P-031810

JDE HCM Tips and Techniques

May 8, 2024

SYNTAX

THE JD EDWARDS FORUM AT BLUEPRINT 4D

JDE HCM Tips and Techniques

Marta DiDomenico
Syntax – Senior JDE Consultant
(407) 595-8940
Marta.DiDomenico@Syntax.com

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JDE HCM Tips and Techniques

Contents

HR

- P060116 vs P0801
- Supergrid/form extension and personalization
- Job Master and UDC tables

Payroll

- User ID in Pay Cycle Workbench
- Changes to Master Pay Cycle Dates/Copy button for Master Pay Cycles
- Online Payment Review
- Journal Detail and Summary
- “Delete previous journals”
- Timecard Automation

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JDE HCM Tips and Techniques

Contents

Benefits

- Enrollment with Eligibility Date
- Using Benefits Workfiles for “other” purposes

Little Stuff

- Dates (no slashes needed)
- XREF
- Entering a name in address number
- Eliminate the “print” screen on UBEs (Release 22)

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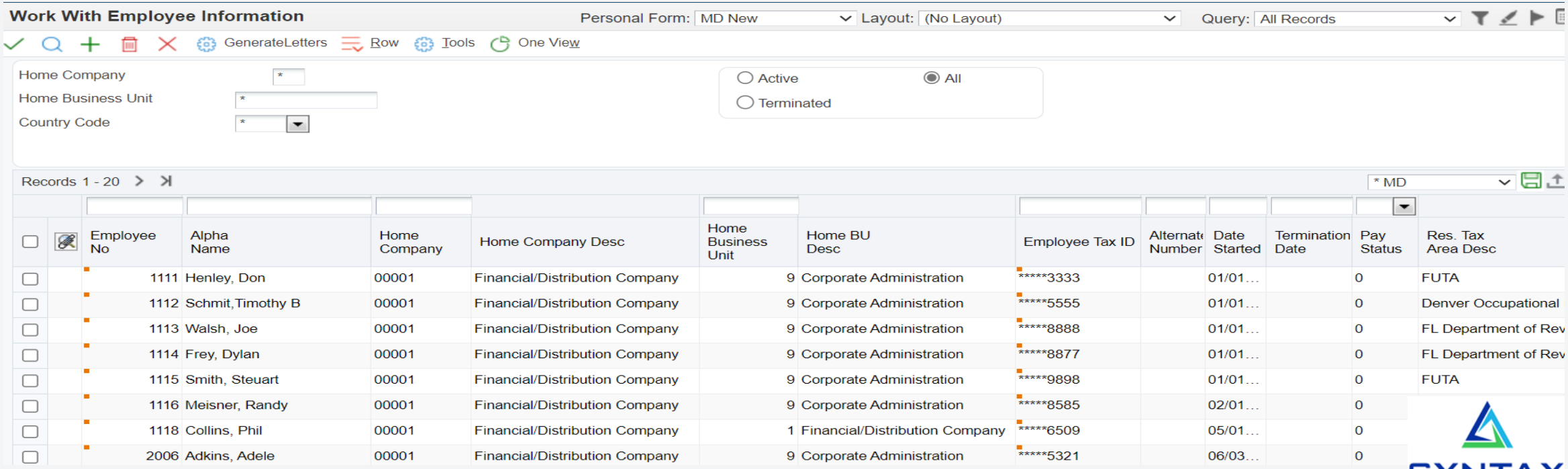
JDE HCM Tips and Techniques – P0801 vs P060116

P0801 – 13 fields



Employee No	Alpha Name	Home Company	Home Company Desc	Home Business Unit	Home BU Desc	Employee Tax ID	Alternate Number	Date Started	Termination Date	Pay Status	Res. Tax Area Desc
1111	Henley, Don	00001	Financial/Distribution Company	9	Corporate Administration	*****3333		01/01…		0	FUTA
1112	Schmit,Timothy B	00001	Financial/Distribution Company	9	Corporate Administration	*****5555		01/01…		0	Denver Occupational
1113	Walsh, Joe	00001	Financial/Distribution Company	9	Corporate Administration	*****8888		01/01…		0	FL Department of Rev
1114	Frey, Dylan	00001	Financial/Distribution Company	9	Corporate Administration	*****8877		01/01…		0	FL Department of Rev
1115	Smith, Steuart	00001	Financial/Distribution Company	9	Corporate Administration	*****9898		01/01…		0	FUTA
1116	Meisner, Randy	00001	Financial/Distribution Company	9	Corporate Administration	*****8585		02/01…		0	
1118	Collins, Phil	00001	Financial/Distribution Company	1	Financial/Distribution Company	*****6509		05/01…		0	
2006	Adkins, Adele	00001	Financial/Distribution Company	9	Corporate Administration	*****5321		06/03…		0	

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JDE HCM Tips and Techniques – P0801 vs P060116

P060116 – 39 fields

Work With Employees

Personal Form: (No Personalization) Layout: (No Layout) Query: *All

Row Tools One View

Home Company *

Home Business Unit *

Employees

○ Active ○ Terminated ◉ All

Records 1 - 20 Show All Columns

Address Number	Alpha Name	Employee Tax ID	Sex	MS TX	Emp St	Co	Home Business Unit	Mail Stop	Pay St	Pay Freq	P C	Pay Class	Union Code	Union Code	Job Typ	Job Step	EEO Job
1111	Henley, Don	*****3333	M	J		00001	9	BDG1	0	W	H	Hourly	9004	Finance Department	0A-10		002
1112	Schmit,Timothy B	*****5555	M	J		00001	9	LOUNGE	0	W	H	Hourly		.	AOPSMG		002
1113	Walsh, Joe	*****8888	M	J		00001	9	LOUNGE	0	B	S	Salaried		.	2H-5		002
1114	Frey, Dylan	*****8877	M	J		00001	9		0	S	S	Salaried		.	2H-2		002
1115	Smith, Steuart	*****9898	M	J		00001	9		0	B	S	Salaried		.	0A-1		001
1116	Meisner, Randy	*****8585	M	J		00001	9		0	B	S	Salaried		.			003
1118	Collins, Phil	*****6509	M	J		00001	1		0	B	H	Hourly	99707	Company 707 Empl...	MUS		005
2006	Adkins, Adele	*****5321	F	M		00001	9		0	W	S	Salaried		.	2H-2		002
2049	Walter, John	*****0492	M	H		00001	9		0	S	S	Salaried		.	2H-4		
2111	Ingram, Paul	*****1112	M	J		00001	9		T	S	S	Salaried		.	8M-1		
2129	Jackson, John	*****8761	M	S		00050	5000		T	S	S	Salaried		.	0A-10		

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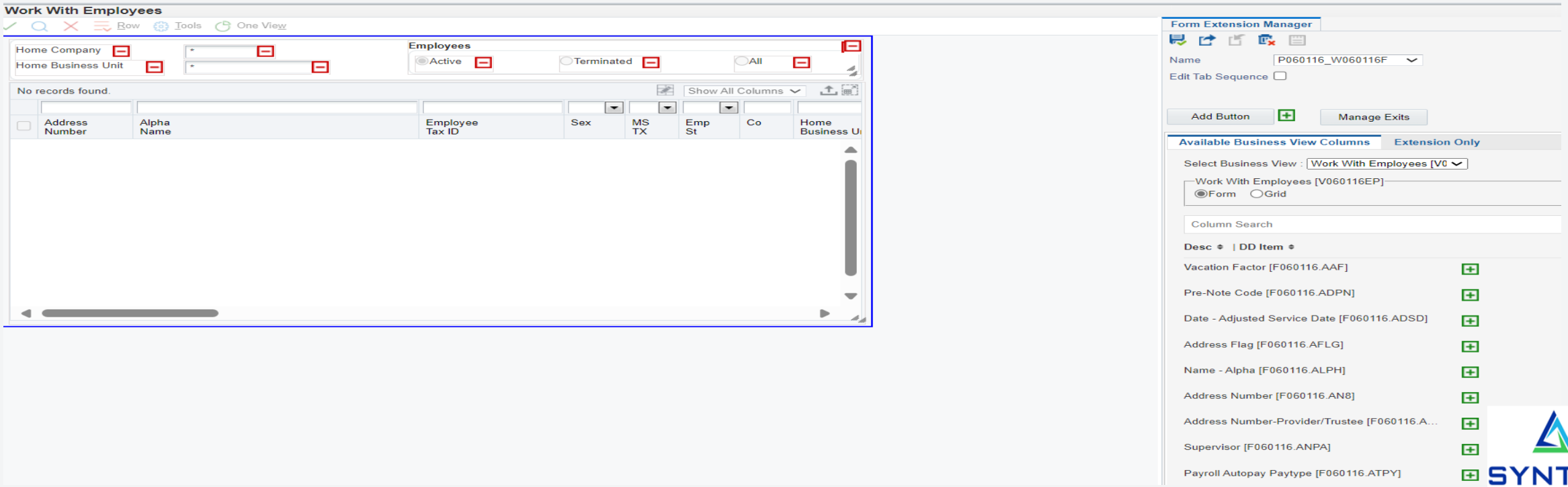
JDE HCM Tips and Techniques – P0801 vs P060116

