C05	3338	4448
999999	1114	20000110	C05	3333	4444
999999	1115	20000112	C05	3338	4448
999999	1116	20000115	C05	3030	4040
999999	1117	20000116	C05	3333	4444

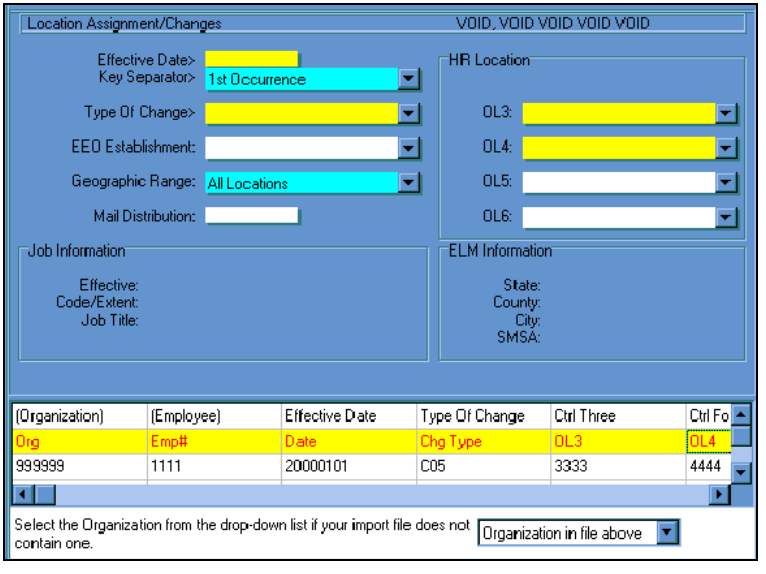
Then create a new import profile to move this data to the Location Assignment/Changes form (05CSCR). Complete all of the necessary steps in the Import wizard:

- Select the form by expanding the Employee Resourcing component, and then expand the Maintain Basic Employee Details process. Then click the Location Change (05CSCR) task.
- Map each of the import items to its corresponding form item.
- Manually select '1st Occurrence' as the Key Separator, 'New York Office' as the EEO Establishment, and 'All Locations' as the Geographic Range.
- Finish the import profile.

Resolve any pre-import validation errors and run the import to a successful conclusion.

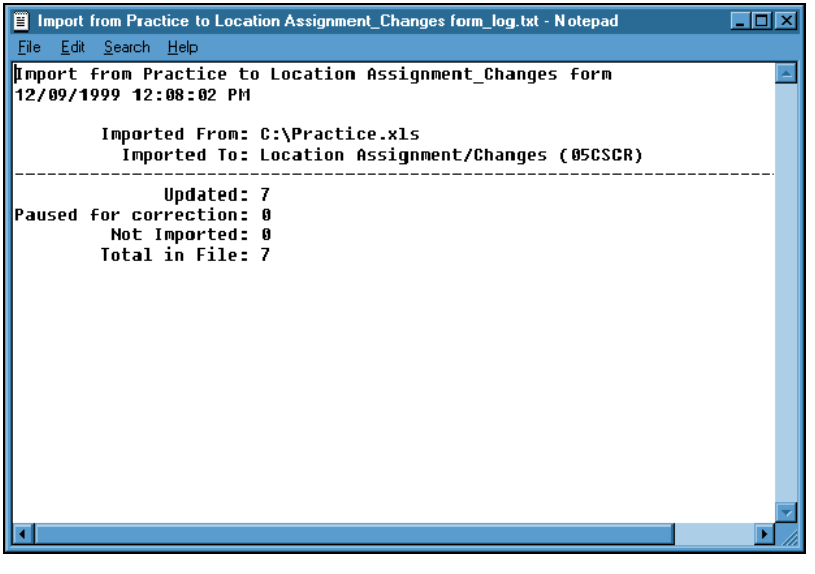
View the message log.

Step 7 of 8 should look similar to the dialog that follows:



Two errors display during the pre-import validation. The OL3 and OL4 option list values are incorrect for employees 1113 and 1115. Correct these values to be 3388 and 4488. Then start the import again at record 1.

The resulting message log should look similar to the following example:



Review of Questions Answered

1. What tools can be used to export data?

   You may select one or more of the following features to export data:

- *ISQL or another query tool—If you have a relational system, you can use these to run queries directly from your system's relational tables. You can then simply save the query content in comma delimited format, alter the data, and use the Import feature to reload in the manipulated data.*
- *Reporting Administration—Using this functionality is the easiest way to manipulate data. As delivered, Reporting Administration provides a means of extracting a great deal of information from your system. By reviewing the data already defined, you may determine that the data you want to extract is already defined. Then the task of manipulating data and importing it back into the system could be as simple as creating an Impromptu report, saving its content in comma delimited format, altering the data, and using the Import feature to apply the manipulated data. If this is the case, you need to verify that a fresh extraction has been performed before creating your Impromptu report.*
- *Batch Reports—We deliver hundreds of batch reports that have been developed using the Cyborg Scripting Language. You can use these reports in their delivered form or customize them to report on specific data. You can also use Cyborg Scripting Language to create your own program that could be run in batch to extract data.*
- *Solution View—The Report Writer in Solution View can be used to create an extract file from data in the system.*

2. What is the Import Profile Manager and what purpose does it serve?

   The Import Profile Manager is the tool that allows you to easily create, modify, rename, and remove an import profile, as well as start the import and view the resulting message log. The Create or Modify options on the Import Profile Manager launch the Import Creation and Amendment wizard.

3. What functions are provided by the Import wizard?

   The Import wizard allows you to complete the following functions:

   - *Choose the target form*
   - *Choose the import file*
   - *Select the import file delimiter and text qualifier*
   - *Specify the presence of an import file header record*
   - *Establish relationships between import data items and form data items*

4. What control options are available for the import process?

You may choose an option for each of the following categories prior to starting the posting of import data:

- *Reject errors*
- *Warnings*
- *Communication events related to the target form*
- *Starting record for an import restart*
- *Automatic display of an import message log when the import has finished*

Document Management Facility

Answers for Review Questions

1. What option list must be edited to support the Document Management Facility?

   Using the Document Definition option list (SC55), you must edit the delivered document types and add any document types needed by your organization.

2. What tasks must be performed to link documents to employee records?

   First, you must define the document types in the Document Definition option list (SC55). Then you must enter a Document Maintenance form (DR-SCR) for each document to be linked to an employee.

3. How do you launch a document?

   You launch a document using the *Document Explorer or the Launcher*.

4. What security can be associated with this functionality?

   You can use network and server security to restrict access to the area where the files are stored, or you can use security to restrict access to the Document Maintenance form (DR-SCR).

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.

820 (Premium Payment for Group Insurance Products) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay remittance information and/or premium payments for heath care insurance products.

834 (Benefit Enrollment and Maintenance) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay information relating to the initial enrollment in and subsequent maintenance of individuals enrolled in a health care insurance product.

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 totalled 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.

ACH
US-specific acronym for Automated Clearing House. The ACH Network provides inter-bank clearing of electronic payments for participating depository financial institutions. The American Clearing House Association, Federal Reserve, Electronic Payments Network, and Visa act as ACH Operators—central clearing facilities through which financial institutions transmit or receive ACH entries.

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
Event that can happen to an employee during employment, for example, new hire, leave of absence, termination, and so forth.

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.

Adjustment
Adjustments increase or reduce to-date accumulations of earnings, deductions, and taxes. Adjustments update month-to-date, quarter-to-date, and year-to-date activity. You can also correct or eliminate deduction arrears, transfer amounts or hours from one earning or deduction to another, redistribute labor hours and dollars, and refund deductions. Adjustment transactions are processed the next time the organization is processed by the batch payroll programs during either a payroll or maintenance run.

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.

Agent types
Agent Indicator on the Employer Information Record (QE-SCR). The field's only allowable entries are selected from option list PR55, which consists of two agent types: Agent Indicator code and Common Pay master.

Further definition of agent types:

1. An employer that wants to use an agent prepares Form 2678, Employer Appointment, and submits the form to an agent.

The agent submits to IRS the form received from the employer along with a written request for authority to act as an agent for an employer.

The IRS gives written approval.

2. A common paymaster is a corporation that pays an employee who works for two or more related corporations at the same time.

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 in Payroll Administration 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.

Anniversary date
Period-end date for the next regularly scheduled pay run for a specific pay frequency.

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. Payroll Administration 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.

Applicant organization
Organization used to store and update applicant records.

Appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

Archive
To transfer files to a slower, cheaper media (usually magnetic tape) to either free up the hard disk space they occupy or to create a backup copy of the files that can be used to restore programs and/or data if there is a system failure.

Arrears
Amount that could not be deducted from an employee's net pay because the available net amount was less than the deduction. This amount may be recorded for recovery in a future pay period.

As-of reporting
Ability to report on data for a specified date or date range.

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.

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 304).

Banner
Banner forms separate groupings on forms produced from the Federal, State/Local, and Employee Queues.

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 Master file (P20)
Sequential version of the Payroll Master information from the Employee Database. The Batch Master File (P20) is accessed and maintained during a batch maintenance run or pay run.

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.

Batch transaction
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 transaction, you may verify your totals against those accumulated by the system.

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 Business Partner
See ***Trading Partner*** (on page 327).

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.

Blocking factor
Represents the number of physical records in a logical record.

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 data mart.

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.

CBSVB
COBOL program used to produce reports and to access or maintain The Solution Series offline.

CBT
Computer-based training. Training through use of computer.

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 workflow 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.

Checklist wizard
Tool used to create checklists.

Checkmark
If in the done column of an 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.

Cleared payment
A check that has been cashed or deposited by the payee and has been returned, marked as such, to the payer’s bank, credit union, or financial institution.

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 (ring)
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.

Co-ordinator
A coordinator is an instructional institution, organization or person who administers training courses.

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 pay master
An organization that pays employees who work for different legal entities. If all the conditions related to a common paymaster are met, the FICA and, in most cases, the SUI does not have to start over.

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.

Company logical Master record
Complete record for a company. It may be composed of multiple physical records.

Company validation table
Table that validates that an Organization Control Number is valid and payments can be made.

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?'

Contractual exchange rate
An annually reviewed exchange rate usually based on an employees anniversary date and reviewed once a year; often used for salaries.

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
Organization Control Number. A six-character, customer-defined code that represents a company or group of employees within 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.

Conversion option
The interval at which you are converting currency (for example: yearly, monthly, weekly).

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.

Costing record
Labor record.

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.

Covered Entity
A member of one of three groups subject to the administrative simplification provisions of HIPAA. The three types of Covered Entities are health plans (not fully insured), clearinghouses, and providers that conduct transactions electronically.

Covered Entity Group
A Covered Entity Group represents in the system a partnership between two Covered Entities (benefits business partners) who transmit benefit information electronically between each other in the form of the 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) Transaction Sets.

CPI
Characters per inch.

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.

Crossfoot
An accounting term that means to compare or add figures to make them balance. If you receive an error message such as ‘Entries do not Crossfoot’, this means that some amounts entered into fields are not balanced.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 301).

Cube (Power Play)
File (with the extension .mdc) that contains data organized into dimensions to provide for faster data retrieval and drill down reporting capabilities.

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.

Custom report format
Custom reporting used by states because their reporting format is neither MMREF, ICESA, nor TIB-4.

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.

CYBMST
Library file that contains the main batch payroll software. This file consists of COBOL programs, report generators, and system tables.

Cyborg Scripting Language
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 Extract File Splitter (RSPLIT)
COBOL program that creates separate files for every representative table, using the Data mart Extract File as input.

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.

Data mart
Relational tables with a defined structure that have been designed to automatically accept full data mart extract data seamlessly.

Data mart Extract File (FILE36)
Temporary system file holding the copied data from The Solution Series.

Data store
Repository where data is stored. Client applications request information from a Solution Series data store.

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.

De-enrollment
The process of shutting off plan benefits for an employee for reasons other than a separation activity.

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.

Default
Value that will appear if no entry is typed or selected.

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.

DEL-PE
Utility program used to delete existing Phonetic Keys.

Delimiter
A character that tells the system where an item of data ends and another starts.

Density
Number of bytes per inch that a tape drive writes to a tape.

Dependent
An individual who relies or depends on another for his or her support.

Dependent GTL
Acronym for Dependent group term life insurance plan.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

Deposit advice
Pay document that looks similar to a check and shows the amount deposited to the employee’s account.

Derived data
Reporting Administration enhances data during the extract process by capturing and storing table-derived data, such as salary grade, that do not reside on the employee’s record.

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.

Direct deposit
Also referred to as an Electronic Funds Transfer, or EFT, direct deposit allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

Disability
Inability to pursue certain occupational activities due to physical or mental impairment.

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. In Payroll Administration, 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).

Display text boxes
An area on a form in which data is shown but cannot be modified.

Disposable income
For garnishment purposes in the U.S., an employee's earnings minus deductions required by state or federal law.

Distributed Access Log Table
Form that records the date, time, and last record distributed to a unique location.

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.

Distributed Location NODE Control Table
Form that defines the operating environment of your remote node. It allows you to assign an access password for the node and indicate whether the option list and table records will be distributed to the remote node.

Distributed Rules Table
Form that records the FILE 02 segments that are to be excluded from the remote location.

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 forms. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 303).

Docked toolbar
Toolbar that is located on the edge of a program window.

Document type
Categorization of a document, such as birth certificate, performance review, drivers license, and so on.

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.

DSP08
Program that displays the current contents of the Replication Holding File (FILE08).

DSRF02
Form that records the FILE02 segments that are to be excluded from the remote location.

DSRSET
Program that activates the Distributed Administration indicator on the PP-SCOPTS record of FILE01.

DSSRRL
Program that will display those remote sites that have not had data distributed to them within the past three days.

DSUSET
Program that deactivates the Distributed Solution indicator on the PP-SCOPTS record of FILE 01.

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 U.S. 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 Binary Coded Decimal Interchange Code; 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.

EDI
Electronic Data Interchange. The electronic exchange of business transactions based on standardized guidelines.

EEOC
Equal Employment Opportunity Commission.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EFT
Electronic Funds Transfer or direct deposit. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

EIC
Abbreviation for ***earned income credit*** (on page 304).

EIN
Employer Identification Number. A federally or state assigned number used to distinguish tax entities in the US.

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic documentation
Documentation that can be viewed, searched, and printed on your computer.

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 cancelled 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.

Employee logical Master record
Complete record for an employee. It may be composed of multiple physical records.

Employee Number
Alphanumeric value of up to 10 characters that you define to be used to identify an individual as an employee. It acts as a key to retrieve an employee's record.

Employee status
Represents an employee's present standing in terms of activities processed for the employee, for example, active, inactive, part-time, full-time, and so forth.

Encoding
The process of applying a badge number to an actual badge. This badge number is then entered on the Badge Number Assignments form to assign it to an employee.

English Language
Former name of our fourth-generation programming language, now called Cyborg Scripting Language.

Enhanced Pay Processing and Reporting
Pay run and reporting process that can be executed online.

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.

Alternate definition: The agency to which an organization submits its quarterly unemployment insurance reports.

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 system resides, and any communication protocols. Also, a workspace dedicated to a specific processing type. For example: development, test, and production.

EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 304).

Establishment Reporting
Establishment Reporting occurs when an employer with several business locations chooses to file wage reports, broken down by location or unit, to the Social Security Administration. Each unit is identified by a four-character code, called an Establishment Number. The employer obtains approval from the SSA to use Establishment Reporting. Establishment Reporting does not apply to 1099s.

Euro triangulation
The conversion between one Euro currency and another.

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.

Exchange rate
The ratio of the value of one currency to another.

Exchange rate type
The interval at which you update the exchange rate; for example, yearly, monthly, weekly.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Execution scripts
Generic reference to Job Control Language (JCL) for your operating system's command language.

Extract file
A data file generated to be used by another system or application.

Extract program

Report generator 7F7F and its subroutines.

This program accesses the P20 file to extract the employee information. It extracts all necessary information and is required to run only once per quarter. It may need to be rerun if there are subsequent adjustments applied to the P20.

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. In Payroll Administration, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FEIN

Federal Employer Identification Number.

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).

Filing entity

Agency to which an organization submits its quarterly report.

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.

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, the Tax Authority File does not provide tax specification information. 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.

Floating toolbar
Toolbar that is located within the program window.

Folder
Logical organization device for the content of a Cognos catalog.

Foreign currency
The currency into which or from which you must convert.

Form
Section of the Work Area in which data is entered and displayed, including text boxes and other controls. This was formerly known as a screen.

Form 300
Log of Work-Related Injuries and Illnesses, used to classify work-related injuries and illnesses and to note the severity and extent of each case. The delivered OSHA Form 300 Log of Work-Related Injuries and Illnesses report (20-RPT) is a facsimile of the Form 300.

Form 300A
Summary of Work-Related Injuries and Illnesses, used to show the totals for the year in each (illness or injury) category. The delivered OSHA Form 300A Summary of Work-Related Injuries and Illnesses report (21-RPT) is a facsimile of the Form 300A.

Form 301
Injury and Illness Incident Report. This must be completed when a recordable work-related injury or illness has occurred. This must be completed by the employer within 7 calendar days following receipt of information that the recordable work-related injury or illness occurred. This form must be kept on file for five years following the year to which it pertains. The delivered OSHA Form 301 Injury and Illness Incident Report (22-RPT) is a facsimile of Form 301.

Form area
An area of the window that contains a form.

Form Builder
A tool 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
Full Time Equivalent. An FTE is the ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of .5 means working time is half of the time that represents full time employment.

FTP
File Transfer Protocol. 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.

Function keys
Keys F2 through F12 on the keyboard that can be assigned to a bookmark or favorite.

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
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.

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.

HIPAA
Acronym for Health Insurance Portability and Accountability Act of 1996. HIPAA is a law that protects citizens from being denied health insurance coverage due to a pre-existing condition, and protects the privacy and security of citizens' healthcare information by enforcing standards for the manner in which health information is transmitted electronically.

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 location
The country in which an employee permanently resides.

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.

I-beam
Symbol that identifies the insertion point.

ICESA
Interstate Conference of Employment Security Agencies. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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.

Impromptu
Tool for interactive database reporting. Reports are built from the database using a pre-defined catalog.

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
An 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

Acronym for Integrated Postsecondary Education Data System.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

"NCES has established the Integrated Postsecondary Education Data System (IPEDS) as its core postsecondary education data collection program (prior to IPEDS some of the same information was collected by the Higher Education General Information Survey-HEGIS). It is a single, comprehensive system that encompasses all identified institutions whose primary purpose is to provide postsecondary education.

IPEDS consists of institution-level data that can be used to describe trends in postsecondary education at the institution, state and/or national levels. For example, researchers can use IPEDS to analyze information on 1) enrollments of students, undergraduate, first-time freshmen, graduate and first-professional students by race/ethnicity and gender; 2) institutional revenue and expenditure patterns by source of income and type of expense; 3) salaries of full-time instructional faculty by academic rank and tenure status; 4) completions (awards) by type of program, level of award, race/ethnicity, and gender: 5) characteristics of postsecondary institutions, including tuition, room and board charges, calendar systems, etc.; 6) status of postsecondary vocational education programs; and 7) other issues of interest."

IRP/BSS

Information Reporting Program/Bulletin Board

IRS/MCC

Internal Revenue Service/Martinsburg Computing Center

JDBC

Java Database Connectivity Application Programming Interface. An application programming interface for accessing tabular data sources from the JAVA programming language.

JMNTRUN

Script used to assign check numbers and create history records.

Job

A 'Job' is a generic description of a role within the organization—for example, Manager.

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. Control statements that execute programs.

Alternately: Jobstreams

Job type

A generic category that further defines a particular job.

JPAYRUN

Script that is used to calculate pay and create payroll reports.

JQTRRUN

Script that executes the new quarterly reporting process.

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.

JXP5QTR

Stand-alone script used on all platforms to extract and compile the new quarterly COBOL program.

KEY-PE

Utility program used to rebuild the QUERY Alternate Keys.

KEYDEL
Utility program used to delete existing QUERY Alternate Keys.

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 (GG-SCR).

Large number
The Multicurrency Payroll component contains a large-number format time entry form that accepts a nine-digit number as opposed to the seven-digit maximum in the standard Payroll Administration.

LDEFAULTS
Term used for a text/list box default template.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Link/jump
Reference to another document. Links (or hotspots) appear as underlined text. When you move your cursor over a link, the cursor changes to a hand. Click the link to access or jump to the referenced document.

LIS file
Standard file name used by all completed report files that are launched online. Files are automatically assigned this extension by the Online Initiation of the Pay Processing and Reporting feature.

Local currency
The currency in which the employee is paid.

Local currency country
The work location for tax purposes.

Log file
Informational file generated when a report is launched online. The log file is used by the Process Monitor to communicate the status, progress, and completion of a report.

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 per inch.

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, calculate pay or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

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 form or page.

Manual payment
A payment not created within The Solution Series.

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 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 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.

MMREF
Magnetic Media Reporting and Electronic Filing. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media. See Social Security Administration publication MMREF-1 for specifications and instructions for reporting quarterly wage information to participating states through magnetic media.

Model (PowerPlay)
File (with the extension .pye) that contains definitions of PowerCube dimensions and measures, queries that define the data sources, and other details needed to create a defined cube. Defined models reflect performance requirements as well as requirements of the final user of the cube.

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.

Multicurrency costing records
Records that maintain a history of the deduction and deposit transactions for each exchange rate.

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.

NACHA
American not-for-profit trade association that develops operating rules and business practices for the Automated Clearing House (ACH) Network and for other areas of electronic payments.

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.

NCES
Acronym for National Center for Educational Statistics.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

Primary federal entity for collecting and analyzing data that are related to education in the United States and other nations.

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 period pay run
Pay run for which the earning and deduction cycles are incremented. New-period pay runs are typically part of a regular pay schedule, and do not include off-cycle runs.

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.

Notional value
A value input for informational purposes only.

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.

Off-cycle pay run
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.

One-stop document
Documentation that contains reference information, step-by-step procedures, and training exercises.

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
A list of valid options and associated descriptions from which you may select an appropriate entry. 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.

The organization is the highest level in The Solution Series structure and is identified by a six character code. All records are organized by organization.

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 levels
Hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are customer-defined.

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.

OSHA
U.S. Department of Labor Occupational Health and Safety Administration.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

P2EDIT
Transaction editor program. This is the first program executed as part of the batch payroll process. This program performs edits on the input transactions.

P4CALC
Program that performs payroll calculations and updates to the sequential Batch Master File during a payroll run.

P5PRNT
Program that formats and creates all output, including payments, reports, tapes, and records that must be recycled to future payroll runs.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Packaged reports
Delivered reports developed using a Fourth Generation scripting language, Cyborg Scripting Language (CSL).

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 extract
Process that extracts data from the online Employee Database.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semi-monthly. Also referred to as a payroll period.

Pay merge
Process that updates the Employee Database with the current data from the recently processed pay run.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A pre-printed 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

An automated process that 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 Control Language.

PDF

Portable Document Format. 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.

Permanent Master Record

Individual employee record in the Employee Database. This record contains all the information about an employee, such as name, address, pay frequency, and salary.

Permanent records of employee earnings, taxes, and deductions in the Employee Database. This is the only record group that contains month-do-date, quarter-to-date, and year-to-date accumulations.

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 definitions:

1. to place an object in a specified location.

2. a location, particularly in a record

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.

PowerPlay
Business intelligence tool for multidimensional analysis of corporate data, also known as Online Analytical Processing (OLAP).

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. To be safe, fill out the Direct Deposit Information form (H9-SCR) 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.

Process Monitor
Utility that allows you to monitor the progress of reports and payroll processes launched online.

Program
A program is a series of classes being administered using Training Administration. For example, 'The Training Schedule for January-June 2004' may be a program consisting of eight different classes.

Alternative definitions:

1. A form or other set of instructions within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

2. A set of coded instructions that enables a computer to perform a desired sequence of operations.

Prompt
Expression set up to enable users to filter data by typing or picking a value, or a series of values, when the report opens.

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 that appears depressed when clicked on (now known as command button).

Qualifier
A drop-down list (field) referring to a data element on the HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions used to describe the type of information supplied in a related data element (field). For example, a Telephone Qualifier drop-down list identifies whether the telephone number supplied in a Telephone Number text box is a home, work, or fax telephone number.

Quarter-end P20
P20 is a file structure used in batch payroll processing. The quarter-end P20 file contains payroll data that is used in the quarterly processing.

Quarterly Processor
Combination of forms, report generators, and COBOL programs that extracts quarterly wage reporting information and produces all of the selected quarterly reports and formatted filing output (paper, tape, or diskette) for all selected employees in all selected states.

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.

Reconciliation number
The unique identification number printed on each pay document. Reconciliation numbers are used in the payment reconciliation procedure to verify cleared and outstanding payments.

Record
A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definitions:

1. To set down for preservation in writing or other permanent form.

2. The reporting format for magnetic media as in Tape Record Type such as ICESA, TIB-4, or MMREF

3. Information or data on a particular subject collected and preserved

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.

Regulatory bulletin
Contains updates to varying components of The Solution Series necessary to maintain regulatory compliance. Tax specifications supplied are delivered in regulatory bulletins (RBs).

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
Batch program that creates report extract records.

Alternate definitions:

1. A detailed accounting of an activity; for example, the quarterly report of unemployment insurance details to a filing entity.

2. As in 'Report Select character', this represents the selection frequency for this output.

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.

Report Viewer
Utility that allows you to view, search, print, save, and delete reports that are launched online.

Reporting Administration
HRMS reporting and analysis tool that links the database functionality found in The Solution Series with sophisticated, yet easy to use business intelligence tools from Cognos®.

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 definitions:

1. key on keyboard used to perform a carriage return; can also be known as Enter.

2. to send back to the originator; for example, the Tape Return Information form (QT-SCR) gives the address to which a filing entity would return a magnetic tape containing errors.

Review process
A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

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.

A Schedule Master table is used to associate schedules with a Policy Master table. A Schedule Master table can also be used to override values held on its corresponding Policy Master table.

Employees are assigned to a Schedule Master table. Schedule Master tables may be created for individual employees, or for use by groups of employees or by crews.

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 system.

SEIN
State Employer Identification Number; required by some states for wage and tax reporting.

Selectable File08 Display
Program that displays FILE08 information based on a selectable record key, starting key, time, and date.

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.

Also known as the Batch Master File.

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 Differential/ Premiums
Premium (or allowance) added to an employee's regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

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 key
Key that corresponds to a command name on a menu, such as CTRL+Z.

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.

SIC
Standard Industrial Classification.

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.

SOAP
Simple Object Access Protocol. This is an XML-based protocol that exchanges structured and typed information on the Web.

SOC
Standard Occupational Classification.

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 retrieves information from a relational database so it can populate Impromptu reports.

Standalone Time and Attendance
Customers who are using Time and Attendance Administration but not Payroll Administration.

Standard Pay Processing and Reporting
Pay run and reporting process that is executed in batch.

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.

Statutory employee
Any of the four categories of workers who are independent contractors under common law and are treated by statute as employees. These include:
(1) a driver who distributes beverages (other than milk) or meat, vegetables, fruits, or bakery products; or who picks up or delivers laundry or dry cleaning, if the driver is your agent or is paid by commission.
(2) certain types of full-time insurance sales reps
(3) an individual who works at home on materials supplied by you that must be returned to you
(4) certain full-time travelling or city salespeople.

Social Security and Medicare (FICA) taxes may or may not be withheld. Income taxes are not withheld from a statutory employee. A statutory employee will receive a W-2 with the 'Statutory Employee' box checked.

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.

SUI
State Unemployment Insurance.

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.

Switches
Text or list box options that allow decisions to be recorded; in some cases, to be turned on or off.

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.

Alternate definition: a function to be performed; objective

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 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 class
Defines taxability for pre-tax deductions. These contributions can vary by tax authority. In the U.S.:

* Tax Class 1 defines taxability for 401(k) plans (maintained for all but local authorities)

* Tax Class 2 defines Section 125 plans (maintained for federal only)

* Tax Class 3 defines tax-sheltered annuities (maintained for federal only)

* Tax Class 4 - 9 fields are customer-defined

Tax code
The three-character to seven-character 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 supplied tax files. A Tax Maintenance File is a file issued 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 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
Income tax, unemployment insurance (including special assessments), and disability insurance are examples of tax types. At the federal level, there are also entitlement taxes: Social Security (FICA-OASDI) and Medicare (FICA-HI). The types of taxes to collect and the methods of collecting them vary by tax authority.

Tax-related Regulatory Bulletin
A regulatory bulletin contains the updates to tax specifications, consisting of a bulletin document and a tax file that contains the updated tax specifications.

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.

TDR

Table Definition Record.

Template

A basis from which to create a custom item. For example, you can use an existing 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 (").

Third Party Administator

An organization outside of a company that administers employee benefit plans on the company's behalf.

TIB-4

Technical Information Bulletin (Social Security Administration Publication 42-007). Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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 Time and Attendance Administration 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.

TLCN

Tape Library Control Number - a government-provided control number.

ToolTip

Text that displays under a tool to describe its function when the mouse is held over the tool.

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.

TPA
Acronym for ***Third Party Administrator*** (see "Third Party Administator" on page 326).

Track
One of the concentric magnetic rings that form separate data storage areas on an electronic medium.

Trading Partner
A Covered Entity with whom another Covered Entity transmits health information electronically through the use of an Electronic Data Interface. Trading partners must create an agreement as to the specific information that will be passed during their transactions. The Electronic Data Interface is standardized by the provisions set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Also referred to as Business Partner.

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 cancelled, 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.

Transaction Set
Refers to HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions meaning the smallest meaningful set of information exchanged between ***trading partners*** (see "Trading Partner" on page 327). The transaction set consists of a transaction header segment, one or more data segments in a specified order, and a transaction trailer segment.

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 definitions:

1. To move data or files from one computer to another

2. Electronic Funds Transfer or direct deposit

3. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

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.

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.

UI
Unemployment Insurance.

UI Number
Unemployment Insurance Number (or SUI number, State Unemployment Insurance number); required by all states.

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 Payroll Administration, 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 that 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 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 delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning
An employee’s schedule warning times.

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.

XML
Extensible Mark-up Language is a language for documents containing structured information.

XML Schema Definition Language
A language for describing and constraining the content of XML documents.

XSLT
Extensible Stylesheet Language Transformations. A language for transforming XML documents into other XML documents.

Year End Master File
P20OUT file from the final payroll run of the year

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Hewitt

eCyborg

eCyborg: Using the Web Client

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eCYBORG®
A Hewitt Solution

Hewitt Associates LLC, Suite 1700, 120 South Riverside Plaza, Chicago, Illinois 60606-3911

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PART 1

Introduction

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CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the use of eCyborg to perform your business tasks.

This manual has been designed as a reference document. You will find sufficient detail for self-study.

Who should use this manual?

This manual is designed to be used by anyone who will be working with eCyborg using the web client. It will be useful to new users and to users who are upgrading from previous versions of Cyborg's systems. Users already familiar with the Windows interface should have no difficulty in using the eCyborg web interface.

The Web Client is also designed for users who want to access the system from remote locations, such as when they work at home or when they are traveling.

We believe that users who have an administrative or implementation role in client functionality would find the administrative client guide more useful to them.

☞ *Refer to the Using The Solution Series: Administrative Solutions or Optimizing System Features documentation for more information on administering client functionality*

Prerequisite skills

Users of this manual should have a basic understanding of using a web browser.

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	Provides an overview of the manual and eCyborg.

Part	Chapters	Description
2. Working with eCyborg	4–7	Provides concepts and detailed instructions for navigating, using support tools and entering, modifying, and deleting data.
3. Appendices	A–B	Provides detailed reference information.

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 eCyborg:

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, and where to get help.
2	Overview of eCyborg	The functions and features of eCyborg.
3	Getting Started	Logging on and off, and changing a user code and a password.

Part 2: Working with eCyborg

The chapters in Part 2 describe how to utilize and navigate the Work Area:

Read this chapter		To learn about
4	Exploring the Work Area	How the Work Area is organized, and about the toolbar and the Navigator.
5	Navigating the System	Different ways of navigating through the system and displaying information.
6	Using the Support Tools	The types of support tools, including help files and online manuals.
7	Working with Data	Viewing, adding and modifying data, employee information deletion and system messages

Part 3: Appendices

Part 3 contains the following quick reference appendices:

Use this appendix		To learn about
A	Dialog Quick Reference	Quick reference information on the dialogs used in eCyborg.
B	Practice and Review Answers	Detailed answers to the practices and reviews at the end of the instructional chapters.

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

This 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 will help 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 appendixes.

Detailed Directions

Detailed Directions provide the specific steps to complete a task. The Detailed Directions contain navigation for both North American and UK users.

A supplemental training data document accompanies this manual, which provides examples of data that you can use with the Detailed Directions. Using the data provided in this document to complete the tasks will help to give you a better understanding of the task you are performing.

To successfully complete a task using this data, you may have to complete the previous tasks in the manual using the data provided. The training data document uses the test data

installed with our software, and for the exercises to work as shown, this test data must not be altered.

Note: *To complete the Detailed Directions using the example data in the training data document, you must either have your own copy of the test data or have the test data restored for you.*

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 appendixes.

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

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the Review of Questions Answered at the end of a chapter. The answers to these questions can be found in the appendixes.

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 for you 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 cannot 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 http://www.hewitt.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 eCyborg

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Introduction

This section section provides you with the 'big picture' of eCyborg. You will learn how it is organized into components, how your organization and its employees are identified to the system, and what reporting options are available.

eCyborg components

From a broad perspective, eCyborg consists of the following components:

- Administrative Solutions
- Web Architecture
- eCyborg Interactive Workforce
- eCyborg Analytics

How these components are related is illustrated in the diagram below:

eCyborg contains both the Windows client (known as The Solution Series, or Administrative Solutions as shown in the figure), and the Web Architecture components.

Administrative Solutions

The Solution Series® contains the functionality of our traditional, core product (formerly known as *The Solution Series/ST*) and the Workforce Data Mart. The Solution Series is targeted to departmental (HR and payroll) users, sometimes referred to as power users.

To use The Solution Series, you would access the system from your desktop (client) machines. Your desktop machine would need to have a Client Data File, and the data is displayed in Windows. The Windows client installation is known as ‘Administrative Client’.

The Solution Series provides the following administrative functionality:

- Human Resources Administration (including Training Administration, Salary Administration, and Position Administration)
- Benefits Administration
- Payroll Administration
- Time and Attendance Administration
- Distributed Administration
- Reporting Administration

☞ *Refer to the Using The Solution Series: Administrative Solutions documentation for more information on using the administrative client.*

Web architecture

The Web Client

The Web Client provides browser-based access to the HR and Payroll functionality of The Solution Series. This means that no Client Data File is required on a machine to access eCyborg. Because only a browser is required on the machine accessing the system, you may hear this referred to as a ‘zero footprint client’.

Browser-based access does not mean that any employees who learn the URL for eCyborg can access the system—the same security required to access the system from the Administrative Client is required to access the system from the Web Client.

