PeopleSoft Workforce Communications 9.1 PeopleBook

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Oracle's PeopleSoft CRM Workforce Communications Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft automation and configuration tools.
- PeopleSoft business object management.
- PeopleSoft product and item management.
- PeopleTools PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews.

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

PeopleSoft Automation and Configuration Tools

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management.

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools.

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration Tools.

  This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge Management.

  This part discusses the setup of Verity search.

- Business process management.

  This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

  - The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
  - The setup and execution of business projects.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Oracle's PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleSoft Business Object Management

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics.

  This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

  This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

  This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

  This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

  This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Oracle's PeopleSoft CRM Business Object Management Preface"

PeopleSoft Product and Item Management

The *PeopleSoft CRM 9.1 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Oracle's PeopleSoft CRM Product and Item Management Preface"

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.52 PeopleBooks.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft Workforce Communications

This chapter provides an overview of PeopleSoft Workforce Communications and discusses:

- PeopleSoft Workforce Communications business processes.
- PeopleSoft Workforce Communications integration.
- PeopleSoft Workforce Communications implementation.

PeopleSoft Workforce Communications Overview

Human Resources (HR) organizations are under growing pressure to produce better results at a time when budget, personnel and other critical resources are limited. Success in this environment can be challenging and requires organizations to focus resources on the most strategic initiatives – those that provide the greatest value to the organization and align with organizational goals and objectives. PeopleSoft Workforce Communications 9.1 is a comprehensive solution for planning and delivering HR programs and surveys to the workforce and can help HR organizations address these challenges.

PeopleSoft Workforce Communications is the first and only solution in the market that enables HR organizations to:

- Deliver the right message to the right audience.
- Capture workforce feedback and take action.
- Gain program insight and quantify success.

Examples of HR programs and surveys that can be managed end-to-end using Workforce Communications 9.1 include:

- Organizational change management communications.
- Cultural brand awareness.
- Open enrollment communications.
- Policy and compliance communications.
- Manager assessed workforce planning.
- Health and wellness programs.

- Alumni community communications and development.

Workforce Communications includes functionality from the PeopleSoft Online Marketing and PeopleSoft Marketing applications, allowing users to:

- Create audiences.
- Create and update profiles.
- Create and execute Online Marketing dialogs for the purpose of sending email communications and of sending or posting on a web page links to Online Marketing surveys.
- Report on Online Marketing dialogs.
- Administer Online Marketing and related components.

With Workforce Communications, users will have the ability to target Workers and Person of Interests as recipients or targets of the email communications and web pages.

Delivering the Right Message to the Right Audience

Whether a HR program's objectives are to increase employee participation in health and wellness programs, strengthen the organizational brand or ensure timely compliance with HR policies, if the program and message are not communicated to the right people at the right time it will not be successful. To maximize HR program success and achieve the best possible outcome, HR organizations can plan and deliver targeted, coordinated HR programs and the necessary communications, aligning employee behavior with organizational goals using PeopleSoft Workforce Communications 9.1.

- Successful HR program planning and execution involves various people who need to work together as a unit. With PeopleSoft Workforce Communications, programs can be planned and run collaboratively in which stakeholders can set budgets, track costs, develop task lists and assign owners with ease. All HR team members participating in the planning and deployment of the program can stay in sync through various stages of the life cycle, helping to keep the program on track.
- Communicating HR programs and messages effectively requires the right communication methods or channels and the right level of workforce exposure to the message being communicated. PeopleSoft Workforce Communications enables you to plan and deploy multi-channel, multi-stepped HR program communications, ensuring maximum reach and assured message delivery.
- Messaging in HR programs needs to be relevant and reach the right workforce population. PeopleSoft Workforce Communications includes a wizard-based component that enables you to target defined groups of individuals. The content of the communication can be personalized to the recipient, delivering relevant content that they are more likely to read and benefit from. Additional tools allow you to identify groups that have previously received communications and avoid "spamming" your workforce.

Capturing Workforce Feedback and Taking Action

HR organizations can create a direct line of communication with the workforce via surveys using PeopleSoft Workforce Communications 9.1. HR organizations can build and roll out surveys to targeted groups of individuals for the purpose of assessment, feedback, satisfaction, preferences and more. Survey responses can be used by HR for organizational decision-making, enabling HR to be more strategic. Surveys used in combination with HR programs provide the instant feedback necessary for continuous improvement of HR programs.

- Insight gained from workforce survey results can provide HR with the information needed to develop a more successful HR strategy and to play an important role in influencing decision making at a corporate level. PeopleSoft Workforce Communications delivers a scoring framework to quickly assess satisfaction, engagement and comprehension—all critical components to developing a robust strategy.
- Surveys are a great mechanism to capture feedback for your HR programs to improve the quality of HR programs, to reduce the cost of programs and to assess whether the target audience of your program gets the message. With PeopleSoft Workforce Communications, you can assess the success of programs throughout their life cycles, resulting in higher-quality and lower-cost programs because you know what works and what doesn't.
- Personalization in surveys helps keep workers engaged and motivated about their participation. With PeopleSoft Workforce Communications, survey questions can be dynamically displayed so that individuals answer only the questions that are relevant to them. Follow-up actions can also be automated to be based on how an individual responds to a survey or interacts with an email or web page. Employees feel connected and informed, and that their opinions and concerns are being heard and addressed, which improves engagement and ultimately customer satisfaction and loyalty.

Gaining Program Insight and Quantifying Success

HR programs need to be analyzed to understand their effectiveness and to measure returns on investment. PeopleSoft Workforce Communications 9.1 enables you to put more decision and support tools in the hands of the decision makers, enabling them to make informed recommendations and take appropriate action. Analysts and managers at all levels can review, analyze and quantify their HR initiatives.

- Monitoring a program's execution in real time can help HR organizations gauge program effectiveness and change course if needed, saving both time and money. PeopleSoft Workforce Communications-delivered analytics enable analysts and managers to understand program performance immediately and modify the program or target workforce population while it is in progress to ensure the best outcome.
- HR programs that are run without tight oversight can quickly lead to cost overruns. With PeopleSoft Workforce Communications, costs incurred can be tracked against their allocated budgets, helping to identify areas in which costs could be cut or services could be modified.
- Survey results could reveal risks and under-performing areas of the organization. PeopleSoft Workforce Communications can help HR understand trends in workforce engagement, make sense of critical feedback or data captured, and identify workforce populations that are the most and least engaged.

PeopleSoft Workforce Communications Features

PeopleSoft Workforce Communications 9.1 features have been grouped into the following categories:

- HR Programs and Communications.
- Surveys.
- Reporting and Analytics.
- Integration and Security.

HR Programs and Communications

In PeopleSoft Workforce Communications 9.1, HR initiatives are represented by programs. A program is an initiative planned by the HR organization to achieve a specific objective such as launch a career development and training program, increase worker productivity or reduce worker medical claims. You can define the following types of programs in PeopleSoft Workforce Communications 9.1:

- *Dialog*: A dialog is defined when an HR organization needs to conduct personalized, online (email or web) communications with the workforce.
- *Campaign*: A campaign is defined when an HR organization needs to perform a coordinated set of manual or automated actions to accomplish the shared objectives of an initiative. These actions are called activities of the campaign.
- *Roll Up*: A roll up program serves as the common parent to one or more campaign or dialog programs. It is defined when several individual programs need to be managed together as part of a "master" HR initiative.

