



Quest
Oracle
Community

PeopleSoft Payroll for NA SIG Meeting

February 9, 2021

Presented by Nicole Apostola and Sandi White

Contact Info

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Agenda

- Housekeeping
- RECONNECT Envision Conference
- Canadian Payroll: Open Discussion & Calendar Year End
- Fluid Payroll Workcenter **with special guest Rachael Butler!**
- US: Open Discussion & Calendar Year End
- **Future Topics:**
 - Component Lockdown (March)
 - Fluid Tips, Tricks & Best Practices



Share your expertise!

Insights, tips & tricks or best practices



Call for Presentation open until February 12th

Hot Topics

- ✓ [Configuration](#)
- ✓ [User Experience](#)
- ✓ [Selective Adoption](#)
- ✓ [Journey to the Cloud](#)
- ✓ [Chatbots](#)

Key Tracks

- ✓ [Enterprise Resource Planning](#)
- ✓ [Human Capital Management](#)
- ✓ [Tools & Technology](#)

Submit your abstract today!

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Join us online!

2 great events, 1 great price



Registration opens March 1st

Plan for the future

Roadmaps, updates, enhancements

PeopleSoft
RECONNECT
ENVISION

April 26 – 29, 2021

With a **focus on planning ahead**, RECONNECT Envision is where IT leaders, decision-makers and end users learn about what's coming from PeopleSoft and how to plan for the next few years: product extensions to consider, and how to leverage technology investments to drive their business forward.

Get hands-on

How to's, workshops, demos

PeopleSoft
RECONNECT
DIVE DEEP

October 4 - 7, 2021

Providing **practical digital learning**, RECONNECT Dive Deep is where PeopleSoft users of all levels can dig into new releases, dive deep into practical learning, get new ideas from best practices, and hone their core PeopleSoft skills.

SAVE BIG with Corporate Pass Event Bundles

questoraclecommunity.org/reconnect

RECONNECT Envision

- **April 26-29, 2021**
- **Think about presenting**, my friends!!
- Suggested Topics:
 - Workcenter Implementation
 - Chatbots
 - How you are using new payroll tools (minimum wage, off-cycle direct deposit, etc.) or 'old' payroll tools (component lockdown)
 - Using new non-payroll-specific tools (File Integration Framework, P&F Configurator, Announcements/Notifications) for payroll
 - Panel Discussions!

Webinar of Interest

- **Managing your PeopleSoft Customizations via Configuration**
- <https://attendee.gotowebinar.com/register/6475537860605448716>
- Tuesday, February 23 at 4pm EST
- Review Oracle delivered features like:
 - Event Mapping
 - Page and Field Configurator
 - Drop Zones
 - Classic Plus Styling
- Lessons Learned
- Challenges and technology limitations – Bring your Oracle bugs and pending SRs to the table

Canadian Payroll

Open Discussion
Calendar Year End

TAX106CN - new T4 boxes 57-60

- **Question from Pat K:**

- Per the CPA, the new boxes on the T4 would include wages + any non-cash taxable benefits + any allowances.
- In my testing our taxable benefits for Life insurance and AD&D benefits were not included.
- What are other customers experiencing?

- **Answer from Maria:**

The information reported in Boxes 57-60 reflect the employee wages and taxable benefits as well as any allowances provided the earnings and deductions are set up correctly in the Earnings and Deductions tables. That's what's captured by TAX106CN.SQR.

TAX106CN – running multiple times

- **Questions from Petra U:**
- The documentation indicates that Tax106CN.sqr could be run multiple times until the tax slips were loaded by CTX910LD. Issue with multiple empl rcds

special posting of Base Bug 32459376

Indian status

- **Question from Petra U:**

- How does one set up Indian status for employees who earn a percentage of Indian earnings?
- If an employee's earnings are 100% eligible for Indian status, box 14, 20 and 44 would all be zero and box 71 would be 100% Indian earnings.
- If an employee's earnings are only 10% exempt then we would report 90% in boxes 20 (Pension) and 44 (union dues)

Predicting Distribution Results

- **Question from Petra U:**
- Is there a way before pay confirm, to verify what gl fund/cost centre/department/account combination the payline would actually be processed to?

Fluid Payroll Workcenter

Rachael Butler
Navy Federal Credit Union

Fluid Payroll Work Center Delivered



Very Configurable

Left menu is collapsible giving more room to work on the screen

Can do all work from this view and never have to use navigator or favorites again

Fluid Payroll Work Center NFCU

The first step is to decide on your categories and what items you want to appear in each category.