Form Extension allows you to add 100+ more fields



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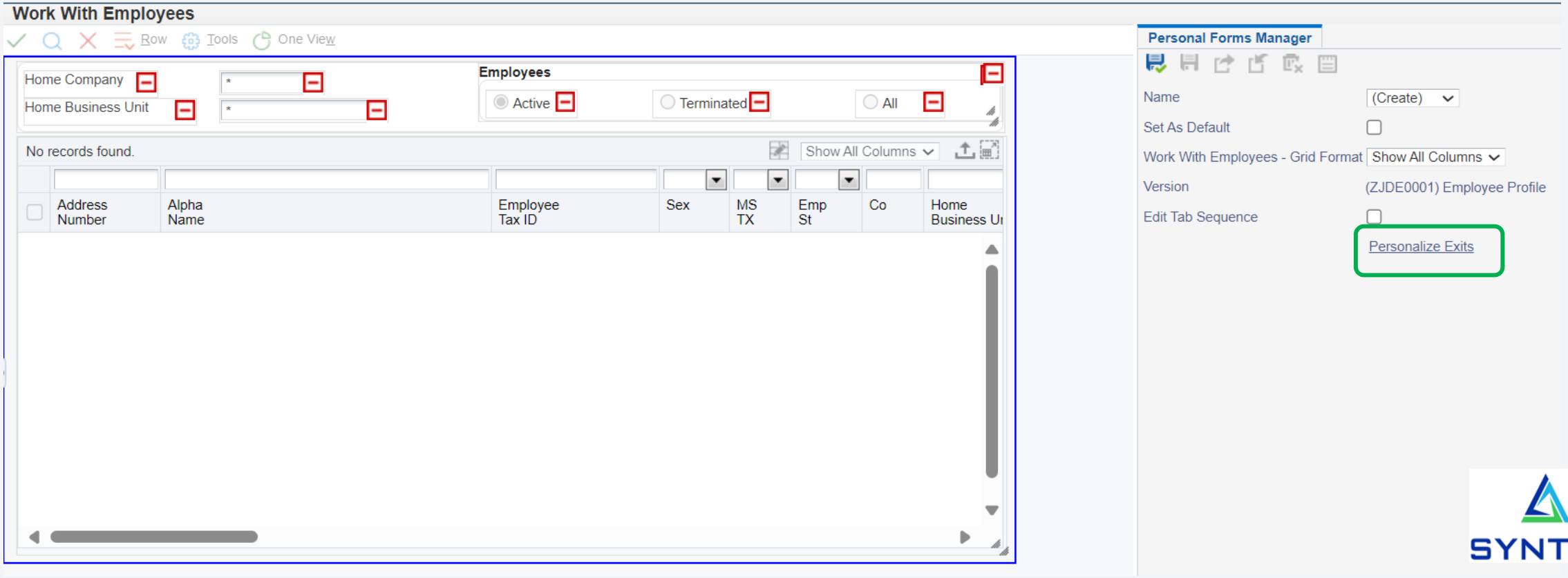
JDE HCM Tips and Techniques – P0801 vs P060116

Form Personalization allows you to move data around



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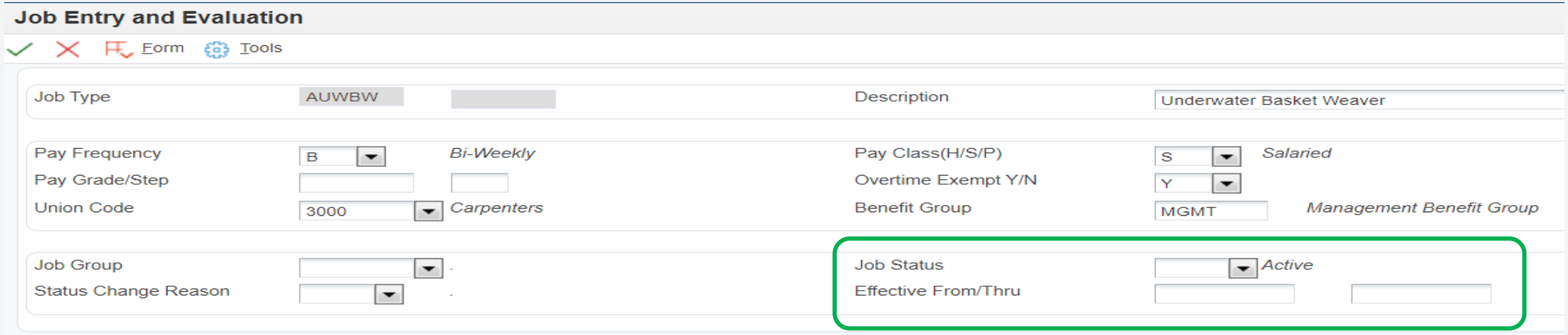
Job Master (P08001) – Part 1



- Entry of jobs into the Job Master creates UDCs 06/G and 06/GS
- Use effective from/through dates to narrow your search
- Populate as many fields as possible so that the data from the job flows into the employee record

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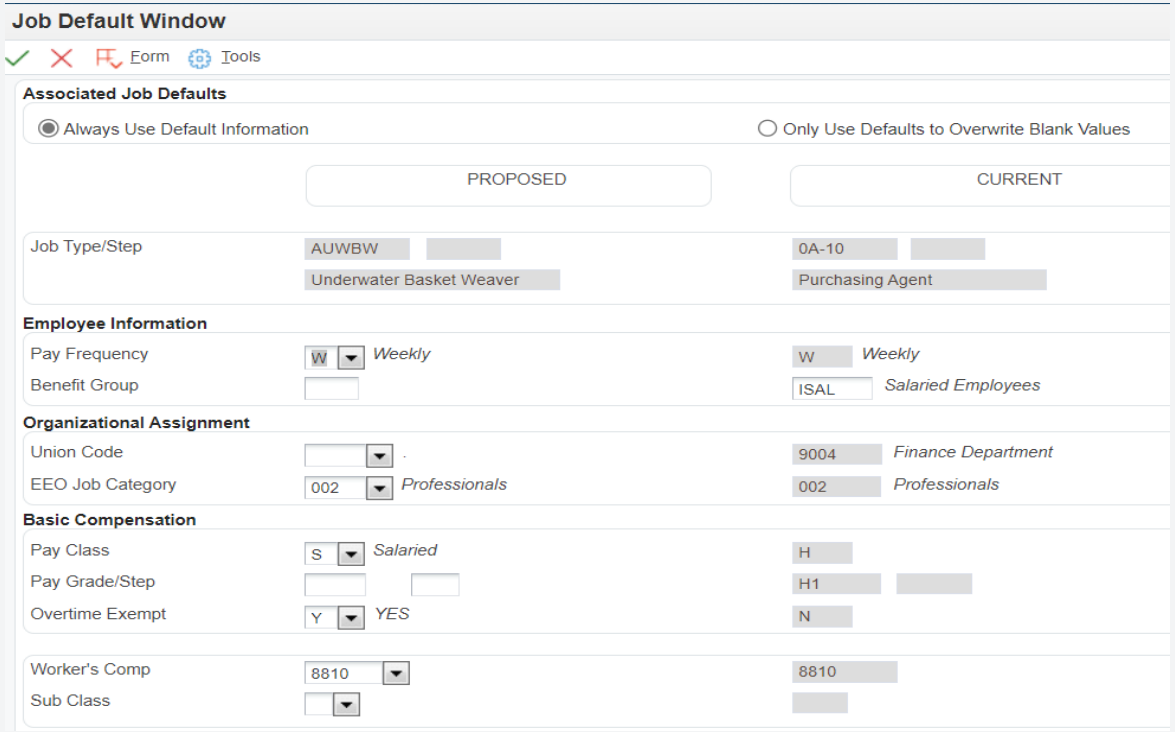
Job Master (P08001) – Part 2



- Always use default information…or "Only use defaults to overwrite blank values"?
- Works in conjunction with a processing option on P0801ORG