Surveys

In today's competitive world, HR organizations need to constantly collect information from the workforce with the intent of improving their skills, satisfaction and productivity. Online surveys provide an inexpensive and effective mechanism to gather such information. With PeopleSoft Workforce Communications 9.1, surveys can be designed and rolled out to targeted groups of individuals to collect feedback, understand preferences, assess skills or identify training needs. Surveys can be deployed independently in a dialog, or as part of a bigger HR program. Results of surveys are recorded and available for reporting purposes for the life of the dialog. Survey feedback is critical to assess a program's reach and comprehension as well as to identify improvement areas, enabling organizations to develop a plan of action. In cases in which respondent privacy is important, surveys can be run anonymously.

Surveys in a dialog flow are web documents with built-in surveying features. In addition to general read-only text, surveys contain user-enterable fields such as text boxes or a set of questions, each requiring one of the different types of answers – single choice, multiple choices, yes/no, and so on. When a survey is deployed online, respondents can complete the required information and then submit it. A built-in Scoring Framework allows survey designers to add weights to survey questions and their answer choices.

Each organization can define and deploy its own surveys. Some examples of how surveys can be used include:

- Career development and skill assessment.
- Employee engagement and satisfaction.
- New hire and exit Interviews.
- Health and wellness programs.
- Equal opportunity compliance programs.

Reporting and Analytics

PeopleSoft Workforce Communications 9.1 provides a number of operational and analytic reports allowing decision makers to view survey results, gauge the effectiveness of HR initiatives, make informed recommendations and take appropriate action.

PeopleSoft Workforce Communications 9.1 reports help you answer the following types of questions:

- Which initiatives were most successful?
- Has the initiative resulted in the committed goal of cost reduction?
- What % of recipients responded to the survey?
- How many people opened the email communication? Who didn't open it?
- Which workforce demographic is the most and least satisfied or engaged?
- How are satisfaction and engagement related to other factors?
- How do you get the right talent in the right position?
- How many contractors have we hired as a result of alumni programs?

Reports available for use with PeopleSoft Workforce Communications 9.1 include:

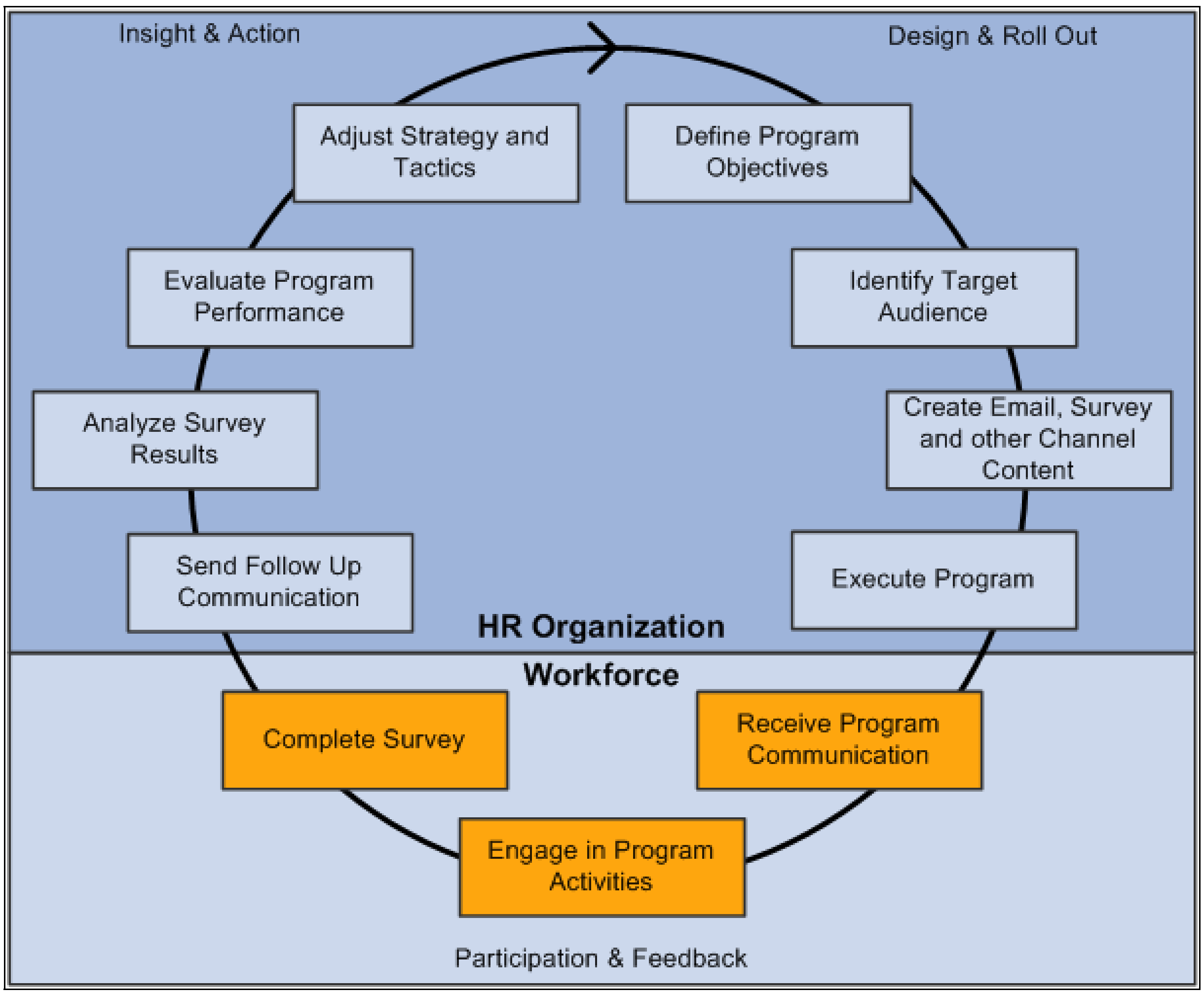
- *Configurable Workforce Search:* HR survey responses received from the workforce can contain certain information that needs to be preserved for future use. For example, an exit interview survey question could ask workers if they would likely consider rejoining the organization in the future. The answer received from each respondent could be stored in a custom profile field associated with workers and then reviewed by HR if the need to target alumni in a recruitment effort arises. PeopleSoft Workforce Communications provides a powerful, configurable search mechanism by which profile fields created to store survey responses can be used as workforce search criteria.
- *Dialog Performance Report:* The success of an HR communications initiative rolled out as a dialog greatly depends on how effectively it reaches its target audience and how well the audience responds to it. The Dialog Performance interactive report displays key reach and response-related performance measures by dimensions such as dialog actions and audiences. Dialog reach measurements such as email hard and soft bounces, click through counts, ratio of emails opened to emails delivered, and so on are available for reporting purposes. Dialog response measurements such as response count, page visits, number of people submitting a survey, and so on can also be displayed.
- *Survey Analysis Report:* A HR survey could be sent out to an audience consisting of a large number of workers. Every respondent of the survey has unique attributes: age, gender, experience level, job title, location, and so on. The Survey Analysis interactive report enables HR management to slice and dice results of a scored survey across respondents simply by dragging and dropping these attributes onto the report.
- *Survey Overall Responses Report:* The distribution of answer choices selected by respondents for each question in a survey (for example, how many employees use a particular benefit program, or how many people are extremely dissatisfied with their manager) can be seen in the Overall Responses report.
- *Survey Individual Responses Report:* Answers to every individual question in a survey for a respondent (for example, the reason she gave for leaving in her exit interview) can be viewed in the Individual Response report. HR can use this report in cases in which a detailed review of every response must be performed.