The Collaborative Platform

The Collaborative Platform enables the eCyborg product line, not just the eCyborg product, to interface with other web-based products, such as recruitment boards. Here are some examples of web collaboration:

- Embedded links to other applications, such as benefits providers
- Sending job postings to job boards
- Obtaining applicant data from job boards
- Tax processing and filing services

eCyborg Interactive Workforce

Interactive Workforce is a web-based application for HR management. It integrates with our best-in-class Human Resource Administration.

Interactive Workforce is a web-based employee self-service application that gives your employees real-time access to view, add, and update their personal information via a user-friendly, web-based interface. It does not display the forms used in the administrative solutions; rather, Interactive Workforce presents web pages on which users enter or update information.

Interactive Workforce gives managers real-time access to data about their team and the ability to approve employee requests.

The modules included in eCyborg Interactive Workforce are:

- Interactive Employee
- Interactive Benefits
- Interactive Manager

☞ *Refer to the Interactive Workforce documentation for more detailed information on the configuration and use of this functionality.*

eCyborg Analytics

eCyborg Analytics refers to the web-based capabilities offered through Cognos' PowerPlay Web product. With Reporting Administration, we deliver two Workforce Planning models: one for Position Administration and one for non-Position Administration data.

☞ *Refer to the Using Reporting Administration documentation for more details on using PowerPlay.*

Application solutions

eCyborg provides an integrated solution to your organization's Human Resource processing needs. eCyborg offers the following administrative solutions:

- Human Resources Administration
- Benefits Administration
- Payroll Administration
- Time and Attendance Administration
- Distributed Administration
- eCyborg Analytics

Human Resources Administration

Human Resources Administration provides organizations with a comprehensive, strategic solution to their human resource management requirements in these mission-critical areas:

- Employee Resourcing
  - Recruiting and selecting employees
  - Hiring, rehiring, reinstating, recalling, or transferring employees
  - Managing employee attendance
  - Managing employee status changes, leaves and returns, and separations
  - Position Administration and Complement Control
  - Requisition Tracking

- Employee Development
  - Tracking employee skills, competencies, and training
  - Tracking performance appraisals
  - Training Administration

- Employee Relations
  - Managing employee health and safety
  - Tracking disciplinary actions and grievances

- Employee Compensation
  - Managing employee compensation
  - Tracking employee relocation expenses
  - Allocating and recovering property from an employee
  - Salary Administration
  - Benefits Administration

☞ *Refer to the appropriate component documentation for more information.*

Benefits Administration

Benefits Administration is an integrated component of Human Resources Administration. It is designed to help you manage every aspect of your benefits programs.

The following are important features of Benefits Administration:

- Adaptable benefits control structure
- Rule-based tables for benefits plan setup
- Welfare plan administration
- Deferred plan administration
- Flex plan administration
- Spouse, dependent, and beneficiary tracking
- Benefits and retirement counseling
- Organizational and regulatory reporting

☞ *Refer to the Using Benefits Administration documentation for more information.*

Payroll Administration

Payroll Administration provides the capability to internally manage the entire payroll and taxation process. The regulatory compliance, integration of payroll data with other applications, and control offered provide a solution for business operations of any size.

Payroll Administration provides a variety of features including the following:

- Virtually unlimited earnings and deductions
- Comprehensive tax processing and reporting
- In-depth labor distribution
- Bank services
- Multi-currency
- Complete online payment history tracking
- Online pay calculation
- Online retroactive pay calculation
- General ledger interface

☞ *Refer to the Payroll documentation for more information.*

Time and Attendance Administration

Time and Attendance Administration provides a table-driven data structure that gives users the flexibility to quickly and easily define, maintain, and change policy and scheduling rules. Its open design allows a wide choice of:

- Time entry methods
- Computing platforms
- Payroll interfaces

The system calculates all categories of hours for input to the payroll process, based on company-defined pay policies. Time entries for special hours may be created online.

Because Time and Attendance Administration is an integrated component of the system, it shares a common database, and has access to human resource information including employee status, emergency contact data, work restrictions, injury and other medical information, education and training, skills and abilities, and detailed termination data.

☞ *Refer to the Using Time and Attendance Administration documentation for more information.*

Performance support tools

Extensive performance support tools are available, including the following:

- Standard online help—context-sensitive help, cue cards, and so forth
- Full text search—find help by searching all of the help files, or limit the search to a particular help file or component
- Electronic documentation—the complete set of One-Stop Documents that you can view and print

☞ *Refer to* **Using the Support Tools** *(on page 85) for more information.*

Data concepts

No matter what your role, you need to understand the following to work effectively with the system:

- Organizations
- Employee Numbers
- Tables

Organization structure

Your organization's structure will be mapped into organization levels in the system. The first two levels are used to define each company/organization separately on the Employee Database for reporting purposes. These levels relate to the two parts of the six-position Organization number. They are defined as follows:

- Organization (part 1)—Positions 1 and 2. Indicates the highest level within your company/organization's hierarchy. This usually refers to the corporate level.
- Organization (part 2)—Positions 3 through 6. Indicates subdivisions within an organization, or indicates a second level within the hierarchy.
- Organization—Represents a combination of both parts, that is, positions 1 through 6. It is synonymous with company/organization.

Consider the following example:

Organization level	Identifier	Stands for
Organization (part 1)	AC	ABC Department Store
Organization (part 2)	USDV	United States Division

This Organization identifier is typically shown together as ACUSDV.

The system is delivered with a series of test organizations, including the following. Notice that the delivered test organizations all start with 99. Part 2 of the Organization number is different for each:

Organization	Stands for
993333	ABC Solutions, Inc—unpaid applicants
995555	ABC Solutions, Inc—retirees
999999	ABC Solutions, Inc—active employees

Even if you will not be defining Organizations, you need to understand their importance. When working with the system, you must ensure that you are using the correct Organization. Only the current Organization's data will be available to you.

☞ *Refer to* **Navigating the System** *(on page 47) for information on viewing a list of defined organizations and information on changing the current organization.*

Employee Numbers

After your Organizations are defined on the Employee Database, you can begin adding employees. Each employee is uniquely identified by an Employee Number. This number provides access to the employee's data; it is the primary key to the employee's master record.

Employee Numbers are user-defined and have a maximum of 10 characters. You can use any combination of letters and numbers when defining Employee Numbers. However, the first character cannot be an 'L'. During implementation planning, you will determine the format for Employee Numbers in your organization.

Note: *Employee Numbers beginning with an 'L' are treated as 'Labor Only' employees by the payroll calculation program. No checks are produced for these employees.*

Following are examples of Employee Numbers:

- 123456789 (Social Security Number)
- 1234
- AB1234

Employee Numbers must be unique within Organization; the system will edit for duplicates within each Organization. If an employee is transferred to a different Organization, you have the option of changing the employee's Employee Number.

When you work with the system, you indicate what Organization you want to work with, and within that Organization, which employee you want to add or work with.

☞ *Refer to* **Navigating the System** *(on page 47) for information on changing to a different employee.*

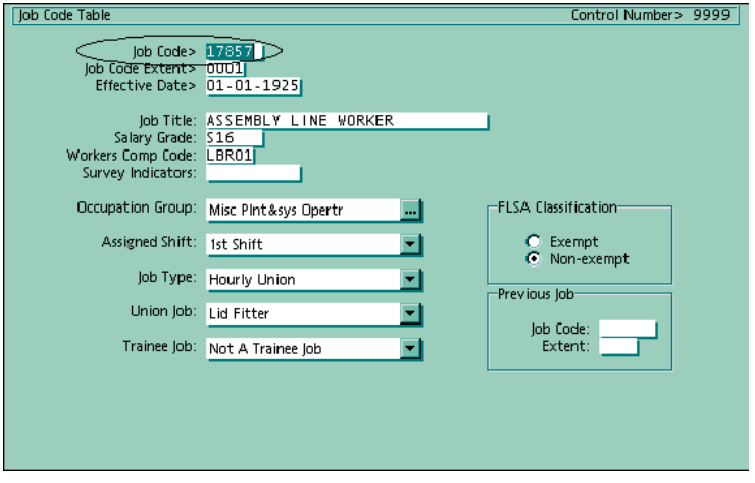
Tables

Most application tables contain standard information about your organization. A few application tables, such as the Company Cross-Reference Table-HR Control Numbers, are used strictly for internal processing.

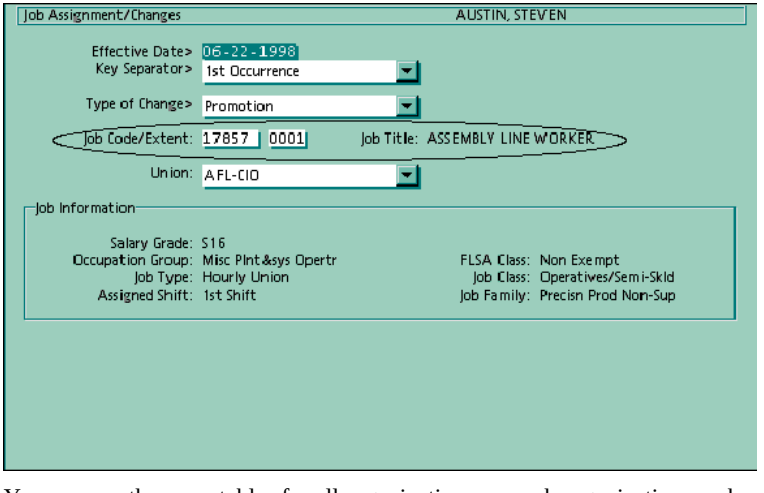
Using application tables greatly reduces the amount of information to be keyed in for an employee; instead, key data entered is cross-referenced to the tables. For example, the Job Code Table contains all possible jobs for an organization and some generic job-related information associated with those jobs. After validation, the information from the tables is referenced by the employee record.

There is a form associated with each table, allowing you to view or modify information. You can also run packaged reports showing the values for each table.

The following figure shows an entry in the Job Code Table form (TA-SCR):



The Job Code defined in this table can then be entered when hiring or promoting an employee. This figure shows that employee Steve Austin has been assigned Job Code 17857. The information set up on the Job Code Table is displayed at the employee level on the Job Assignment/Changes form (05-SCR):



You can use the same tables for all organizations, or each organization can have its own set of tables.

☞ *Refer to the appropriate component documentation for more information on setting up tables.*

Reporting on your data

Several delivered tools to help you analyze and report on information about your organization and employees. 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.

Options for reporting on information in The Solution Series include the following:

- Reporting Administration
- Delivered packaged reports
- Solution View (online queries and packaged reports)

☞ *Refer to the Using The Solution Series: Administrative Solutions, Reporting Administration, and Solution View documentation for more information on using these reporting tools.*

Note: You would need to use the administrative client to use these reporting tools.

For the web, a web-enabled solution helps you analyze information about your organization and employees—eCyborg Analytics.

eCyborg Analytics

This analysis function combines the power of the business intelligence tools from Cognos Corporation, a strategic partner, with a value-added relational database (Workforce data mart) package. eCyborg Analytics includes the following:

- The Cognos reporting tool PowerPlay and the delivered Workforce Planning models
- Ability for you to access the Cognos reporting tool from the web

☞ *Refer to the Reporting Administration documentation for more information on using PowerPlay.*

CHAPTER 3

Getting Started

In This Chapter

Introduction 20
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Introduction

Before you can use eCyborg, you need to be connected to the system. This section describes how to log on to eCyborg and explains what the user code and password are and how they are used.

Tasks

This section explains the following:

- Logging on to eCyborg
- Changing your user code
- Changing your password
- Logging off

Prerequisites

Before you can log on to eCyborg, you must be set up as a user and be given a user code and password by your Security Officer.

Note: *If you have a user code and password from previous versions of the system, you will be able to use them to access eCyborg.*

You need to be familiar with using a web browser (Netscape or Internet Explorer).

You should also be a competent computer user and be familiar with Microsoft Windows 2000 or higher.

Questions answered

The following questions are answered in this section:

1. What information must you have before you can log on?
2. How can user codes and passwords be used as part of your organization's security strategy?
3. How do you log out of the system?

The process of logging on

Logging on to eCyborg is a very simple task. However, before you can log on, your Security Officer will need to give you a user code and a password. You will need to enter these when you log on, as they identify you to the system.

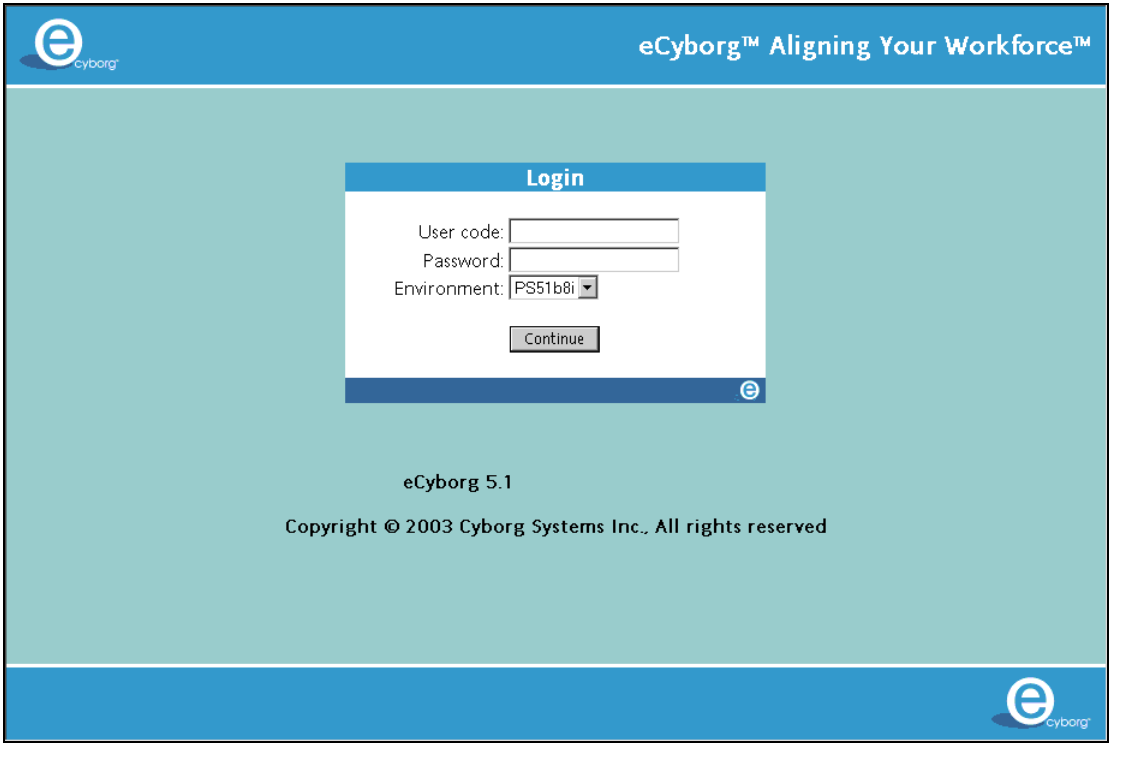
Note: *Your user code and password are used for security purposes and should not be written down or revealed to anyone.*

Note: *Your user code and password can be used to access The Solution Series using the Web Client.*

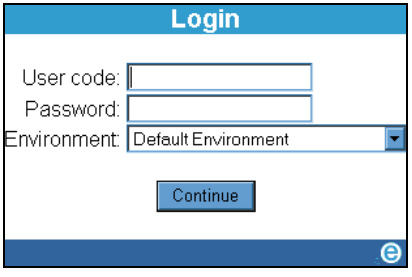
Note: *This user code and password will not give you access to eCyborg Interactive Workforce. If you use Interactive Workforce you will be given a separate User ID and password to gain access.*

The login screen

When you first launch eCyborg you will be presented with the eCyborg Login screen:



The Login dialog



To log on to eCyborg, you must enter the following three pieces of information:

- Your User code
- Your Password
- Environment

Note: *For security purposes, if you enter the wrong password you will be presented with the login dialog continually until you enter the correct login details. If you cannot remember your password, contact your Security Officer.*

Note: *The first time that you log in to eCyborg it may be a little slower than normal to connect you. This is perfectly normal and you will notice that the next time you log in it will be a much faster connection process.*

When you have completed the logon process, the Work Area displays:

☞ *Refer to* **Exploring the Work Area** *(on page 35) for more information on the Work Area.*

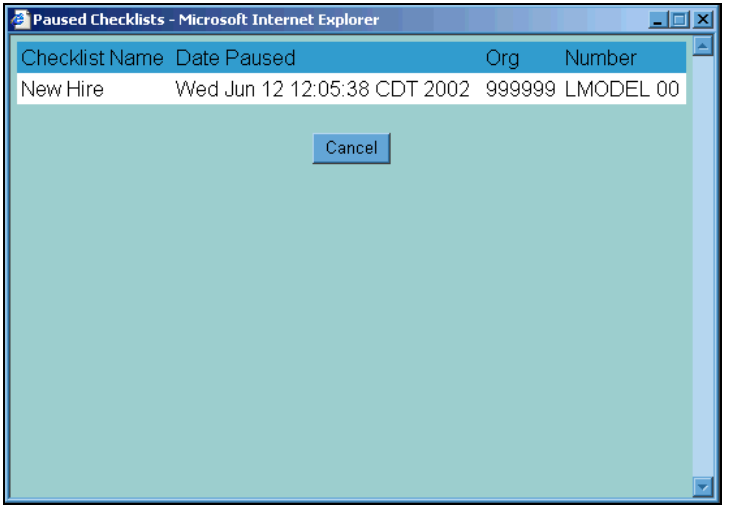
Note: *If, in a previous session, you started to complete a checklist and then paused the process, the Paused Checklists dialog will display the next time you log on.*

See also:

- Logging on with paused checklists ***(on page 23)***
  For an explanation of Paused Checklists.
- Understanding user codes and passwords ***(on page 24)***
  For an explanation of user codes.
- Understanding which environment you should log on to ***(on page 25)***
  For an explanation of environments.

Logging on with paused checklists

If, in a previous session, you started to complete a checklist and then paused the process, the Paused Checklists dialog box will be displayed the next time you log on.



You can select a checklist and resume the checklist process.

☞ *Refer to* **Navigating the System** *(on page 47) for more detailed information on checklists.*

See also

- Logging on to eCyborg ***(on page 27)***

For detailed directions on logging on to eCyborg.

Understanding user codes and passwords

When you log on, you are prompted to enter a user code and password, which will be given to you by a Security Officer. They are used by the system for security purposes to identify you as a valid user when you sign on.

Note: *Your user code and password are case sensitive (upper case, lower case). You must enter your user code and password using the correct case.*

Note: *For security purposes, when you enter your password it is displayed as a series of asterisks.*

You can change both your user code and password at any time. You may want to change them to something that you find easy to remember. If you want to change your user code, you must use the Change User Code dialog box. If you want to change your password, you must use the Change Password dialog box.

Note: *Your organization may not allow end users to change their password—you may not have access to the Change Password dialog box.*

Note: *The system may be set up to prompt you to change your user code on a regular basis.*

See also:

■ Logging on to eCyborg ***(on page 27)***
For detailed directions on logging on to eCyborg.

■ Changing your user code ***(on page 29)***
For detailed directions on changing your user code.

■ Changing your password ***(on page 29)***
For detailed directions on changing your password.

Understanding which environment you should log on to

When you log on, you are also prompted to select which environment you want to log on to. Typically an organization will have two environments—a test environment that is used by new users while they learn how to use the system and a live environment which contains your organization's data.

Your organization may have other environments, such as a test environment for year-end testing. When you log on, you must select which environment you want to use.

When you are assigned a user code and password, you should also be told which environment to use.

Logging out

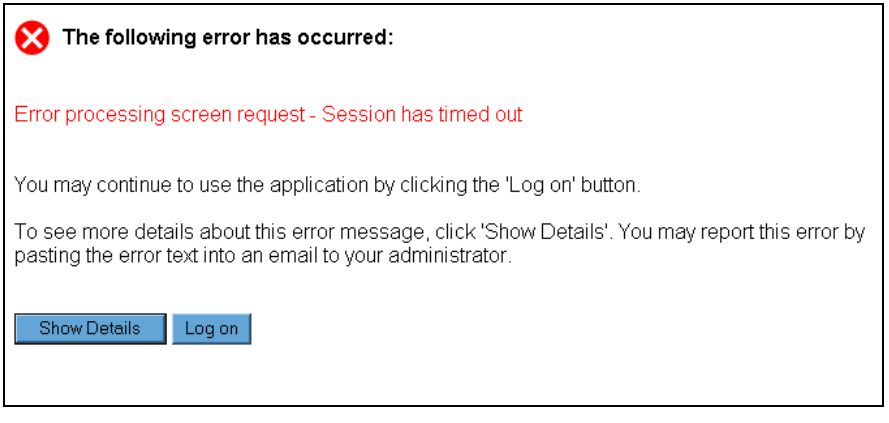
You can log out from eCyborg using the Logout button on the toolbar.

Note: *It is important that you log out using this button, rather than simply closing your browser window by using the X on the top right corner of the window as your eCyborg session may still remain active.*

IMPORTANT

Be aware that if you navigate to another web page without first logging out from eCyborg, your eCyborg session will still be active.

You will be automatically logged out after a period of inactivity. If this happens you will see an error message similar to this example:



Your system administrator will be able to tell you how your system is configured and therefore after how many minutes of inactivity you will be logged out.

Note: *This, or a similar, error message may appear at other times when using the system—if it does, contact your System Administrator. It would be helpful to copy and paste the text shown in the message box when the Show Message button has been clicked into an email, as this could be useful information for your administrator or the support team when determining the problem.*

See also:

- Logging out of eCyborg ***(on page 31)***

For detailed directions on logging out of eCyborg

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Logging on to eCyborg

To log on to eCyborg, follow these steps:

1. Access eCyborg

eCyborg can be accessed from a URL given to you by your administrator.

2. Type Your User Code

Type your user code in the User code text box of the Login dialog. This will initially have been provided by your Security Officer. A user code can be up to 18 alphanumeric characters long.

Note: Your user code and password are case sensitive (upper case, lower case). You must enter your existing user code using the correct case.

3. Type Your Password

Enter your password. This will initially have been provided by your Security Officer. If you have forgotten your password, please contact your Security Officer who will provide you with a new one. A password can be up to 14 alphanumeric characters long.

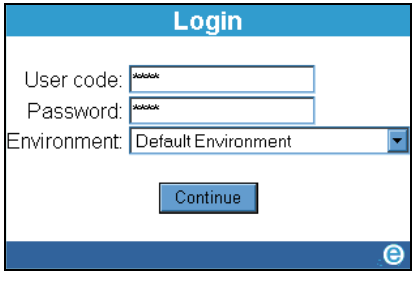
Note: For security purposes, your password is displayed as a series of asterisks.

Note: Your user code and password are case sensitive (upper case, lower case). You must enter your existing password using the correct case.

4. Select an Environment

Select the environment you want to use. Typically your organization will have a live environment and a test environment.

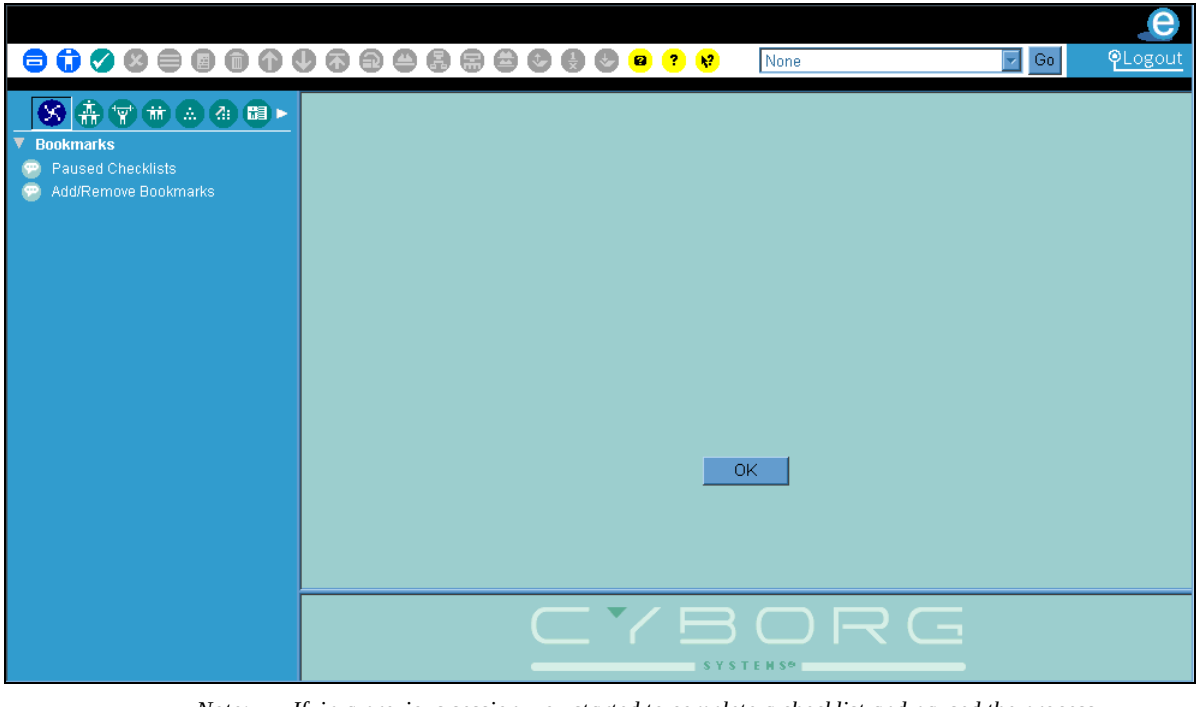
If you completed the previous steps, the results should look similar to the example that follows:



5. Click Continue

eCyborg will establish a connection to the server and verify your user code and password.

If you completed the previous steps, the results should look similar to the example that follows:



Note: If, in a previous session, you started to complete a checklist and paused the process, eCyborg will display the Paused Checklists dialog box the next time you log on.

See also:

- The process of logging on ***(on page 21)***

For more information on the log on process.

- Logging on with paused checklists ***(on page 23)***

For more information on paused checklists.

Changing your user code

You can change your user code at any time, or eCyborg may be set up to prompt you to change your user code on a periodic basis. You enter your user code when you log on. To change your user code, complete these steps:

1. Access the Change User Code dialog box

Access this dialog box by making the following selections on the Navigator:

Component:	User Tools
Process:	User Tools
Task:	Change User Code

2. Type your New user code

Type the new user code. A user code can be up to 18 alphanumeric characters long.

Note: You can enter your new user code using either case (upper or lower) or a mixture of both. However, the new user code will be case sensitive.

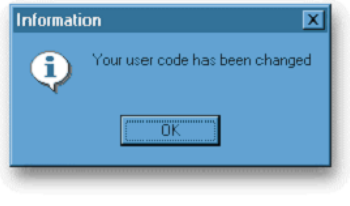
3. Confirm your user code

Retype your user code in the Confirm user code text box.

4. Click OK

To change your user code, click OK.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Understanding user codes and passwords ***(on page 24)***

For more information on user codes.

Changing your password

You can change your password at any time. You enter your password when you log on. To change your password, complete these steps:

Note: Your organization may not allow you to change your password.

1. Access the Change Password dialog box

Access this dialog box by making the following selections on the Navigator:

Component: User Tools
Process: User Tools
Task: Change Password

2. Type your Old password

Type your existing password in the Old password text box.

Note: Your password is case sensitive (upper case, lower case). You must enter your existing password using the correct case.

3. Type your New password

Type a new password. A password can be up to 14 alphanumeric characters long.

Note: You can enter your new password using either case (upper or lower) or a mixture of both.

4. Confirm your new password

Type your new password again.

To check that you have entered the correct new password, eCyborg will compare this entry with the entry you made in Step 3.

5. Operator ID

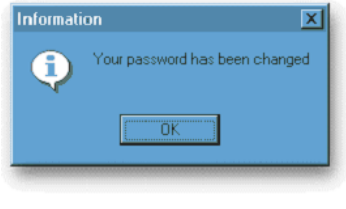
The Operator ID is assigned by your security officer and can not be changed. The Operator ID is used for audit purposes and is shown on this dialog box for display purposes only.

6. Click OK

If the entries you made in Steps 3 and 4 match, your password will be changed and a confirmation dialog will be shown.

If the entries you made in Steps 3 and 4 do not match, an error message displays. You will need to repeat Steps 3 and 4.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Understanding user codes and passwords ***(on page 24)***

For more information on passwords.

Logging out of eCyborg

To log out of eCyborg, follow this step:

Click the Logout button

Click the Logout button.

Note: *Do not log out from eCyborg by simply closing your browser window as your session will still remain active.*

See also

- Logging out ***(on page 26)***

For more information on the logout process.

Review of Questions Answered

1. What information must you have before you can log on?

2. How can user codes and passwords be used as part of your organization's security strategy?

3. How do you log out of the system?

PART 2

Working with eCyborg

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Working with Data 113

CHAPTER 4

Exploring the Work Area

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Introduction

This section introduces you to eCyborg interface. We refer to the interface as your Work Area. Your Work Area contains all the navigation methods and tools that you need to interact with the administrative solutions. The forms and dialog boxes that you need to enter data into are all displayed in the Work Area.

Prerequisites

Before you can complete the task in this section you must log on to eCyborg.

☞ *Refer to* **Getting Started** *(on page 19) for more information on how to log on to eCyborg.*

Questions answered

The following questions are answered in this section:

1. What is the Work Area?
2. What is the Navigator?
3. What is the Form area?
4. What is the Message area?
5. What is a user profile?

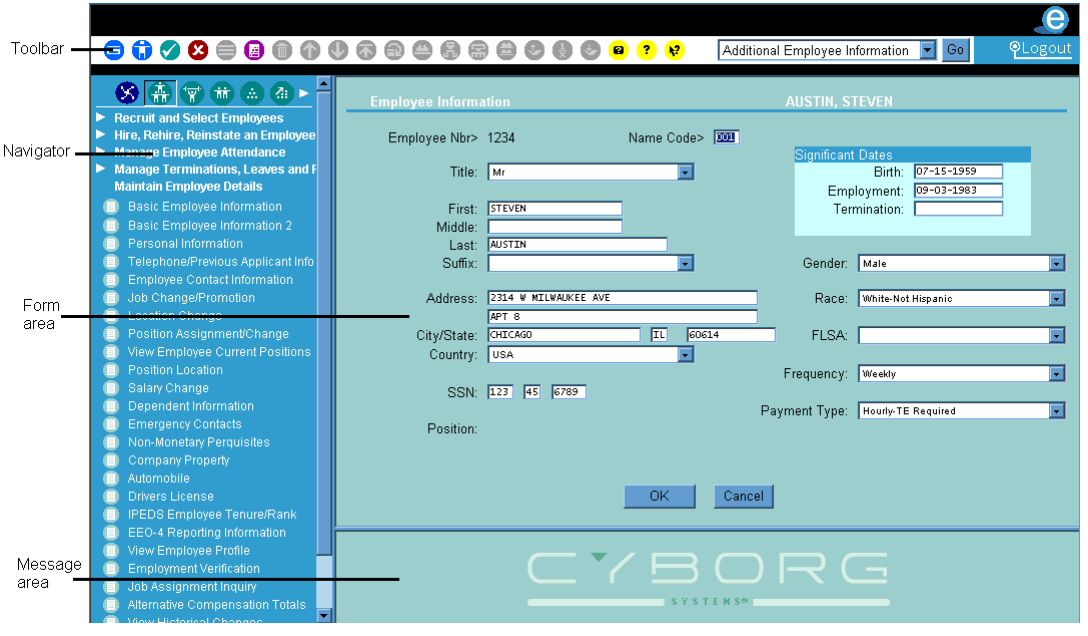
What is in the Work Area

The Work Area describes the entire display area that you see after you log on. The Work Area can be tailored to meet the needs of your organization and your personal work style. When you log on, the Work Area should look similar to this:

The Work Area can be broken down into four distinct areas:

- The Toolbar
- Navigator
- Form area
- Message area

This is illustrated in the following figure:



The toolbar

The following buttons are included on the toolbar:

Button	Caption	Description
	Enter Command	Display the Command Entry dialog
	Change Employee	Select an Employee or Organization
	Save	Save this Form
	Cancel	Cancel this Form
	Select	Show selection list in the message area
	Clear Fields	Clear all the text boxes on this form
	Delete This Entry	Delete the current record from the database
	Up Selection List	Move up to the next selection in the message area
	Down Selection List	Move down to the next selection in the message area
	Top of Selection List	Move up to the top of the selection list
	Refresh Selection List	Refresh the selection list
	Job	The action associated with this button depends on where you are in Position Administration
	Organization List	The action associated with this button depends on where you are in Position Administration
	Position	The action associated with this button depends on where you are in Position Administration
	Incumbent	Used to 'drill down' from Position level forms. Access incumbents associated with the positions
	Restore Data	Restores you to the Online Pay Calculation form (PAY-CP) after processing a 'What If' or an 'Update'

Button	Caption	Description
	What-If Mode	Allows you to view calculated data without updating the employee record
	Update Mode	Updates the employee's record by applying the calculated pay information
	Help Menu	Access help for all of eCyborg components
	Help on This Form	Shows Help for the selected form
	What's This?	Shows help for a text box or option list
Logout	Logout	Log out from eCyborg
What If	What-if mode	Displays when in What-if mode

☞ *Refer to* **Navigating the System** *(on page 47) for more information on using these buttons.*

Navigator

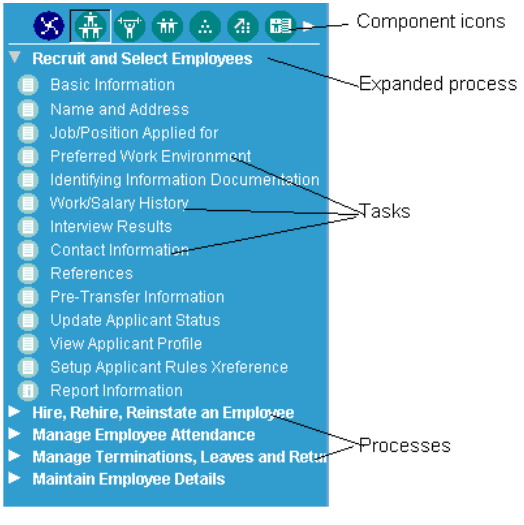
The Navigator provides an easy way to navigate the system. It uses a three-level navigation format that is composed of the following:

- Components
- The Processes associated with components
- The Tasks associated with a process

To navigate the system using the Navigator, you must first select the correct component. Each component of the system is represented by an icon.

If you are unsure of the meaning of an icon, you can place the pointer over the icon and the ToolTip will display the component name:

To navigate through the different components, you must click the arrows at the ends of the Component bar. When the component you are looking for is in view, click its icon to display the processes for that component.



After you select a component, you then select a process. A process is used to categorize a group of related tasks. After you select a process, you can then select a task.