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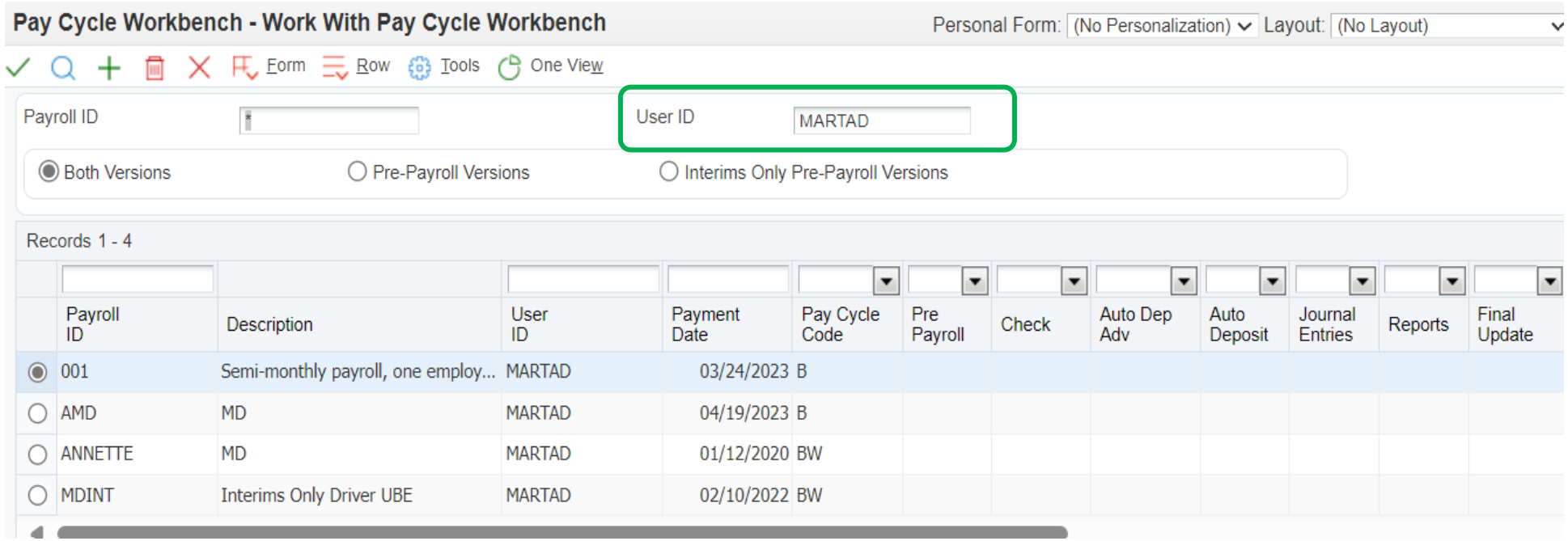
JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench



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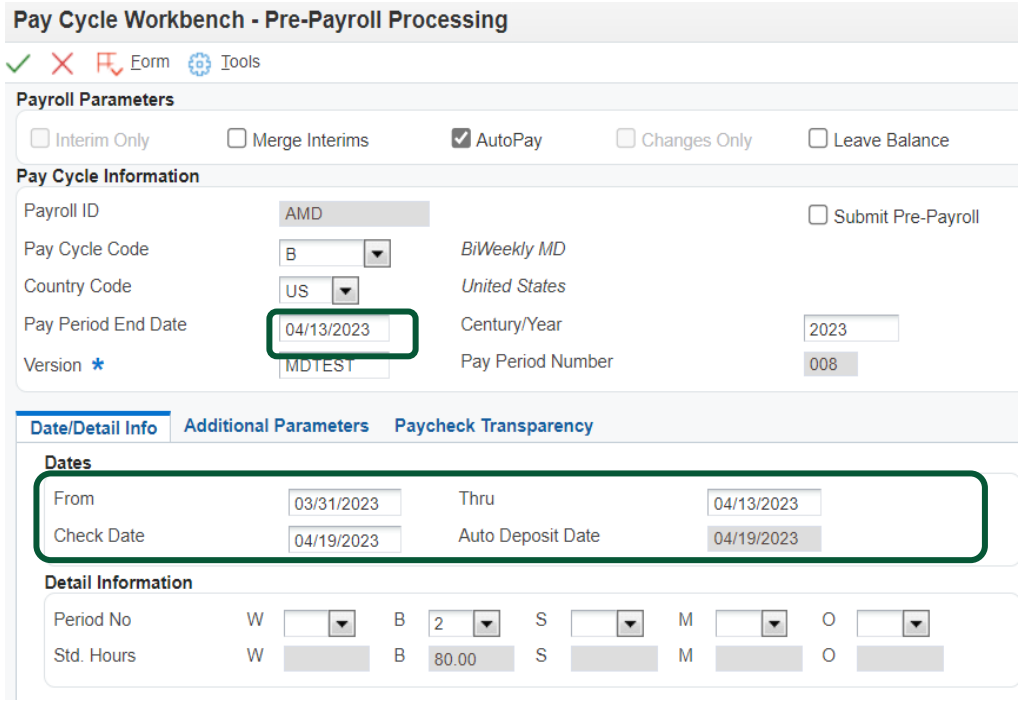
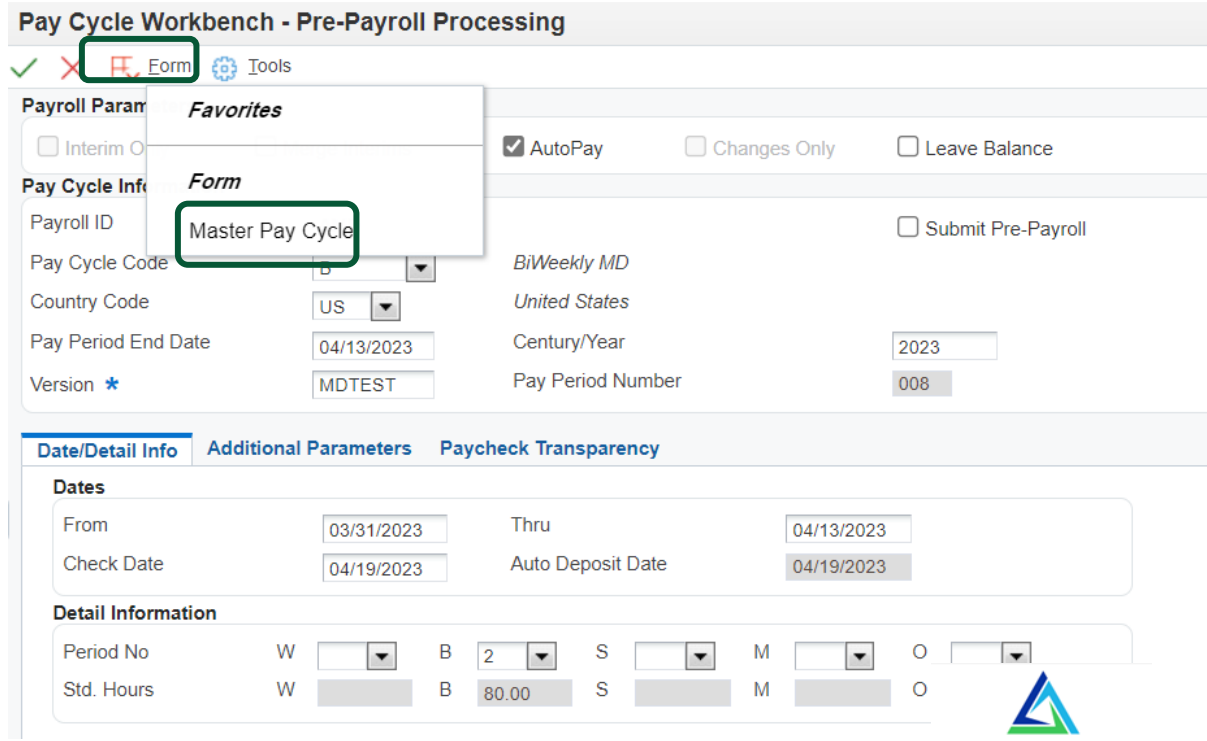
JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench – Master Pay Cycles





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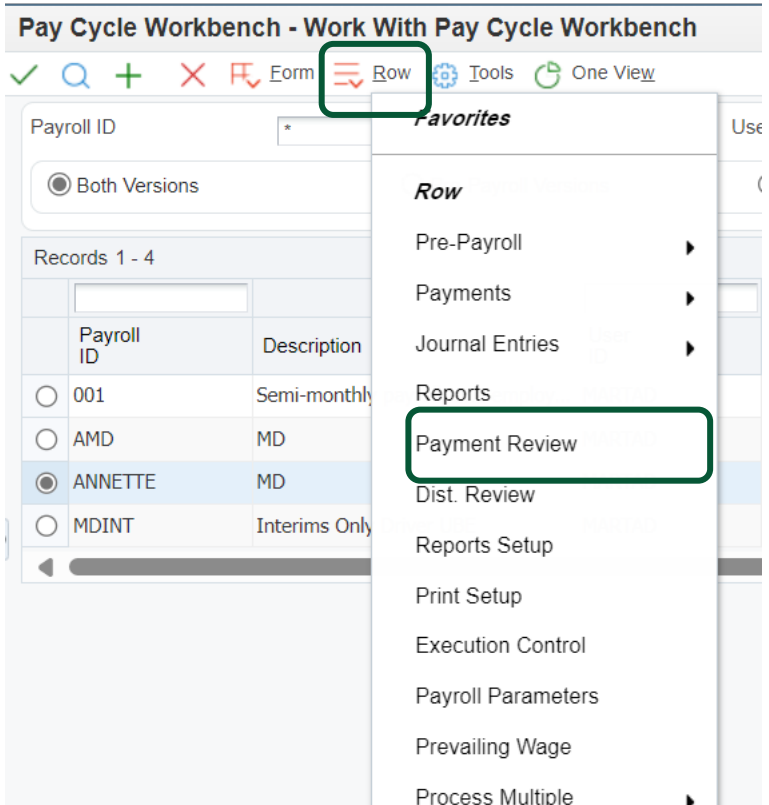
JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench – Online Payment Review