PeopleSoft Workforce Communications Business Processes

Using Workforce Communications to create and analyze employee surveys requires that you perform a number of tasks. This section guides you in creating a dialog and provides a brief overview of the specific tasks involved. They include:

- Design and roll out.
- Participation and feedback.
- Insight and action.
- Analyzing survey results.

The following process flow illustrates the PeopleSoft Workforce Communications business processes, from the initial access and setup through final survey analysis:



Workforce Communications business process

Note. Because Workforce Communications bundles functionality from both PeopleSoft Online Marketing and PeopleSoft Marketing, you should familiarize yourself with the business processes and functionality of these applications as well.

Design and Roll Out

In this phase, the HR organization designs an HR program and rolls it out to the workforce. The phase consists of the following steps:

- *Define Program Objectives*: Specify the measurable goals and objectives that the HR program is intended to accomplish.
- *Identify Target Audience*: Identify the specific workforce population that the HR program is designed to serve.
- *Create Email, Survey, and other Channel Content*: Compose rich, personalized email communications and interactive surveys for email or intranet deployment. Create other channel content like posters, postcards, flyers and so on.
- *Execute Program*: Send out communications and deploy intranet web pages and surveys.

Participation and Feedback

In this phase, the targeted workforce population participates in the HR program and then provides feedback to the HR organization. The phase consists of the following steps:

- *Receive Program Communication*: Received personalized email communications, links to web surveys, and other channel content.
- *Engage in Program Activities*: Participate in program activities as outlined by the communication—for example, join an activity group or attend an HR-conducted event.
- *Complete Survey*: Answer personalized, dynamic survey questions to provide feedback and other inputs regarding program effectiveness.

Insight and Action

In this phase, the HR organization evaluates program performance and survey results, and acts on the information. The phase consists of the following steps:

- *Send Follow Up Communication*: Depending on how a respondent answered the survey, send follow-up emails and surveys if required.
- *Analyze Survey Results*: Use analytic reporting tools to analyze survey results across the targeted workforce population.
- *Evaluate Program Performance*: Gauge program effectiveness by evaluating metrics: for example, number of employees who opened an email, clicked on a survey link, completed the survey, and so on. Compare program results with intended goals.
- *Adjust Strategy and Tactics*: Based on all information gathered during program execution, modify the current HR program or redesign it for its next iteration.

See Also

PeopleSoft Online Marketing 9.1 PeopleBook, "Oracle's PeopleSoft CRM Online Marketing Preface"

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Oracle's PeopleSoft CRM Marketing Applications Preface"

PeopleSoft Workforce Communications Integrations

PeopleSoft Workforce Communications integrates with versions 8.8, 8.9, and 9.1 of PeopleSoft HCM using EIPs.

The purpose of this integration is to synchronize worker, Person of Interest (POI) and worker job information from HR to CRM. The HR information can be used in the following areas:

- To build audiences based on HR criteria.
- For personalization of content in email and web documents.
- As criteria for determining the dynamic content displayed in email and web documents.
- Logic in the dynamic branching of dialogs.

Note. Some of the HR data can only be used for creating audiences.

Some of the data synchronized from HCM into CRM tables is made available as CRM Profiles, which enables the data to be used for the purposes previously described. This profile data is also used for reporting—the Survey Analysis Report, delivered with Workforce Communications, leverages HCM information to allow analysis of the data based on HR criteria and profile information.

Before you can use Workforce Communications, you must set up the appropriate EIPs to move data into your CRM system. For a description of these EIPs, refer to the "Managing Enterprise Integration for PeopleSoft CRM" chapter of the *PeopleSoft CRM 9.1 Business Object Management PeopleBook.* The relevant EIPs appear in the table in the "PeopleSoft CRM Foundation EIPs" section and include *HCM* in the Direction of Integration column.

We discuss integration considerations in the implementation chapters of this PeopleBook.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Oracle's PeopleSoft CRM Business Object Management Preface"

PeopleSoft Workforce Communications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleSoft documentation.

This table lists all of the components that have component interfaces:

Component	***Component Interface***	***Reference***
Dimension Value Groups RY_SVY_GROUP	RY_SVY_GROUP_CI	See and Chapter 5, "Analyzing Program and Dialog Results," page 31.
Survey Ratings RY_SVY_RATING	RY_SVY_RATING_CI	See and Chapter 5, "Analyzing Program and Dialog Results," page 31.
Role to Dimension Mapping RY_SVY_ROLE_DIM	RY_SVY_ROLE_DIM_CI	See and Chapter 5, "Analyzing Program and Dialog Results," page 31.
Survey Setup Options RY_SVY_SETUP	RY_SVY_SETUP_CI	See and Chapter 5, "Analyzing Program and Dialog Results," page 31.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,PeopleSoft CRM 9.1 Business Object Management PeopleBook,* and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook* with information on where to find the most up-to-date version of each.

See Also

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

PeopleTools 8.52: PeopleSoft Component Interfaces PeopleBook

Chapter 2

Setting Up Workforce Communications

This chapter discusses installation options for Workforce Communications, and contains the following sections:

- Understanding Installation Options.
- Setting Installation Options.
- Understanding Roles Used with Workforce Communications.
- Enabling the Person of Interest Role for Use With Audience Builder.

Understanding Installation Options

Depending on the products you have licensed and enabled, you will have different options available to you with Workforce Communications. Workforce Communications itself is designed for the purpose of planning, building, and deploying programs for and sending communications to Workers and Persons of Interest (POIs) only. The Workforce Communications installation option has some logic to restrict the ability to create audiences consisting only of Workers and POIs. If you want to target programs for and communicate to external audiences (for example, to create marketing campaigns targeted at customers or potential customers), you must also license PeopleSoft Marketing and Online Marketing.