Workforce Administrator Process Monitor New Window

Process List Server List

View Process Request For

User ID [REDACTED] Type [v] Last [v] 20 Days [v] Refresh

Server [v] Name [v] Instance From [v] Instance To [v] Report Manager

Run Status [v] Distribution Status [v] Save On Refresh

Process List

1-22 of 22 View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
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This tab collapses the menu if you need more room on your screen

Configuration (Enterprise Components>WorkCenter/Dashboards>Configure Pagelets)

< Installation PNA Pagelet Configuration

Pagelet Configuration

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Configuration ID:

Description:

Portal Name:

Workcenter Menu Item:

Dashboard Menu Item:

Case Sensitive

[Basic Search](#)

Search Results

View All 1-5 of 5

Configuration ID	Description	Portal Name	Workcenter Menu Item	Dashboard Menu Item
GP_WC	Global Payroll WorkCenter	EMPLOYEE	(blank)	(blank)
PYCAN_FL	Canada Payroll Fluid WorkCenter	EMPLOYEE	(blank)	(blank)
PYUSA_FL	US Payroll Fluid Workcenter	EMPLOYEE	(blank)	(blank)
PYWC	Payroll WorkCenter	EMPLOYEE	HC_PAYROLL_WORKCENTER	(blank)
TLWC	Time and Labor Workcenter	EMPLOYEE	HC_TL_WRCNTR_LAUNCH_GBL	(blank)

Configuration (Enterprise Components>WorkCenter/Dashboards>Configure Pagelets)

Installation PNA Configure Pagelets

WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes

Configuration ID: PYUSA_FL
*Description: US Payroll Fluid Workcenter
Portal Name: EMPLOYEE

WorkCenter
Menu Item:

Fluid WorkCenter
Menu Item: HC_PY_WC_APP_FL

Dashboard/Homepage
Menu Item:

Fluid WorkCenter Grouplet Display Order

1-4 of 4 | [View 3](#)

Display Order	Fluid WorkCenter Grouplet	Show Grouplet
1	My Work	<input type="checkbox"/>
2	Links	<input checked="" type="checkbox"/>
3	Queries	<input checked="" type="checkbox"/>
4	Reports/Processes	<input checked="" type="checkbox"/>

Configuration (Adding new items to the workcenter)

By selecting these checkboxes, you can allow users to add links themselves or to reorder the links on their homepage.

The screenshot shows the 'Configure Pagelets' interface for 'US Payroll Fluid Workcenter'. It includes a 'Description' section with two checkboxes: 'Allow User to Personalize the Display Options' and 'Allow User to Add Additional Links'. Below this is an 'Update User Personalization Settings' dialog with an 'Activate Links Settings' button. The main area is a 'Link Groups' section with a search bar and a 'Link List' table. The table has columns for 'Define Link/Security', 'Display Order', 'Link Label', 'Link Type', 'Show Link', 'Starting Page', and 'Open in New Window'. The last row, 'Process Monitor', has its 'Show Link' checkbox checked and a '+' sign in the 'Open in New Window' column. Navigation buttons like 'Save', 'Add', and 'Update/Display' are at the bottom.

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define	1	Component Lockdown	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	2	Load Time and Labor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	3	Precalculation Audit Report	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	4	Calculate Payroll	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	5	Review Payroll Error Messages	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	6	Payroll Error Message Report	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	7	Payroll Summary	Menu Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	8	Add Additional Paysheets	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	9	Update Paylines	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	10	Calculate Where Needed	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	11	Review Paychecks	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	12	Final Payroll Calculation	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	13	Precconfirm Audit Report	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	14	Confirm Payroll	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	15	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-

Once page is complete, Click the Activate Link Settings button to make the changes live.

You can add pages or sections by selecting the + sign. On the new row select the Define hyperlink and it will open a menu for you to add the path to the new page. (see next slide)

Configuration (Adding a new item to the workcenter)

The screenshot displays the 'Configure Pagelets' interface. At the top, there's a breadcrumb 'Installation PNA' and a title 'Configure Pagelets'. Below this, there are controls for 'Display Order' (set to 4) and 'Hide Group'. The main area is a 'Link List' table with columns: Define Link/Security, Display Order, Link Label, Link Type, Show Link, and Starting Page. The table lists 15 items, with the last one being 'Process Monitor'. A 'Define Link/Security' dialog box is open over the table, showing 'Link Type' as 'Menu Item', 'Menu Item' as 'PT_PROCESSMONITOR_GBL', and 'Label' as 'Process Monitor'. A 'Select a Content Reference' dialog box is also open, showing a tree view of content references under 'Payroll Processing USA'. The tree view includes items like 'Create and Load Paysheets', 'Update Paysheets', 'Produce Payroll', etc. The bottom of the interface has navigation buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'. At the very bottom, there's a footer with 'WorkCenter/Dashboard | My Work | Links | Queries | Reports/Processes'.