Much easier than going to the payroll register!
The exit is only available after you run prepayroll

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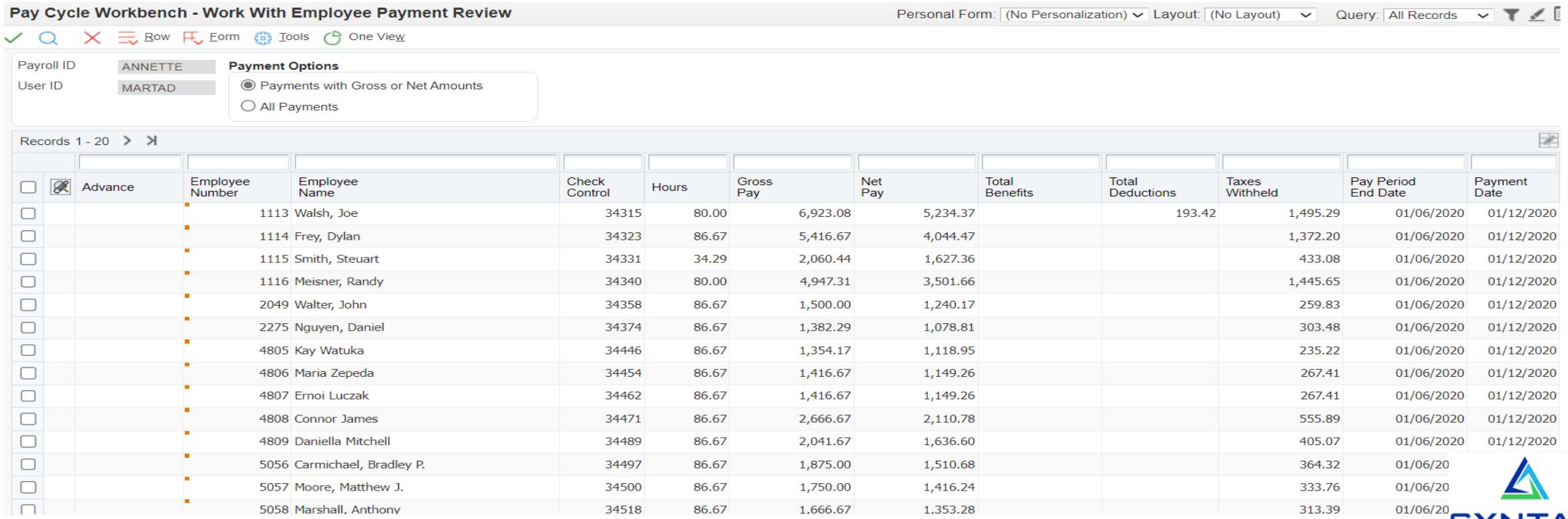
JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench – Online Payment Review



Pay Cycle Workbench - Work With Employee Payment Review

Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Row Form Tools One View

Payroll ID ANNETTE
User ID MARTAD

Payment Options
- (•) Payments with Gross or Net Amounts
- ( ) All Payments

Records 1 - 20

Advance	Employee Number	Employee Name	Check Control	Hours	Gross Pay	Net Pay	Total Benefits	Total Deductions	Taxes Withheld	Pay Period End Date	Payment Date
	1113	Walsh, Joe	34315	80.00	6,923.08	5,234.37		193.42	1,495.29	01/06/2020	01/12/2020
	1114	Frey, Dylan	34323	86.67	5,416.67	4,044.47			1,372.20	01/06/2020	01/12/2020
	1115	Smith, Steuart	34331	34.29	2,060.44	1,627.36			433.08	01/06/2020	01/12/2020
	1116	Meisner, Randy	34340	80.00	4,947.31	3,501.66			1,445.65	01/06/2020	01/12/2020
	2049	Walter, John	34358	86.67	1,500.00	1,240.17			259.83	01/06/2020	01/12/2020
	2275	Nguyen, Daniel	34374	86.67	1,382.29	1,078.81			303.48	01/06/2020	01/12/2020
	4805	Kay Watuka	34446	86.67	1,354.17	1,118.95			235.22	01/06/2020	01/12/2020
	4806	Maria Zepeda	34454	86.67	1,416.67	1,149.26			267.41	01/06/2020	01/12/2020
	4807	Ernoi Luczak	34462	86.67	1,416.67	1,149.26			267.41	01/06/2020	01/12/2020
	4808	Connor James	34471	86.67	2,666.67	2,110.78			555.89	01/06/2020	01/12/2020
	4809	Daniella Mitchell	34489	86.67	2,041.67	1,636.60			405.07	01/06/2020	01/12/2020
	5056	Carmichael, Bradley P.	34497	86.67	1,875.00	1,510.68			364.32	01/06/20	
	5057	Moore, Matthew J.	34500	86.67	1,750.00	1,416.24			333.76	01/06/20	
	5058	Marshall, Anthony	34518	86.67	1,666.67	1,353.28			313.39	01/06/20	

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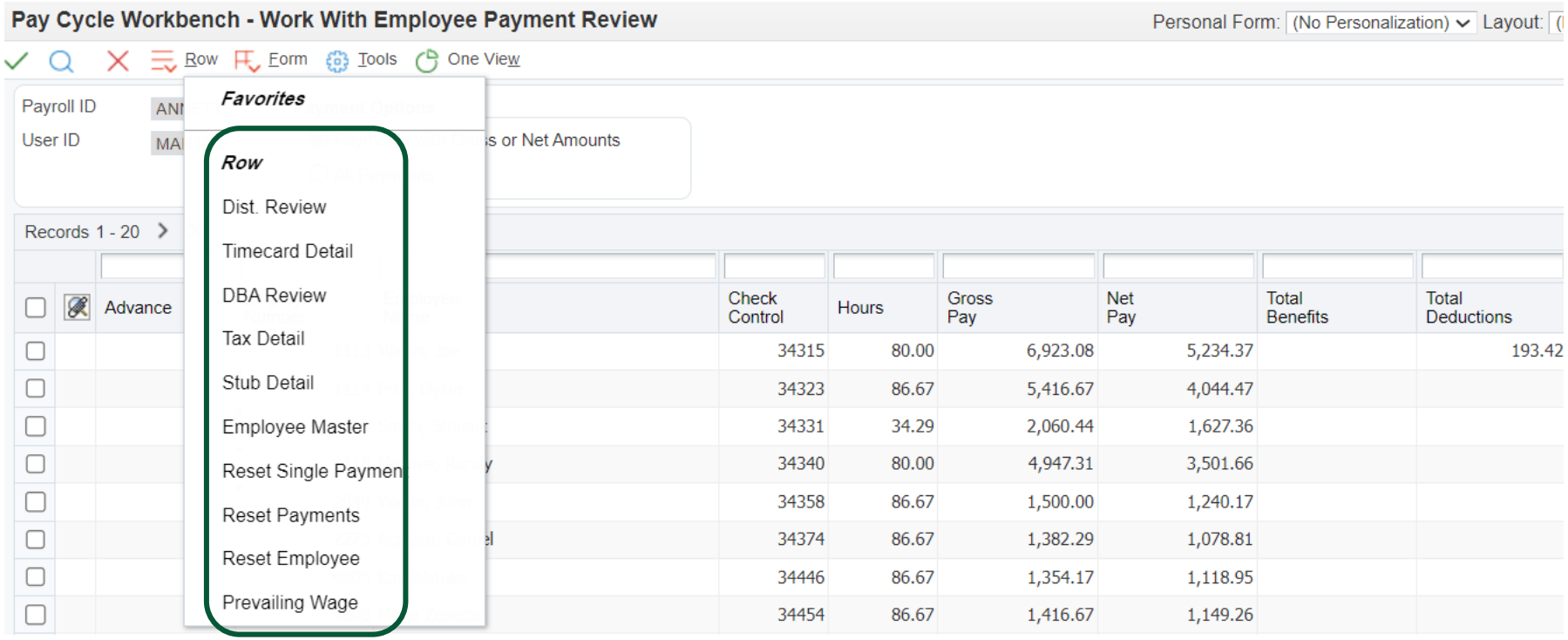
- Pay Cycle Workbench – Online Payment Review



Look at all this great data online! Includes employer transactions too!