Setting Installation Options

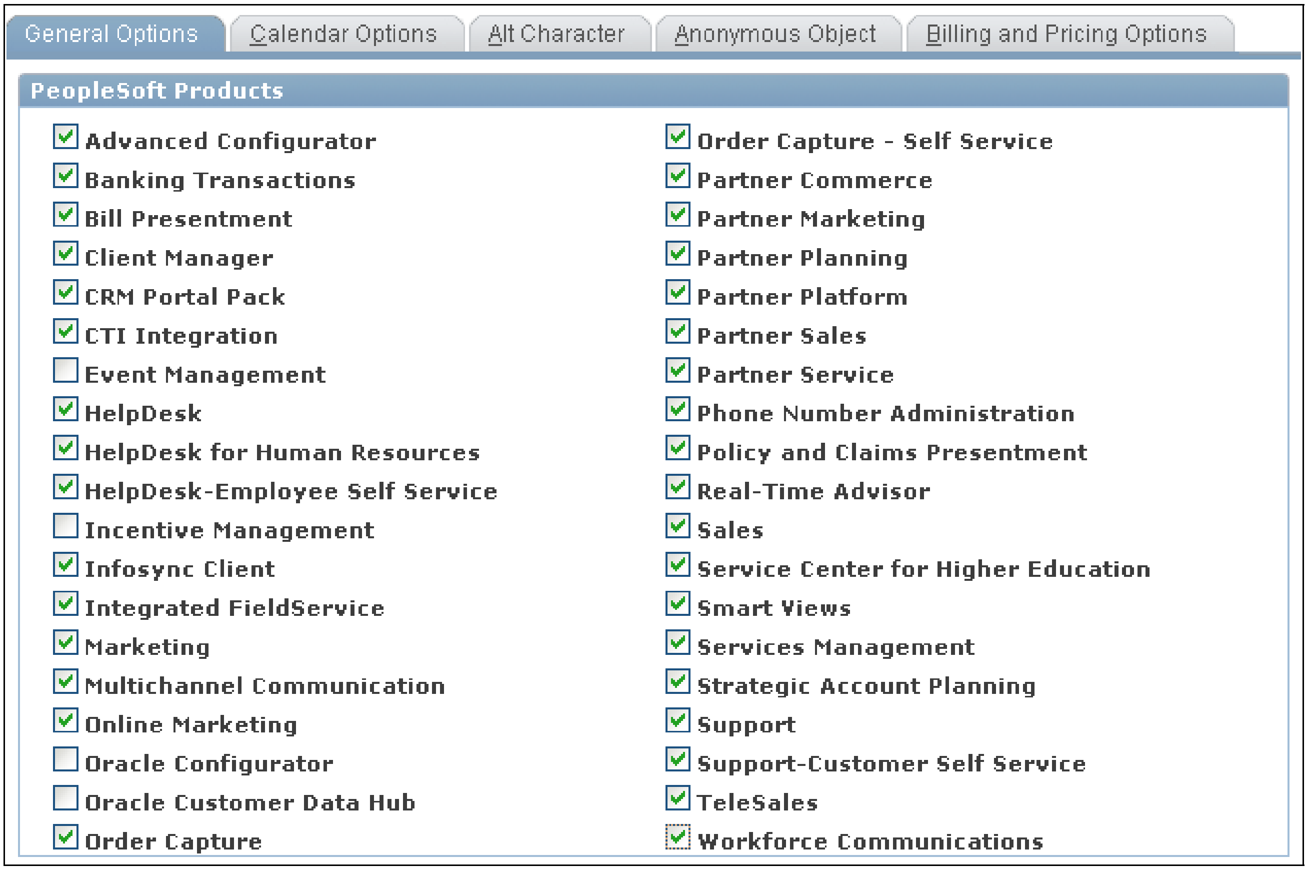
Before you can use Workforce Communications, you must enable it on the Installation Options page.

Page Used to Enable Workforce Communications

Page Name	***Definition Name***	***Navigation***	***Usage***
Installation Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options	Enable the Workforce Communications option.

Enabling Workforce Communications

Access the Installation Options page (Set Up CRM, Install, Installation Options).



Installation Options page

Workforce Communications	Select this check box to enable Workforce Communications.

Understanding Roles Used with Workforce Communications

The following table shows the roles that are delivered for use with Workforce Communications, along with the default users who belong to the roles.

Role Name	***Employee/Person Name***	***User***	***Capabilities and Typical Users***
WFC Profile Administrator	James Clooney	WFCPADMIN	Creates and modifies profiles. Typically HR Administrators or HR Analysts.
WFC Audience Administrator	Charles Baran	WFCAADMIN	Creates audiences. Typically an HR Analyst or HR Administrator.
WFC Dialog Manager	Francine Holmes	WFCDMGR	Creates and manages dialogs and documents. Typically an HR Analyst or Mid-Level/Executive Level Manager's Analyst.

Role Name	Employee/Person Name	User	Capabilities and Typical Users
WFC Campaign Manager	Frederick Martin	WFCCMGR	Creates and manages marketing campaigns and programs, and related objects. Typically an HR Analyst or Mid-Level/Executive Level Manager's Analyst.
Worker and POI Administrator	John Johanssen	WRKPOIADMIN	Manages Workers and Persons of Interest. Typically an HR Administrator.
WFC Dialog Reports Analyst 2	Alexa Klein	WFCRPT2	Views individual survey results. Typically HR Analyst, HR Management or Mid-Level/Executive Level Manager's Analyst.
WFC Dialog Reports Analyst 1	Chris Baker	WFCRPT1	Views aggregate survey reports. Typically HR Analyst, HR Management, Mid-Level/Executive Level Management and their Analysts.
WFC System Administrator	Carlos Martin	WFCSADMIN	Performs setup and administration components that are required to install and use Workforce Communications, including the setup for reporting features and installation options. Typically an HR System Administrator or HR Administrator.
WFC Super User	Kurt Riddler	WFCSUSR	Has access to all functions for all roles identified for Workforce Communications.

Enabling the Person of Interest Role for Use With Audience Builder

Before you can use the Person of Interest role with Workforce Communications, it must be enabled.

Note. The Person of Interest role is enabled by default; this section is for informational purposes only.

Page Used to Enable the Person of Interest Role for Use With Audience Builder

Page Name	Definition Name	Navigation	Usage
Marketing/Dialog Role Enablement	RA_MKT_ROLE	Set Up CRM, Product Related, Marketing, Marketing/Dlg Role Enablement	Enable the Person of Interest role for use in the Audience Builder.

Enabling the Person of Interest Role

Access the Marketing/Dialog Role Enablement page (Set Up CRM, Product Related, Marketing, Marketing/Dlg Role Enablement).

Marketing/Dialog Role Enablement page

Role Description	Enter *Person of Interest* to enable this role.
Individual Role	Select *Person of Interest* from the list of available choices.

Chapter 3

Creating Audiences with Workforce Communications

This chapter discusses creating audiences using Workforce Communications, and contains the following sections:

- Defining Audiences.
- Defining Audiences for Workers and Persons of Interest.
- Defining Audience Security.

Defining Audiences

In PeopleSoft Workforce Communications, an audience is a targeted group of people that an HR program is designed to reach. Effective targeting is crucial because it ensures that an HR initiative affects or influences only the intended set of people, allowing programs to be run in an effective and cost-efficient manner. For example, a new hire survey should be sent out only to workers who have been recently hired and haven't previously completed the survey. Both dialogs and campaign programs can have audiences associated with them.

Audiences can be either fixed or dynamic. A *fixed audience* is defined when the group of people it targets does not change over time. For example, the list of employees who attended a particular training session in the past is a fixed audience. But in many cases, the target group changes over time, so such an audience needs to be generated dynamically. If current members of the organization's fitness club have to be sent a newsletter on the first day of every month, then the target group can be generated only at the time of sending the newsletter. This type of audience is defined as a *dynamic audience.*

The Audience Builder tool provides an intuitive, wizard-like interface for nontechnical users to create powerful selection queries to build audiences of workers or POIs (persons of interest). Selection conditions specified can be based on a person's HR profile fields, such as job information, demographic data, employment status, and so on. For example, an audience of all US managers who have been hired within the last three months could be defined. PeopleSoft Workforce Communications delivers numerous worker and POI profile fields that are ready to be used. Selection conditions can also be based on a person's membership in another audience, survey results and execution history of dialogs.

The WFC Audience Administrator role is responsible for creating audiences.