Each task is represented by an icon and a description. Each icon indicates the type of task associated with it. The task icons include the following:

Icon	Description
	Checklist
	Dialog Box
	Form
	Report

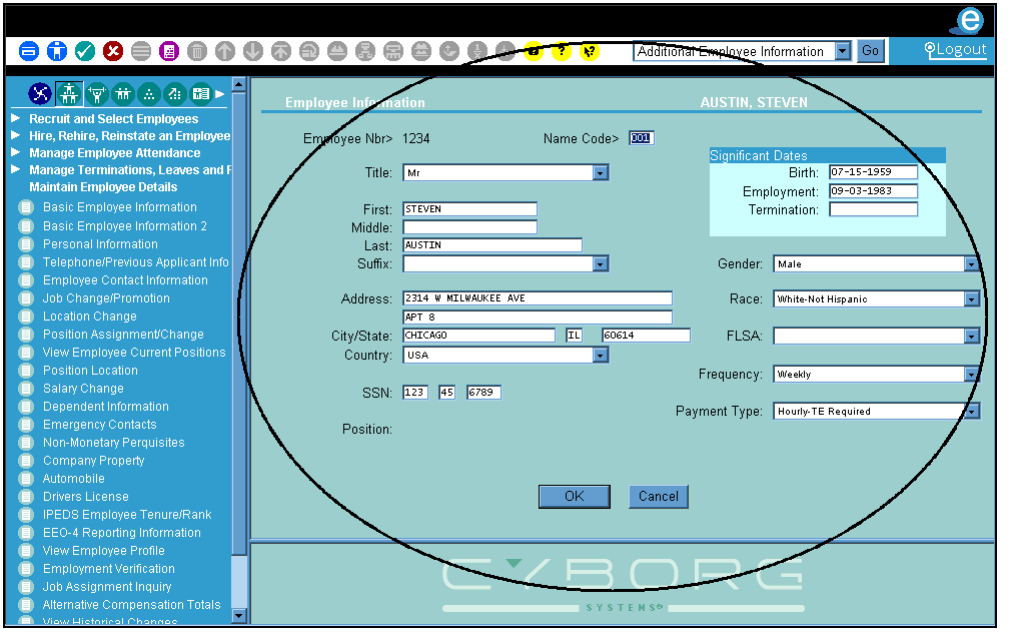
When you select a task, the associated item (form, dialog, and so forth) is displayed in the Form area.

☞ *Refer to* **Navigating the System** *(on page 47) for more information on the Navigator.*

☞ *Refer to* **Working with Data** *(on page 113) for more information on completing tasks.*

Form area

When you select a form, the form will be displayed in the Form area:



Note: *When you log on to eCyborg, the Form area will be blank.*

When you enter data on a form, you can use the Save or Cancel buttons on the toolbar to save or cancel the information. It is good practice to clear data from the form or table before entering new data. To create a blank form, use the Clear Fields button. This button removes any data from the text boxes, but does not delete the record. If you need to delete the record, use the Delete button.

Note: *If you are unsure which are the correct buttons, hover the pointer over the buttons on the toolbar to see the ToolTip giving the name of the button.*

☞ *Refer to* **Working with Data** *(on page 113) for more information on using forms.*

Message area

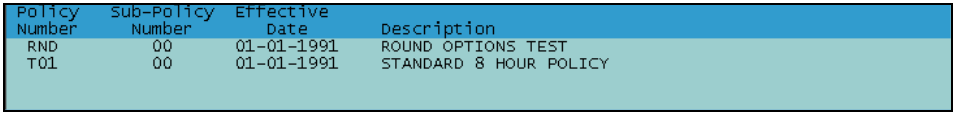
The Message area is used to display two types of information.

First, it is used to display information, warnings, and reject messages in response to data that you have entered on the form.

☞ *Refer to* **System messages** *(on page 134) for more information on system messages.*

Second, it displays a selection list for forms that have multiple occurrences of the same type of information. You can use a selection list to choose the record that includes the information you want to work with.

The following example shows a Selection list for the Policy Master form (PT1SCR) used in the Time and Attendance system.



Policy Number	Sub-Policy Number	Effective Date	Description
RND	00	01-01-1991	ROUND OPTIONS TEST
T01	00	01-01-1991	STANDARD 8 HOUR POLICY

Effect of your user profile

A user profile is created and maintained for you by a Security Officer. Each user has a user profile. A user profile is 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.

For example, confidential information such as salary details are usually accessible only to users in your organization's payroll department. Typically, users who do not work in the payroll department would not receive access to the Salary Administration component.

Review of Questions Answered

1. What is the Work Area?

2. What is the Navigator?

3. What is the Form area?

4. What is the Message area?

5. What is a user profile?

CHAPTER 5

Navigating the System

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Introduction

The Work Area is where you begin to interact with eCyborg. This section introduces you to the different navigation methods and tools designed to help you gain the most from eCyborg.

Tasks

This section explains the following tasks:

- Using the Navigator
- Switching between forms
- Accessing a checklist
- Pausing a checklist
- Resuming a paused checklist
- Changing to a different employee or organization
- Displaying a list of organizations

Prerequisites

Before you can complete the tasks in this section, you must log on to eCyborg.

☞ *Refer to* **Getting Started** *(on page 19) for more information on how to log on to eCyborg.*

☞ *Refer to* **Exploring the Work Area** *(on page 35) for more information on using the work area.*

Questions answered

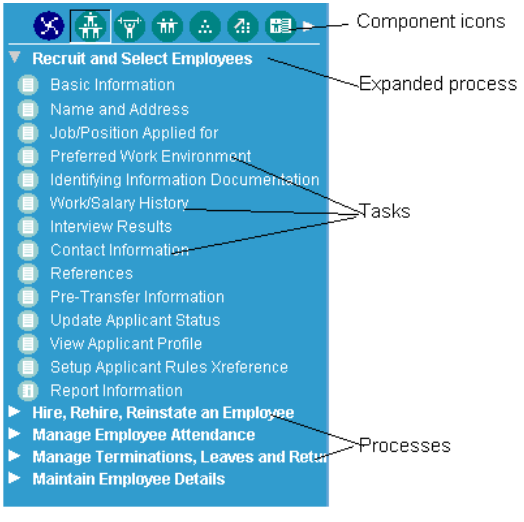
The following questions are answered in this section:

1. How is the Navigator organized?
2. What effect does your user profile have on information you can access?
3. How would you switch between forms?
4. What are checklists?
5. What method is provided to allow the selection of a different employee?

The Navigator

The Navigator provides the means for navigating the system. The Navigator is positioned on the left side of the Work Area. The Navigator is made up of these three levels:

- Components
- Processes—each process is associated with a component
- Tasks—each task is associated with a process



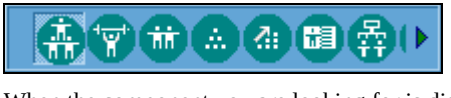
By selecting the different items on these levels, you navigate to the item (form, dialog box, checklist and so forth) that you need.

Note: *The Navigator may only be controlled with the mouse.*

Components

To navigate the system using the Navigator, you must first select the correct component. Each component in the system is represented by an icon.

Your user profile will determine the components to which you have access. The component bar can display a limited number of component icons. If you have access to more than can be displayed, you will need to use the arrows on the Component bar to navigate to them. Click the arrow at either end of the Component bar to navigate to the different components.



When the component you are looking for is displayed, you must click its icon to display the processes associated with that component.

☞ *Refer to* **Working with Data** *(on page 113) for more information on how to select components using the Navigator.*

Note: Your user profile determines which components you can access—you may not have access to all of the components shown here.

Bookmarks

The first icon in the components bar on the Navigator is for Bookmarks:

Component on the Navigator	Description
	Bookmarks

☞ *Refer to* **Using bookmarks** *(on page 54) for more information on bookmarks.*

The HR application

The HR application consists of the following components that can be accessed from the Navigator:

Component on the Navigator	Description
	Employee Resourcing
	Employee Development
	Employee Relations
	Employee Compensation
	Salary Administration
	HR Setup
	Position Administration
	Requisition Tracking
	Training Administration

The Benefits application

The Benefits application consists of the following components that can be accessed from the Navigator:

Component on the Navigator	Description
	Health Welfare Plan Enrollment/Maint
	Deferred Plan Enrollment/Maintenance

Component on the Navigator	Description
	Flex Plan Enrollment/Processing
	Benefit Plan Setup and Maintenance

The Payroll application

The Payroll application consists of the following components that can be accessed from the Navigator:

Component on the Navigator	Description
	Employee Payroll
	Payroll Setup Processing
	Payroll Year end

The Time and Attendance application

The Time and Attendance application consists of the following component that can be accessed from the Navigator:

Component on the Navigator	Description
	Time and Attendance

Processes

After you select a component, you must then select a Process. A Process is used to categorize the different tasks within a component. When you first log on to eCyborg the Processes are displayed at the top of the Navigator. When you click a collapsed Process, it expands to reveal its tasks.

Note: *Some components have only one Process.*

☞ *Refer to* **Working with Data** *(on page 113) for more information on how to select and use Processes.*

Tasks

Each task is represented by an icon and a description of the task. The icon associated with each task indicates the type of task. The task icons include the following:

Icon	Description
	Checklist
	Dialog Box
	Form

Icon	Description
	Report

When you select a task, the associated item is displayed in the Form area.

☞ *Refer to* **Working with Data** *(on page 113) for more information on how to select a task.*

See also:

- Using the Navigator ***(on page 65)***

For detailed directions on using the Navigator.

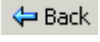
Back and Forward buttons

You can use your browser's Back and Forward buttons as a quick way to switch between forms that you have accessed in a session.

Note: *How these buttons display and work would largely depend on your browser, but should be similar to the functionality described here.*

Note: *The examples shown here are from the Microsoft Internet Explorer browser.*

After you have accessed two or more forms, the Back button is enabled.



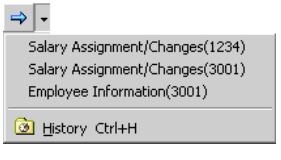
The Back button provides a quick way to switch to an earlier form in the list for a specific employee. Once you click the Back button, the Forward button is enabled.

You can use the Forward button to move forward through the list. When you reach the end of the list, the appropriate button will be disabled.

You can also use the Back and Forward drop-down buttons to recall forms that you have used.

Clicking one of the drop-down buttons will display a list of forms accessed in this session. The form name and employee number is displayed on the list. You can directly select the form you want to recall rather than paging through the forms one-by-one.

Following is an example of the list displayed from the Forward drop-down button:



See also:

- Switching between forms one-by-one ***(on page 67)***
- Switching between forms by selection ***(on page 69)***

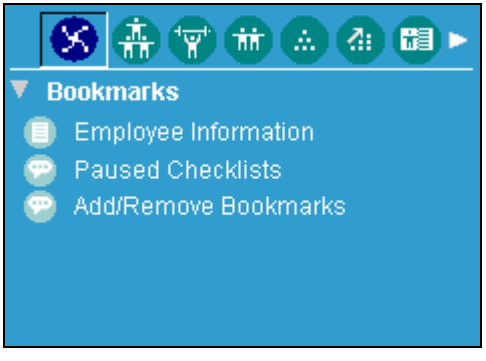
For detailed directions on changing forms.

Using Bookmarks

You use forms and checklists to perform various tasks when using the administrative solutions. Each task, such as updating an employee's address, uses a specific form. You can easily access all of the various forms using the Navigator. Bookmarks give you quick access to the forms that you use most often.

Bookmarks show up as tasks in the Navigator under the Bookmarks process.

When you create a bookmark, it is immediately added to the Bookmarks section of the Navigator. In the example below, the Employee Information form (EF-SCR) has been added to the list of Bookmarks:



You can access a form using a bookmark by selecting it directly from the list of Bookmarks in the Navigator.

See also:

- Adding a bookmark ***(on page 73)***
- Accessing a bookmark ***(on page 75)***

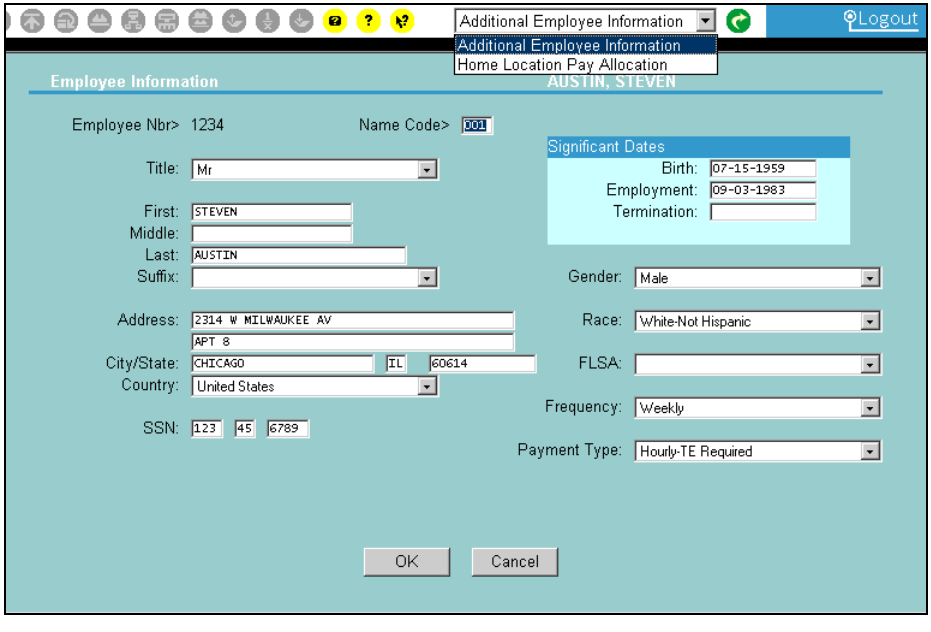
For detailed directions on adding and accessing bookmarks.

Related forms

If there are any additional forms related to a particular form, they will be in the drop-down list in the toolbar.

You could use this list to navigate to related forms. In the following example, you could navigate to the following forms:

- Additional Employee/Payroll Information form (EG-SCR)
- Payroll Home Location/Pay Allocations form (GG-SCR)



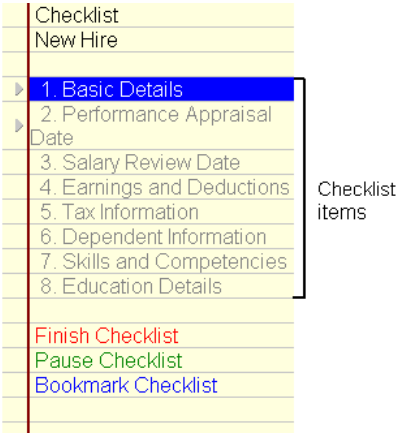
See also:

- Moving to a related form ***(on page 71)***

For detailed directions on using the drop-down list to navigate to another form.

Understanding checklists

A checklist provides a way to link different items (forms, dialog boxes, checklists, and report groups) to create a workflow. Each of these items can then be completed consecutively, using the checklist to navigate them. For example, eCyborg is delivered with a checklist called 'New Hire'. This checklist contains all the items that need to be completed in order to add a new employee to the system, and optional information you might want to add.



Checklists eliminate the need to navigate to individual items. They also ensure that all the items that are part of a workflow are presented for completion. When you access a checklist, you are presented with a list of items in the sequence in which they should be completed.

☞ *Refer to the Optimizing System Features documentation for more detailed information on using checklists to design a business process.*

See also:

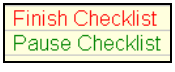
- Accessing a checklist ***(on page 77)***

For detailed directions on accessing a checklist.

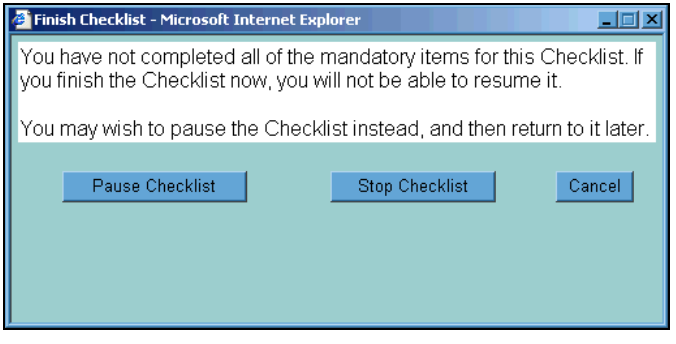
Working through a checklist

When you complete an item in a checklist, you can click the next item in the checklist. When you click the next item, the system will check the record and save it. If the record cannot be saved, the appropriate message (Reject, Warning, Information) will display in the Message area.

When you complete the mandatory items in a checklist, you can click Finish Checklist or Pause Checklist.



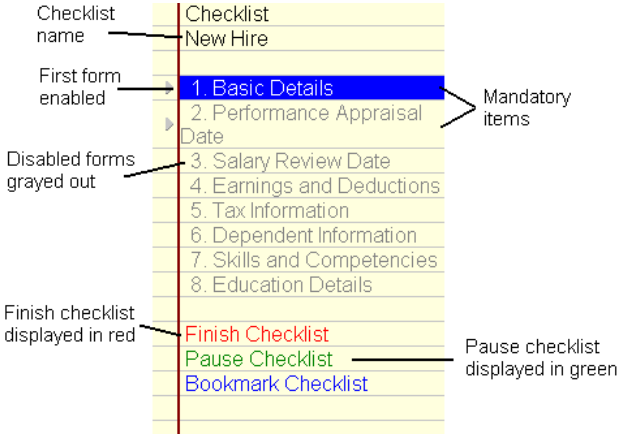
If you have not completed the mandatory items in a checklist when you click Finish Checklist, you will see a warning dialog, giving you the option to pause the checklist:



Checklist symbols

When you use a checklist, you need to be aware of what the symbol next to each item on the checklist means.

Items in a checklist can be mandatory or optional. A mandatory item must be completed before the next checklist item can be accessed. A mandatory item is displayed with a gray triangle next to it. In the New Hire checklist shown next, the first two items are mandatory:



Until the mandatory items are completed, optional items are displayed in gray and are not accessible. After the mandatory items are completed, the optional items will be enabled. Their color will be changed to black.

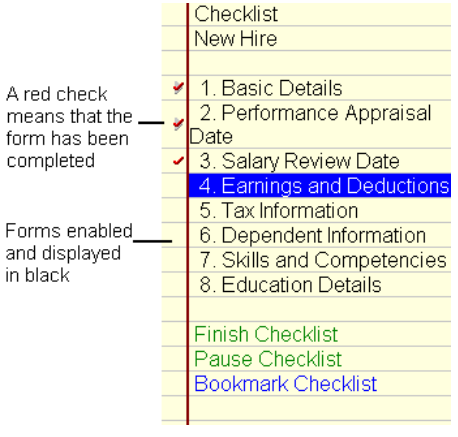
Until the mandatory steps are complete, the Finish Checklist control will be displayed in red or not available, depending on checklist options. The Finish Checklist control is displayed in green when all mandatory steps have been completed. The 'Pause Checklist' item is displayed in green.

Note: *If the Finish Checklist control is available (displayed in red), the checklist can be stopped even though all mandatory steps have not been completed. Stopping a checklist, however, cancels all further processing.*

The next example shows the 'New Hire' checklist after the first three items have been completed. When an item is completed, a red check or tick is displayed next to it. Note that the Finish Checklist item is now showing as green text, showing you that you can now stop the checklist at any point.

When you complete the mandatory items in a checklist, you can click one of the following checklist controls:

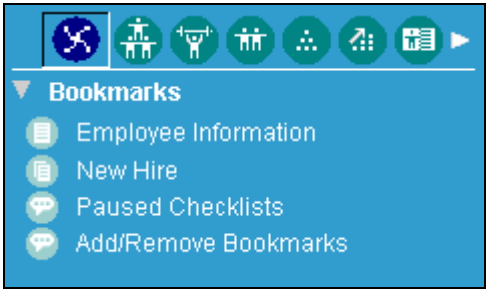
- Pause Checklist—to pause the checklist and return to it at a later date.
- Finish Checklist—to finish the checklist and complete the process.



The next example shows the 'New Hire' checklist with all the items completed:

Bookmark a checklist

You can save the current checklist as a bookmark by clicking the Bookmark Checklist option. This adds the checklist to your list of bookmarks in the Navigator. The following example shows the New Hire checklist as a bookmark:



See also

- Accessing a bookmark ***(on page 75)***

For detailed direction on accessing bookmarks.

Resume a paused checklist

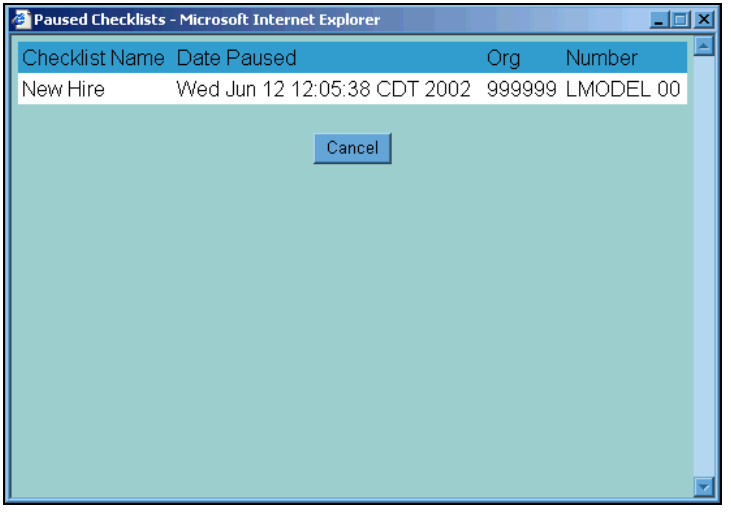
You can pause a checklist for a number of reasons. For example, if you are using the New Hire checklist and you do not have the employee's birth date, you could pause the checklist and complete it at a later date when you have the information.

A paused checklist can be accessed in one of the following two ways:

- When you log on
- From the Navigator

When you log on

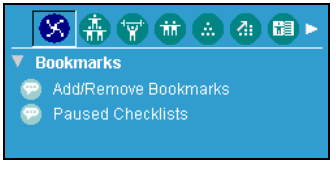
If you have paused checklists on the system, the Paused Checklists dialog box will be displayed the next time you log on:



Click on a checklist to resume it, or click Cancel if you do not wish to proceed with this checklist at this time. It will still remain as a paused checklist and can be resumed at a later time.

From the Navigator

Another way to access a paused checklist is to click the Paused Checklists option from the Navigator to access the Resume A Checklist dialog box.



See also:

- Pausing a checklist ***(on page 75)***

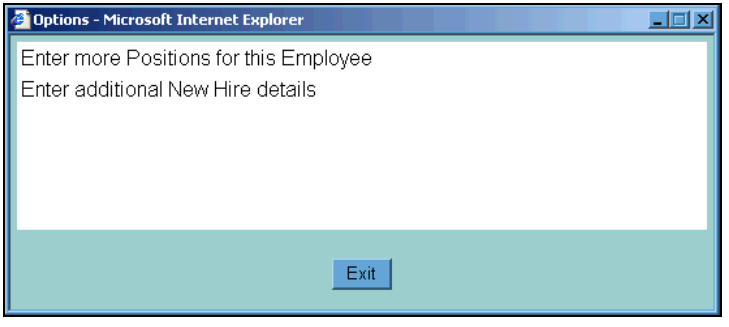
For detailed directions on pausing a checklist.

- Resuming a paused checklist ***(on page 76)***

For detailed directions on resuming a paused checklist.

Finishing a checklist

When you complete a checklist click Finish Checklist. An Options dialog may appear suggesting other actions you could take. Select one of the options to continue, or click Exit.

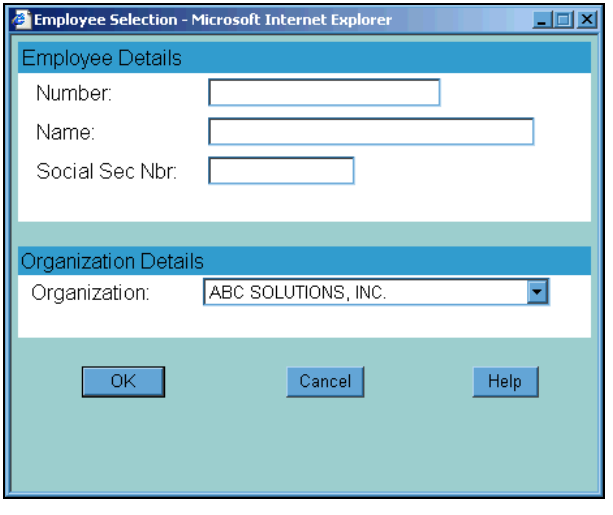


Switching between different employees and organizations

If you have more than one organization established on your system, you will need to be able to switch between these organizations easily and quickly. Within these organizations, you will also need to switch between different employees just as easily.

For example, if you need to enter salary information for a number of employees, you will want to be able to switch employees after you complete a Salary Assignment/Changes form (40-SCR) for each of them.

To switch between organizations and employees, you use the Employee Selection dialog box:



To access this dialog box, click the Change Employee button on the toolbar.

See also:

- Changing to a different employee or organization ***(on page 79)***

For detailed directions on selecting a different employee or organization.

- Displaying a list of organizations ***(on page 80)***

For detailed directions on displaying a list of organizations.

Communication events

Communication events are letters or emails that can be triggered automatically within The Solution Series. Communication events include data from the current form or record. For example, your manager may set up a communication event that automatically generates a Salary Increase confirmation letter to an employee when his or her salary is changed on the Salary Assignment/Changes form (40-SCR).

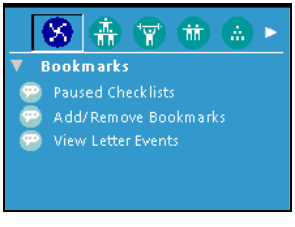
When communication events are set up as Server events, emails and/or letters are triggered by the forms and checklists you use on The Solution Series web client. When you set up a server event, the generated e-mails are sent automatically, and the generated letters are queued for release.

Manually triggering a communication event

You have the option to automatically generate a letter or email while working with a specific form, depending on the whether Server Event was checked on the Communication Events Manager. The View Letter Events Bookmark on your browser allows you to access the letters queued for printing. Emails are sent automatically.

Queued letters dialog

The Solution Series automatically generates communication event letters and queues them on the server. You access the queued letters through the View Letter Events bookmark on your browser.



The Queued Letter Events page lists all of the letters queued for printing. The letters are grouped by your ID. To print the letters you must download both the Template (.dat file) and Data (.doc file) files for the letter from the page that displays when you View Letter Events. You use the Microsoft mail merge feature to generate the letter. Downloading and viewing the letters gives you the capability of editing and printing them using the functions and tools in Microsoft Word.

Note: *The mail merge function works differently based on your version of Microsoft Word.*

See also

- ***Triggering a letter communication event***

For detailed directions on manually triggering a letter communication event.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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Switching between forms by selection....69
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Displaying a list of organizations....80
Viewing, editing, and printing a queued letter....81

Using the Navigator

The Navigator is made up of these three levels:

- Components
- Processes—each process is associated with a component
- Tasks—each task is associated with a process

To use the Navigator to access a Task, complete the following steps:

1. Access a Component icon

Not all of the component icons are on display at once. To display a Component icon, you may need to navigate to it by clicking the arrows on the Component bar.

2. Click the Component icon

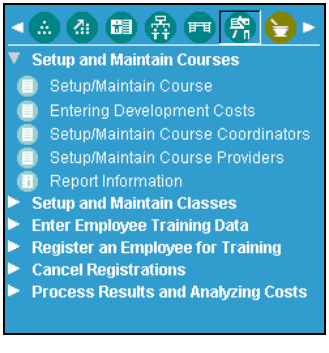
To access the Processes, click the Component icon.

If you completed the previous steps, the results should look similar to the example that follows:

3. Click a closed Process

To view the tasks associated with a closed Process, click it. The Process will expand to display the tasks associated with it.

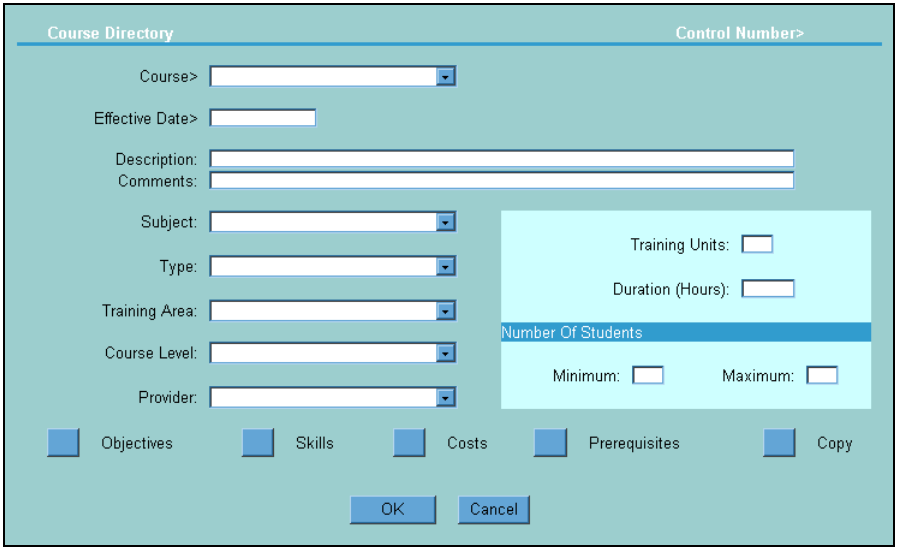
If you completed the previous steps, the results should look similar to the example that follows:



4. Click a task

To access a task, click the task icon.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- The Navigator ***(on page 49)***

For more information on using the Navigator.

- Components ***(on page 49)***

For more information on Components.

- Tasks ***(on page 51)***

For more information on Tasks.

Switching between forms one-by-one

The Back and Forward buttons on your browser's toolbar enable you to switch between forms that you have accessed previously in a session. This means that you can use the Back and Forward buttons to move quickly between forms and tables that you use repeatedly.

For example, you may want to copy information such as address details from one form to another. The Back and Forward buttons are a quicker way of moving between these two forms.

Note: *The Back and Forward buttons of your browser may not function precisely as described in this task. Refer to your browser's documentation for further details that are specific to your browser.*

Note: *The Back and Forward buttons may only be enabled when you have accessed two or more forms.*

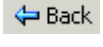
There are two ways that you can switch back and forth between forms:

- Switching between forms one-by-one (this task)
- ***Switching between forms by selection*** (on page 69)

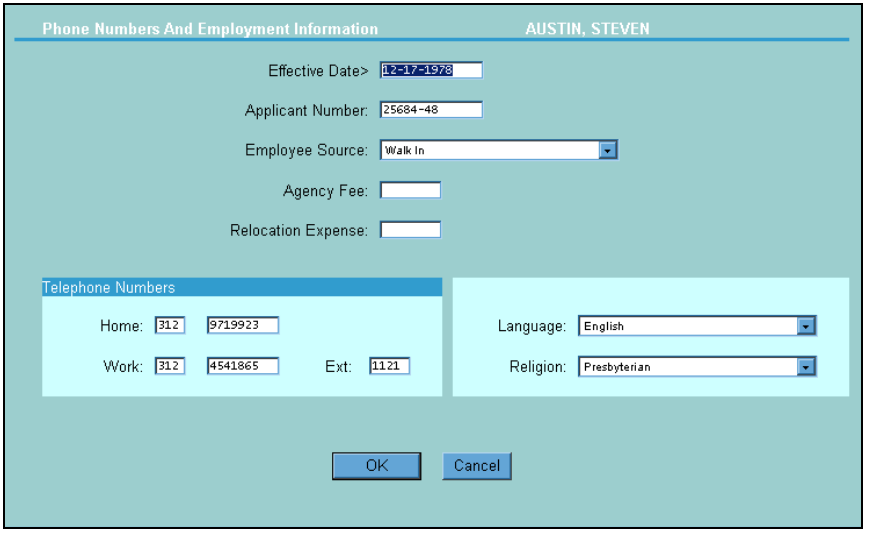
This task explains how to switch between forms one-by-one. To do this, complete these steps:

1. Click Back

Click the Back button on your browser's toolbar to access a form you have previously accessed.



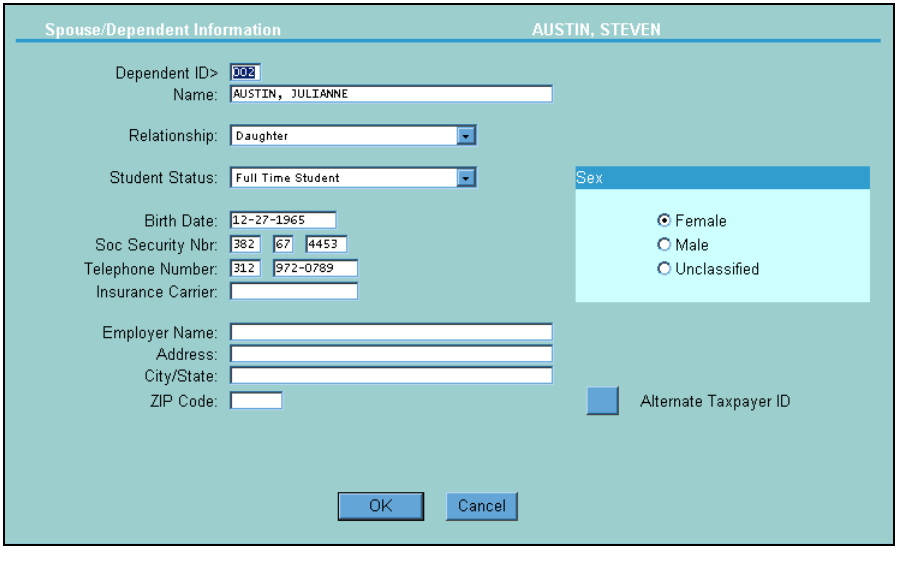
The Back button will be disabled when you reach the first form you accessed in a session.



2. Click Forward

To move forward one-by-one through the forms you have accessed, use the Forward button on the Standard toolbar.

The Forward button will be disabled when you reach the last form you accessed in a session.



See also:

- Back and Forward buttons ***(on page 53)***

For more information on switching between forms.

Switching between forms by selection

You can use your browser's Back and Forward buttons to switch between forms that you have accessed previously in a session. This means that you can use the Back and Forward buttons to move quickly between forms and tables that you use repeatedly.

For example, you may want to copy information such as address details from one form to another. The Back and Forward buttons are a quicker way of moving between these two forms.

Note: *The Back and Forward buttons of your browser may not function precisely as described in this task. Refer to your browser's documentation for further details that are specific to your browser.*

Note: *The Back and Forward buttons are enabled only when you have accessed two or more forms.*

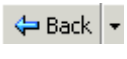
There are two ways that you can switch back and forth between forms:

- ***Switching between forms one-by-one*** (on page 67)
- Switching between forms by selection (this task)

This task explains how to switch between forms by selection. To switch between forms by selecting the form follow these steps:

1. Click the Back drop-down

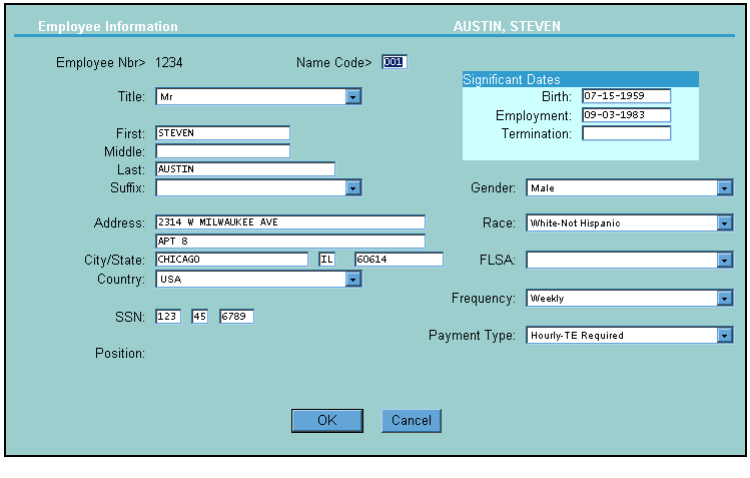
Click the Back drop-down button on your browser's toolbar to access the list of forms you have previously accessed.