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page
Define	1	Component Lockdown	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	2	Load Time and Labor	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	3	Precalculation Audit Report			
Define	4	Calculate Payroll			
Define	5	Review Payroll Error Messages			
Define	6	Payroll Error Message Report			
Define	7	Payroll Summary			
Define	8	Add Additional Paysheets			
Define	9	Update Paylines			
Define	10	Calculate Where Needed			
Define	11	Review Paychecks			
Define	12	Final Payroll Calculation	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	13	Preconfirm Audit Report	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	14	Confirm Payroll	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Define	15	Process Monitor	Menu Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Configuration (Query Configuration)

[New Window](#) |

- [WorkCenter/Dashboard](#)
- [My Work](#)
- [Links](#)
- Queries**
- [Reports/Processes](#)

Configuration ID PYUSA_FL

Description US Payroll Fluid Workcenter

- Allow User to Personalize the Display Options
- Allow User to Add Additional Links

Update User Personalization Settings ?

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Activate Queries Settings

Last Modified 09/15/2019 3:20:39AM
 Last Run On 09/15/2019 12:47:01AM

Query Groups ?

4 of 5 | [View All](#)

*Group Label
 Display Order

- Start Group Collapsed
- Hide Group

+ -

Query Definition ?

1-3 of 3 | [View All](#)

Display Order	*Type	Override Title/Description	Query Name	Description	Access	Show Link	Starting Page		
<input type="text" value="1"/>	Query <input type="checkbox"/>	<input type="checkbox"/>	EMPLOYEES_BY_STATE <input type="text"/>	Employee by State	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="2"/>	Query <input type="checkbox"/>	<input type="checkbox"/>	N_USAFED_EES <input type="text"/>	Former USAFED EE's	Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="3"/>	Query <input type="checkbox"/>	<input type="checkbox"/>	YTD_EARNINGS_BY_CODE <input type="text"/>		Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Configuration

(Reports/Processes Configuration)

Installation PNA Pagelet Configuration

WorkCenter/Dashboard My Work Links Queries Reports/Processes

Configuration ID PYUSA_FL

Description **US Payroll Fluid Workcenter**

- Allow User to Personalize the Display Options
- Allow User to Add Additional Links

Update User Personalization Settings

This action will activate pagelet changes for all users. For users with personalization settings, it will only add new rows or remove rows that are no longer available.

Activate Reports/Processes Settings

Last Modified 09/15/2019 3:20:39AM
Last Run On 09/15/2019 2:48:59AM

Link Groups

*Group Label Year End Process

Display Order 4

Start Group Collapsed

Hide Group

Link List

Define Link/Security	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define	1	Balance ID Table	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	2	Create Pay Calendars	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	3	Ann Leave Bump & Payout Rpt - N_00048BN	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	4	OSHA File and Report	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	5	CFC/United Way Upload Program	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	6	Leave Liab Rpt - YE - N_0036PY/N_0037PY	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	7	FUTA Credit Reduction Tax - TAX020	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	8	Cobra/Retiree/LTD Upload - N_0064PY_AE	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
Define	9	Update Year End Reporting Info - TAX504	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Working/Testing from the WorkCenter

Workforce Administrator | Pay Calendar Table

Pay Calendar Table
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Company: begins with [] [Q]

Pay Group: begins with [] [Q]

Pay Period End Date: = [] [Calendar Icon]

Pay Run ID: begins with [] [Q]

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

You can do all of your work from this one screen. Since the menu stays open on the left, you can kick off processes and once they finish move on to the next process without ever navigating away.

Workforce Administrator

Prepare Payroll

- Review Pay Calendars
- Presheet Audit Report
- Create Paysheets
- Load Retro Pay to Paysheets
- By Payline
- Update Paysheet Transactions
- Load Paysheet Transactions
- Rapid Entry Multiple Dates
- One Time Deduction Override
- Employee Conversion Report - N_007
- Hired & Term Contractors - N_0080HI
- Safe Act Process
- Emergency Notification System - N_0
- Upload to Rapid Entry - N_0025PY

Pay Calendar Table
Enter any information you have and click Search. Leave fields blank for a list of all v:

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Company: begins with [] [Q]

Pay Group: begins with [] [Q]

Pay Period End Date: = [] [Calendar Icon]

Pay Run ID: begins with [] [Q]

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Informational in case you want to use the delivered My Work Tab

- If you want to use the delivered audit exceptions that appear on the My Work Tab, you will have to turn on Generate Audit Exceptions by checking the box on the PNA Installation Table.

[← Products](#)

Payroll for NA Installation

Retroactive Payroll

Last Retro Pay Request Seq Nbr

Accounts Payable

AP Invoice Number Prefix

Last AP Invoice Number

WorkCenter Parameters

Generate Audit Exceptions

US Payroll

Open Discussion
Calendar Year End

Next Meeting – March 9

<https://register.gotowebinar.com/register/1335711324969603083>

We will be discussing Component Lockdown
with special guest Rachael Butler of Navy Federal Credit Union