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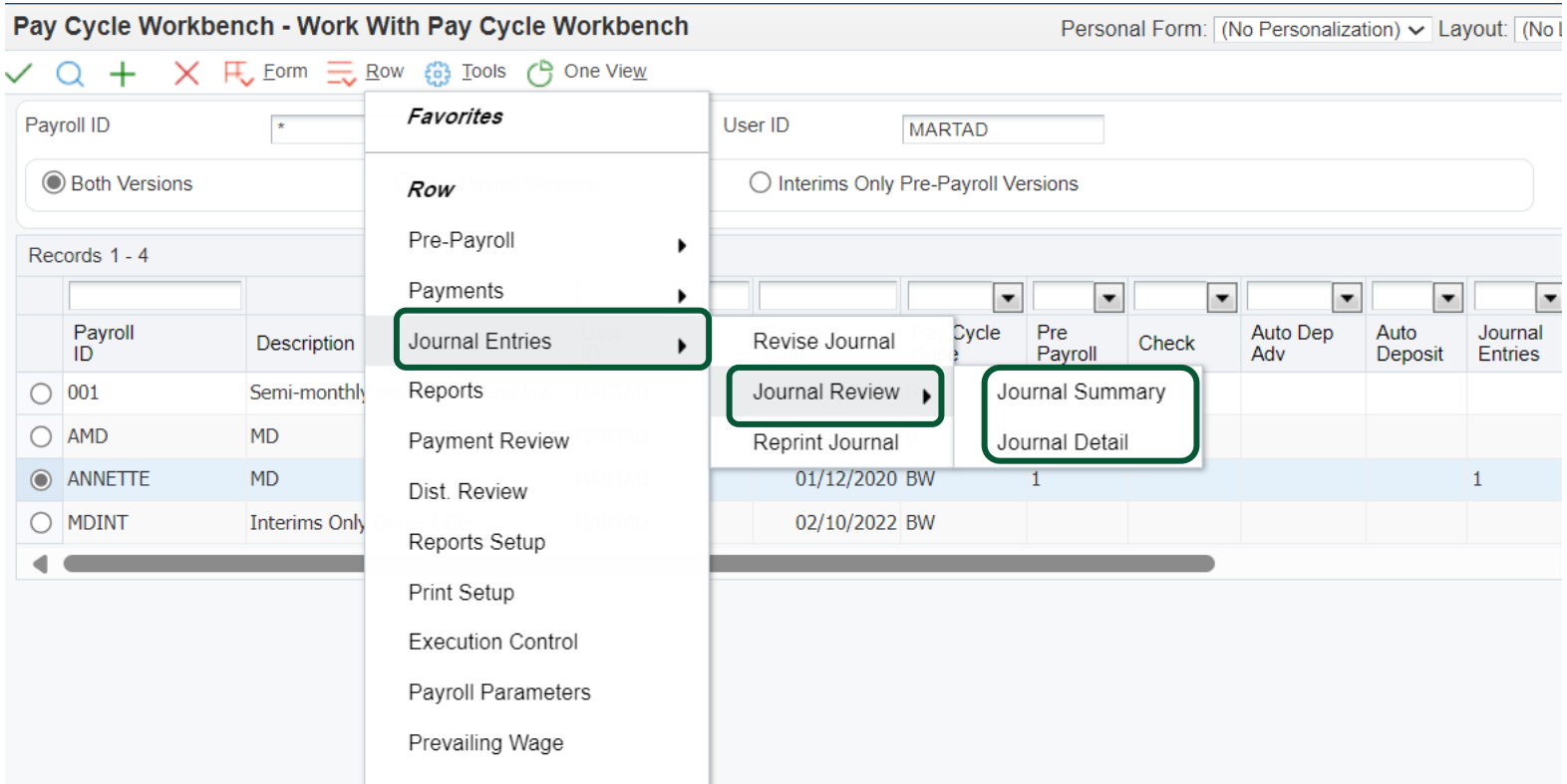
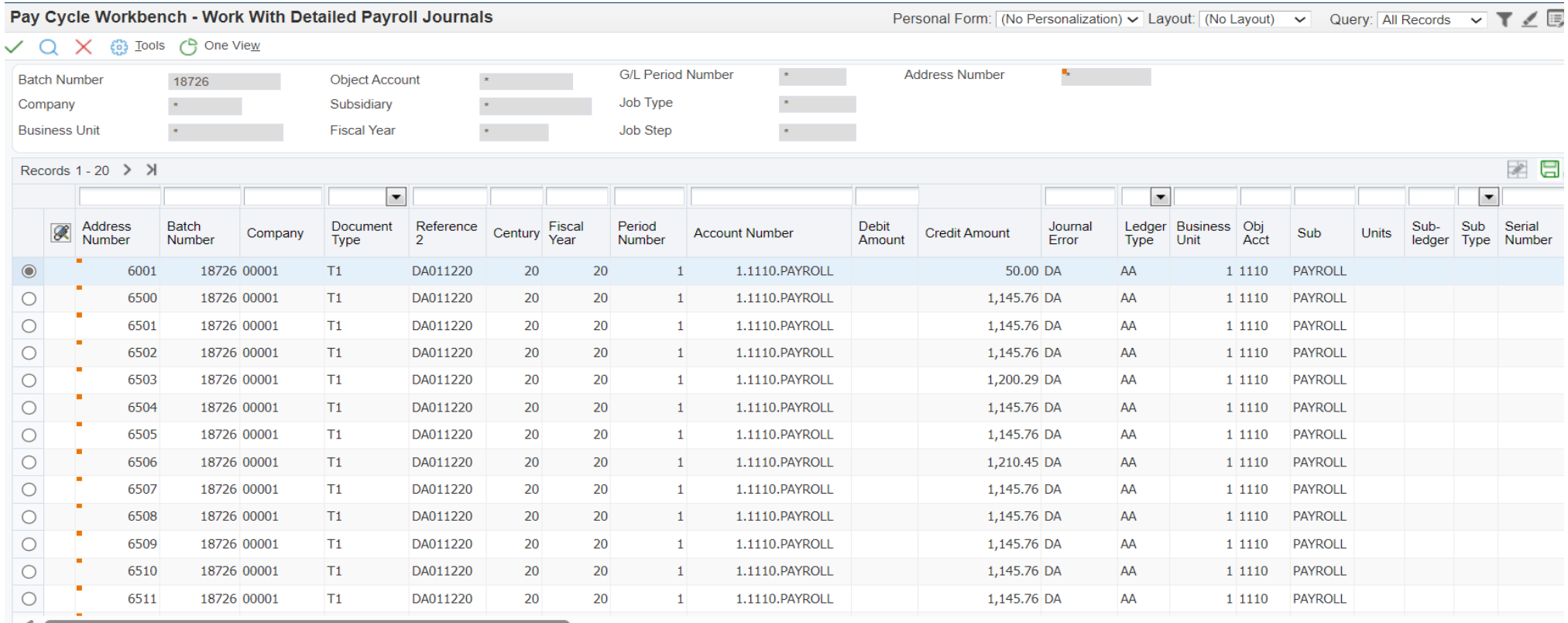
JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench – Journal Entry Detail



JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench – Journal Entry Detail



Pay Cycle Workbench - Work With Detailed Payroll Journals

Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Tools One View

Batch Number	18726	Object Account	*	G/L Period Number	*	Address Number
Company	*	Subsidiary	*	Job Type	*	
Business Unit	*	Fiscal Year	*	Job Step	*	

Records 1 - 20

Address Number	Batch Number	Company	Document Type	Reference 2	Century	Fiscal Year	Period Number	Account Number	Debit Amount	Credit Amount	Journal Error	Ledger Type	Business Unit	Obj Acct	Sub	Units	Sub-ledger	Sub Type	Serial Number
6001	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		50.00	DA	AA	1	1110	PAYROLL				
6500	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6501	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6502	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6503	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,200.29	DA	AA	1	1110	PAYROLL				
6504	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6505	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6506	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,210.45	DA	AA	1	1110	PAYROLL				
6507	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6508	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6509	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6510	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				
6511	18726	00001	T1	DA011220	20	20	1	1.1110.PAYROLL		1,145.76	DA	AA	1	1110	PAYROLL				

JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench – Journal Entry Summary

Pay Cycle Workbench - Work With Compressed Payroll Journals

Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Row Tools One View

Batch Number 18726

Records 1 - 20

Batch Number	Co	Doc Type	Reference 2	Fiscal Year	Per No	G/L Date	Labor Period Ending Date	Account Number	Debit Amount	Credit Amount	Units	A M	Explanation Alpha Name
18726	00001	T1	DA011220	20	1	01/12/2020		1.1110.PAYROLL		36,396.66		2	Payroll Disbur
18726	00001	T1	DP011220	20	1	01/12/2020		1.1110.PAYROLL		114,690.28		2	Payroll Disbur
18726	00001	T1	AW011220	20	1	01/12/2020		1.4205	164,386.90			2	Payroll Disbur
18726	00001	T1	AL011220	20	1	01/12/2020		1.4206		6,333.64		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4211		27,740.30		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4212		26,940.40		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4213		6,563.87		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4214		273.17		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4221.CA		24.25		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4221.CO		7,515.00		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4221.GA		118.30		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4221.MI		49.72		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4221.NE		39.23		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4222		501.91		2	Payroll Disbur
18726	00001	T1	AT011220	20	1	01/12/2020		1.4222.CA		100.15		2	Payroll Disbur