Defining Audiences for Workers and Persons of Interest

This section describes how to define audiences for workers and persons of interest.

Note. The process of defining audiences, as well as an explanation of other audience types, is described in detail in the *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.* This section concerns audience definition only as it relates specifically to Workforce Communications.

See and Chapter 2, "Setting Up Workforce Communications," Understanding Roles Used with Workforce Communications, page 12.

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences."

Pages Used to Define Audiences for Workers and Persons of Interest

Page Name	***Definition Name***	***Navigation***	***Usage***
Create a Target Audience Step 1: Select Roles	RA_LB_STEP_1	Marketing, Manage Audiences Click Create a New Audience Click Define Selection Criteria	Begin the process of defining selection criteria for audiences.
Create a Target Audience Step 2: Define Selection Criteria	RA_LB_STEP_2	Click the Next Step button on the Create a Target Audience Step 1: Select Roles page.	Define the selection criteria for the audience.

Selecting Roles

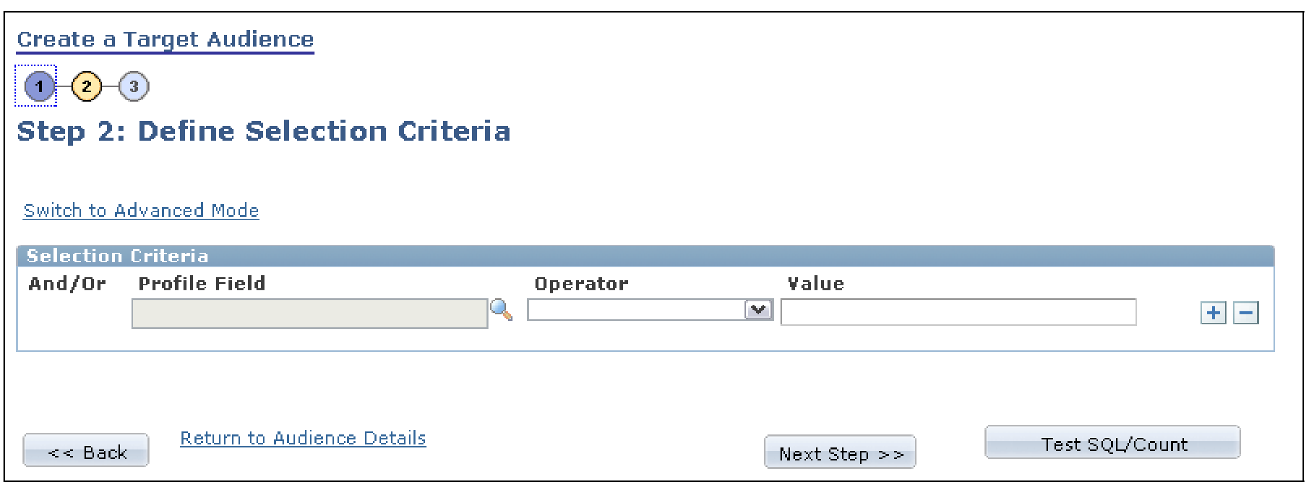
Access the Create a Target Audience Step 1: Select Roles page (Marketing, Manage Audiences).

Create a Target Audience Step 1: Select Roles page

Roles Select the roles you want to include in the audience (Worker, Person of Interest, or both).

Defining Selection Criteria

Access the Create a Target Audience Step 2: Define Selection Criteria page (Marketing, Manage Audiences, click Define Selection Criteria, click the Next button on the Step 1: Select Roles page).



Create a Target Audience Step 2: Define Selection Criteria page

Profile Field	Click the lookup next to the Profile Field prompt to display a list of profile fields. Click the Individuals link, then either Workers or Persons of Interest to display the list of available profile fields. **Note.** Audience Builder provides unrestricted access to all Worker and Person of Interest data in Workforce Communications. Some administrators might prefer that only a centralized, trusted administrator have the ability to build and provide access to audiences. Worker and Person of Interest specific profile fields can be used to generate targeted lists for use in program communications. You can find a list of profiles usable with Workforce Communication in the Appendix.

See and Appendix B, "Profiles Containing HR Data," page 61.

See and Chapter 3, "Creating Audiences with Workforce Communications," Defining Audience Security, page 18.

Defining Audience Security

Workforce Communications includes security that restricts users' access to only those audiences that they have been authorized to view. This prevents non-authorized individuals from seeing the members of an audience.

In an HR setting, this security allows a centralized administrator to build audiences and then make those audiences available to specific groups.

Understanding Audience Security

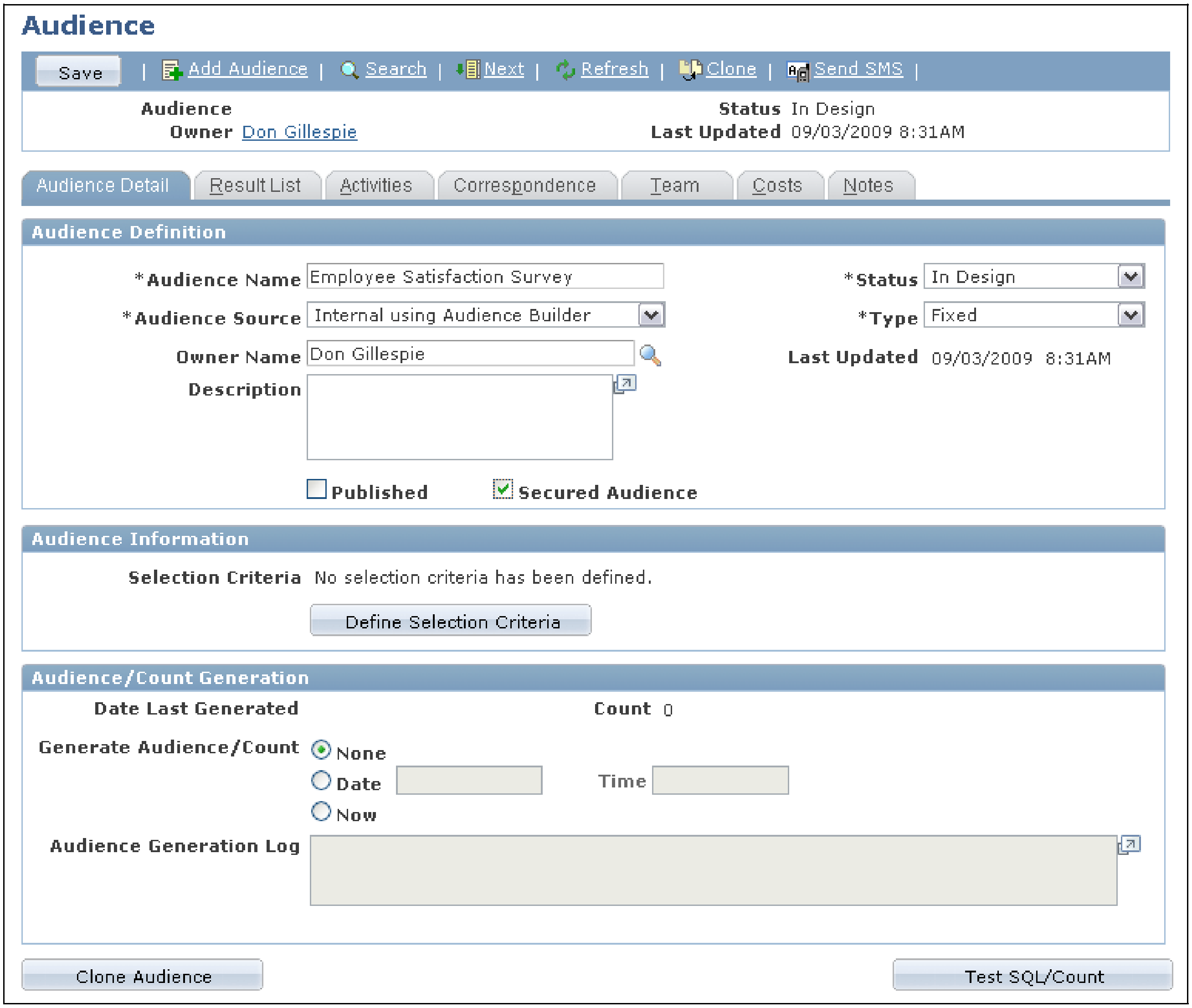
Workforce Communications includes various entry points to the audience (such as Marketing activities and the Dialog Designer). At each of these entry points (for example, Online Marketing's Dialog Designer), validation occurs to ensure that the user attempting to access it is either its owner, a team member, or a member of the team role associated with the audience. If the validation fails, the user is not allowed to transfer to the audience and an error message is displayed.