2. Select a form

Select a form from the list by clicking on it.

Note: *After you select one of the forms from the list, the list will be refreshed.*

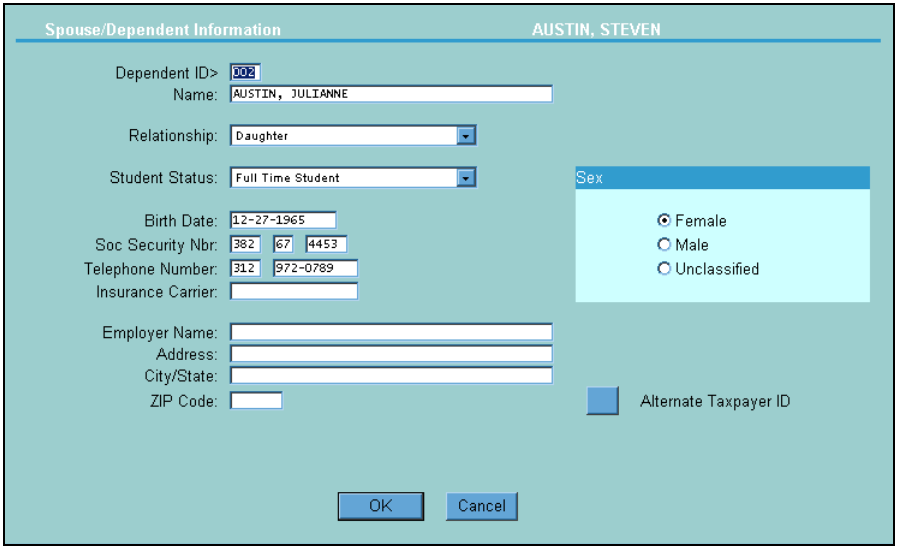


3. Click the Forward drop-down

Click the Forward drop-down button on the Standard toolbar to access the list of forms you have accessed.

4. Select a form

Select a form from the list by clicking it.



See also:

- Back and Forward buttons ***(on page 53)***

For more information on switching between forms.

Moving to a related form

This task explains how to navigate to a related form.

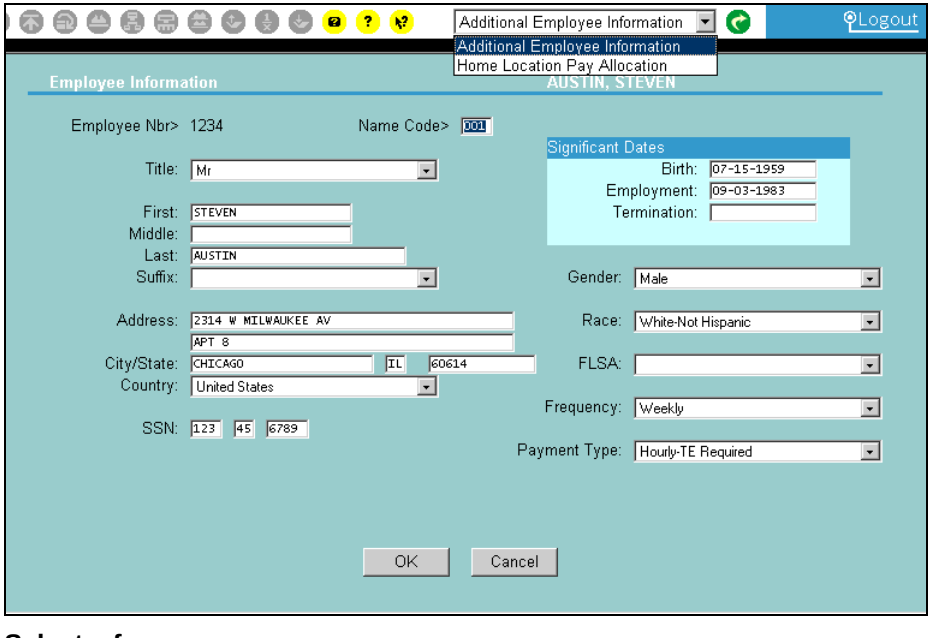
To complete this task you must first access the Employee Information form for Employee Number '1234' by making the following selections from the Navigator.

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

1. Click on the selection list

Click the down arrow button beside the list box on the toolbar.

A list of forms related to the form with which you are currently working will display.



2. Select a form

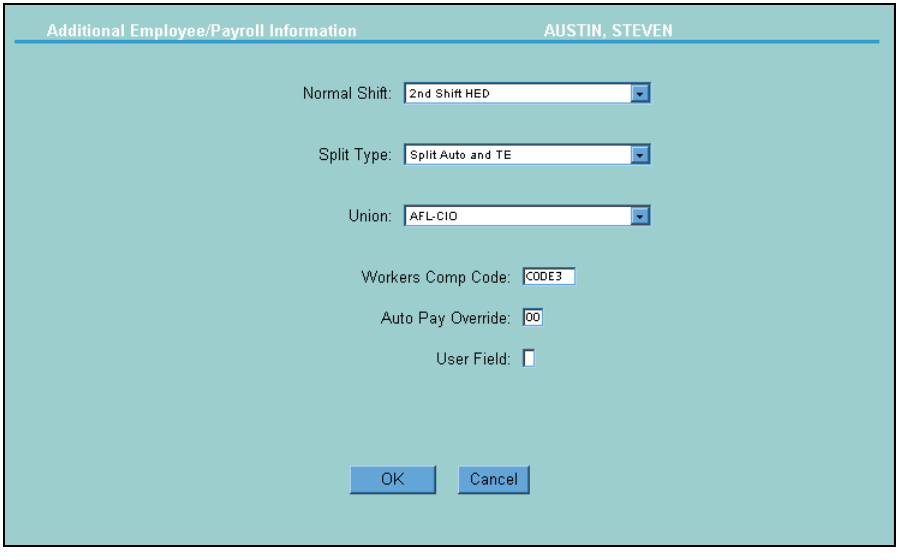
To navigate to a related form, select one of the forms shown in the list.

3. Click Go

Click the Go button beside the drop-down list on the toolbar.

The selected form will display in the Form Area.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Related forms ***(on page 55)***

For more information on related forms.

Adding a bookmark

To add a bookmark to your list of bookmarks on the Navigator, follow these steps:

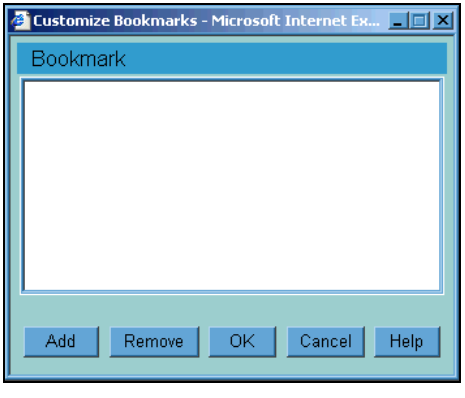
1. **Access the form**

   Access the form you would like to include as a bookmark.

2. **Access the Customize Bookmarks dialog**

   Access this dialog by making the following selections from the Navigator:

   Component: Bookmarks
   Process: Bookmarks
   Task: Add/Remove Bookmarks



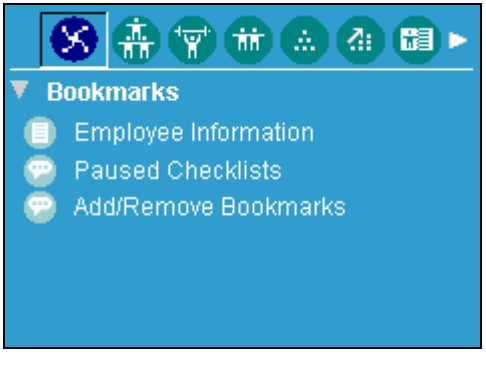
3. **Click Add**

   The form is added to the list in the dialog.

4. **Click OK**

   The dialog closes, and the form is added to the list of bookmarks in the Navigator.

   If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Using bookmarks ***(on page 54)***

For more information on bookmarks.

Accessing a bookmark

To complete this task, you must first complete the task ***Adding a bookmark*** (on page 73) to add a bookmark that you can access.

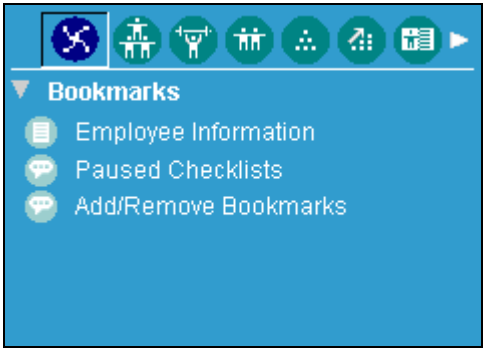
Access a Bookmark

Access a bookmark that you have previously added to the list of bookmarks.

To access a bookmark make the following selections on the Navigator:

Component: Bookmarks
Process: Bookmarks

You will see your list of saved bookmarks in the Navigator.



See also:

- Using bookmarks ***(on page 54)***

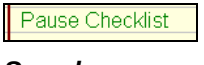
For more information on bookmarks.

Pausing a checklist

When you have accessed a checklist, you can pause it at any time. You may need to do this if you discover that you do not have the necessary information to complete the checklist items.

Click the Pause Checklist control

To pause the checklist, click the Pause Checklist control on the Navigator:



See also

- Understanding checklists ***(on page 56)***

For more information on checklists.

Resuming a paused checklist

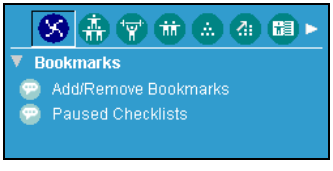
To resume a paused checklist, you use the Resume A Checklist dialog box. This dialog box can be accessed in one of two ways:

- When you log on to eCyborg
- From the Navigator

In this example, you access the Resume A Checklist dialog box from the Navigator.

1. Access the Resume A Checklist dialog box

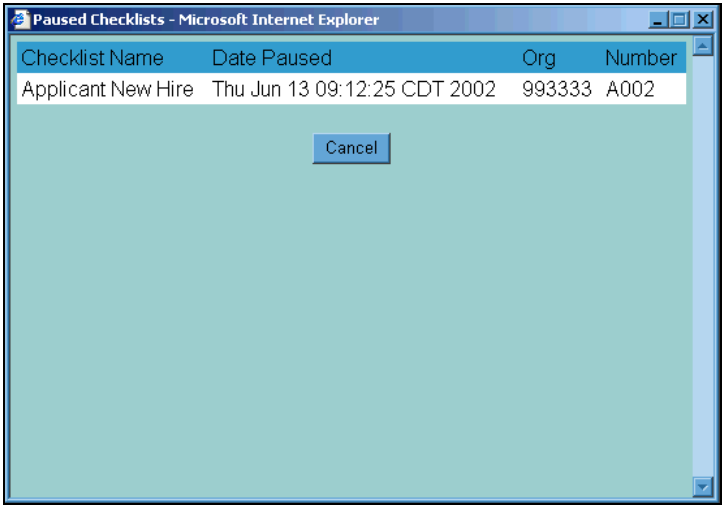
Click the Paused checklists option in the navigator to access the Resume A Checklist dialog box.



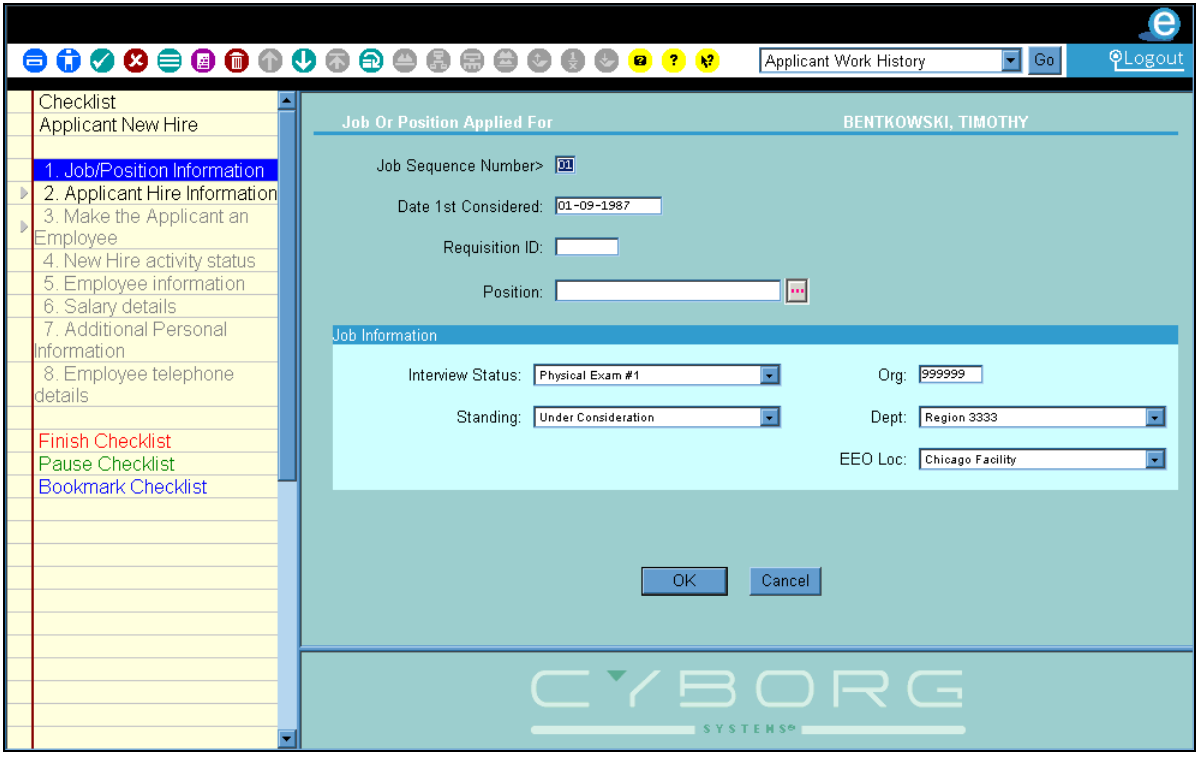
Note: The Resume A Checklist dialog box can also be displayed when you log on to eCyborg if you had previously paused a checklist.

2. Select a paused checklist

Select the paused checklist you want to resume.



If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Resume a paused checklist ***(on page 60)***

For more information on paused checklists.

Accessing a checklist

Checklists provide a way to link multiple items that you can access and work through using a list displayed in the Navigator. In this example you are going to access a checklist that is delivered with eCyborg.

1. Access a checklist

Access a checklist you want to use.

Access this checklist by making the following selections from the Navigator:

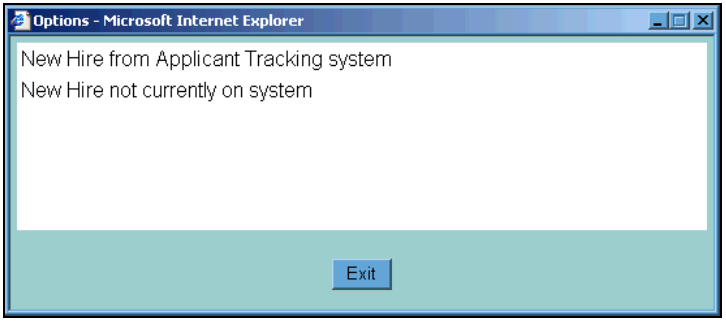
Component: Employee Resourcing
Process: Hire, Rehire, Reinstate an Employee
Task: Hire a New Employee

2. Select which checklist you want to use (optional)

In the Hire a New Employee checklist, there are two types of employees that you can hire. To proceed, you must select which type of employee you want to use. Skip this step if your checklist does not offer a similar option.

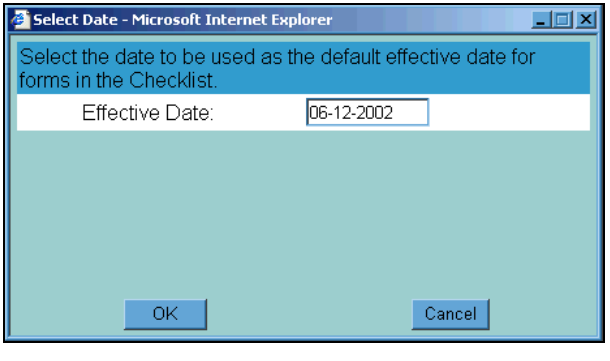
Select which type of employee you want to use:

- New Hire from Applicant Tracking system—if the employee's record has already been entered on the system.
- New Hire not currently on the system—if there is no existing record of the new employee.



3. Enter date

On the Select Date dialog box, enter a default effective date for the forms in this checklist.



4. Click OK

Click OK on the Select Date dialog.

5. Change employee (optional)

The first form of the checklist may open with the current employee. If you wish to change the employee, click the Change Employee button.

6. Enter a Number, Name or Social Sec Nbr

Enter the employee number, name, or Social Sec Nbr of the applicant you want to create as a new employee.

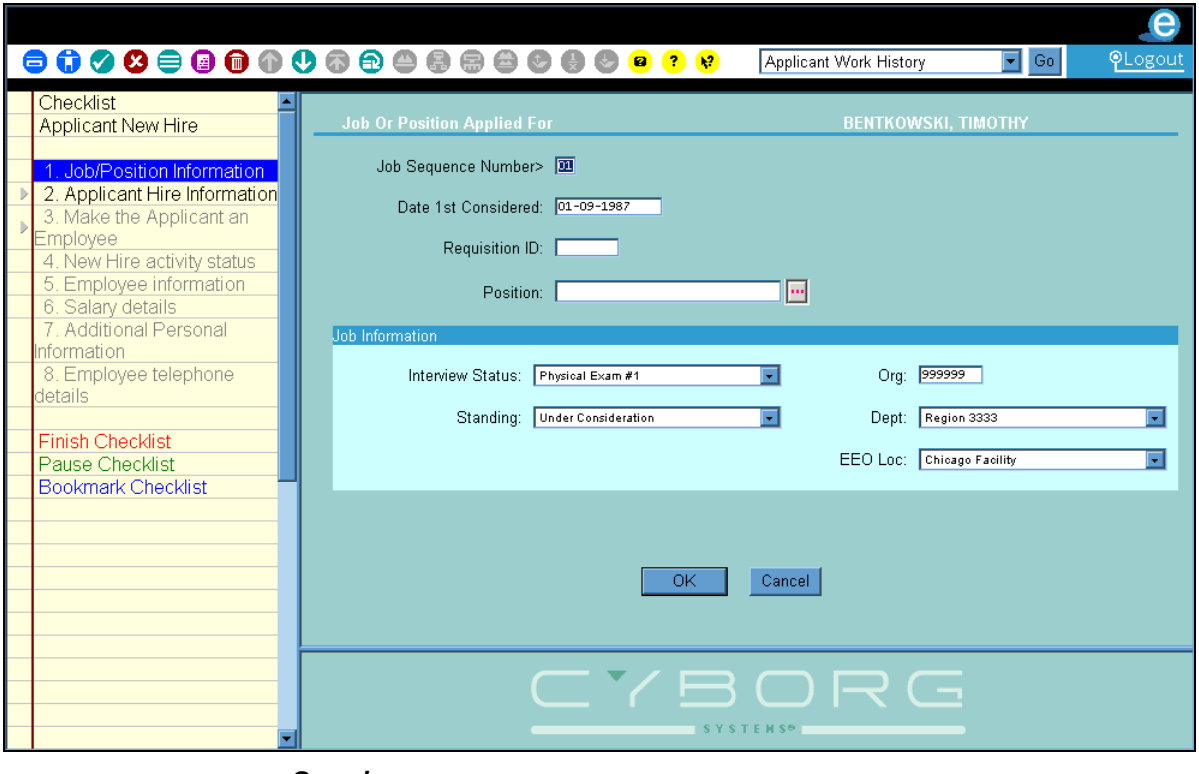
7. Select an Organization

In the Organization option list, select the organization in which you want to create the new employee.

8. Click OK

Click OK to access the checklist.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Understanding checklists ***(on page 56)***

For more information on checklists.

Changing to a different employee or organization

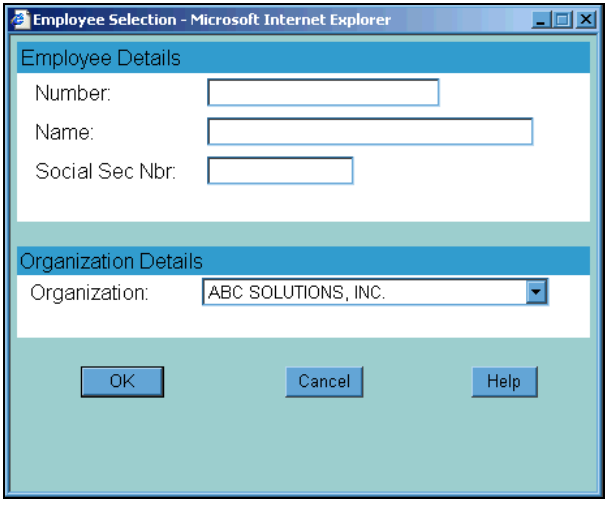
The Employee Selection dialog box can be used to select a different employee or organization.

In this example, you are going to select a different Employee Number and Organization.

1. Access the Employee Selection dialog box

Click the Change Employee button to access the Employee Selection dialog box.

Note: Before you can change to a different employee or organization, you must access a form.



2. Enter a Number, Name, or Social Sec Nbr

3. Select an Organization

Select the Organization that you want to use.

4. Click OK

When you click OK, the form will display the record for the selected employee.

See also:

- Switching between different employees and organizations ***(on page 63)***

For more information on how you switch between different employees and organizations.

Displaying a list of organizations

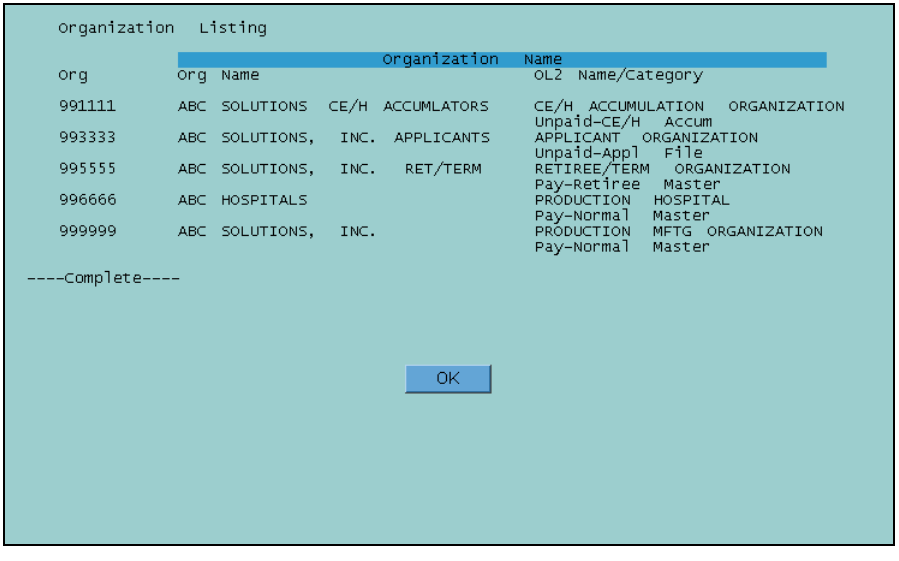
To display a list of the organizations that have been established on eCyborg, use the Organization Listing form (COLIST).

1. Access the Organization Listing form

Access this form by clicking the Enter Command button on the toolbar.

Type COLIST in the Program text box and click OK.

If you completed the previous step, the results should look similar to the example that follows:



Note: *The Organization Listing form (COLIST) can have multiple pages. To view the next page of records, click OK.*

The following message will appear when all the records on file have been viewed.

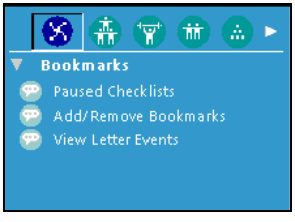
'----Complete----'

Viewing, editing, and printing a queued letter

To view, edit, and/or print a server event letter that has been queued, complete these steps:

1. Access the Queued Letters

Click View Letter Events on the Bookmarks area of your browser to access the Queued Letters, which have both a .dat and .doc file.

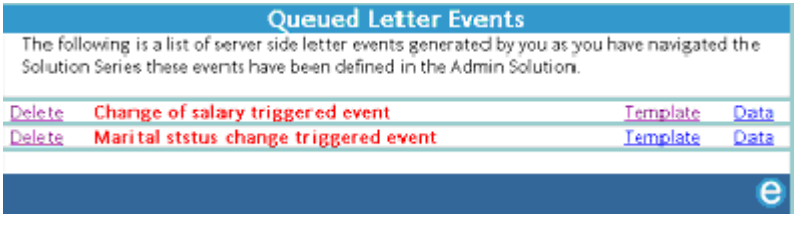


Note: A system message appears telling you there are no queued letters, if this is the case.

2. Download the files

Double click the Template for the letter you want to view, edit, and/or print. This downloads the template.

Double click the Data for the letter you want to view, edit, and/or print. This downloads the document using the template you downloaded.



Microsoft Word is started, data from The Solution Series is merged, and the letter is displayed in the word-processing application.

3. View, edit, and/or print the letter

If desired, you can edit and print the letter using the word-processor's functions.

4. Exit the application

Click the Exit button to close the word-processing application.

The word-processing application is closed.

Review of Questions Answered

1. How is the Navigator organized?

2. What effect does your user profile have on information you can access?

3. What method is provided to allow for switching between forms?

4. What are checklists?

5. What method is provided to allow the selection of a different employee?

CHAPTER 6

Using the Support Tools

In This Chapter

Introduction 86
The Help system 87
Report information.....97
Context-sensitive help 100
Electronic documentation 104
Detailed Directions 106
Review of Questions Answered.....111

Introduction

eCyborg support tools provide point-and-click access to a comprehensive set of product information. Whether you are looking for directions for completing a task, an example of a report, or context-sensitive help the information is available to you. This section explains the purpose of the delivered support tools and how to use them.

Tasks

This section explains the following:

- Accessing the Help menu
- Accessing help for all of eCyborg
- Accessing help for a component
- Accessing context-sensitive help for a form
- Accessing context-sensitive help for text and list boxes

Prerequisites

You should be familiar with using web browser software.

Questions answered

The following questions are answered in this section:

1. What types of online help are provided?
2. How do you access help on all of eCyborg?

The Help system

To effectively use the Help system, you should understand how it is organized and what types of help are available. There are several ways in which you can get help online with eCyborg:

- Modular help
- Standard online help
- Step-by-step directions
- Conceptual information
- Quick reference information
- Full text search

Modular help system

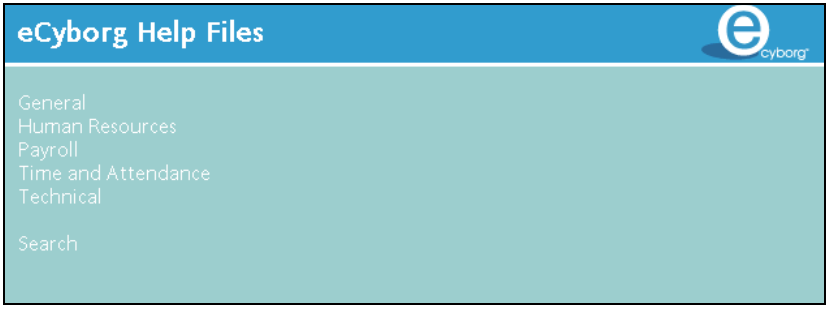
The system is delivered with a number of help files, arranged in a logical manner on your web server. Using a modular online help system means that you have two ways of looking at help:

- Help menu—displays help on the entire system, allowing you to search for information even if you are not sure of its location in the system.
- Help on a specific part of the system—allows you to search for and display help relating only to the component of the system in which you are interested.

Both help for all of eCyborg and help for a specific component use standard XHTML pages.

The Help menu

The Help menu provides access to all of the help files provided with eCyborg.



See also:

■ Accessing the Help menu ***(on page 106)***
For detailed directions on accessing the Help menu.

■ Accessing help on using the eCyborg web client ***(on page 106)***
For detailed directions on using the Help menu.

Standard XHTML help

Extensive online help is provided with eCyborg in the form of XHTML pages, including the following:

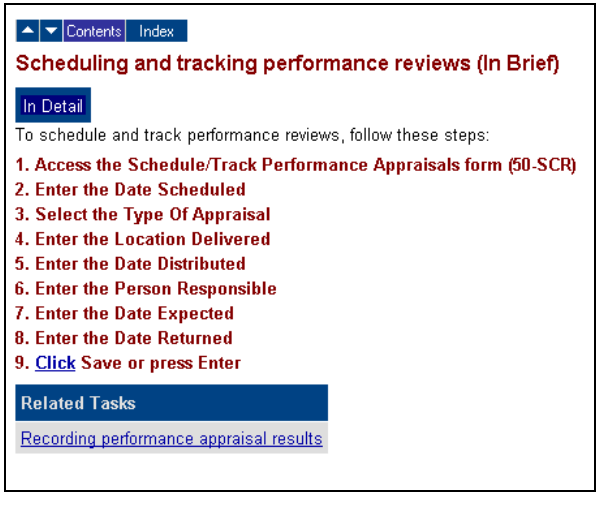
- Step-by-step directions
- Related topic information
- Conceptual information
- Quick reference information

Step-by-step directions

Step-by-step directions are provided for tasks, providing an important source of support while you complete a task.

You can display two levels of information in the detailed directions—in detail and in brief. 'In detail' lists the steps and provides additional rationale and tips. 'In brief' lists only the steps.

The following figure shows the 'In brief' display for the task 'Scheduling and tracking performance reviews':



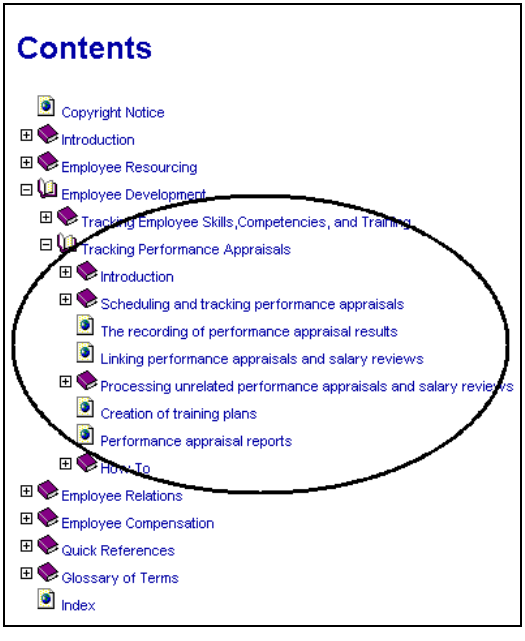
If enabled, the Up and Down arrow buttons will take you to other tasks you might complete in a series. Related tasks are also shown at the bottom of the page.

To access step-by-step directions for a task, you access the help for a form and then select the particular task from the 'See also' list.

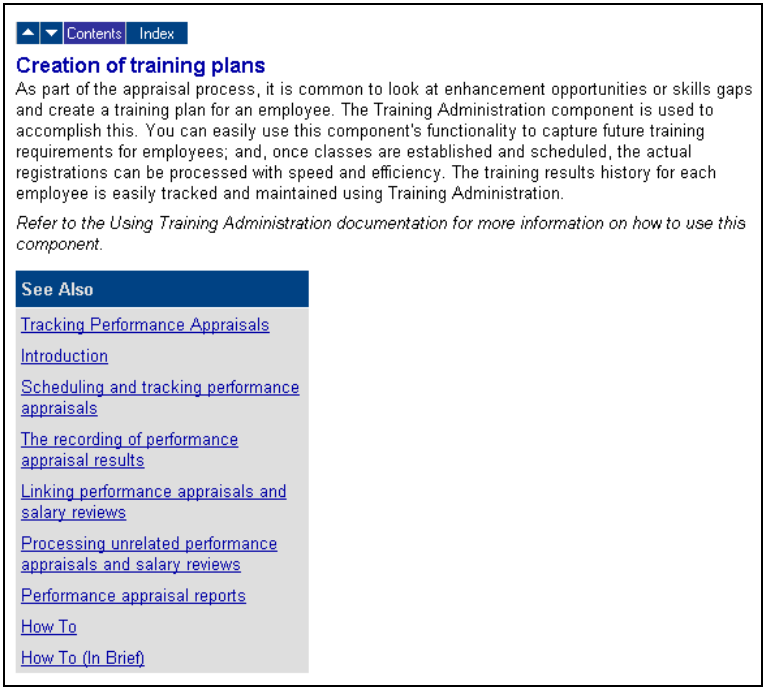
Conceptual information

Supporting conceptual information is provided for all tasks in the help. You can access these by looking in the help for a component.

For example, the Human Resource Management Administration component offers the following conceptual help on tracking a performance appraisal:



If you select the concept 'Creation of training plans', the following information will be displayed:


Contents Index

Creation of training plans

As part of the appraisal process, it is common to look at enhancement opportunities or skills gaps and create a training plan for an employee. The Training Administration component is used to accomplish this. You can easily use this component's functionality to capture future training requirements for employees; and, once classes are established and scheduled, the actual registrations can be processed with speed and efficiency. The training results history for each employee is easily tracked and maintained using Training Administration.

Refer to the Using Training Administration documentation for more information on how to use this component.

See Also

Tracking Performance Appraisals

Introduction

Scheduling and tracking performance appraisals

The recording of performance appraisal results

Linking performance appraisals and salary reviews

Processing unrelated performance appraisals and salary reviews

Performance appraisal reports

How To

How To (In Brief)

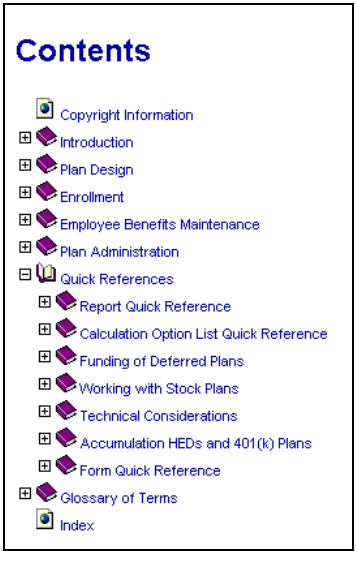
Links to related concepts and tasks are displayed at the bottom of the screen.