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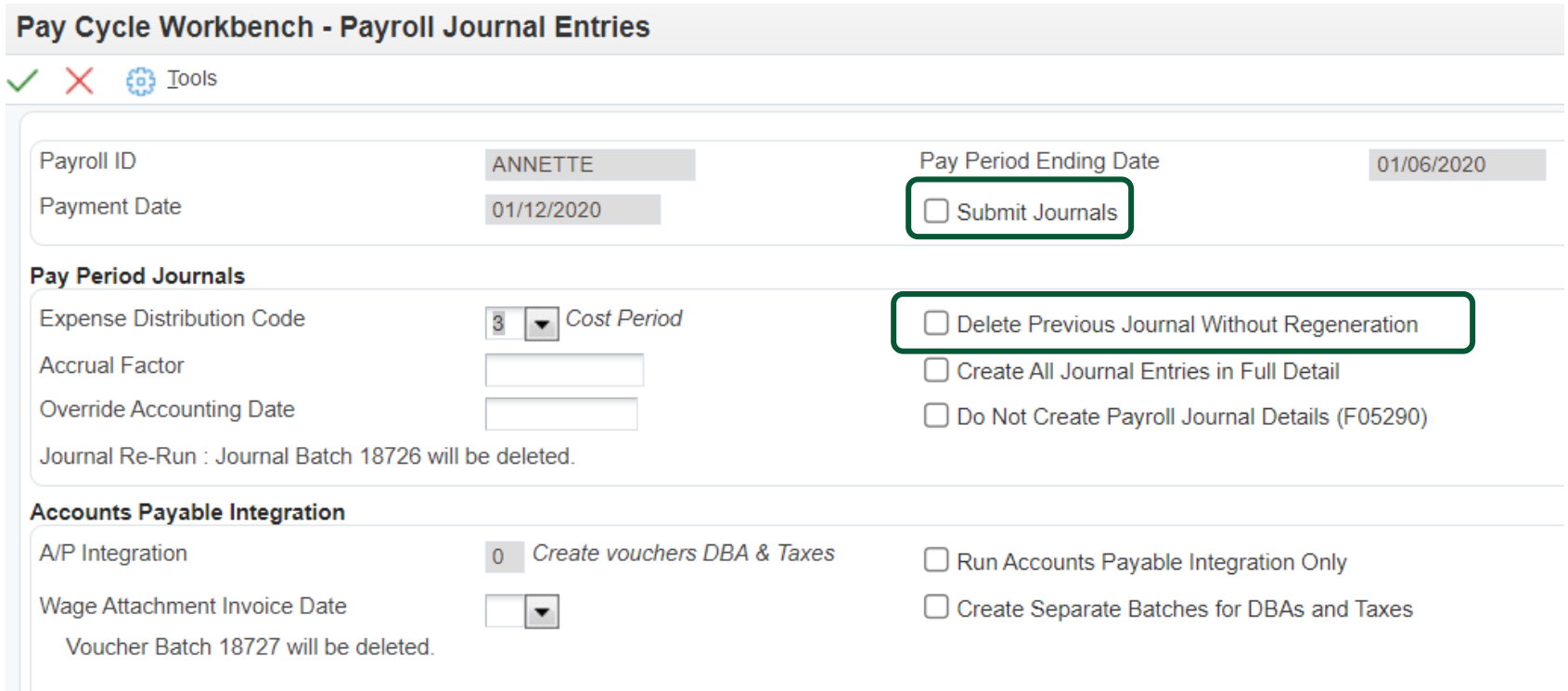
JDE HCM Tips and Techniques - Payroll

- Pay Cycle Workbench – delete previous journals



When rerunning journals, always delete the previous batch!

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JDE HCM Tips and Techniques - Timecard Automation

This is the best thing since sliced bread!!!

TIMECARD TEMPLATES

Used to generate timecard models for holiday pay or bonuses

OVERTIME

Use the system to calculate overtime, based on union, federal or state rules

RETROACTIVE PAY

Used for paying employees retroactively, when their salary adjustments or union pay rates weren't in the system in a timely manner

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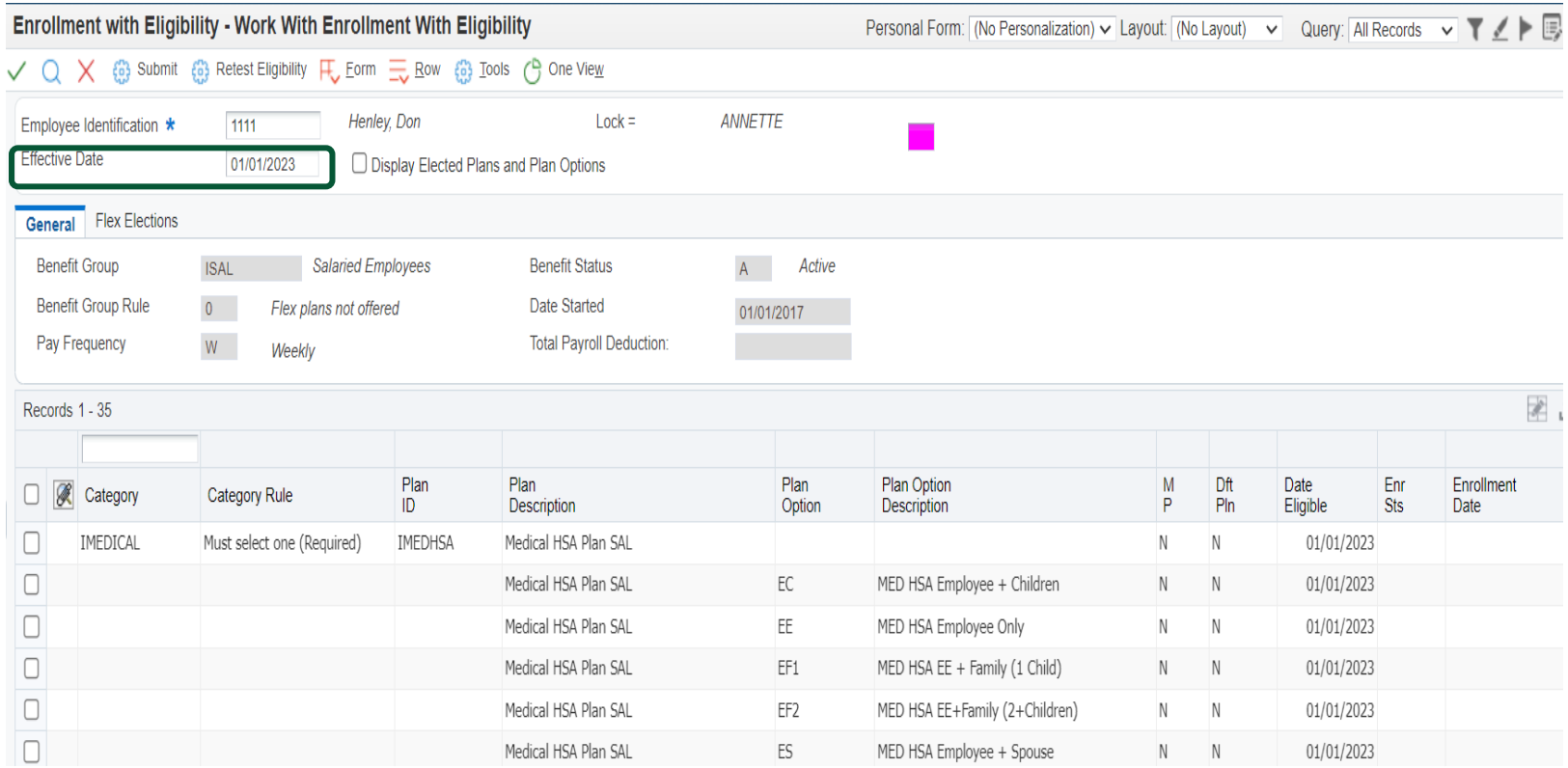
JDE HCM Tips and Techniques - Benefits



Category	Category Rule	Plan ID	Plan Description	Plan Option	Plan Option Description	M P	Dft Pln	Date Eligible	Enr Sts	Enrollment Date
IMEDICAL	Must select one (Required)	IMEDHSA	Medical HSA Plan SAL			N	N	01/01/2023		
			Medical HSA Plan SAL	EC	MED HSA Employee + Children	N	N	01/01/2023		
			Medical HSA Plan SAL	EE	MED HSA Employee Only	N	N	01/01/2023		
			Medical HSA Plan SAL	EF1	MED HSA EE + Family (1 Child)	N	N	01/01/2023		
			Medical HSA Plan SAL	EF2	MED HSA EE+Family (2+Children)	N	N	01/01/2023		
			Medical HSA Plan SAL	ES	MED HSA Employee + Spouse	N	N	01/01/2023		

- Controlled by a processing option
- This is the date that will be used on all records when making changes
- This is also the “as of” date