Pages Used to Secure an Audience

Page Name	*Definition Name*	*Navigation*	*Usage*
Audience – Audience Detail	RA_LIST_MAIN	Marketing, Manage Audiences	Specify whether an audience is secured.
Audience – Team	RA_LIST_TEAM	Click the Team tab on the Audience page.	Specify which users or roles are authorized to access the audience.

Defining an Audience as Secured

Access the Audience – Audience Detail page (Marketing, Manage Audiences).

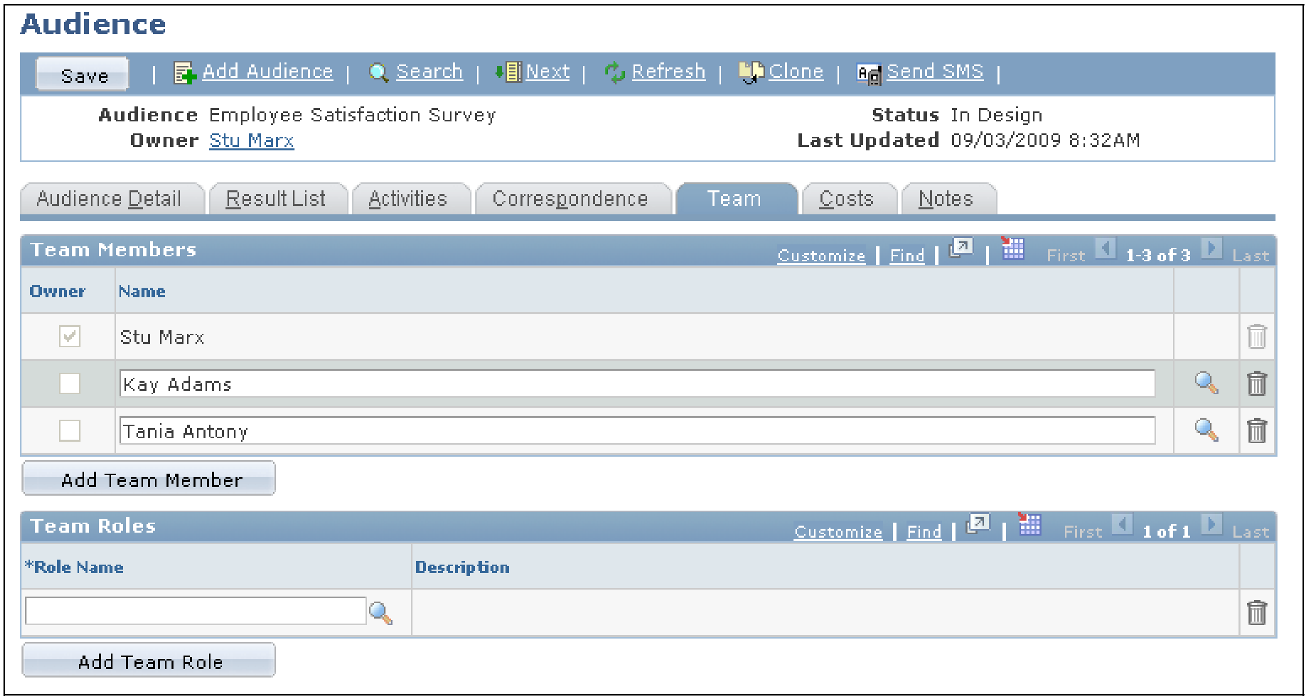


Audience page

Secured Audience Select this check box to define the audience as a secured audience.

Specifying the Users and Roles With Audience Permission

Access the Audience – Team page (Click the Team tab on the Audience component).



Audience - Team page

Team Members

Add the individual team members whom you want to grant permission to see and edit the audience. You can associate individual workers or entire roles as team members—in the case of roles, each individual worker who has that role is considered a team member.

Team Roles

Add the roles to which you want to grant permission to see the audience. Roles leverage the PeopleTools security roles. You can create groups of people, assign a PeopleTools security role to that group, and reuse the group in the future. For example, you might create a "North American Benefits" role, then associate that role with each audience that is related to North American benefits.

Chapter 4

Working with Dialogs

This chapter discusses dialog security, and includes the following sections:

- Understanding Dialogs.
- Understanding Dialog Security.
- Setting Up Survey Ratings and Scores.
- Defining Dialog Security.

Understanding Dialogs

With PeopleSoft Workforce Communications, initiatives that require automated, one-way or two-way online communications between HR and the workforce can be implemented using dialogs. A dialog program defines a flow or a sequence of actions that describe which workforce population would be reached, what kind of communication would be sent, when it would be sent, how responses would be handled and how subsequent follow up interactions would be performed. Dialogs can be rolled out independently or as part of a higher-level roll up program.

For a detailed description of online dialogs and their creation, refer to the Online Marketing documentation.

See Also

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Oracle's PeopleSoft CRM Marketing Applications Preface"

Understanding Dialog Security

You can set security for online dialogs, defining which users and roles can access them and who can view the individual and aggregate reports that are generated from dialog data. You can set security for dialogs, different types of survey reports, audiences, and profiles. You can also set up surveys to be anonymous, so respondents' identifying information is not included with their survey responses.

Dialog Security

When dialog security is specified for a dialog, the Marketing Program search will only display those dialogs that users are authorized to access, based on User ID or whether they belong to a role that has been given permission to view the dialog. Permissions are set in the Team tab on the Dialog Designer page. Note that the dialog owner has access to the dialog by default.

Individual Survey Security

Individuals and roles can be given permission to view reports that contain survey responses from individual members of the audiences targeted by the dialog.

Aggregate Survey Security

Individuals and roles can be given permission to view the aggregate Workforce Survey Analysis report for the specified dialog.

Profile Security

Access to profile definitions is available only to users with the WFC Profile Administrator role and associated permission lists. Profile managers can determine which of the Profile Groups are visible for Workers and Persons of Interest, and under what conditions (based on user role and other configurable conditions) those profiles and profile groups are visible.