Quick reference information

Quick reference information is provided for a variety of information, including the following:

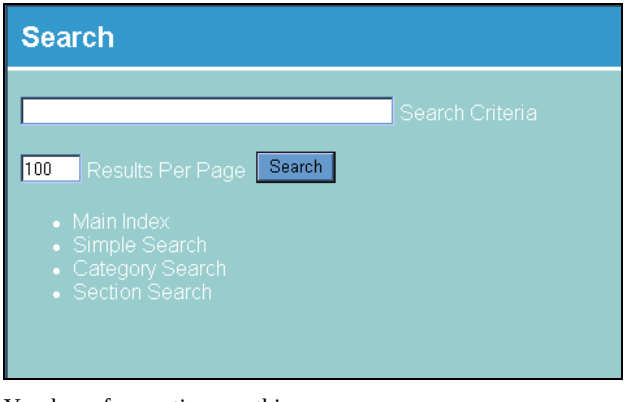
- Reports
- Forms
- Option lists
- Dialog boxes

This information is accessed from the Quick References section of the help.



Full text search

The Help menu includes a full text search, allowing you to search all, or a combination of, the help files. When you click the Search option on the Main Index page of the Help Menu, the main Search page is displayed:



You have four options on this page:

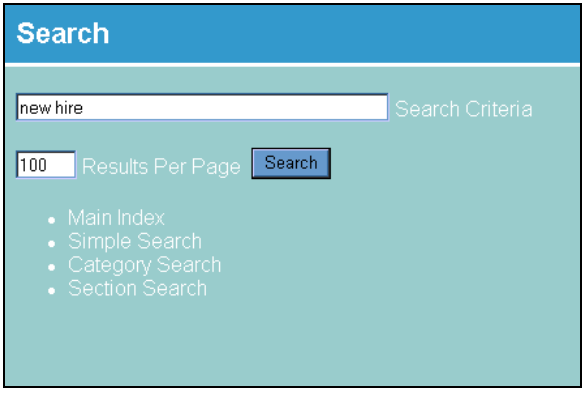
- Main Index
- Simple Search
- Category Search
- Section Search

Main Index

Click this option to display the main Help Menu.

Simple Search

This is the default search, which searches all of the help files for a word or phrase. For example, if you typed the words 'new hire' in the search box, and clicked Search...



...you will get the following results:

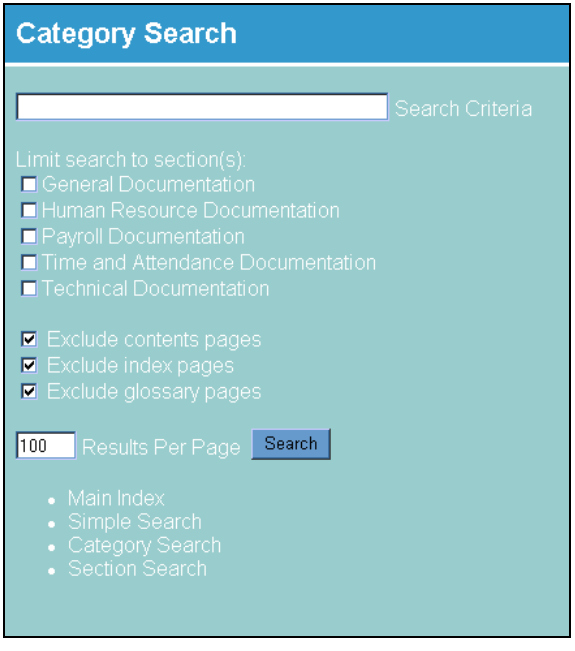
eCyborg Help Files

Document	Summary
New Hire form	New Hire form If you are using the Position Management Solution, this form is automatically created for you when you enter the Employee Information form (EF-SCR) or Set Up A New Employee form (NH-SCR). The form holds new hire data including the emplo
New Hire Details	New Hire Details You use templates called logical employee models when processing new hires. Each logical employee model contains default information to make the process more efficient. Your organization can have many logical employee m
New Hire checklist	New Hire checklist You use templates called logical employee models when processing new hires. Each logical employee model contains default information to make the process more efficient. Your organization can have many logical employe
Examples:	Examples: A02 New Hire I15 Increase-Merit S06 Increased Hours See Also HR12 - Job Type
Entering new hire activity details	Entering new hire activity details To enter new hire activity details, follow these steps: 1. Access the New Hire form (01-SCR) The New Hire form (01-SCR) is used to record the effective date of an employee's new hire activity. Access this form by making
New Hire (01-SCR)	New Hire (01-SCR) The New Hire form (01-SCR) is used to record an employee's New Hire activity. The Employee Information form (EF-SCR) must be entered and accepted to establish an employee before this or any other employee-level form may be used. If the Se
Processing future-dated new hires	Processing future-dated new hires By entering a Future Hire Date, you can use the Pending Plan Enrollment/De- Enrollment form (90-SCR) to process a New Hire option as of the date entered, even though the employee has not been actively hired on the cu
Major Activity Listing (1U-RPT) Example	Major Activity Listing (1U-RPT) Example CORPORATION 99 ACME MANUFACTURING MAJOR ACTIVITY AUDIT TRAIL REPT PAGE 1 DIVISION 9999 PRODUCTION CTL 1-2 AS OF 01-01-1985 1U-R TIME 14:26 DATE 02-19-1998 CTRL CTRL CTRL CTRL EMPLOYEE ORIGINAL ACTIVITY ------- ACTI
Entering new hire activity details (In Brief)	Entering new hire activity details (In Brief) To enter new hire activity details, follow these steps: 1. Access the New Hire form (01-SCR) 2. Enter the Effective Date 3. Select the Activity 4. Click Save or press Enter Related Tasks Transferring an appl

Click on any of the options in the left pane to bring up the relevant help page.

Category Search

You can limit your search to look in one or more categories:



The categories you can select (and therefore include in the search) are:

- General Documentation
  - Using the eCyborg Web Client
  - Optimizing System Features
  - Solution View
  - Field and Verb Descriptions

- Human Resource Documentation
  - Implementing Human Resources Administration
  - Benefits Administration
  - Using Human Resources Administration
  - Position Administration
  - Requisition Administration
  - Salary Administration
  - Training Administration

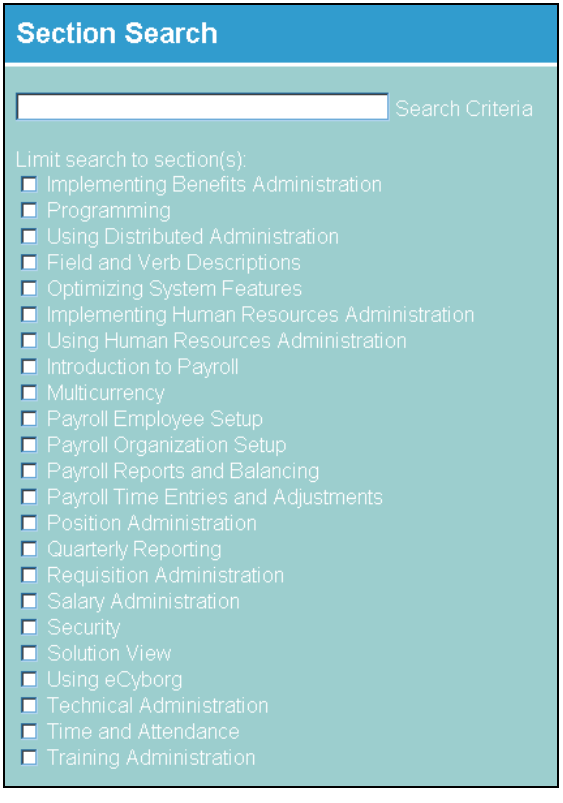
- Payroll Documentation
  - Introduction to Payroll
  - Payroll Organization Setup
  - Payroll Employee Setup
  - Payroll Reports and Balancing
  - Payroll Time Entries and Adjustments
  - Multicurrency
  - Quarterly Reporting

- Time and Attendance Documentation
  - Time and Attendance Administration

- Technical Documentation
  - Programming
  - Security
  - Distributed Administration
  - Technical Administration

Section Search

You can limit your search to particular help files:



Select those sections you wish to include in your search.

Report information

You can access report information directly from the Navigator. Each process contains a Report Information item; this item is always the bottom item in the list.

The following figure shows the tasks and Report Information item for the process Track Performance Appraisals. To view report information, click the Report Information option.

Clicking on the Report Information option will bring up a list of all of the reports associated with a component. The following example shows the Reports available for the Benefits Administration component:

You can then choose a specific report for more detailed information. For example, if you selected quick reference help on the 'Benefit Plan Tables Report (9KARPT)' report, the following information would be displayed. Click the small picture of the camera to see an example of the report.

Benefit Plan Tables Report (9KARPT)

Example

The Benefit Plan Tables Report (9KARPT) displays all of Benefits Administration table records associated with a plan or a range of plans specified on the parameter form.

Business Tasks

This report is used to complete the following business tasks:

- Review benefits plan rules and options
- Analyze plan coverage and cost
- Analyze plan eligibility rules
- Analyze vesting and participation rules
- Analyze HED prototype

Report field details

The fields on this report are listed in the documentation for each of Benefit Administration table record reports.

Parameter options and setup

- **Control Number**—Enter the Control Number of the table set you want to print. Specify this parameter and leave the As Of Date field blank to include all table records in the table set, regardless of date.
- **As Of Date**—Enter in CCYYMMDD or MM-DD-CCYY (US and Canada) or CCYYDDMM or DD-MM-CCYY (elsewhere) format to select the table records in effect as of this date. Specify this parameter and leave the Control Number field blank to include all table records.
- **Beginning Range Plan ID**—Enter the first benefit plan in the range to be printed. If you want to print only one plan, specify it here.
- **Ending Range Plan ID**—Enter the last benefit plan in the range to be printed.

See also:

- ***Plan documentation for welfare plans***

For information on how to use this report.

Context-sensitive help

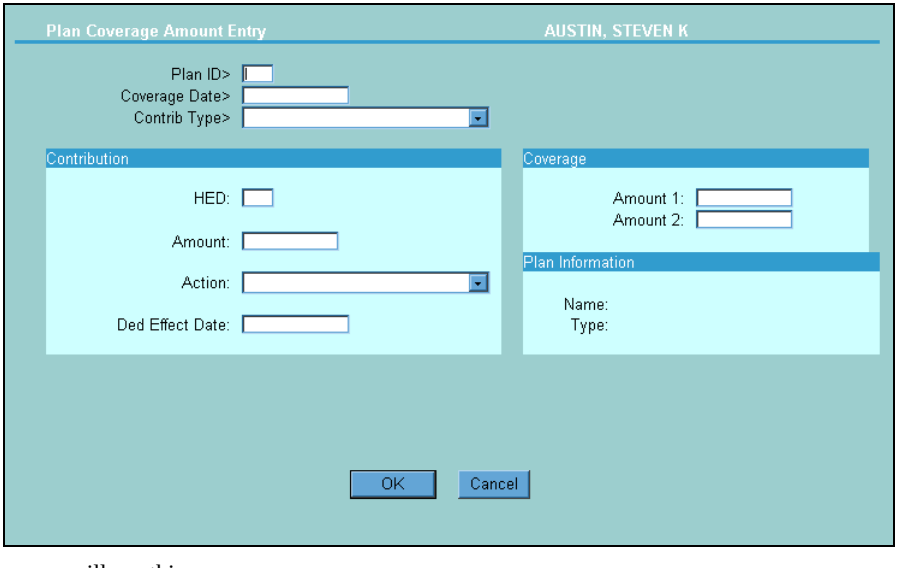
The levels of context-sensitive help that are available to you are:

- Form
- Text or list box
- Dialog

Help on forms

To learn the purpose of a form, use the form-level help. To display form-level help, access a form and click the Help on This Form button on the toolbar.

For example, if you click the form-level help button on the Plan Coverage Amount Entry form (53-SCR):



…you will see this:

Plan Coverage Amount Entry (53-SCR)

The Plan Coverage Amount Entry form (53-SCR) is used to view or record an employee's coverage and contribution amounts in a welfare benefits plan.

When an employee is enrolled in a welfare plan or changes the option, coverage, contribution, or status, an entry is made on the Welfare Plan Enrollments/Changes form (55-SCR). At that time, one Plan Coverage Amount Entry form (53-SCR) is system generated for each contribution type available under the welfare plan.

This form contains the effective date of the coverage and the Coverage Amount 1, Coverage Amount 2, and annualized contribution amount for the contribution type. The annualized contribution amount is then de-annualized to the employee's frequency. The Contribution Action list box is used to record whether the values on this form were accepted as calculated by the plan rules, overridden, or entirely rejected.

The Plan Coverage Amount Entry form (53-SCR) is intended to provide a historical record of an employee's plan coverage amounts.

Business Tasks

This form is used to perform the following business task:

- Viewing coverage and contribution amounts

The Business Tasks section provides links to detailed directions for completing business tasks associated with this form.

See also:

■ Accessing context-sensitive help for a form ***(on page 108)***

For detailed directions on accessing context-sensitive help for a form.

Help on text and list boxes

To access help on text and list boxes on a form, use the 'What's This?' help button on the toolbar, and then click in the box you want to know about.

For example, if you wanted to know about the Address text box on the Employee Information form (EF-SCR), you would drag the help icon to 'Address' and click. In this instance, the following help will display:

ADDRESS

Description

This alphanumeric field contains 30 characters.

Business Use

The Address field is used to enter the street number and street name portion of the applicant's address.

See also:

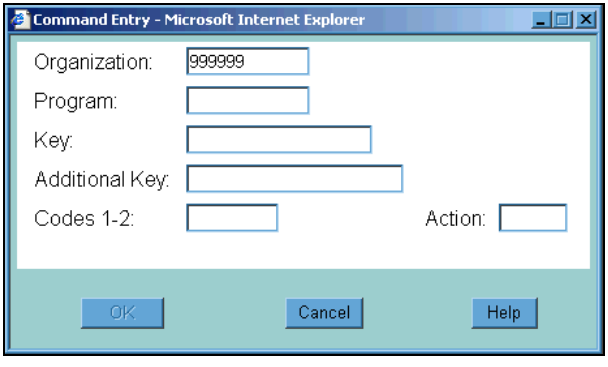
■ Accessing context-sensitive help for text and list boxes ***(on page 109)***

For detailed directions on accessing context-sensitive help for a box or list.

Help on dialog boxes

Clicking on the Help button on a dialog box will bring up the help associated with that dialog.

For example, if you click the Help button on the Command Entry dialog box:



...you will see this help page displayed:

Command Entry

Use the Command Entry dialog box to enter the IDs of forms, queries, other programs, and other parameters that may be required. When you choose the OK button, the command constructed from your entered parameters is executed.

Command Entry contains:

- Organization
- Program
- Key
- Additional Key
- Codes 1-2
- Action

Organization

If it is not already displayed in the text box, enter the ID of the company whose information you want to enter/and or display.

Program

Enter the ID of the form you want to display or the query or program to execute.

Key

Type the key value (for example, Employee Number). The system uses the values in the Program and Key text boxes to display the form and data you requested. The value in the Key text box must be consistent with the requirements of the form you requested.

Additional Key

Use this text box to continue the entry made in the Key text box when the entry is too long to fit in just the Key text box. You may also make an entry in the Additional Key text box to specify a special value required for processing the form or program.

Codes 1-2

If required, type a Code1 value in the first character position and/or a Code2 value in the second character position of this text box. Code1 valid entries are E or blank (Default), I for inquiry, and K for a 'what-if' mode. Code2 valid entries are U go to the next form in the stack, S

Electronic documentation

We host a full set of One-Stop Documentation on the Hewitt eCyborg Customer Center Documentation pages.

Each of these electronic manuals is a complete One-Stop Document; it includes all of the appendices, glossary, index, and the training exercises you would find in a printed manual. You can access and view this set of One-Stop Documentation user manuals, allowing you to print an entire manual or sections of a manual.

Note: *If you do not have access to the Customer Center, speak to your Administrator, who should be able to access the documentation for you.*

Note: *These manuals may be stored locally on a network server. Consult your System Administrator for specific instructions on how to access the electronic documentation at your site.*

The electronic documents are saved in the Portable Document Format (PDF) from Adobe Systems, Inc. You cannot view these documents in your word processor, rather you would use the Adobe Acrobat Reader (available as a free download from Adobe Systems, Inc.).

Adobe Acrobat Reader

The Adobe Acrobat Reader is a tool produced by Adobe Systems, Inc. The Acrobat Reader allows you to access Acrobat documents we have produced. These documents can be used online, or printed out for an exact replica of the documentation. The Adobe Acrobat Reader will help you to:

- Access and read all electronic documentation
- Search for any word or phrase within a document
- Search for any word or phrase across all electronic documents
- Print out a hard copy of any document precisely as it would have been produced

☞ *Refer to the Adobe Acrobat Online Guide for further information on how to use the Adobe Acrobat Reader. You can access the Adobe Acrobat Online Guide by starting the Acrobat Reader and selecting the Help menu and then the Reader Online Guide option.*

Detailed Directions

This section provides detailed directions on completing a business task.

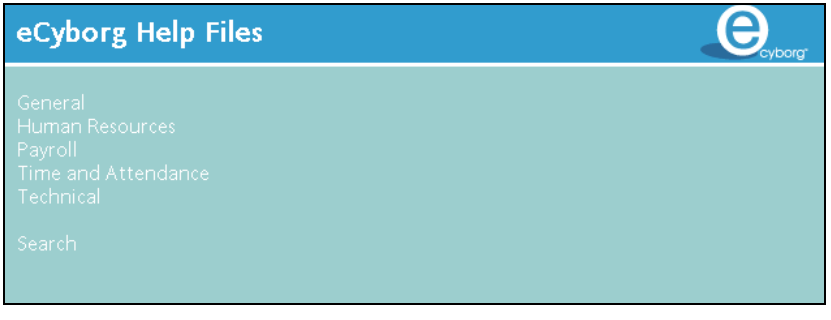
Tasks

Accessing the Help menu 106
Accessing help on using the eCyborg web client 106
Accessing help for a component from the Help menu 107
Accessing context-sensitive help for a form 108
Accessing context-sensitive help for text and list boxes 109

Accessing the Help menu

To access the Help menu from the toolbar, click the Help Menu button:

The help files are grouped in components.



See also

- The Help system ***(on page 87)***

For more information about help on eCyborg.

Accessing help on using the eCyborg web client

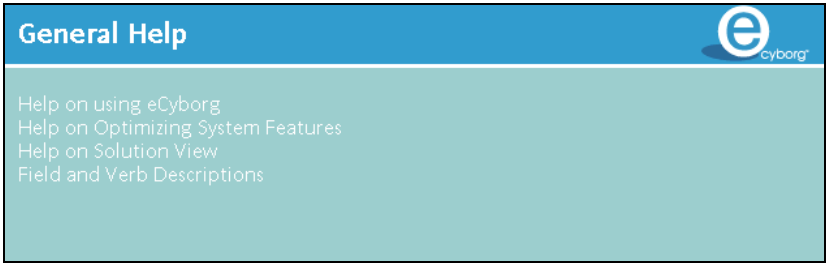
To access help on using the eCyborg web client, follow these steps:

1. Access the Help menu

Access the Help menu by clicking the Help Menu button.

2. Click General

Click the General option.



3. Click Help on using eCyborg

Click the 'Help on using eCyborg' item. The help file for using eCyborg will display in your browser window.

See also:

- The Help system ***(on page 87)***

For more information about help on eCyborg.

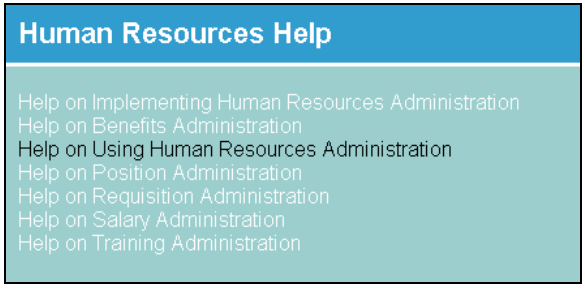
Accessing help for a component from the Help menu

To access help for a particular component of the system using the support interface, follow these steps:

1. **Access the Help menu**
   Access the Help menu by clicking the Help Menu button on the toolbar .

2. **Click an item containing a component**
   Click the item in which you are interested.

3. **Click the item in which you are interested**
   Click an item and the help file will be opened.



See also:

- The Help system ***(on page 87)***

For more information about help on eCyborg.

Accessing context-sensitive help for a form

To access context-sensitive help for a form, access a form and follow these steps:

1. Access a form

Access the form for which you want to see help.

2. Click the Help on this Form button

Click the Help on this Form button on the toolbar. The help for that form will be displayed in a browser window.

If you completed the previous steps, the results should look similar to the example that follows:

Employee Information form (EF-SCR)

The Employee Information form (EF-SCR) is used to add an applicant or new employee to the Employee Database (FILE02) using a Local Employee Model and to change existing employee information

A legal name and address must be entered for every employee. Name Code 001 is always reserved for the legal name and address. It is used as payee information in the Payroll module unless another Name Code is set up for this function. The Name Code is required whether you are entering information online or in batch.

Note This form cannot be used to update a Logical Employee Model. You must use the Employee Name And Address form (FF-SCR) for the Logical Employee Model instead.

Business Tasks

- ***Using the Employee Information form (FF-SCR) to enter basic information***

For more information about this form.

See also:

- Help on forms ***(on page 100)***

For more information about help on forms.

Accessing context-sensitive help for text and list boxes

To access context-sensitive help for a box or list, access a form and follow these steps:

1. Access a form and position the pointer

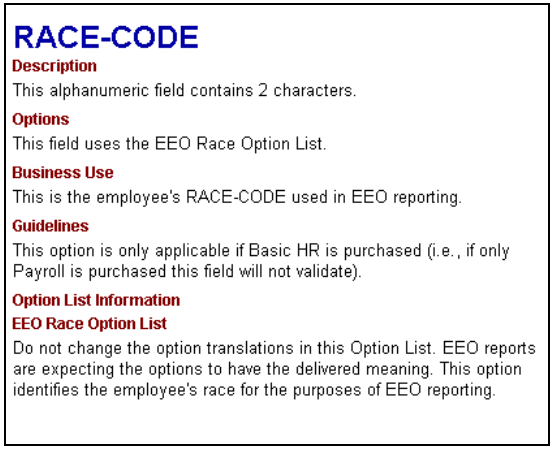
Access the desired form and then position the pointer in the text or list box for which you want to see help.

2. Click the 'What's This?' button

Click the 'What's This?' button on the toolbar. The pointer will now have a question mark associated with it.

3. Click the box or list

Click the box or list about which you want help to display the context-sensitive help.



RACE-CODE

Description

This alphanumeric field contains 2 characters.

Options

This field uses the EEO Race Option List.

Business Use

This is the employee's RACE-CODE used in EEO reporting.

Guidelines

This option is only applicable if Basic HR is purchased (i.e., if only Payroll is purchased this field will not validate).

Option List Information

EEO Race Option List

Do not change the option translations in this Option List. EEO reports are expecting the options to have the delivered meaning. This option identifies the employee's race for the purposes of EEO reporting.

See also:

- Help on text and list boxes ***(on page 101)***

For more information about field-level help.

Review of Questions Answered

1. What types of online help are provided?

2. What is the Help menu?

CHAPTER 7

Working with Data

In This Chapter

Introduction 114
Viewing data.....115
Adding and modifying data 121
Option lists.....124
Form actions 129
Record deletion.....133
System messages 134
Detailed Directions 136
Review of Questions Answered.....161

Introduction

When you begin to enter data into eCyborg, you need to know how to select different employees, as well as the different formats that the system will accept when you enter different types of data. This section tells you how to access a different employee and explains the different data formats.

Tasks

This section explains the following:

- Displaying employee data using Employee Number, name, or Social Security Number
- Displaying employee data using phonetic search
- Displaying a selection list in the message area
- Choosing a record from a selection list
- Displaying an employee profile
- Clearing all boxes on a form
- Entering dates
- Entering numeric data
- Using option lists
- Saving changes to a form
- Canceling changes to a form
- Adding a record
- Modifying a record
- Deleting a record
- Responding to reject messages
- Responding to warning messages

Prerequisites

Before you can complete the tasks in this section you need to have completed the following:

- Logged on to eCyborg.
- Read ***Exploring the Work Area*** (on page 35) that introduces you to eCyborg interface.
- Read ***Navigating the System*** (on page 47) that explains how you navigate eCyborg.

Questions answered

The following questions are answered in this section:

1. What methods are available for viewing employee and organizational data?
2. What types of numeric data are used?
3. What are option lists and how are they used?
4. What actions can be performed when working with forms?
5. How are employee and organizational data deleted?
6. What types of system messages are provided?

Viewing data

When using eCyborg, you work with both employee and organizational data. This section explains how to access employee data.

Employee data

Employee data is stored in records that contain information that is specific to an employee.

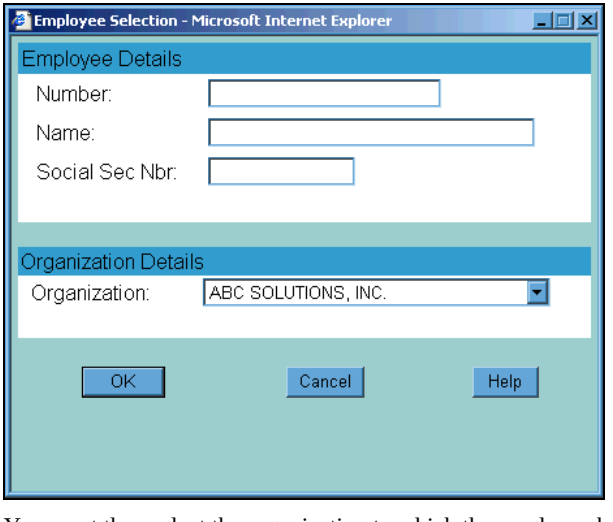
Accessing employee data

Employee data is stored in records that contain information that is specific to an employee.

In order to view a record for an employee, you need to identify to the system which employee's record you want to access.

You can access an employee's record by entering the relevant information in one of three text boxes in the Employee Selection dialog box.

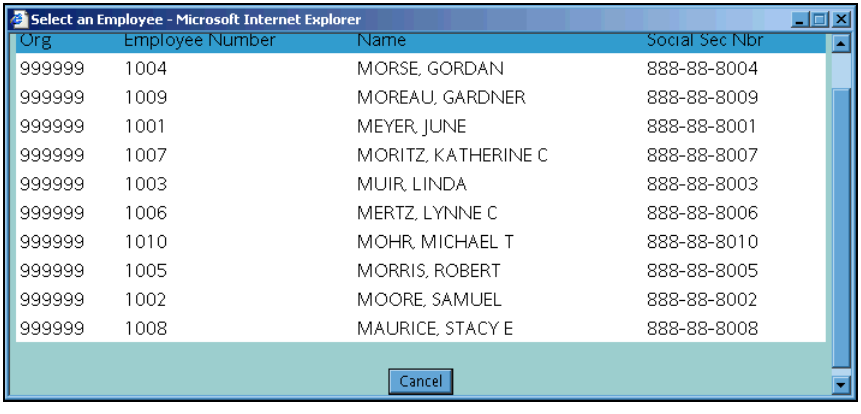
- Number—Employee Number
- Name—Employee Name
- Social Sec Nbr—Employee Social Security Number



You must then select the organization to which the employee belongs.

When you have entered the relevant information, click OK to access the employee's record.

When you enter an employee's name, you can enter either the complete name using the correct mix of upper and lower case, or just the last name. If you enter the last name, the Select an Employee dialog box will be shown, from which you can select the exact employee and access his or her record.



Org	Employee Number	Name	Social Sec Nbr
999999	1004	MORSE, GORDAN	888-88-8004
999999	1009	MOREAU, GARDNER	888-88-8009
999999	1001	MEYER, JUNE	888-88-8001
999999	1007	MORITZ, KATHERINE C	888-88-8007
999999	1003	MUIR, LINDA	888-88-8003
999999	1006	MERTZ, LYNNE C	888-88-8006
999999	1010	MOHR, MICHAEL T	888-88-8010
999999	1005	MORRIS, ROBERT	888-88-8005
999999	1002	MOORE, SAMUEL	888-88-8002
999999	1008	MAURICE, STACY E	888-88-8008

See also:

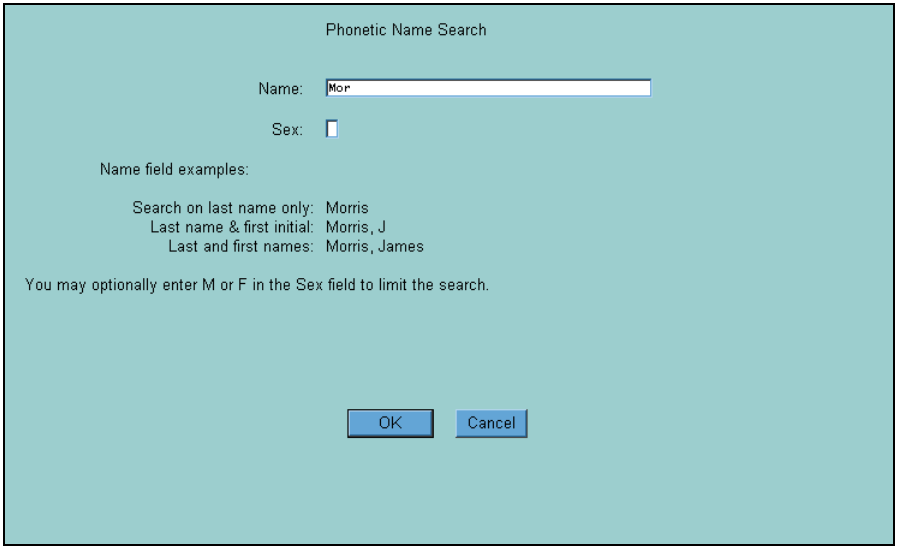
- Displaying employee data using Employee Number, name or Social Security Number ***(on page 136)***

For detailed directions on viewing employee data.

Accessing an employee using phonetics

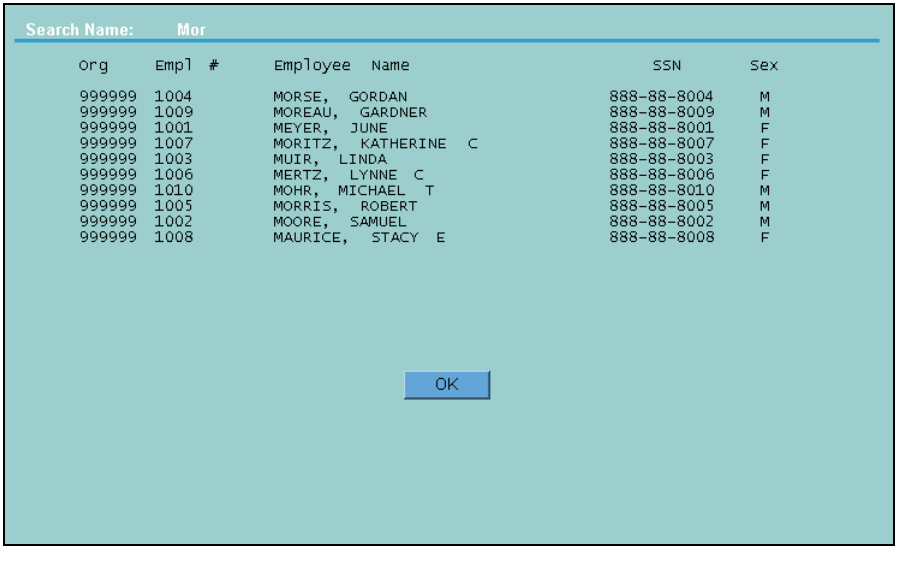
There may be occasions when you are provided with an employee's name, and you need to check the system to ensure that you have the correct spelling and that there are not several employees with a similar name.

When you enter a name on the Employee Phonetic Name Lookup form (PHONET), any name that sounds close to your guessed spelling is displayed, so that you can find the correct spelling.



When the results of the search are displayed, you can find out:

- Which organization he or she is in
- The Employee Number
- The correct spelling of the employee's name
- The Social Security Number
- The Sex of the employee



When you have this information, you can use the Employee Selection dialog box to access the employee's record.

Click OK to return to the Employee Phonetic Name Lookup form (PHONET).

See also:

- Displaying employee data using phonetic search ***(on page 138)***

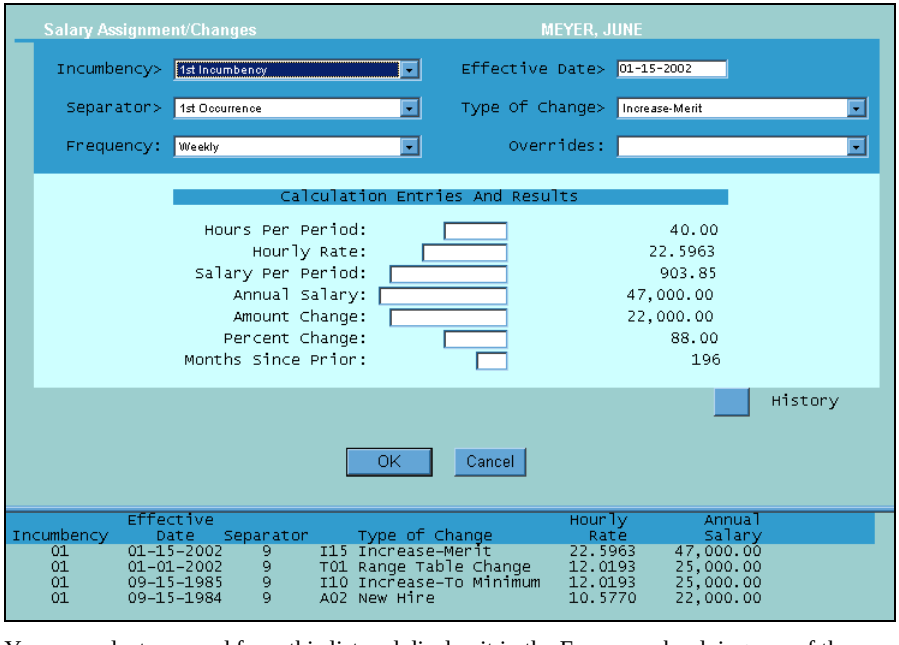
For detailed directions on using the Employee Phonetic Lookup form.

Viewing multiple occurrences of data on a form

When you access a form that contains historical or multiple occurrences of data, the most current data will be displayed. If a form has multiple or historical records, you can access these records through the Selection list. For example, from the Salary Assignment/Changes form (40-SCR) you can access the history of an employee's salary and assignment changes. The Selection list is displayed in the Message area.

You can display the Selection list using the Selections button on the Standard toolbar. The Selections button is only enabled when there are multiple or historical records.