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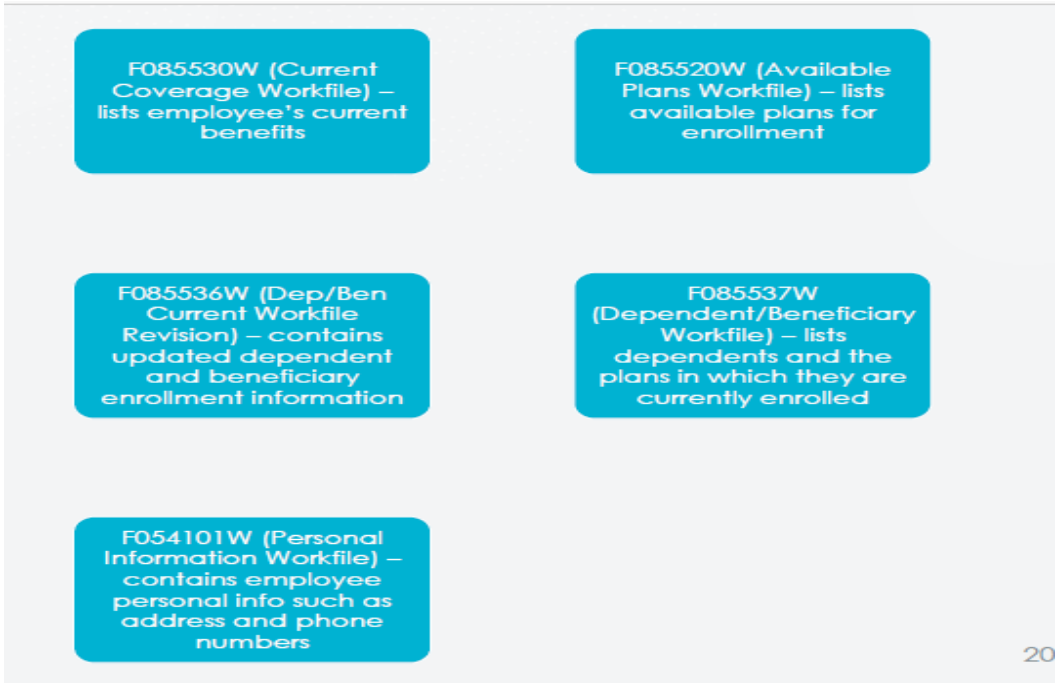
JDE HCM Tips and Techniques – Benefits Workfiles



- Can be used to retrieve data from a third-party provider and import to JDE
- Can be used to mass enroll employees in benefits (without using ESS)
- Some setup is required, but ESS functionality is not

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JDE HCM Tips and Techniques – The "Little Things"

- Dates – when entering dates in JDE, no slashes are needed. 010124, instead of 01/01/24
- Xref facility – cross references data between tables, forms and batches
- Enter an employee name in the address book search field and a list of values will pop up
- Eliminate the "print" form so that it's skipped when running UBEs

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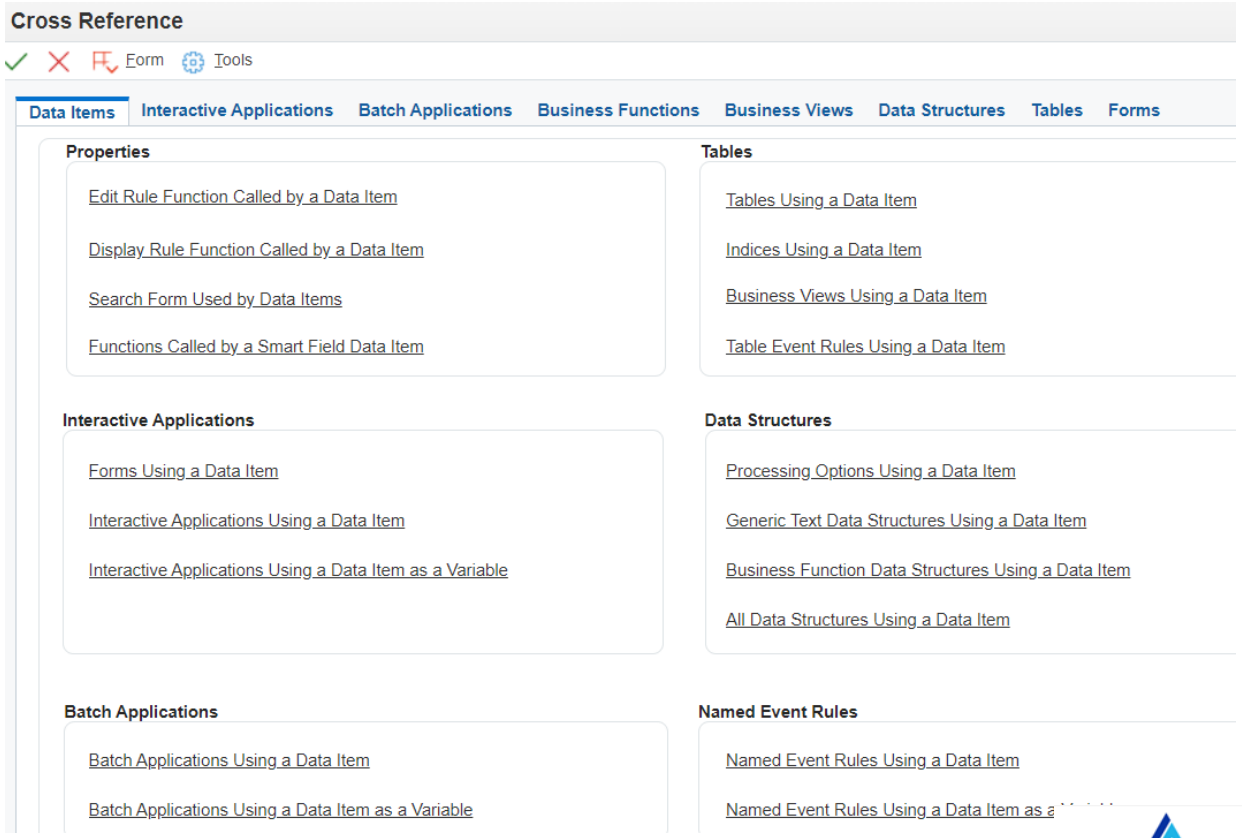
JDE HCM Tips and Techniques

- **Cross Reference Facility – or maybe this is the best thing since sliced bread?**

Fast Path = XREF



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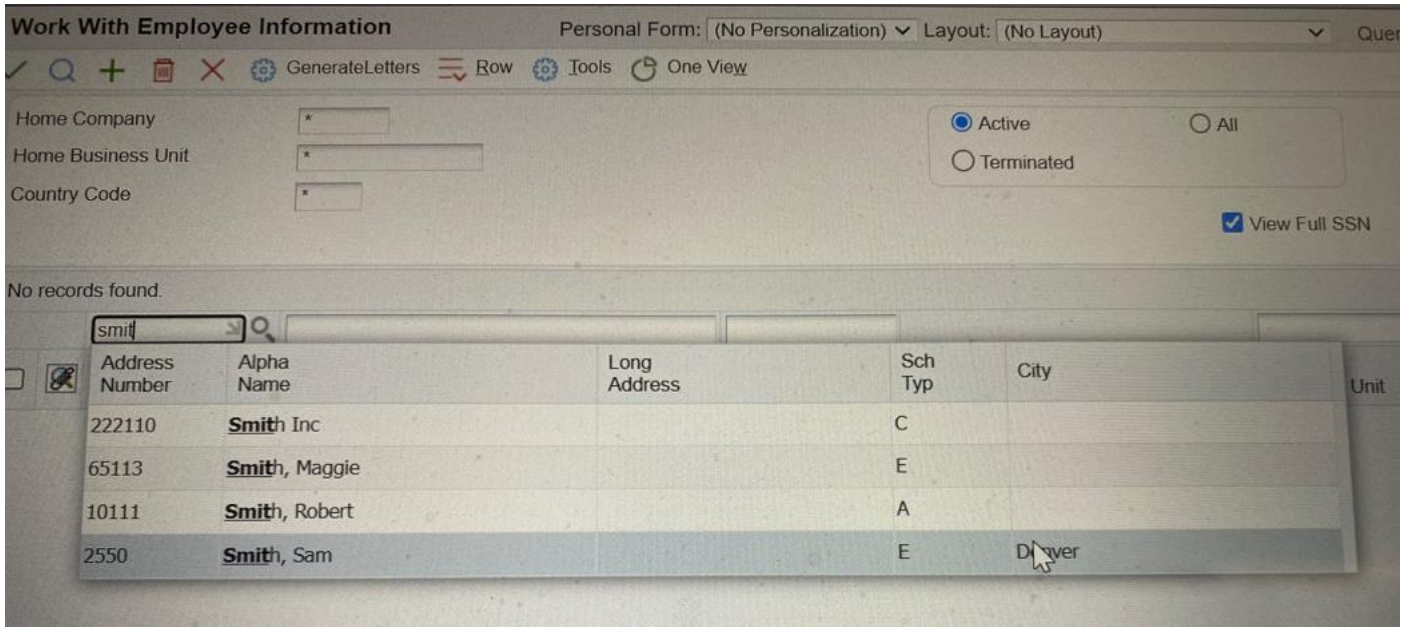
JDE HCM Tips and Techniques – The "Little Things"