Worker and Person of Interest Security

Access to Worker and Person of Interest components is granted to users with the Workforce Administrator role and associated permission lists. Visibility to specific pages within the Worker record is controlled by CRM application security and the Secured Worker role that limits visibility to sensitive worker data based on the user role.

Anonymous Survey Data

Workforce Communications provides the ability to allow employees, contingent workers, and persons of interest to complete dialog surveys anonymously. This enables confidentiality in responses when needed for surveys relating to satisfaction, engagement, or anything else of a sensitive nature.

For example, employees that attended an all-hands meeting can complete a survey to confidentially provide their feedback about the meeting's effectiveness. Depending on the information they provide, the system does one of the following.

Note. The most common scenario is for respondents to receive the survey link in an email, rather than by way of a web site.

If the Survey Link Was Received in Email

If the survey link was received in email, the system associates the survey with the person to whom it was emailed unless the Track click-through by recipient option is not selected in the email document. The Online Marketing documentation regarding adding a web link to an email document describes this option in more detail.

Note. Be aware that although Online Marketing will not track identifying information about an email recipient if the Track click-through by recipient option is not selected in the email document, if the dialog contains a last name and email address field and these fields are filled out, the survey will be associated with the respondent.

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Email Documents."

If the Survey Link Was Accessed from a Website

Surveys can be accessed from a web page. Surveys can be configured to provide a self-identification page where the recipient will need to provide their first name, last name, and email address. Once they've provided this info, the following validation will occur.

- If the last name and email address are provided (by default—this is configurable on the Online Marketing Matching Rules page), the system checks to see if the employee exists in the database. If the employee does exist, the system stores the survey associates those survey results with the employee.
- If the last name and email address are provided but employee does not exist in the database, the system creates a new Person, then creates a record for the survey associated to this new person.

  Note. If the dialog is marked for "Worker," no new person record is created in the system.

- If the last name and email address are not provided (that is, if the respondent chooses to respond anonymously) or not requested at all, the system bypasses the database and creates a record for the survey with no identifying information associated.

Setting Up Survey Ratings and Score Bracket

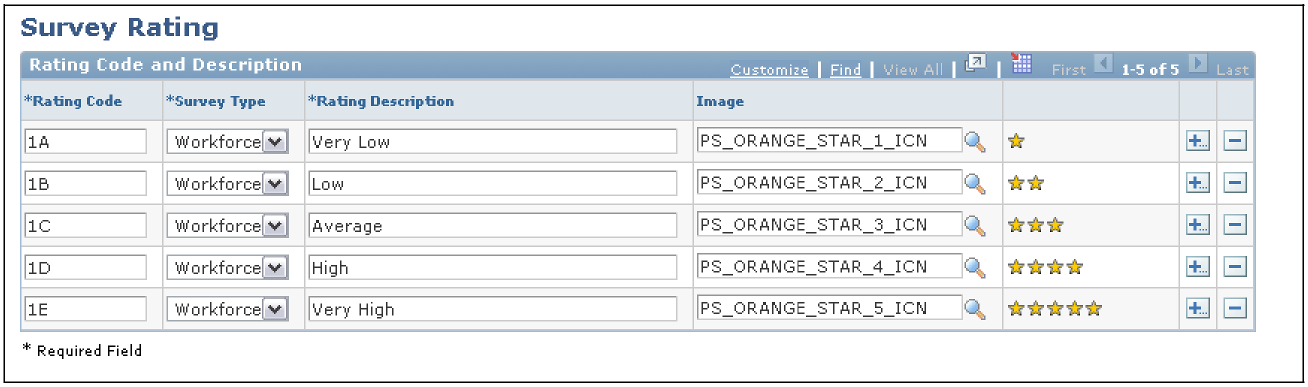
This section describes how to set up survey ratings and score brackets for dialog surveys.

Pages Used to Set up Survey Ratings and Score Brackets

Page Name	*Definition Name*	*Navigation*	*Usage*
Survey Rating	RY_SVY_RATING	Set Up CRM, Product Related, Marketing, Surveys, Survey Ratings	Define interpretive meanings for each survey score bracket.
Score Brackets	RY_SVY_SCORES	Marketing, Score Brackets	Enables derivation of the Score Bracket dimension values.

Setting Up Survey Ratings

Access the Survey Rating page (Set Up CRM, Product Related, Marketing, Surveys, Survey Ratings).



Survey Rating page

Survey Ratings allow each Score Bracket to be assigned an interpretive meaning so that surveys designed with dissimilar score brackets can still be compared in the Workforce Survey Analysis Report.

You can set up Survey Ratings at any point, and use them with multiple dialogs. After they have been created, survey rating can be assigned to Score Brackets in one or more dialogs as needed.

Note. This setup is performed by the WFC System Administrator as needed, and the information is used only with the Survey Analysis Report.

Rating Code

A unique code that has to be assigned to each Rating. This value is mandatory.

Survey Type

For Workforce Communications, this value must be set to *Workforce.*

Rating Description

A textual description of the Survey Rating. This value is mandatory.

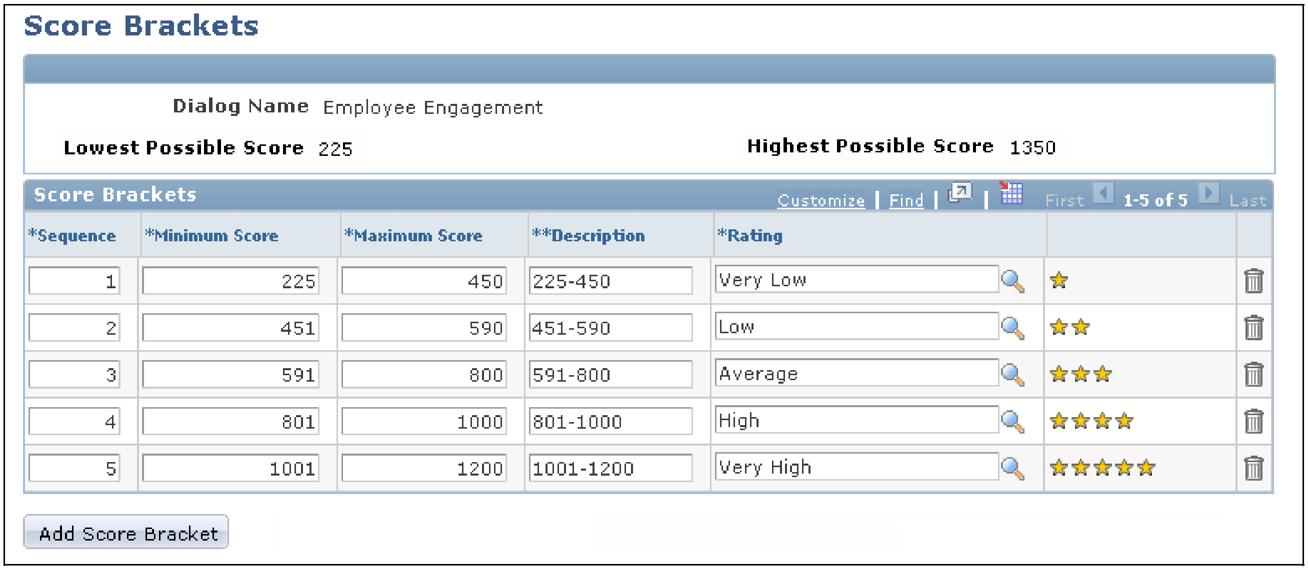
Image

Each rating can be associated with an image that will be used to visually display the meaning of a rating on the Workforce Survey List pagelet and in the Workforce Survey Analysis Report's configurable search results. This value is optional.