The following example shows the history of June Meyer's salary and assignment changes:



You can select a record from this list and display it in the Form area by doing one of the following:

- Clicking anywhere on an item in the list
- Using the up and down arrows on the toolbar to display in the Form area the different records listed on the Selection list

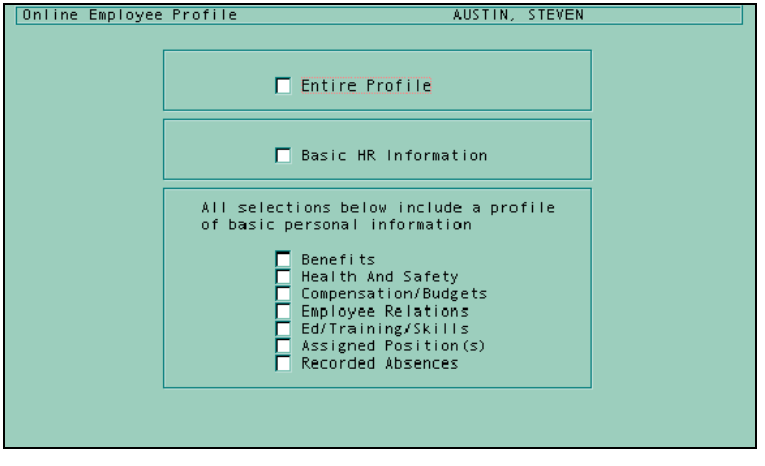
See also:

■ Displaying a selection list in the Message area ***(on page 141)***
For detailed directions on accessing multiple occurrences of a form.

■ Choosing a record from a selection list ***(on page 142)***
For detailed directions on selecting a record from the selection list.

Employee Profiles

You can use an employee profile to view a summary listing of all or part of an employee's data. The Online Employee Profile form (PROFIL) displays data from different parts of an employee's master record. An employee profile can be used to view data on an employee's benefits, training, or absences.



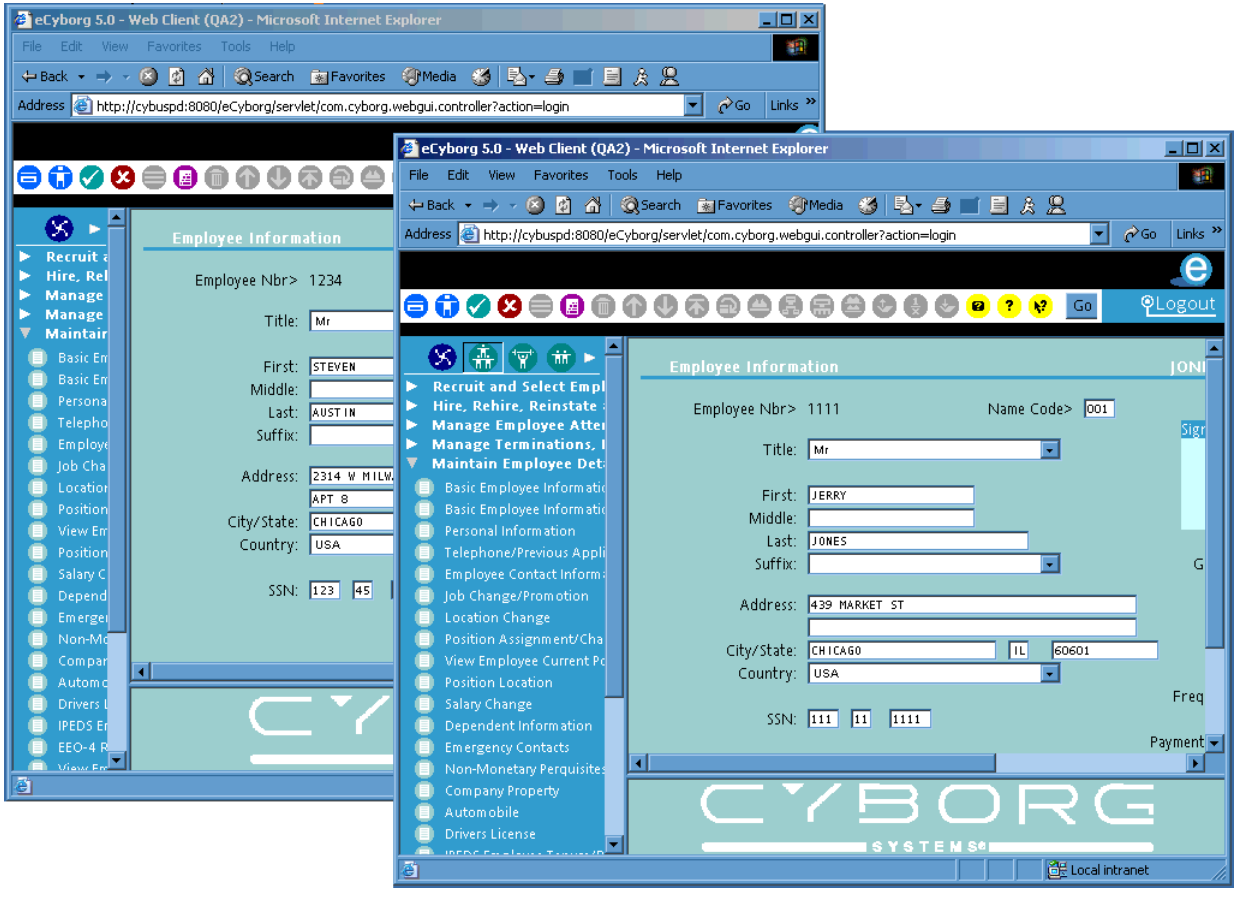
Note: *This feature is typically used by experienced users who are very familiar with employee data.*

See also:

■ Displaying an employee profile ***(on page 142)***
For detailed directions on displaying an employee profile.

Using multiple sessions to view additional data

If you need to view two forms at once, you can run multiple sessions of eCyborg and either toggle between the two sessions, or adjust the size of your browser's window so that you can see two forms simultaneously.



Adding and modifying data

There are different types of text box in eCyborg:

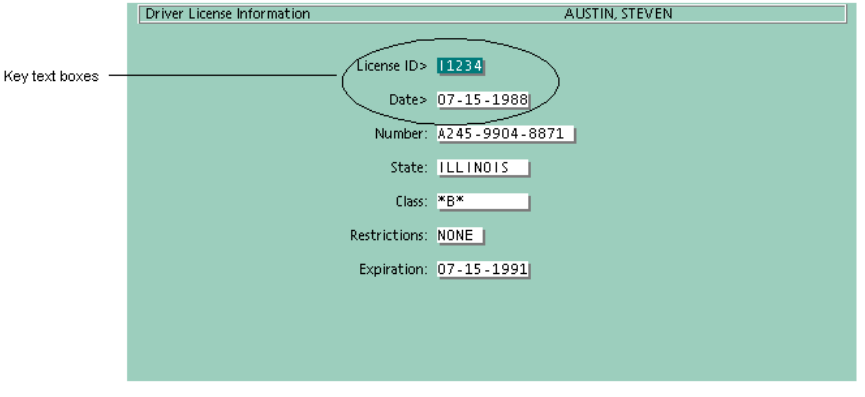
- Key
- Character
- Date
- Numeric

In order to enter data correctly, you need to know what types of data can be entered into the different types of text boxes.

Key text boxes

Every form will have at least one key item (text box, option list, and so forth). eCyborg uses key items as the means of making each record unique. A key item is identified by a > (greater than) symbol next to the text box or display on a form.

For example, there are two unique items on the Driver License Information form (25-SCR), License ID and Date. These items are needed in order to make the record unique:



Character text boxes

Character text boxes are alphanumeric text boxes. They can contain text or numeric characters. Two types of character text boxes are used in eCyborg:

- Unformatted character text boxes—contain 1 to 60 characters that can be entered in any order or format.
- Formatted character text boxes—contain 1 to 30 characters that must be entered in a specific format.

Date text boxes

Date information is presented in the following formats:

- MM-DD-CCYY (US and Canada, excluding Quebec)
- DD-MM-CCYY (elsewhere)
  - MM—Month (01 for January, 12 for December)
  - DD—Day (01 for the first of the month, 10 for the tenth of the month)
  - CC—Century (19 for the twentieth century, 20 for the twenty-first century)
  - YY—Year (02 for the second year of the century)

For example 12-31-2002 represents December 31, 2002 in the MM-DD-CCYY format. 31-12-2002 represents December 31, 2002 in the DD-MM-CCYY format.

Numeric text boxes

eCyborg is delivered with several types of numeric text boxes. When you enter numerical data that contains decimals into these text boxes, you must follow certain formats. The numeric text boxes include the following:

- Rates
- Hours
- Percentages
- Amount/Salary

See also:

- Entering numeric data ***(on page 146)***

For detailed directions on entering numeric data.

Numeric text boxes and decimals

Most of the numeric text boxes use decimal places.

When you enter numeric data that contains decimal places, you can either enter the decimal place manually, or let the system enter the decimal for you.

The following formats must be used when entering numeric data that contains decimals.

Rate text boxes

A rate text box uses four decimal places. For example, 12.40 can be entered as:

- 12.40
- 12.4000
- 124000

Hour text boxes

An hour text box uses two decimal places. For example, 40 hours can be entered as:

- 40.
- 4000

Percentage text boxes

A percentage text box uses two decimal places. For example, 33.3% can be entered as:

- 33.3
- 3330

Amount and Salary text boxes

An amount or salary text box uses two decimal places. For example, 1,000.00 can be entered as:

- 1000.
- 100000

See also:

- Entering numeric data ***(on page 146)***

For detailed directions on entering numeric data

Option lists

An option list contains a list of predefined options from which you may choose. You must choose one of the predefined options as your selection. In contrast to a character text box, you can not key your own data into an option list.

For example, the Frequency option list (PP29) on the Employee Information form (EF-SCR) has the following options:

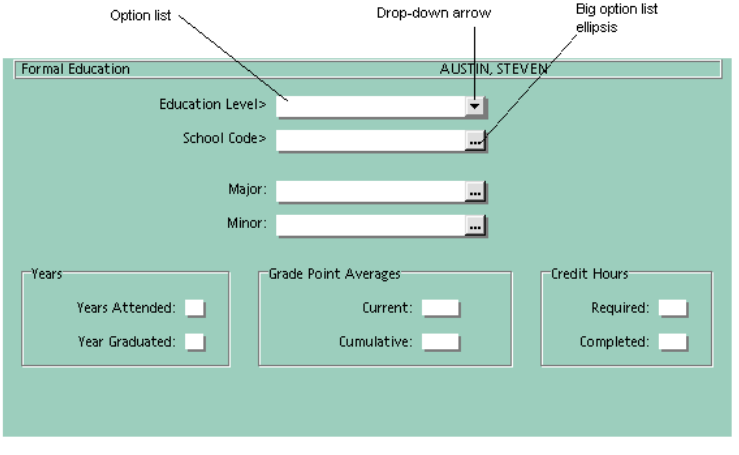
- None
- Bi Weekly
- Monthly
- Semi Monthly
- Weekly

Types of option lists

There are two types of option lists:

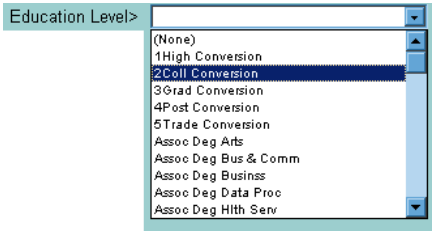
- Standard option lists—identified by a drop-down arrow

- Big option lists—identified by an ellipsis



Standard option list

Click the drop-down arrow to display the option list. Select an option by clicking it. When you select an option, the list collapses and your selection is displayed.



See also:

- Selecting an option from an option list ***(on page 147)***

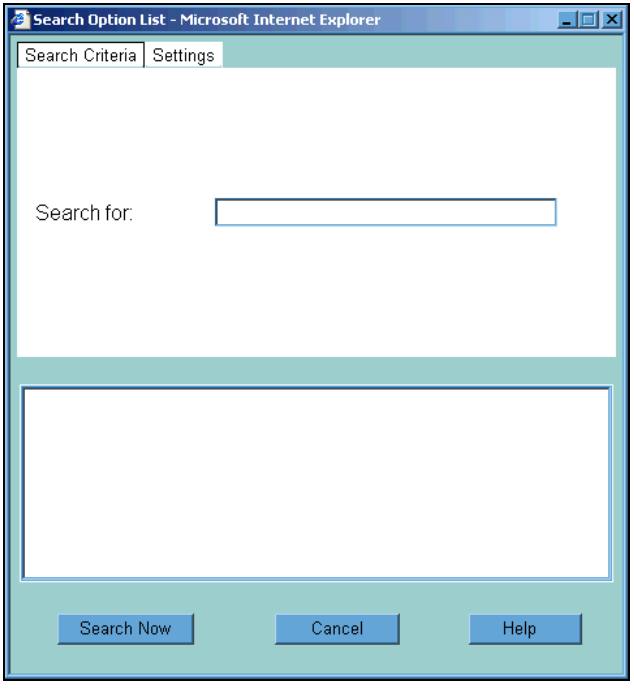
For detailed directions on using an option list.

Big option list

A big option list is indicated by an ellipsis (three dots where the drop-down arrow would normally be displayed):

A big option list is used to help you narrow the selections from a large list. For example, on the Formal Education form (30-SCR) the School Code option list (HR32) contains too many education establishments to be displayed in a standard drop-down list box.

When you access a big option list, the Search Option List dialog box is shown:



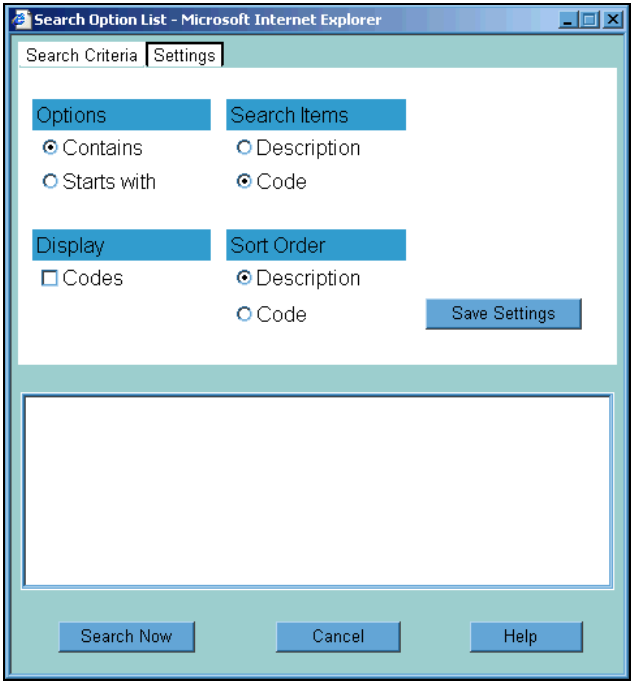
The Search Option List dialog box contains two tabs—Search Criteria and Settings.

Search Criteria tab

The Search Criteria tab contains the Search for text box. To search for an option, enter either its complete name or part of its name. For example, you could enter all or part of the name of the educational establishment you want to select.

Settings tab

When you have entered an option, you can click the Search Now button, or you can refine your search using the options on the Settings tab:



- Options group box
  Choose to search for an option that either Starts with or Contains your choice.

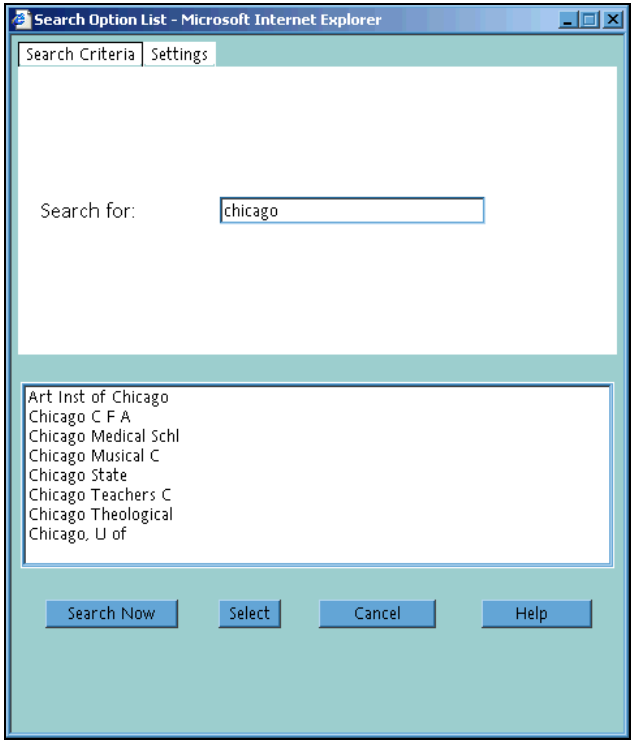
- Search Items group box
  Choose to search for a Description of the educational establishment or its Code.

- Display group box
  Choose the Codes check box to display the code for each educational establishment.

- Sort Order group box
  Choose to sort the educational establishments alphabetically by Description or Code.

If you have used the Settings tab to refine your search, click the Search Now button to begin the search.

If the system finds an option(s) that matches your selection, the Search Option List dialog box reveals the results. The following example shows the results for a search for anything containing 'chicago' in the School Code option list on the Formal Education form (30-SCR):



If your option is displayed, you can select it and click the Select button.

If your selection is not displayed, you can try again by entering a new option in the Search for text box.

See also:

- Selecting an option from a big option list ***(on page 148)***

For detailed directions on using a big option list.

Form actions

When you access a form, you have a range of options for actions.

Note: *You cannot close a form on the Form area. In order to protect confidential information from being observed on your screen, you should either log out of eCyborg or minimize it when you are not using it.*

The following table contains the options that are available:

Button	Name	Description
	Save	Saves the current data. This button is enabled when you have entered new data or amended existing data.
	Cancel	Cancels changes made to the current data. This button is enabled when you have entered new data or amended existing data.
	Change Employee	Accesses the Employee Selection dialog box.
	Select	Displays the Selection List in the Message area. This button is enabled when there are multiple records for the form you have accessed.
	Clear Fields	Clear the data in the current record (form, table and so forth).
	Delete This Entry	Deletes the current selected record (form, table and so forth).

In addition, you can use your browser options to print your current work area, and to move backwards and forwards between previously accessed forms.

Options for updating data

When you access a form it will generally be populated with the most recently entered data. When you are entering new data on a form that already has data displayed on it, you have three choices:

- Clear all the data
- Clear existing data for specific text boxes
- Key over the existing data

Clearing all data boxes on a form

When entering new data, we recommend that you first clear the form to remove all the data from the text boxes. Clearing the form does not delete the existing information.

To clear a form, you use the Clear Fields button on the toolbar:

See also:

- Clearing all boxes on a form ***(on page 145)***

For detailed directions on clearing text boxes on a form.

Keying over existing data

You can enter new data on a form by keying over the existing data. However, if you do this, you run the risk of mixing up the existing data with the new data and saving the wrong data.

See also:

- Modifying a record ***(on page 155)***

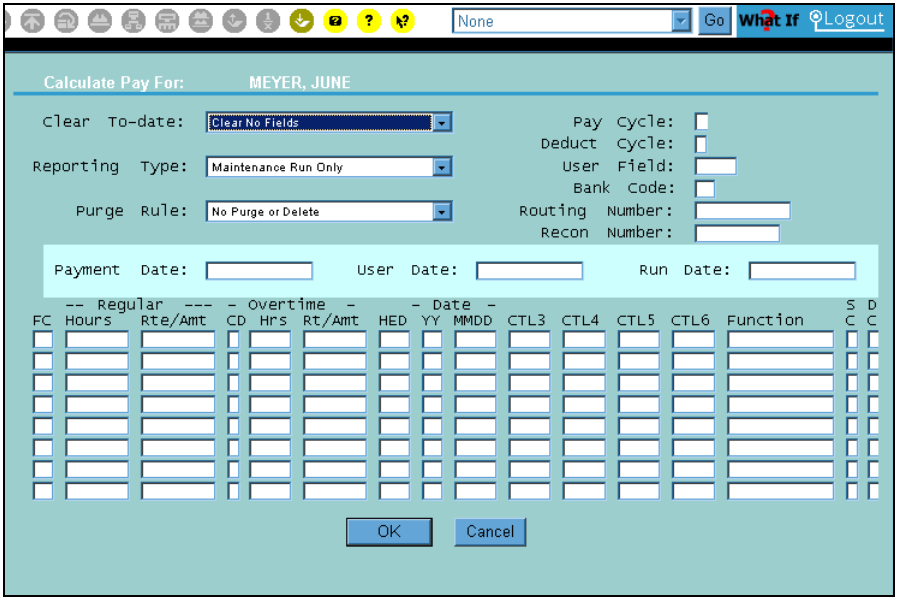
For detailed directions on modifying information on a form.

What-if and update modes

When you are in What-if mode, an icon will display beside the Logout button on the toolbar:

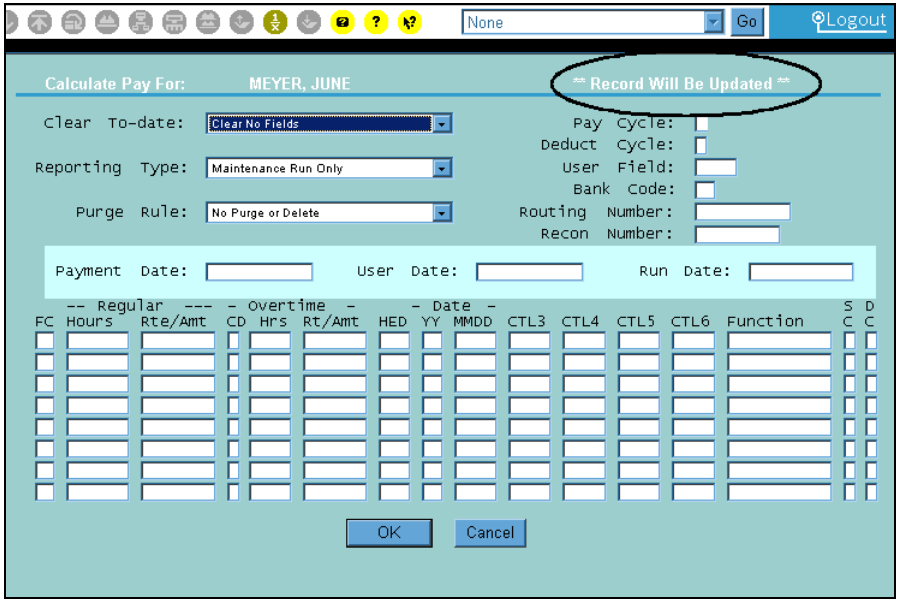
When used with the Calculate Pay For: form (PAY-CP), the what-if mode performs a simulated pay calculation, so that you can see what the pay document and stub will look like. What-if calculations do not update the Employee Database. Common uses of the what-if calculations include testing and verification of tax updates, changes in employee exemptions claimed or marital status, changes in pay rates, and so on. The results are provided immediately online, including a message about whether the payment was updated or not.

The following example shows the Calculate Pay For: form (PAY-CP) in what-if mode:



If you want to update the employee's record with a what-if payment, or if you want to enter a payment immediately, you must switch to update mode. In this mode, the employee's record will be updated, and a payment will be issued either immediately or during the next payroll run for the employee's frequency.

When you are in update mode, the form will have a warning at the top informing you that updates will be made to the record:



Use the Payroll buttons on the toolbar to toggle between the two modes. The three buttons on the toolbar for Payroll are:

- What-If Mode
- Update Mode
- Restore Data

The Restore Data button will bring you back to Calculate Pay For: form (PAY-CP) with the original data.

☞ *Refer to the Payroll Employee Setup documentation for more information on the what-if and update modes.*

Record deletion

If a record is no longer required or an error was made when the data was originally entered, it is possible to delete the record. If an error was made on the original record, it should be possible to amend the record and then save the correct data. This is the recommended way of dealing with data errors.

A record can be deleted from the system by clicking the Delete button on the toolbar.

Note: *The first non-key field must have an entry in order to delete a record.*

Note: *Caution should be taken when you delete information from eCyborg.*

See also:

■ Keying over existing data ***(on page 130)***
For more information on how to amend data on a record.

■ Deleting a record ***(on page 156)***
For detailed directions on deleting a record.

System messages

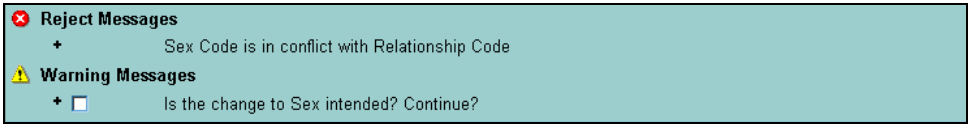
Three types of system messages can be displayed in the Message area:

- Reject
- Warning
- Information

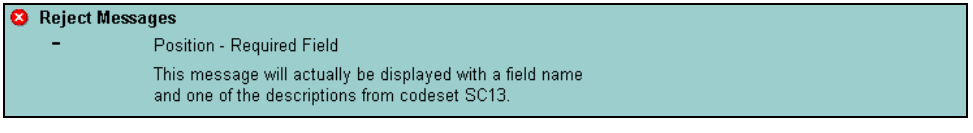
Note: *This is the order in which the system will display the messages.*

Overview of reject and warning messages

The system validates any data you enter into the system. If there is a problem with the data, a warning or reject message will be displayed in the Message area:



A brief explanation of the warning or reject message is displayed. If the reason for the warning or reject requires a more detailed explanation, you can click the plus sign (+) next to it. This expands the message to reveal a more detailed explanation.



Reject messages

A reject message occurs when data you have entered can not be accepted and is rejected. A reject message will also be displayed if you have not entered data in a required field. A reject message must be corrected before you can save the form.

There are two ways to deal with a reject message:

- Correct the data.
- Cancel the form. If you cancel the form you return it to its original condition. The data will not be saved.

See also:

- Responding to reject messages ***(on page 157)***

For detailed directions on responding to a reject message.

Warning messages

A warning message informs you that illogical data has been entered, that may or may not be correct.

There are three ways to deal with a warning message:

- Correct the data—Re-enter the correct data.
- Override the warning message—Override the warning message and accept the data by selecting the check box.
- Cancel the form—If you cancel the form, you return it to its original condition. The data will not be saved.

See also:

- Responding to warning messages ***(on page 158)***

For detailed directions on responding to a warning message.

Information messages

An information message is displayed when the system determines that an action you have performed should be brought to your attention. An information message is also used when a reject or warning message is displayed. The information message displays a generic explanation of these message types.

See also:

- Responding to reject messages ***(on page 157)***
- Responding to warning messages ***(on page 158)***

For detailed directions on displaying the additional information about the reject or warning message.

Detailed Directions

This section provides detailed directions on completing a business task.

Tasks

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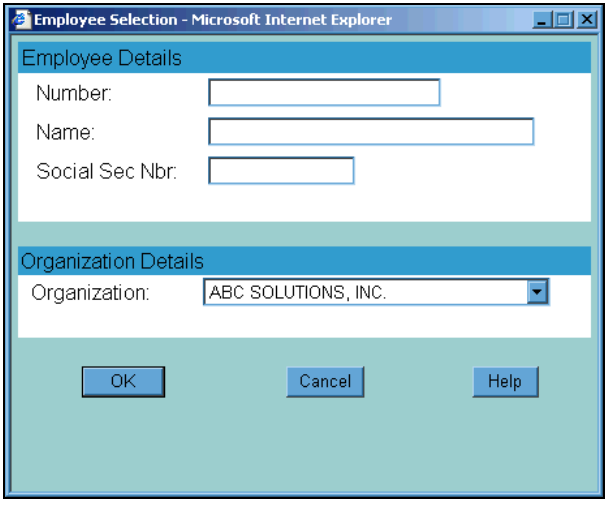
Displaying employee data using Employee Number, name or Social Security Number

To view data on a form for a different employee, follow these steps:

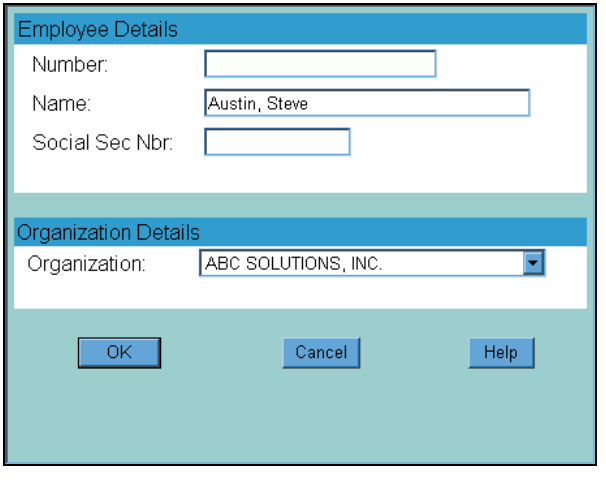
1. **Click Change Employee**

   Click the Change Employee button to access the Employee Selection dialog box.



2. **Enter a Number, Name, or Social Sec Nbr**

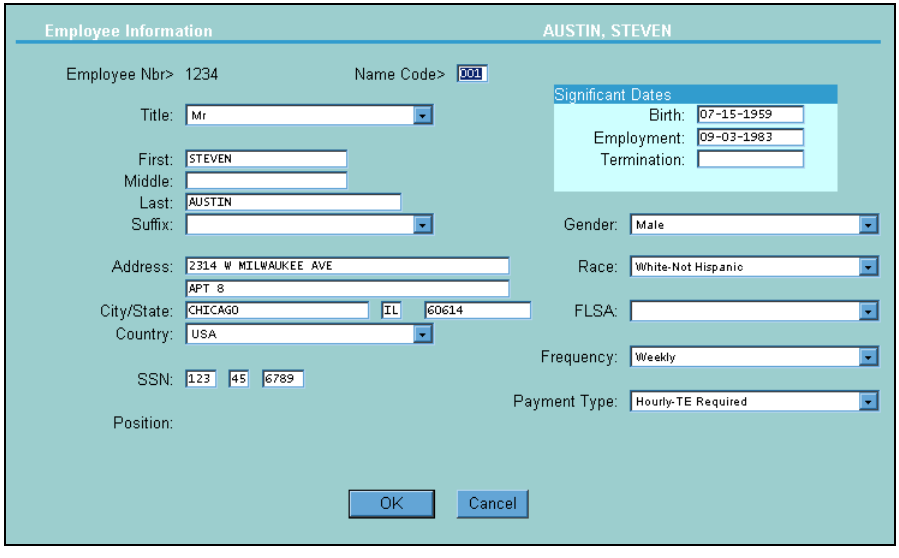
   Enter an employee Number, Name, or Social Security Number.



3. Click OK

To select the new employee, click OK.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Viewing data ***(on page 115)***

For more information on how to view employee data.

Displaying employee data using phonetic search

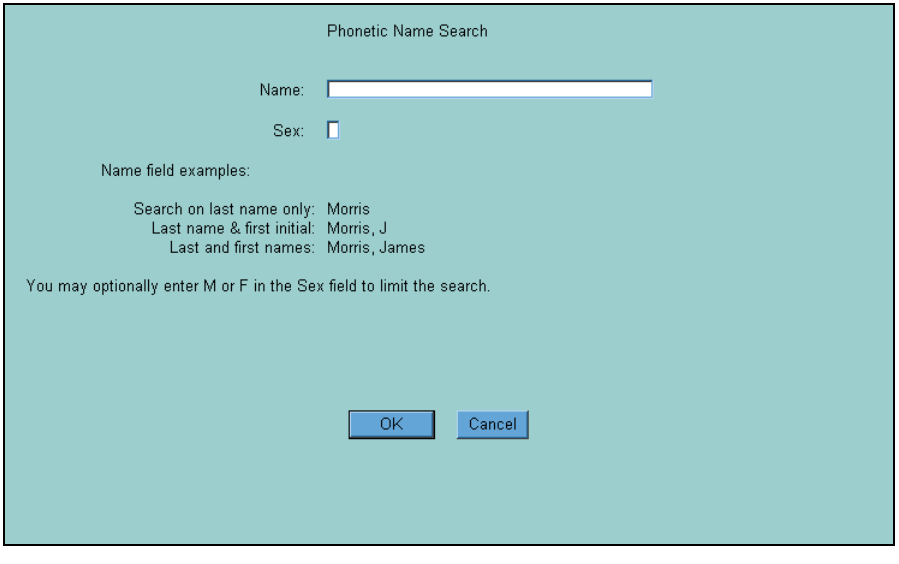
In this task, you are unsure of the correct spelling of an employee's last name and do not know the Employee Number. You will use the Employee Phonetic Name Lookup form (PHONET) to find out the employee's name and Employee Number. You are looking for an employee called either More or Moore.

The Employee Phonetic Name Lookup form (PHONET) is useful if you are unsure of the spelling of an employee's last name. Any name that sounds close to your guessed spelling is displayed, so that you can find the correct spelling. This form is also useful if you have several employees with the same last name.

1. Access the Employee Phonetic Name Lookup form

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

Component: User Tools
Process: User Tools
Task: Employee Phonetic Name Lookup



2. Enter the Name

For the employee's name, you can enter one of the following:

- All of the employee's last name (Moore)
- Last name and first initial (Moore, S)
- Last and first names (Moore, Samuel)

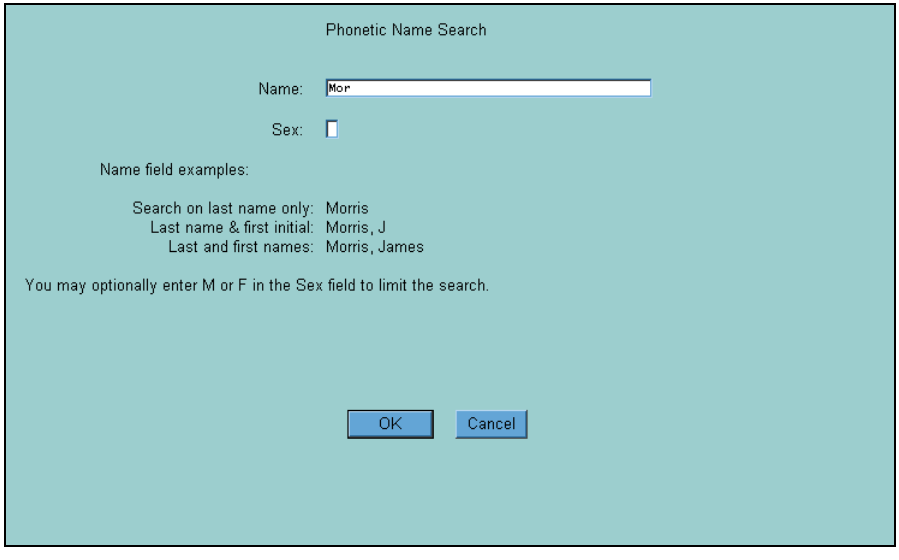
Note: If you are using the employee's last name with either the first initial or first name, you must separate them with a comma.

Note: You must use the correct case (upper and lower) when entering employee names.

3. Enter the sex of the employee (optional)

To limit the search to one particular gender, enter one of the following:

- M for male
- F for female



4. Click OK

To search for the employee, click OK. The results of your selection will be displayed.

If you completed the previous steps, the results should look similar to the example that follows:

Search Name: Mor

Org	Empl #	Employee Name	SSN	Sex
999999	1004	MORSE, GORDAN	888-88-8004	M
999999	1009	MOREAU, GARDNER	888-88-8009	M
999999	1001	MEYER, JUNE	888-88-8001	F
999999	1007	MORITZ, KATHERINE C	888-88-8007	F
999999	1003	MUIR, LINDA	888-88-8003	F
999999	1006	MERTZ, LYNNE C	888-88-8006	F
999999	1010	MOHR, MICHAEL T	888-88-8010	M
999999	1005	MORRIS, ROBERT	888-88-8005	M
999999	1002	MOORE, SAMUEL	888-88-8002	M
999999	1008	MAURICE, STACY E	888-88-8008	F

OK

Note: *Clicking OK on the results form will take you back to the Employee Phonetic Name Lookup form (PHONET).*

See also:

- Viewing data ***(on page 115)***

For more information on how to view employee data.