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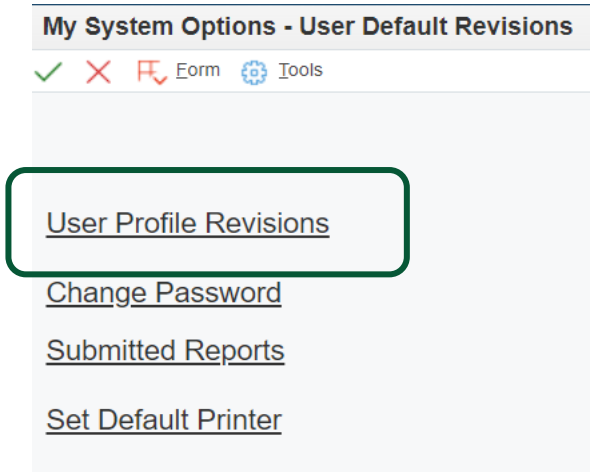
JDE HCM Tips and Techniques – The "Little Things"



Skipping the "print" form in UBEs

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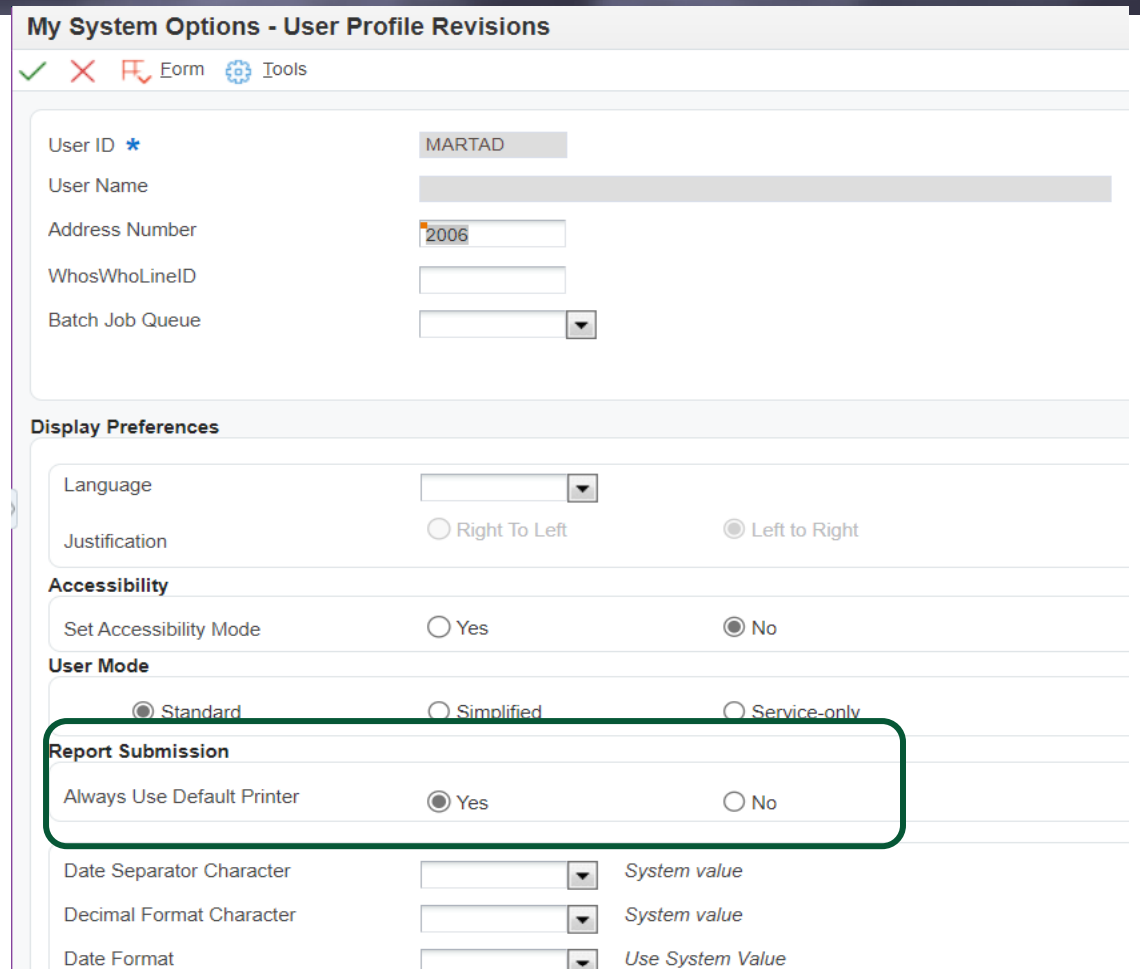
JDE HCM Tips and Techniques – The "Little Things"



Skipping the "print" form in UBEs

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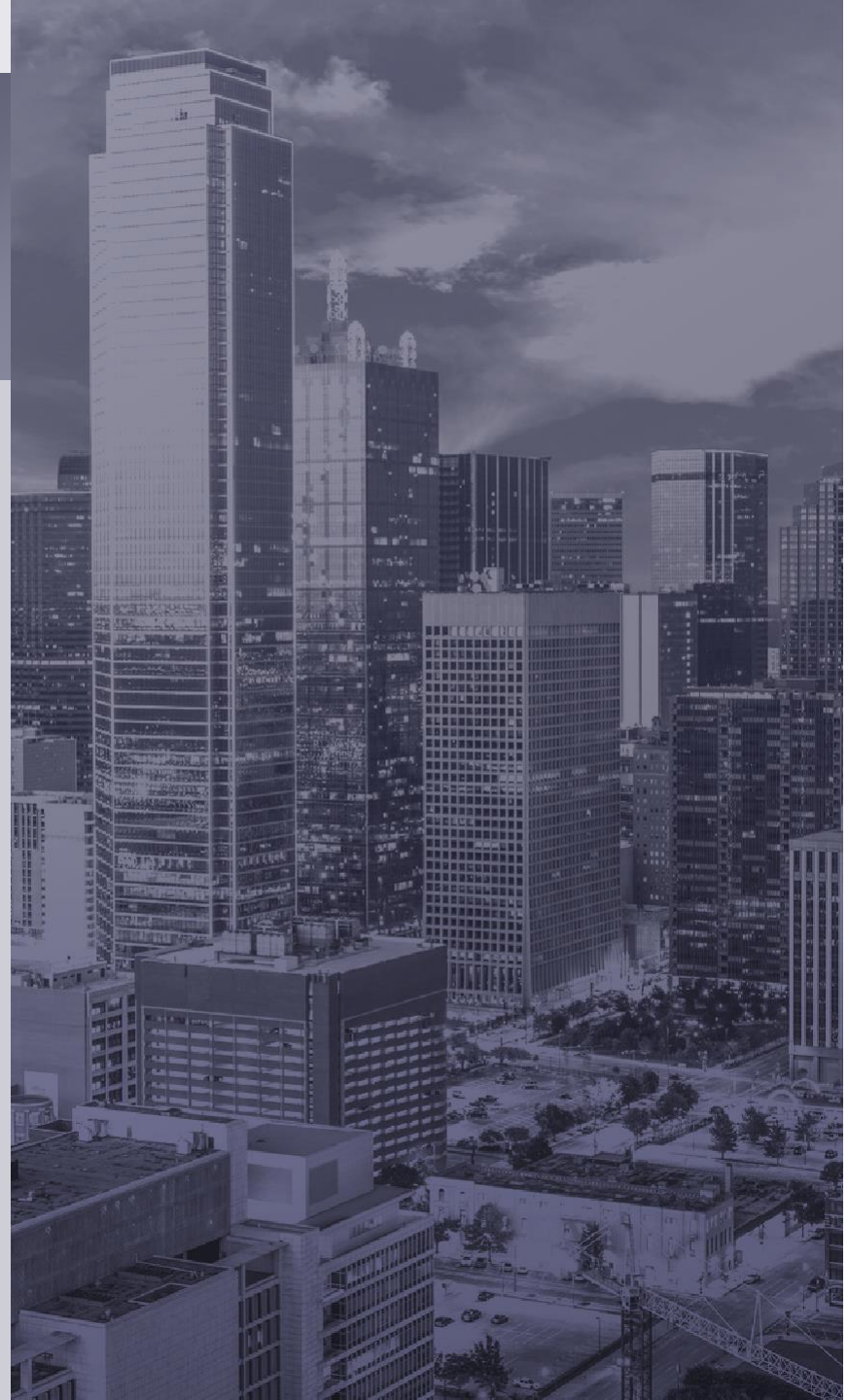

JDE HCM Tips and Techniques – Questions?

Contact me:

Marta DiDomenico
Marta.didomenico@syntax.com
407 595-8940

Session ID:

P-031810

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