Displaying a selection list in the Message area

If a form has multiple occurrences or historical records, they can be accessed using a Selection list.

Note: In order to access a Selection list, the Select button must be enabled.

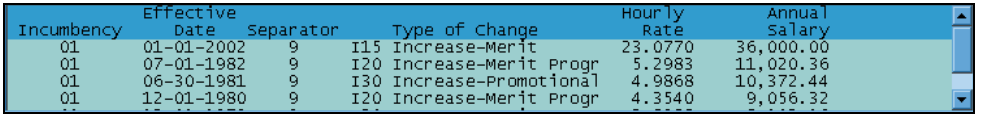
1. Access the Salary Assignment/Changes form (40-SCR)

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

Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Salary Change

2. Click Select

Click the Select button to display the selection list in the Message area.



Incumbency	Effective Date	Separator		Type of Change	Hourly Rate	Annual Salary
01	01-01-2002	9	I15	Increase-Merit	23.0770	36,000.00
01	07-01-1982	9	I20	Increase-Merit Progr	5.2983	11,020.36
01	06-30-1981	9	I30	Increase-Promotional	4.9868	10,372.44
01	12-01-1980	9	I20	Increase-Merit Progr	4.3540	9,056.32

See also:

- Viewing multiple occurrences of data on a form ***(on page 118)***

For more information on Selection lists.

Choosing a record from a selection list

Select a record on the Selection list

Select a record on the Selection list by clicking anywhere on the record.

See also:

- Viewing multiple occurrences of data on a form ***(on page 118)***

For more information on Selection lists.

Displaying an employee profile

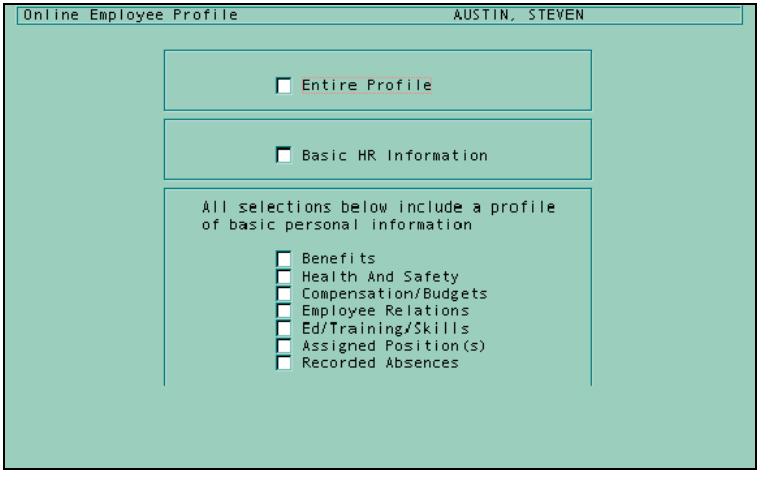
You can use the Online Employee Profile form (PROFIL) to display a specific employee's master record from the Employee Database. You can choose to display the entire record or specific information such as Employee Relations.

To display the employee profile, complete these steps:

1. Access the Online Employee Profile form

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

Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: View Employee Profile



2. Select Entire Profile (optional)

If you want to display the entire profile for the employee, select this check box. If you select this option, you do not need to select any of the other check boxes.

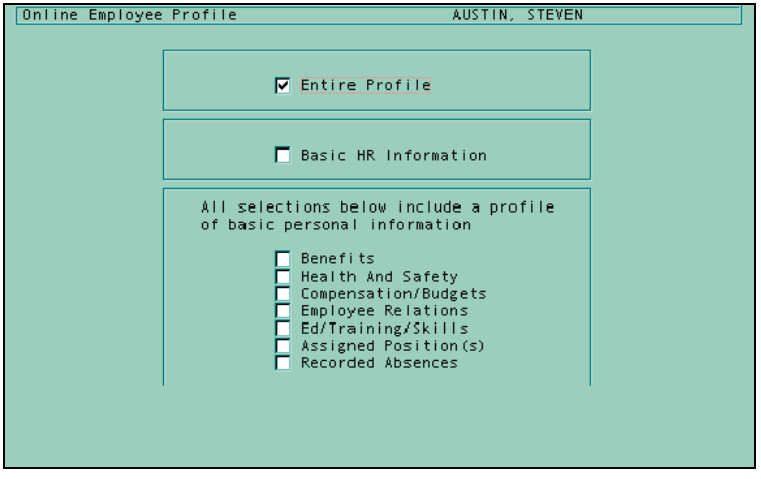
3. Select Basic HR Information (optional)

If you want to display basic HR information for the employee, select this check box. In addition to basic HR information, you also have the option to select information from other categories by selecting the relevant check boxes.

4. Select the type of information you want to display

Select the appropriate check box(es) for the type of information you want to display.

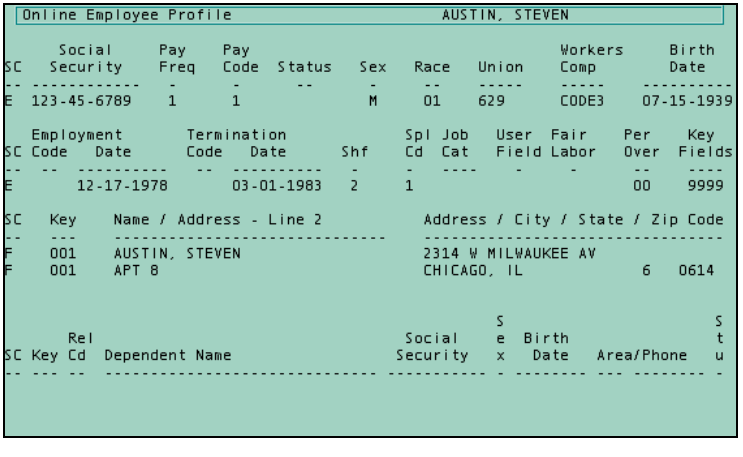
Note: If you have selected the Entire Profile option, you do not need to select these options.



5. Click Save or press Enter

To display the employee profile using your selection criteria, click Save.

If you completed the previous steps, the results should look similar to the example that follows:



6. Press Enter

The Online Employee Profile is a multi-page form. Press Enter to view the next page.

When you reach the end of the Online Employee Profile, the following message is displayed:

'----Complete----'

See also:

■ Employee Profiles ***(on page 119)***

For more information about employee profiles.

Clearing all boxes on a form

Access the Spouse/Dependent Information form (10-SCR) for Employee Number 1234.

It is good practice to clear existing data from a form before you enter new data. To clear a form use the Clear button.

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

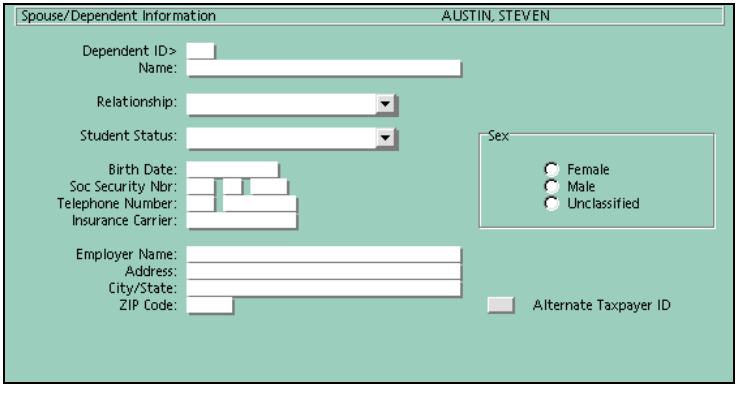
Component:	Employee Resourcing
Process:	Maintain Basic Employee Details
Task:	Dependent Information

Click Clear Fields

Click the Clear Fields button to clear the data from the form.

Note: *This button is enabled only when a form is selected.*

If you completed the previous steps, the results should look similar to the example that follows:



See also:

■ Options for updating data ***(on page 129)***

For more information about clearing data from a form.

■ System messages ***(on page 134)***

For information on messages that could be displayed when you try to save a record.

Entering numeric data

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234.

Change the Soc Security (SSN) text box to 987-65-4321.

To enter numeric data, complete the following steps:

Note: *This example does not contain decimals. When you enter data into a field that uses decimal places, you must enter it using the correct format.*

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

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

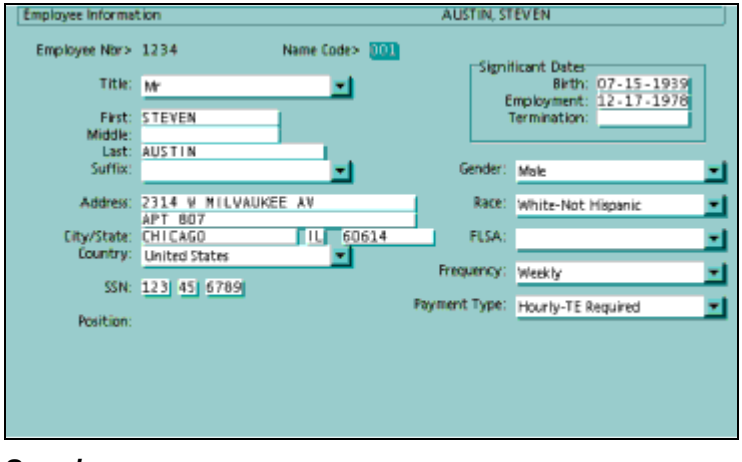
1. Select a numeric text box

Select a numeric text box that requires a numeric entry.

2. Enter the numeric data

Enter the numeric data in the correct format. If the numeric text box uses decimal places, you must use the correct format to enter the data. Different types of numeric data include rates, hours, percentages, and salaries. Each of these types of numeric data have specific formats when decimals are used.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Numeric text boxes ***(on page 122)***

For more information on entering numeric data.

- System messages ***(on page 134)***

For information on messages that could be displayed when you try to save a record.

Selecting an option from an option list

An option list contains a list of predefined options from which to choose. You must select one of the predefined options. There are two types of option lists:

- Option lists (this task)
- ***Big option lists*** (see "Selecting an option from a big option list" on page 148)

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234.

Change the Frequency option list (PP29) to Monthly.

To select an option from an option list, complete the following steps:

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

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

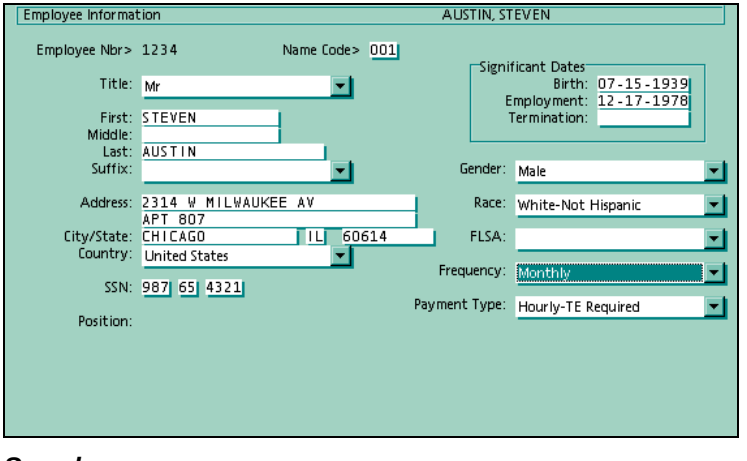
1. Select an option list

Select an option list from which you want to select an option.

2. Click the drop-down arrow and select an option

Click the drop-down arrow to display the option list and select an option.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Option lists ***(on page 124)***
- Standard option list ***(on page 124)***

For more information on option lists.

Selecting an option from a big option list

In this task, you are going to change the following information in the Certificates, Licenses and Permits form (28-SCR) for Employee Number 1234.

An option list contains a list of predefined options from which to choose. You must select one of the predefined options. There are two types of option lists:

- ***Option lists*** (see "Selecting an option from an option list" on page 147)
- Big option lists (this task)

To select an option from a big option list, complete the following steps:

Access the Certificates, Licenses and Permits form (28-SCR) by making the following selections from the Navigator:

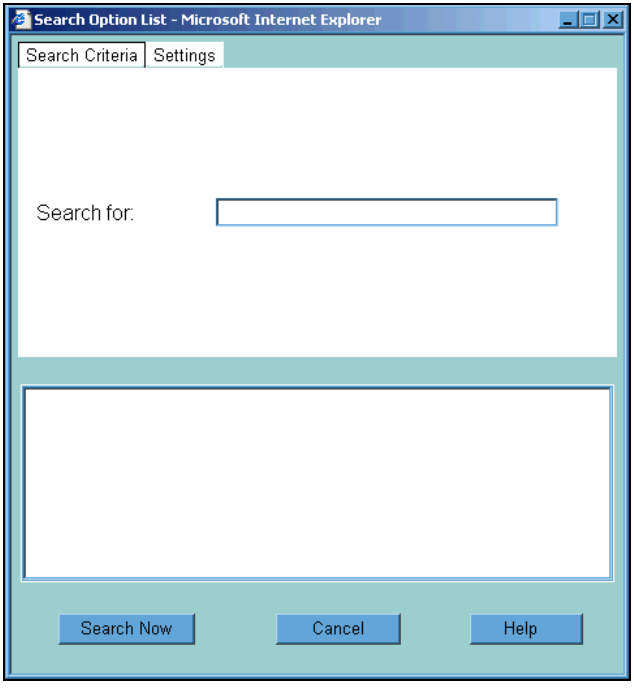
Component:	Employee Development
Process:	Employee Skills, Competencies, Training
Task:	Certificates, Licenses and Permits

1. Select an option list

Select an option list from which you want to select an option.

2. Click the ellipsis

Click the ellipsis to select the Search Option List dialog box.



3. Enter an option

Enter the name of the option you want to select. You can enter the entire name of the option or just the first few characters.

4. Click the Settings tab (optional)

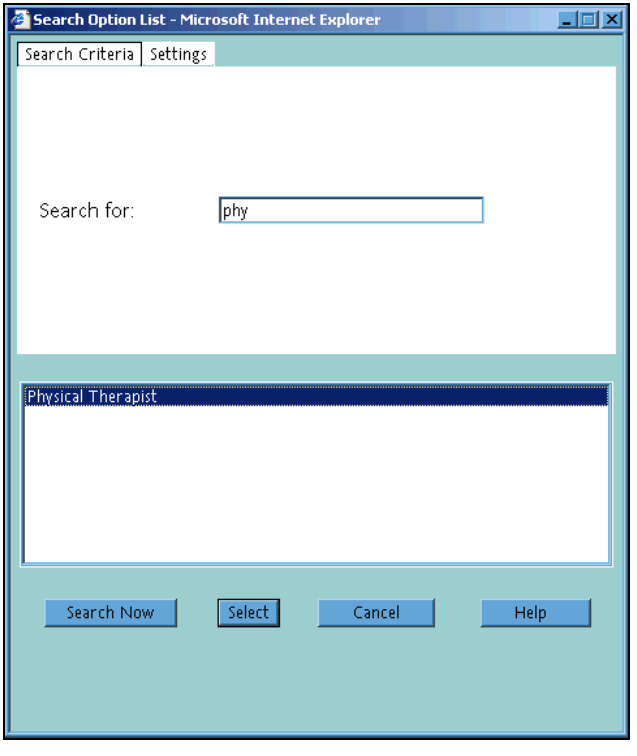
Click the Settings tab. Select the appropriate options on this tab to refine your search.

5. Click Search Now

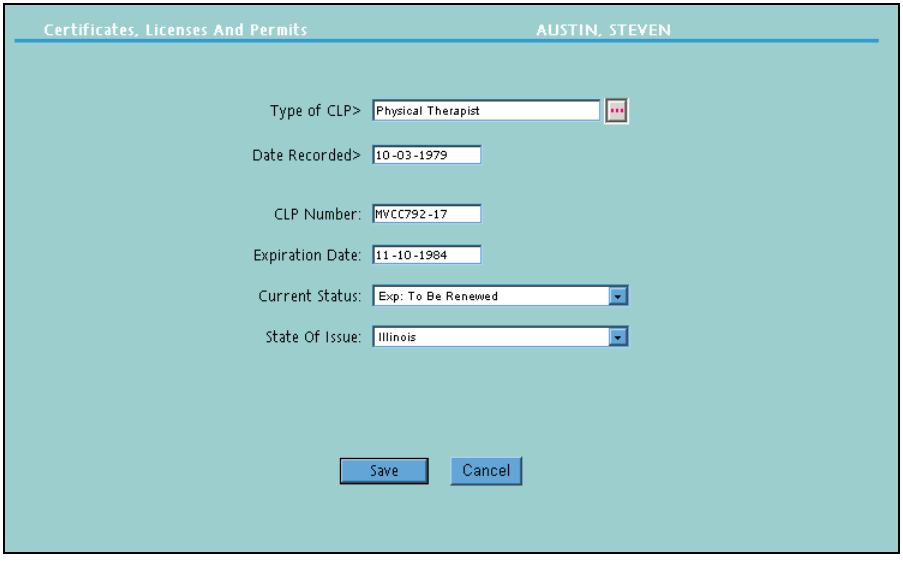
Click the Search Now button to find the option you entered.

6. Select your option

Select the option for which you were searching and click the Select button. The option will be displayed in the big option list.



If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Option lists ***(on page 124)***
- Big option list ***(on page 125)***

For more information on option lists.

Saving changes to a form

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234. You will then save the form.

Change the Zip Code to 60606.

When you have entered data on a form you will need to save it. To save a form complete the following steps.

Access the Employee Information form (EF-SCR) by making the following selections from the Navigator:

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

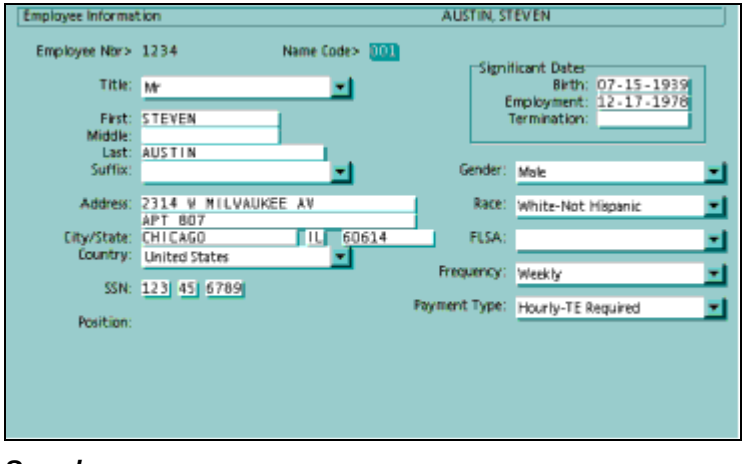
1. Enter new data or amend existing data on a form

When you enter new data or amend existing data on a form, the Save button will be enabled.

2. Click Save

Click the Save button to save the changes you have made to a form.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- System messages ***(on page 134)***

For information on messages that could be displayed when you try to save a record.

Canceling changes to a form

If you enter data on a form and then decide that you do not want to save the data, you need to click the Cancel button to discard the data.

The Cancel button is enabled when you enter new data or amend existing data.

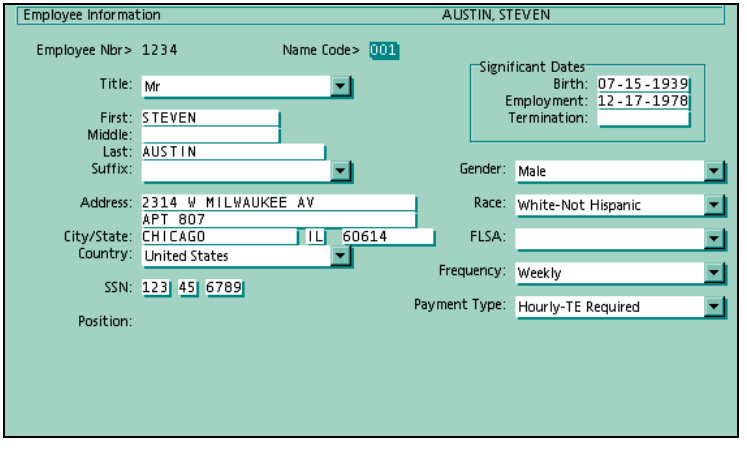
To use the Cancel button, complete the following steps.

In this task, you are going to change the following information in the Employee Information form (EF-SCR) for Employee Number 1234.

Change the Payment Type to Salary-Auto Paid.

Access the Employee Information form (EF-SCR) by making the following selections from the Navigator:

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

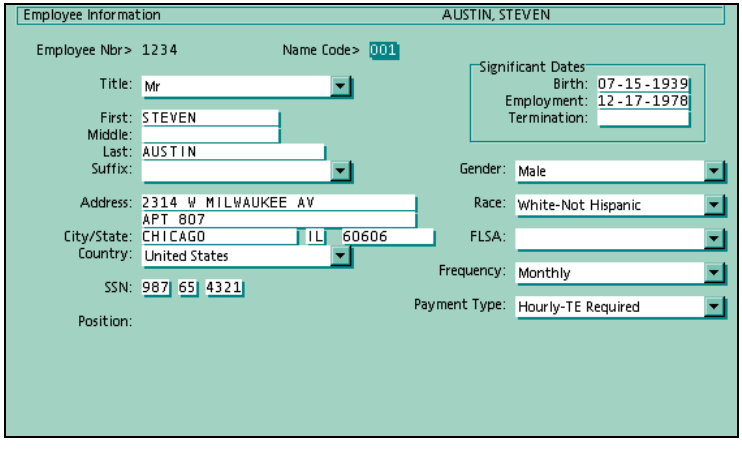


Click Cancel

If you enter new data on a form and want to discard the data, click the Cancel button.

If you amend existing data on a form and want to return to the original settings, click the Cancel button.

If you completed the previous steps, the results should look similar to the example that follows:



Adding a record

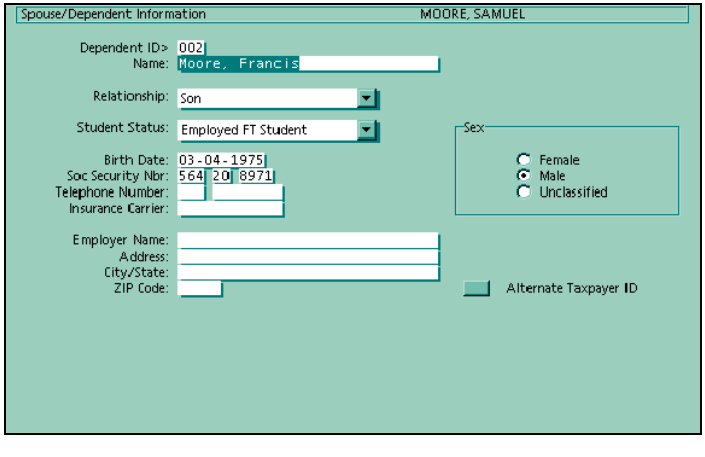
In this task, you are going to add a new record to the Spouse/Dependent Information form (10-SCR) for Employee Number 1002. Complete this form as shown. Before you enter this data, use the Clear button to start with a blank form.

To add a new record to eCyborg, complete these steps:

1. Access a form

Access the form to which you want to add a new record by using the Navigator.

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



2. Enter the new data

Enter the new data on the form.

3. Click Save

Click the Save button to save the information.

See also:

- Adding and modifying data ***(on page 121)***

For more information on entering data.

- System messages ***(on page 134)***

For information on messages that could be displayed when you try to save a record.

Modifying a record

In this task, you are going to modify the Spouse/Dependent Information form (10-SCR) for Employee Number 1002.

After you have created a form, you can modify the information on it at any time.

1. Access the form you want to modify

Access the form you want to modify by using the Navigator.

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

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

2. Modify the information

Modify the information on the form. You can:

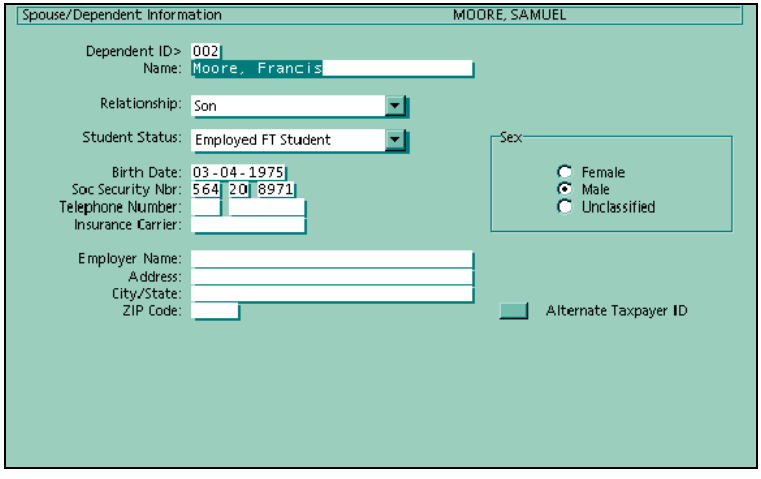
- Type over all the existing data.
- Type over data in specific fields.

If necessary, you can clear all the data and start with a blank form.

3. Click Save

Click the Save button to save the information.

If you completed the previous steps, the results should look similar to the example that follows:



See also:

- Adding and modifying data ***(on page 121)***

For more information on modifying data.

- System messages ***(on page 134)***

For information on messages that could be displayed when you try to save a record.

Deleting a record

In this task, you are going to delete the Spouse/Dependent Information form (10-SCR) for Employee Number 1002.

If you need to delete a record, complete the following steps:

Note: *Caution should be taken when you delete information from the system.*

1. Access the form you want to delete

Access the form you want to delete by using the Navigator.

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

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

2. Click Delete This Entry

To delete the form, click the Delete This Entry button.

3. Click OK

To confirm that you want to delete the form, click the OK button.

See also:

- Record deletion ***(on page 133)***

For more information about deleting a record.

Responding to reject messages

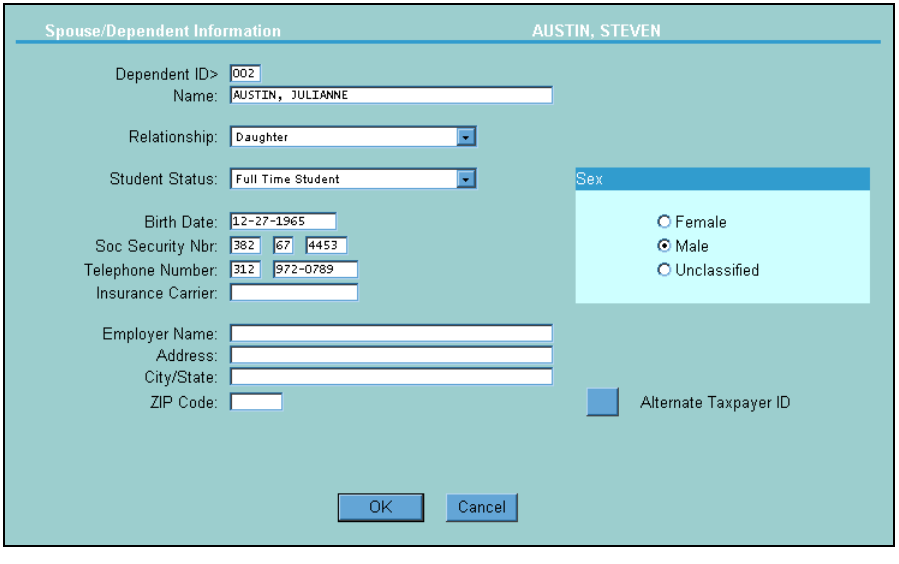
A reject message displays in the Message area in response to incorrect information you enter on a form. To respond to a reject message, complete the steps in this task.

In this task, you are going to modify the Spouse/Dependent Information form (10-SCR) for Employee Number 1234.

In order to see an example of a reject message, you are going to change the gender status for Julianne Austin from Female to Male.

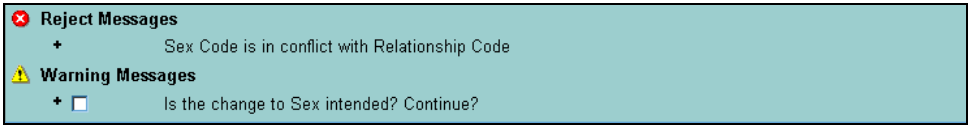
Access the Spouse/Dependent Information form (10-SCR) by making the following selections from the Navigator:

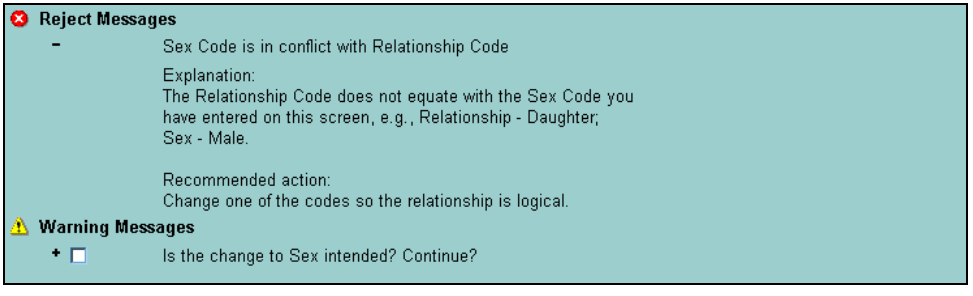
Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Dependent Information



1. Click the plus sign (+) to reveal additional information about the reject message

Additional information about reject message can be displayed by clicking the plus sign (+).





2. Read the reject message

Read the reject message and take the appropriate action. You can do one of the following:

- Correct the error(s)
- Click Cancel to cancel the form

See also:

- System messages ***(on page 134)***

For more information on system messages.

Responding to warning messages

A warning message displays in the Message area in response to information you enter on a form. To respond to a warning message, complete the steps in this task.

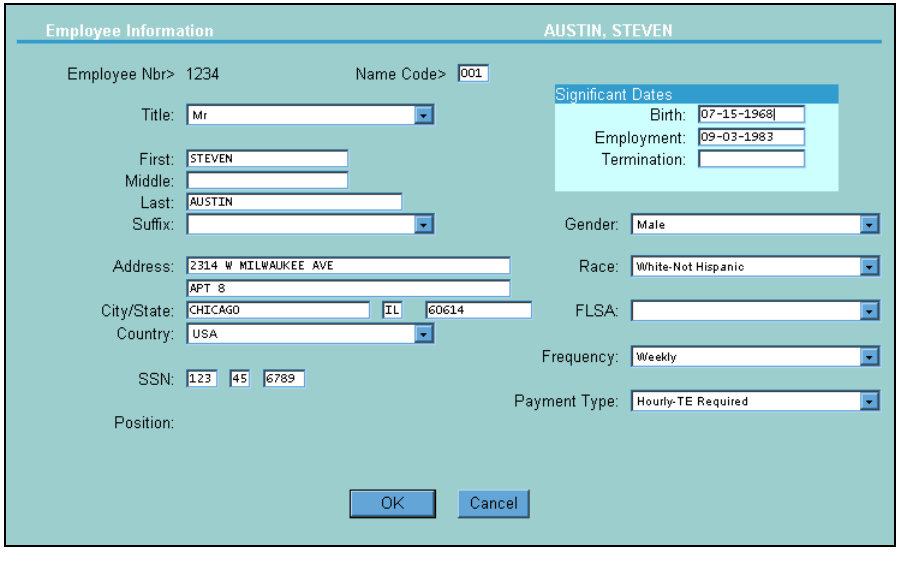
In this task, you are going to modify the Employee Information form (EF-SCR) for Employee Number 1234.

In order to see an example of a warning message, you are going to change the age of the employee so that the employee was under 13 when they started employment.

Access the Employee Information form (EF-SCR) by making the following selections from the Navigator:

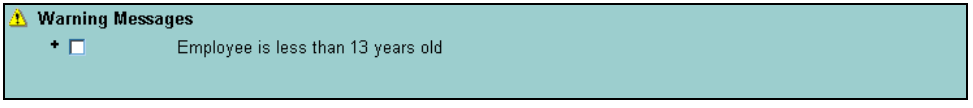
Component: Employee Resourcing
Process: Maintain Basic Employee Details
Task: Basic Employee Information

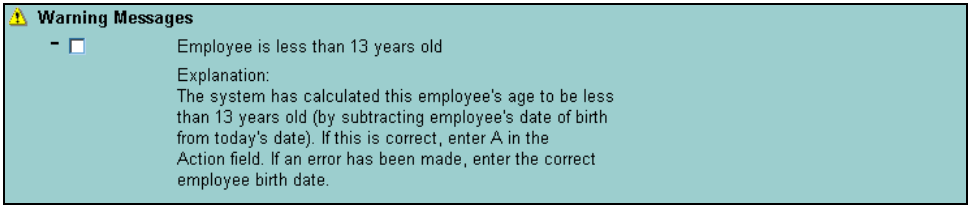
Change the employee's date of birth to 07-15-1968 (US and Canada, excluding Quebec) or 15-07-1968 (elsewhere) and click Save.



1. Click the plus sign (+) to reveal additional information about the warning message

Additional information on the warning message can be displayed by clicking the plus sign (+).





2. Read the warning message

Read the warning message and take the appropriate action. You can do one of the following:

- Correct the warning(s) and save the form
- Click Cancel to cancel the form
- Select the check box and click Save to accept the warning

See also:

- System messages ***(on page 134)***

For more information on system messages.

Review of Questions Answered

1. What methods are available for viewing employee and organizational data?

2. What types of numeric data are used?

3. What are option lists and how are they used?

4. What actions can be performed when working with forms?

5. How are employee and organizational data deleted?

6. What types of system messages are provided?

PART 3

Appendices

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APPENDIX A

Dialog Quick Reference

In This Appendix

Dialog boxes 166

Dialog boxes

This section provides a quick reference guide to dialog boxes in eCyborg.

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Change password (PASS-P)

Your password is entered when you log on to eCyborg. It can be changed at any time.

Your password is case sensitive (upper case, lower case). You must enter your existing password using the correct case. You can enter your new password using either case (upper or lower) or a mixture of both. For security purposes when you enter your password, it is displayed as a series of asterisks.

See also:

- Changing your password ***(on page 29)***

To learn how to change your password.

Change user code (PASS-U)

You can change your user code at any time, or eCyborg may be set up to prompt you to change your user code on a periodic basis.

Your user code is case sensitive (upper case, lower case). You must enter your existing user code using the correct case. You can enter your new user code using either case (upper or lower) or a mixture of both.

See also:

- Changing your user code ***(on page 29)***

To learn how to change your user codes.

Command Entry

Use the Command Entry dialog box to enter the IDs of forms, queries, other programs, and other parameters that may be required. When you choose the OK button, the command constructed from your entered parameters is executed.

Command Entry contains:

- Organization
- Program
- Key
- Additional Key
- Codes 1-2
- Action

Organization

If it is not already displayed in the text box, enter the ID of the company whose information you want to enter/and or display.

Program

Enter the ID of the form you want to display or the query or program to execute.

Key

Type the key value (for example, Employee Number). The system uses the values in the Program and Key text boxes to display the form and data you requested. The value in the Key text box must be consistent with the requirements of the form you requested.

Additional Key

Use this text box to continue the entry made in the Key text box when the entry is too long to fit in just the Key text box. You may also make an entry in the Additional Key text box to specify a special value required for processing the form or program.

Codes 1-2

If required, type a Code1 value in the first character position and/or a Code2 value in the second character position of this text box. Code1 valid entries are E or blank (Default), I for inquiry, and K for a 'what-if' mode. Code2 valid entries are U go to the next form in the stack, S same segment, B go back to the previous form in the stack, and F go to the first in the stack. P can be entered in either text box to print the form to an audit file.

Action

If required for the form or program you are asking to use, enter an action command code of A or Q in the Action text box. Enter A (for Accept) to override a warning and update the Employee Database with the form information. Enter Q (for Quit) to ignore all entries made on the form and leave the Employee Database untouched.

Customize bookmarks and favorites

Since bookmarks give you quick access to forms, you should consider adding bookmarks for the forms that you use often to the Navigator. This will increase your efficiency by allowing you to access a form with just one mouse click.

When you add a bookmark, the name that is added to the Bookmarks list is that of the form. You must first access the form using the Navigator. Then, you use the Add/Remove bookmarks option to add the form. The form is then added and displayed in the Navigator.

You can edit a bookmark. Using the Customize bookmarks dialog you can change the name. You may want to change the name to something that is more meaningful to you.

If your job responsibilities or day-to-day tasks change, you may want to remove a bookmark that accesses a form. When you remove a bookmark, the system will display a warning message, prompting you to confirm the removal.

See also:

■ Adding a bookmark ***(on page 73)***
To learn how to add a form as a bookmark.

■ Accessing a bookmark ***(on page 75)***
To learn how to access a previously defined bookmark.

eCyborg Login

Logging on to eCyborg is a very simple task. However, before you can log on, your Security Officer will need to give you a user code and a password. You will need to enter these when you sign on, as they identify you to the system.

To log on to eCyborg you must enter the following three pieces of information:

- Your user code
- Your password
- Your environment

Your user code and password are used for security purposes and should not be written down or revealed to anyone.

Typically an organization will have two environments, a test environment that is used by new users while they learn how to use eCyborg and a live environment that contains your organization's data.

Your organization may have other environments such as a test environment for year-end testing. When you log on to eCyborg, you must select which environment you want to use. The next time you log on, the system 'remembers' the environment you last accessed.

When you have completed the log on process the Work Area should be displayed.

See also:

■ Logging on to eCyborg ***(on page 27)***
To learn about logging on to eCyborg.

Employee Lookup

Use this dialog to lookup an employee by name.

After you type the first couple of characters of the employee's name and pause, the system will search for names that start with those characters and display them in the list.

Enter the name in one of the following formats:

- Three or more letters of the employee's last name (Moore)
- Last name and first initial (Moore, S)
- Last and first names (Moore, Samuel)

Note: *If you are using the employee's last name with either the first initial or first name, you must separate them with a comma.*

Note: *You must use the correct case (upper and lower) when entering employee names.*

If the employee you are looking for is displayed in the list, select it by clicking it, and then click the To: or cc: button.

Employee Selection

If you have more than one organization established, you will need to be able to switch between these organizations easily and quickly. Within these organizations you will also need to switch between different employees just as easily.

For example, if you need to enter salary information for a number of employees, you will want to be able to switch employees after you complete a Salary Assignment/Changes form for each of them.

To switch between organizations and employees, you use the 'Employee Selection' dialog box. To access this dialog box, click the Employee button on the toolbar.

Accessing employee data

In order to view a record for an employee, you need to identify to the system which employee's record you want to access.

There are a number of different ways to access an employee's record. You can access an employee's records by entering the relevant information in one of three text boxes in the Employee Selection dialog box.

- Number—the Employee Number
- Name—the employee's name
- Social Sec Nbr—the employee's Social Security Number

You must then select which organization the employee belongs to.

When you have entered the relevant information, click OK to access the employee's record.

When you enter an employee's name, you can enter either the complete name using the correct mix of upper and lower case, or just the last name. If you enter the employee's last name the Select an Employee dialog box will display, from which you can select the exact employee and access his or her record.

See also:

■ Changing to a different employee or organization ***(on page 79)***
To learn how to use the Employee Selection dialog box to change employees or organizations.

■ Displaying employee data using Employee Number, name or Social Security Number ***(on page 136)***
To learn how to display employee data using various methods.

New Hire Details

You use templates called logical employee models when processing new hires. Each logical employee model contains default information to make the process more efficient. Your organization can have many logical employee models. When you process a new hire, you must identify the organization and which logical employee model is to be used.

If you create a checklist that processes new hire information, you must identify it as such. Doing so causes special processing to occur that allows the person using the checklist to select the organization and logical employee model to use with the new hire.

When you identify a checklist as a new hire checklist, a New Hire Details dialog box displays first when the checklist is accessed.

☞ *Refer to the Using The Solution Series: Administrative Solutions documentation to learn how to create a universal or personal checklist.*

Resume A Checklist

You can pause a checklist for a number of reasons. For example, if you are using the New Hire checklist and you do not have the employee's birth date, you could pause the checklist and complete it at a later date when you have the information.

A paused checklist can be accessed in the following ways:

- When you log on to eCyborg
- From the Navigator

To resume a checklist, select it and click Resume.

See also:

■ Pausing a checklist ***(on page 75)***
To learn more about how to pause a checklist.

■ Resuming a paused checklist ***(on page 76)***
To learn more about how to resume a checklist.

Search Option Lists

When you access a big options list, eCyborg will display the Search Option List dialog box.

The Search Option List dialog box contains two tabs, Search Criteria and Settings.

Search Criteria

The Search Criteria tab contains the Search for text box. To search for an option enter either its complete name or part of its name. For example you could enter all or part of the name the educational establishment you want to select.

When you have entered an option, you can click the Search Now button, or you can refine your search using the options on the Settings tab.

Settings

In the Options group box you can choose to search for an option that either starts with or contains your selection on the Search Criteria tab.

In the Search Items group box you can choose search for a description of the educational establishment or code.

In the Display group box you can choose the Codes check box to display the code for each educational establishments.

In the Sort Order group box you can choose to sort the educational establishments alphabetically by code or description.

If you have used the Settings tab to refine your search, click the Search Now button to begin the search.

If eCyborg finds an option(s) that matches your selection, the Search Option List dialog box expands to reveal the results.

If your option is displayed, you can select it and click the Select button.

If your selection is not displayed, you can try again by entering a new option in the Search for text box.

When you have highlighted your option, click Select to insert it into the option list.

See also:

- Selecting an option from an option list ***(on page 147)***
- Selecting an option from a big option list ***(on page 148)***

To learn how to use option lists.

APPENDIX B

Practice and Review Answers

In This Appendix

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Working with Data 179

Introduction

This appendix provides answers for the Apply the Concept questions, Review of Questions Answered and Extended Practice questions that are included in each instructional chapter.

Getting Started

Review of Questions Answered

1. What information must you have before you can log on?
   A user code, password and environment.

2. How can user codes and passwords be used as part of your organization's security strategy?
   Each user of eCyborg should be given an individual user code and password. The system will only allow someone to log on when they have entered the correct user code and password. A user has three attempts to log on to the system. If they do not enter the correct user code or password on the third attempt they will not be allowed to log on. The system can be set up to prompt the user to change their user code on a regular basis. To ensure that only authorized users access eCyborg a user should not reveal their user code or password to anyone else.

3. How do you log out of the system?
   You use the Logout button on the toolbar to log out of the system.

Exploring the Work Area

Review of Questions Answered

1. What is the Work Area?
   The Work Area describes the entire display area that you see after you log on to eCyborg.
2. What is the Navigator?
   The navigator is the method of accessing different components and forms. It is the pane on the left side of your Work Area.
3. What is the Form Area?
   When you have navigated to a component and selected a form, it will be displayed in the Form area, to the right of the Navigator.
4. What is the Message area?
   The Message area is used to display two types of information.

   First, it is used to display information, warnings and reject messages in response to information that you have entered on the form.

   Second, it displays a selection list for forms that have multiple occurrences of the same type of information. You can use a selection list to choose the record that includes the information you want to work with.
5. What is a user profile?
   A user profile is used for security purposes to determine what you can and can not do while you are using eCyborg, and which parts of the system you can access.

Navigating the System

Review of Questions Answered

1. How is the Navigator organized?
   The Navigator is made up of these three levels:
   - *Components*
   - *Processes—each process is associated with a component*
   - *Tasks—each task is associated with a process*

2. What effect does your user profile have on information you can access?
   Your user profile determines what you can and can not do while using eCyborg, and which parts of the system you can access.

3. How would you switch between forms?
   Your browser's Back and Forward buttons are a quick way to switch between forms

4. What are checklists?
   A checklist provides a way to link different items (forms, dialog boxes, checklists) to create a workflow. Each of these items can then be completed consecutively, using the checklist to navigate them.

5. What method is provided to allow the selection of a different employee?
   To switch between organizations and employees, you use the Employee Selection dialog box.

Using the Support Tools

Review of Questions Answered

1. What types of online help are provided?
   The Help system contains modular help files that allow you to access help for the entire system and standard XHTML help on each component of the system. The help files contain cue cards, conceptual information, and quick reference information.
2. What is the Help menu?
   The Help menu consists of the help system, allowing you to navigate around all of the delivered help files.

Working with Data

Review of Questions Answered

1. What methods are available for viewing employee and organizational data?
   You can access an employee's records by entering the relevant information in one of three text boxes in the Employee Selection dialog box:
   - *Number—employee's Number*
   - *Name—employee's name*
   - *Social Sec Nbr—employee's Social Security Number*

2. What types of numeric data are used?
   - *Rates*
   - *Hours*
   - *Percentages*
   - *Amount/Salary*

3. What are option lists and how are they used?
   An option list contains a list of predefined options for you to choose from. You must select one of the predefined options as your selection. In contrast to a character text box, you can not key your own data into an option list

4. What actions can be performed when working with forms?
   The following actions can be performed when working with forms:

Button	Name	Description
	Save	Saves the current data. This button is enabled when you have entered new data or amended existing data.
	Cancel	Cancels changes made to the current data. This button is enabled when you have entered new data or amended existing data.
	Change Employee	Accesses the Employee Selection dialog box.
	Select	Displays the Selection List in the Message area. This button is enabled when there are multiple records for the form you have accessed.
	Clear Fields	Clear the data in the current record (form, table and so forth).
	Delete This Entry	Deletes the current selected record (form, table and so forth).
	Bookmarks	Adds the current form to the Bookmarks area of the Navigator.

In addition, you can use your browser options to print your current work area, and to move backwards and forwards between previously accessed forms.

5. How are employee and organizational data deleted?
   Employee and organizational data can be deleted from the system by clicking the Delete button on the toolbar.

6. What types of system messages are provided?
   - *Reject*
   - *Warning*
   - *Information*

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.

820 (Premium Payment for Group Insurance Products) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay remittance information and/or premium payments for heath care insurance products.

834 (Benefit Enrollment and Maintenance) Transaction Set
A specific transaction, standardized by the United States government, used between Covered Entities to relay information relating to the initial enrollment in and subsequent maintenance of individuals enrolled in a health care insurance product.

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 totalled 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.

ACH
US-specific acronym for Automated Clearing House. The ACH Network provides inter-bank clearing of electronic payments for participating depository financial institutions. The American Clearing House Association, Federal Reserve, Electronic Payments Network, and Visa act as ACH Operators—central clearing facilities through which financial institutions transmit or receive ACH entries.

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
Event that can happen to an employee during employment, for example, new hire, leave of absence, termination, and so forth.

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.

Adjustment
Adjustments increase or reduce to-date accumulations of earnings, deductions, and taxes. Adjustments update month-to-date, quarter-to-date, and year-to-date activity. You can also correct or eliminate deduction arrears, transfer amounts or hours from one earning or deduction to another, redistribute labor hours and dollars, and refund deductions. Adjustment transactions are processed the next time the organization is processed by the batch payroll programs during either a payroll or maintenance run.

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.

Agent types
Agent Indicator on the Employer Information Record (QE-SCR). The field's only allowable entries are selected from option list PR55, which consists of two agent types: Agent Indicator code and Common Pay master.

Further definition of agent types:

1. An employer that wants to use an agent prepares Form 2678, Employer Appointment, and submits the form to an agent.

The agent submits to IRS the form received from the employer along with a written request for authority to act as an agent for an employer.

The IRS gives written approval.

2. A common paymaster is a corporation that pays an employee who works for two or more related corporations at the same time.

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 in Payroll Administration 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.

Anniversary date
Period-end date for the next regularly scheduled pay run for a specific pay frequency.

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. Payroll Administration 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.

Applicant organization
Organization used to store and update applicant records.

Appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

Archive
To transfer files to a slower, cheaper media (usually magnetic tape) to either free up the hard disk space they occupy or to create a backup copy of the files that can be used to restore programs and/or data if there is a system failure.

Arrears
Amount that could not be deducted from an employee's net pay because the available net amount was less than the deduction. This amount may be recorded for recovery in a future pay period.

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 192).

Banner
Banner forms separate groupings on forms produced from the Federal, State/Local, and Employee Queues.

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 Master file (P20)
Sequential version of the Payroll Master information from the Employee Database. The Batch Master File (P20) is accessed and maintained during a batch maintenance run or pay run.

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.

Batch transaction
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 transaction, you may verify your totals against those accumulated by the system.

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 Business Partner
See ***Trading Partner*** (on page 215).

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.

Blocking factor
Represents the number of physical records in a logical record.

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 data-mart.

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.

CBSVB
COBOL program used to produce reports and to access or maintain The Solution Series offline.

CBT
Computer-based training. Training through use of computer.

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 workflow 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.

Checklist wizard
Tool used to create checklists.

Checkmark
If in the done column of an 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.

Cleared payment
A check that has been cashed or deposited by the payee and has been returned, marked as such, to the payer's bank, credit union, or financial institution.

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 (ring)
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 pay master
An organization that pays employees who work for different legal entities. If all the conditions related to a common paymaster are met, the FICA and, in most cases, the SUI does not have to start over.

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.

Company logical Master record
Complete record for a company. It may be composed of multiple physical records.

Company validation table
Table that validates that an Organization Control Number is valid and payments can be made.

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?'

Contractual exchange rate
An annually reviewed exchange rate usually based on an employees anniversary date and reviewed once a year; often used for salaries.

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
Organization Control Number. A six-character, customer-defined code that represents a company or group of employees within 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.

Conversion option
The interval at which you are converting currency (for example: yearly, monthly, weekly).

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.

Costing record
Labor record.

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.

Covered Entity
A member of one of three groups subject to the administrative simplification provisions of HIPAA. The three types of Covered Entities are health plans (not fully insured), clearinghouses, and providers that conduct transactions electronically.

Covered Entity Group
A Covered Entity Group represents in the system a partnership between two Covered Entities (benefits business partners) who transmit benefit information electronically between each other in the form of the 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) Transaction Sets.

CPI
Characters per inch.

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.

Crossfoot
An accounting term that means to compare or add figures to make them balance. If you receive an error message such as ‘Entries do not Crossfoot’, this means that some amounts entered into fields are not balanced.

Cross-reference keys
Provide direct query access to data within the system database.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 189).

Cube (Power Play)
File (with the extension .mdc) that contains data organized into dimensions to provide for faster data retrieval and drill down reporting capabilities.

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.

Custom report format
Custom reporting used by states because their reporting format is neither MMREF, ICESA, nor TIB-4.

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.

CYBMST
Cyborg Library file that contains the main batch payroll software. This file consists of COBOL programs, report generators, and system tables.

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 Extract File Splitter (RSPLIT)
COBOL program that creates separate files for every representative table, using the Datamart Extract File as input.

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.

Data mart
Relational tables with a defined structure that have been designed to automatically accept full data-mart extract data seamlessly.

Data store
Repository where data is stored. Client applications request information from a Solution Series data store.

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.

Datamart Extract File (FILE36)
Temporary system file holding the copied data from The Solution Series.

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.

Default
Value that will appear if no entry is typed or selected.

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.

DEL-PE
Utility program used to delete existing Phonetic Keys.

Density
Number of bytes per inch that a tape drive writes to a tape.

Dependent
An individual who relies or depends on another for his or her support.

Dependent GTL
Acronym for Dependent group term life insurance plan.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

Deposit advice
Pay document that looks similar to a check and shows the amount deposited to the employee’s account.

Derived data
Reporting Administration enhances data during the extract process by capturing and storing table-derived data, such as salary grade, that do not reside on the employee’s record.

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.

Direct deposit
Also referred to as an Electronic Funds Transfer, or EFT, direct deposit allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

Disability
Inability to pursue certain occupational activities due to physical or mental impairment.

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. In Payroll

Administration, 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).

Display text boxes
An area on a form in which data is shown but cannot be modified.

Disposable income
For garnishment purposes in the U.S., an employee's earnings minus deductions required by state or federal law.

Distributed Access Log Table
Form that records the date, time, and last record distributed to a unique location.

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.

Distributed Location NODE Control Table
Form that defines the operating environment of your remote node. It allows you to assign an access password for the node and indicate whether the option list and table records will be distributed to the remote node.

Distributed Rules Table
Form that records the FILE 02 segments that are to be excluded from the remote location.

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 forms. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 191).

Docked toolbar
Toolbar that is located on the edge of a program window.

Document type
Categorization of a document, such as birth certificate, performance review, drivers license, and so on.

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.

DSP08
Program that displays the current contents of the Replication Holding File (FILE08).

DSRF02
Form that records the FILE02 segments that are to be excluded from the remote location.

DSRSET
Program that activates the Distributed Administration indicator on the PP-SCOPTS record of FILE01.

DSSRRL
Program that will display those remote sites that have not had data distributed to them within the past three days.

DSUSET
Program that deactivates the Distributed Solution indicator on the PP-SCOPTS record of FILE 01.

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 U.S. 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 Binary Coded Decimal Interchange Code; 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.

EDI
Electronic Data Interchange. The electronic exchange of business transactions based on standardized guidelines.

EEOC
Equal Employment Opportunity Commission.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EFT
Electronic Funds Transfer or direct deposit. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

EIC
Abbreviation for ***earned income credit*** (on page 192).

EIN
Employer Identification Number. A federally or state assigned number used to distinguish tax entities in the US.

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic documentation
Documentation that can be viewed, searched, and printed on your computer.

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 cancelled 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.

Employee logical Master record
Complete record for an employee. It may be composed of multiple physical records.

Employee Number
Alphanumeric value of up to 10 characters that you define to be used to identify an individual as an employee. It acts as a key to retrieve an employee's record.

Employee status
Represents an employee's present standing in terms of activities processed for the employee, for example, active, inactive, part-time, full-time, and so forth.

Encoding
The process of applying a badge number to an actual badge. This badge number is then entered on the Badge Number Assignments form to assign it to an employee.

English Language
Former name of our fourth-generation programming language, now called Cyborg Scripting Language.

Enhanced Pay Processing and Reporting
Pay run and reporting process that can be executed online.

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.

Alternate definition: The agency to which an organization submits its quarterly unemployment insurance reports.

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 system resides, and any communication protocols. Also, a workspace dedicated to a specific processing type. For example: development, test, and production.

EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 192).

Establishment Reporting
Establishment Reporting occurs when an employer with several business locations chooses to file wage reports, broken down by location or unit, to the Social Security Administration. Each unit is identified by a four-character code, called an Establishment Number. The employer obtains approval from the SSA to use Establishment Reporting. Establishment Reporting does not apply to 1099s.

Euro triangulation
The conversion between one Euro currency and another.

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.

Exchange rate
The ratio of the value of one currency to another.

Exchange rate type
The interval at which you update the exchange rate; for example, yearly, monthly, weekly.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Execution scripts
Generic reference to Job Control Language (JCL) for your operating system's command language.

Extract file
A data file generated to be used by another system or application.

Extract program
Report generator 7F7F and its subroutines.

This program accesses the P20 file to extract the employee information. It extracts all necessary information and is required to run only once per quarter. It may need to be rerun if there are subsequent adjustments applied to the P20.

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. In Payroll Administration, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FEIN
Federal Employer Identification Number.

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).

Filing entity
Agency to which an organization submits its quarterly report.

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.

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, the Tax Authority File does not provide tax specification information. 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.

Floating toolbar
Toolbar that is located within the program window.

Folder
Logical organization device for the content of a Cognos catalog.

Foreign currency
The currency into which or from which you must convert.

Form
Section of the Work Area in which data is entered and displayed, including text boxes and other controls. This was formerly known as a screen.

Form 300
Log of Work-Related Injuries and Illnesses, used to classify work-related injuries and illnesses and to note the severity and extent of each case. The delivered OSHA Form 300 Log of Work-Related Injuries and Illnesses report (20-RPT) is a facsimile of the Form 300.

Form 300A
Summary of Work-Related Injuries and Illnesses, used to show the totals for the year in each (illness or injury) category. The delivered OSHA Form 300A Summary of Work-Related Injuries and Illnesses report (21-RPT) is a facsimile of the Form 300A.

Form 301
Injury and Illness Incident Report. This must be completed when a recordable work-related injury or illness has occurred. This must be completed by the employer within 7 calendar days following receipt of information that the recordable work-related injury or illness occurred. This form must be kept on file for five years following the year to which it pertains. The delivered OSHA Form 301 Injury and Illness Incident Report (22-RPT) is a facsimile of Form 301.

Form area
An area of the window that contains a form.

Form Builder
A tool 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
Full Time Equivalent. An FTE is the ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of .5 means working time is half of the time that represents full time employment.

FTP
File Transfer Protocol. 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.

Function keys
Keys F2 through F12 on the keyboard that can be assigned to a bookmark or favorite.

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
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.

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.

HIPAA
Acronym for Health Insurance Portability and Accountability Act of 1996. HIPAA is a law that protects citizens from being denied health insurance coverage due to a pre-existing condition, and protects the privacy and security of citizens' healthcare information by enforcing standards for the manner in which health information is transmitted electronically.

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 location
The country in which an employee permanently resides.

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.

I-beam
Symbol that identifies the insertion point.

ICESA
Interstate Conference of Employment Security Agencies. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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.

Impromptu
Tool for interactive database reporting. Reports are built from the database using a pre-defined catalog.

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
An 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

Acronym for Integrated Postsecondary Education Data System.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

"NCES has established the Integrated Postsecondary Education Data System (IPEDS) as its core postsecondary education data collection program (prior to IPEDS some of the same information was collected by the Higher Education General Information Survey-HEGIS). It is a single, comprehensive system that encompasses all identified institutions whose primary purpose is to provide postsecondary education.

IPEDS consists of institution-level data that can be used to describe trends in postsecondary education at the institution, state and/or national levels. For example, researchers can use IPEDS to analyze information on 1) enrollments of students, undergraduate, first-time freshmen, graduate and first-professional students by race/ethnicity and gender; 2) institutional revenue and expenditure patterns by source of income and type of expense; 3) salaries of full-time instructional faculty by academic rank and tenure status; 4) completions (awards) by type of program, level of award, race/ethnicity, and gender: 5) characteristics of postsecondary institutions, including tuition, room and board charges, calendar systems, etc.; 6) status of postsecondary vocational education programs; and 7) other issues of interest."

IRP/BSS

Information Reporting Program/Bulletin Board

IRS/MCC

Internal Revenue Service/Martinsburg Computing Center

JDBC

Java Database Connectivity Application Programming Interface. An application programming interface for accessing tabular data sources from the JAVA programming language.

JMNTRUN

Script used to assign check numbers and create history records.

Job

A 'Job' is a generic description of a role within the organization—for example, Manager.

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. Control statements that execute programs.

Alternately: Jobstreams

Job type

A generic category that further defines a particular job.

JPAYRUN

Script that is used to calculate pay and create payroll reports.

JQTRRUN

Script that executes the new quarterly reporting process.

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.

JXP5QTR

Stand-alone script used on all platforms to extract and compile the new quarterly COBOL program.

KEYDEL

Utility program used to delete existing QUERY Alternate Keys.

KEY-PE
Utility program used to rebuild the QUERY Alternate Keys.

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 (GG-SCR).

Large number
The Multicurrency Payroll component contains a large-number format time entry form that accepts a nine-digit number as opposed to the seven-digit maximum in the standard Payroll Administration.

LDEFAULTS
Cyborg term used for a text/list box default template.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Link/jump
Reference to another document. Links (or hotspots) appear as underlined text. When you move your cursor over a link, the cursor changes to a hand. Click the link to access or jump to the referenced document.

LIS file
Standard file name used by all completed report files that are launched online. Files are automatically assigned this extension by the Online Initiation of the Pay Processing and Reporting feature.

Local currency
The currency in which the employee is paid.

Local currency country
The work location for tax purposes.

Log file
Informational file generated when a report is launched online. The log file is used by the Process Monitor to communicate the status, progress, and completion of a report.

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 per inch.

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, calculate pay or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

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 form or page.

Manual payment
A payment not created within The Solution Series.

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 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 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.

MMREF
Magnetic Media Reporting and Electronic Filing. Also used to refer to the specifications and instructions for reporting to participating states through magnetic media. See Social Security Administration publication MMREF-1 for specifications and instructions for reporting quarterly wage information to participating states through magnetic media.

Model (PowerPlay)
File (with the extension .pye) that contains definitions of PowerCube dimensions and measures, queries that define the data sources, and other details needed to create a defined cube. Defined models reflect performance requirements as well as requirements of the final user of the cube.

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.

Multicurrency costing records
Records that maintain a history of the deduction and deposit transactions for each exchange rate.

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.

NACHA
American not-for-profit trade association that develops operating rules and business practices for the Automated Clearing House (ACH) Network and for other areas of electronic payments.

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.

NCES
Acronym for National Center for Educational Statistics.

(Taken from NCES website at http://nces.ed.gov/ipeds/AboutIPEDS.html)

Primary federal entity for collecting and analyzing data that are related to education in the United States and other nations.

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 period pay run
Pay run for which the earning and deduction cycles are incremented. New-period pay runs are typically part of a regular pay schedule, and do not include off-cycle runs.

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.

Notional value
A value input for informational purposes only.

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.

Off-cycle pay run
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.

One-stop document
Documentation that contains reference information, step-by-step procedures, and training exercises.

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
A list of valid options and associated descriptions from which you may select an appropriate entry. 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.

The organization is the highest level in The Solution Series structure and is identified by a six character code. All records are organized by organization.

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 levels
Hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are customer-defined.

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.

OSHA
U.S. Department of Labor Occupational Health and Safety Administration.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

P2EDIT
Transaction editor program. This is the first program executed as part of the batch payroll process. This program performs edits on the input transactions.

P4CALC
Program that performs payroll calculations and updates to the sequential Batch Master File during a payroll run.

P5PRNT
Program that formats and creates all output, including payments, reports, tapes, and records that must be recycled to future payroll runs.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Packaged reports
Delivered reports developed using a Fourth Generation scripting language, Cyborg Scripting Language (CSL).

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 extract
Process that extracts data from the online Employee Database.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semi-monthly. Also referred to as a payroll period.

Pay merge
Process that updates the Employee Database with the current data from the recently processed pay run.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A pre-printed 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

An automated process that 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 Control Language.

PDF

Portable Document Format. 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.

Permanent Master Record

Individual employee record in the Employee Database. This record contains all the information about an employee, such as name, address, pay frequency, and salary.

Permanent records of employee earnings, taxes, and deductions in the Employee Database. This is the only record group that contains month-do-date, quarter-to-date, and year-to-date accumulations.

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 definitions:

1. to place an object in a specified location.

2. a location, particularly in a record

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.

PowerPlay
Business intelligence tool for multidimensional analysis of corporate data, also known as Online Analytical Processing (OLAP).

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. To be safe, fill out the Direct Deposit Information form (H9-SCR) 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.

Process Monitor
Utility that allows you to monitor the progress of reports and payroll processes launched online.

Program
A program is a series of classes being administered using Training Administration. For example, 'The Training Schedule for January-June 2004' may be a program consisting of eight different classes.

Alternative definitions:

1. A form or other set of instructions within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

2. A set of coded instructions that enables a computer to perform a desired sequence of operations.

Prompt
Expression set up to enable users to filter data by typing or picking a value, or a series of values, when the report opens.

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 that appears depressed when clicked on (now known as command button).

Qualifier
A drop-down list (field) referring to a data element on the HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions used to describe the type of information supplied in a related data element (field). For example, a Telephone Qualifier drop-down list identifies whether the telephone number supplied in a Telephone Number text box is a home, work, or fax telephone number.

Quarter-end P20
P20 is a file structure used in batch payroll processing. The quarter-end P20 file contains payroll data that is used in the quarterly processing.

Quarterly Processor
Combination of forms, report generators, and COBOL programs that extracts quarterly wage reporting information and produces all of the selected quarterly reports and formatted filing output (paper, tape, or diskette) for all selected employees in all selected states.

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.

Reconciliation number
The unique identification number printed on each pay document. Reconciliation numbers are used in the payment reconciliation procedure to verify cleared and outstanding payments.

Record
A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definitions:

1. To set down for preservation in writing or other permanent form.

2. The reporting format for magnetic media as in Tape Record Type such as ICESA, TIB-4, or MMREF

3. Information or data on a particular subject collected and preserved

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.

Regulatory bulletin
Contains updates to varying components of The Solution Series necessary to maintain regulatory compliance. Tax specifications supplied are delivered in regulatory bulletins (RBs).

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
Batch program that creates report extract records.

Alternate definitions:

1. A detailed accounting of an activity; for example, the quarterly report of unemployment insurance details to a filing entity.

2. As in 'Report Select character', this represents the selection frequency for this output.

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.

Report Viewer
Utility that allows you to view, search, print, save, and delete reports that are launched online.

Reporting Administration
HRMS reporting and analysis tool that links the database functionality found in The Solution Series with sophisticated, yet easy to use business intelligence tools from Cognos®.

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 definitions:

1. key on keyboard used to perform a carriage return; can also be known as Enter.

2. to send back to the originator; for example, the Tape Return Information form (QT-SCR) gives the address to which a filing entity would return a magnetic tape containing errors.

Review process
A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

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.

A Schedule Master table is used to associate schedules with a Policy Master table. A Schedule Master table can also be used to override values held on its corresponding Policy Master table.

Employees are assigned to a Schedule Master table. Schedule Master tables may be created for individual employees, or for use by groups of employees or by crews.

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 system.

SEIN
State Employer Identification Number; required by some states for wage and tax reporting.

Selectable File08 Display
Program that displays FILE08 information based on a selectable record key, starting key, time, and date.

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.

Also known as the Batch Master File.

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 Differential/ Premiums
Premium (or allowance) added to an employee's regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

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 key
Key that corresponds to a command name on a menu, such as CTRL+Z.

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.

SIC
Standard Industrial Classification.

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.

SOAP
Simple Object Access Protocol. This is an XML-based protocol that exchanges structured and typed information on the Web.

SOC
Standard Occupational Classification.

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 retrieves information from a relational database so it can populate Impromptu reports.

Standalone Time and Attendance
Customers who are using Time and Attendance Administration but not Payroll Administration.

Standard Pay Processing and Reporting
Pay run and reporting process that is executed in batch.

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.

Statutory employee
Any of the four categories of workers who are independent contractors under common law and are treated by statute as employees. These include:
(1) a driver who distributes beverages (other than milk) or meat, vegetables, fruits, or bakery products; or who picks up or delivers laundry or dry cleaning, if the driver is your agent or is paid by commission.
(2) certain types of full-time insurance sales reps
(3) an individual who works at home on materials supplied by you that must be returned to you
(4) certain full-time travelling or city salespeople.

Social Security and Medicare (FICA) taxes may or may not be withheld. Income taxes are not withheld from a statutory employee. A statutory employee will receive a W-2 with the 'Statutory Employee' box checked.

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.

SUI
State Unemployment Insurance.

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.

Switches
Text or list box options that allow decisions to be recorded; in some cases, to be turned on or off.

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.

Alternate definition: a function to be performed; objective

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 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 class
Defines taxability for pre-tax deductions. These contributions can vary by tax authority. In the U.S.:

* Tax Class 1 defines taxability for 401(k) plans (maintained for all but local authorities)

* Tax Class 2 defines Section 125 plans (maintained for federal only)

* Tax Class 3 defines tax-sheltered annuities (maintained for federal only)

* Tax Class 4 - 9 fields are customer-defined

Tax code
The three-character to seven-character 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 supplied tax files. A Tax Maintenance File is a file issued 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 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
Income tax, unemployment insurance (including special assessments), and disability insurance are examples of tax types. At the federal level, there are also entitlement taxes: Social Security (FICA-OASDI) and Medicare (FICA-HI). The types of taxes to collect and the methods of collecting them vary by tax authority.

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 regulatory bulletin contains the updates to tax specifications, consisting of a bulletin document and a tax file that contains the updated tax specifications.

TDR

Table Definition Record.

Template

A basis from which to create a custom item. For example, you can use an existing 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 (").

Third Party Administator

An organization outside of a company that administers employee benefit plans on the company's behalf.

TIB-4

Technical Information Bulletin (Social Security Administration Publication 42-007). Also used to refer to the specifications and instructions for reporting to participating states through magnetic media.

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 Time and Attendance Administration 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.

TLCN

Tape Library Control Number - a government-provided control number.

ToolTip

Text that displays under a tool to describe its function when the mouse is held over the tool.

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.

TPA
Acronym for ***Third Party Administrator*** (see "Third Party Administator" on page 214).

Track
One of the concentric magnetic rings that form separate data storage areas on an electronic medium.

Trading Partner
A Covered Entity with whom another Covered Entity transmits health information electronically through the use of an Electronic Data Interface. Trading partners must create an agreement as to the specific information that will be passed during their transactions. The Electronic Data Interface is standardized by the provisions set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Also referred to as Business Partner.

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 cancelled, 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.

Transaction Set
Refers to HIPAA 834 (Benefit Enrollment and Maintenance) and 820 (Group Premium Payment for Insurance Products) transmissions meaning the smallest meaningful set of information exchanged between ***trading partners*** (see "Trading Partner" on page 215). The transaction set consists of a transaction header segment, one or more data segments in a specified order, and a transaction trailer segment.

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 definitions:

1. To move data or files from one computer to another

2. Electronic Funds Transfer or direct deposit

3. Allows employees to authorize the organization they work for to automatically deposit all or part of net pay into one or more bank accounts.

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.

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.

UI
Unemployment Insurance.

UI Number
Unemployment Insurance Number (or SUI number, State Unemployment Insurance number); required by all states.

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 Payroll Administration, 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 that 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 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 delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning
An employee’s schedule warning times.

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.

XML
Extensible Mark-up Language is a language for documents containing structured information.

XML Schema Definition Language
A language for describing and constraining the content of XML documents.

XSLT
Extensible Stylesheet Language Transformations. A language for transforming XML documents into other XML documents.

Year End Master File
P20OUT file from the final payroll run of the year

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