Note. If a user tries to delete a Survey Rating that is already tied to a Score Bracket, then an error message is displayed and the action will not be allowed.

Setting Up Score Brackets

Access the Score Brackets page (Marketing, Score Brackets).



Score Brackets page

Note. This setup is performed by the user who sets up the dialogs, and the information is used only with the Survey Analysis Report.

When you select a Dialog Survey, the dialog's name is displayed in read-only form in the header of the Score Brackets page, along with the Lowest Possible Score and Highest Possible Score values for the dialog. These values are calculated by querying the dialog's document setup tables, and they define the score bounds of the Survey. You can use them as a reference while defining your Score Brackets.

Sequence

Score Brackets are sorted by Sequence number by default. When a new row is added, the Sequence number for that row is calculated by incrementing the highest existing Sequence number on the page by 1. Users can change Sequence numbers, but they should have unique values and must be whole numbers (including 0).

Minimum Score

The lower end of a Score Bracket. This value must be a whole number (including 0).

Maximum Score

The higher end of a Score Bracket. This value must be a whole number (including 0) and must be greater than the Minimum Score value.

Note. Do not define overlapping Score Brackets, nor leave gaps between Score Brackets.

Description

The description of the Score Bracket—the value that is displayed in the Workforce Analysis Interactive Report filter for Score Brackets. When Minimum Score and Maximum Score values are specified, the Description field is automatically populated with the value Minimum Score – Maximum Score (for example, *0 – 20*), but the user can change this (for example, *0 to 20*).

Rating	Use this prompt to choose a previously defined Survey Rating to be assigned to the Score Bracket (as applicable to the Survey Type, which in the case of Workforce Communications is *Workforce*). When the average score of a Survey is calculated on the Workforce Survey List Pagelet and the Configurable Search Results for the Workforce Survey Analysis Report, this Rating value is displayed next to it, thus allowing the user to better interpret survey results.
Image display column	This read-only column displays the image that corresponds to the Survey Rating chosen for the Score Bracket, providing a preview of what will be displayed on the pagelet and on the configurable search results screen.
Add Score Bracket	Click this button to add a new Score Bracket row. Note that Score Brackets are specific to individual dialogs.

Note. If the survey dialog contains multiple survey documents, then all the documents will be considered when calculating the Lowest and Highest Possible Score values. Thus, users should not create survey dialogs that link documents using conditional logic because the system could double-count questions when generating low and high scores. The system will not prevent you from creating survey dialogs with documents containing conditional logic, but you should be aware that if you do so, the low and high scores will not be accurate.

See and Chapter 4, "Working with Dialogs," Setting Up Survey Ratings and Score Bracket, page 23.

Updating Score Brackets

You can safely update score brackets for a survey before it has any responses. However, if you want to update a Score Bracket (that is, update a row that already exists on the Score Bracket page) and any responses exist for the survey associated with it, a warning message will display if you try to do any of the following:

- Update the Minimum Score value.
- Update the Maximum Score value.
- Update the Description.
- Delete the row.

The warning message will indicate that deleting or updating Score Brackets associated with surveys that have responses can result in the generation of incorrect results in the Survey Analysis Report. In order to prevent this from happening, you should save changes on the Score Brackets page and then run the Stage Data for Reporting Application Engine program with the Refresh Dimension References option selected.

See and Chapter 5, "Analyzing Program and Dialog Results," Staging Data for Workforce Surveys, page 45.

Defining Dialog Security

This section discusses how to:

- Define a secure dialog.

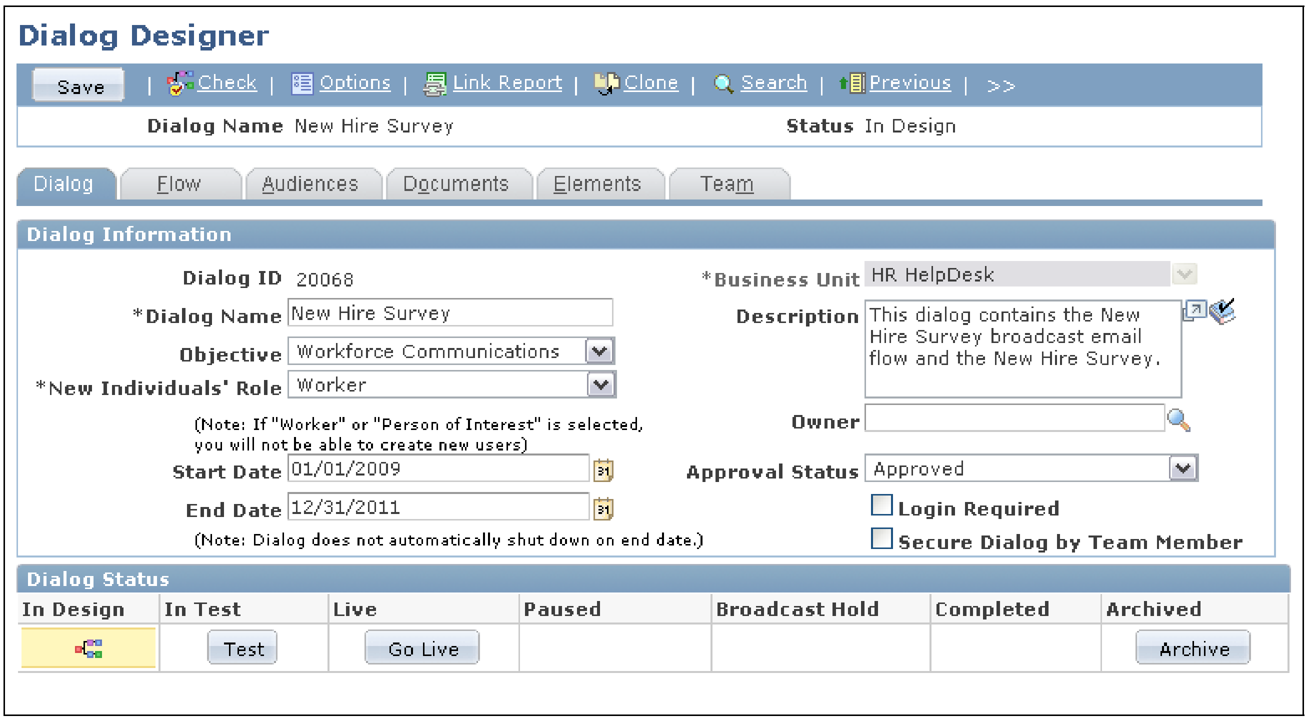
- Specify dialog access.

Pages Used to Define Dialog Security

Page Name	*Definition Name*	*Navigation*	*Usage*
Dialog Designer – Dialog Information	RY_DIALOG	Marketing, Dialog Designer, Dialog	Specify that a dialog is secured.
Dialog Designer – Team	RY_DIALOG_TEAM	Marketing, Dialog Designer, Team	Specify dialog security access for team members.

Defining a Secure Dialog

Access the Dialog Designer – Dialog Information page (Marketing, Dialog Designer, Dialog).



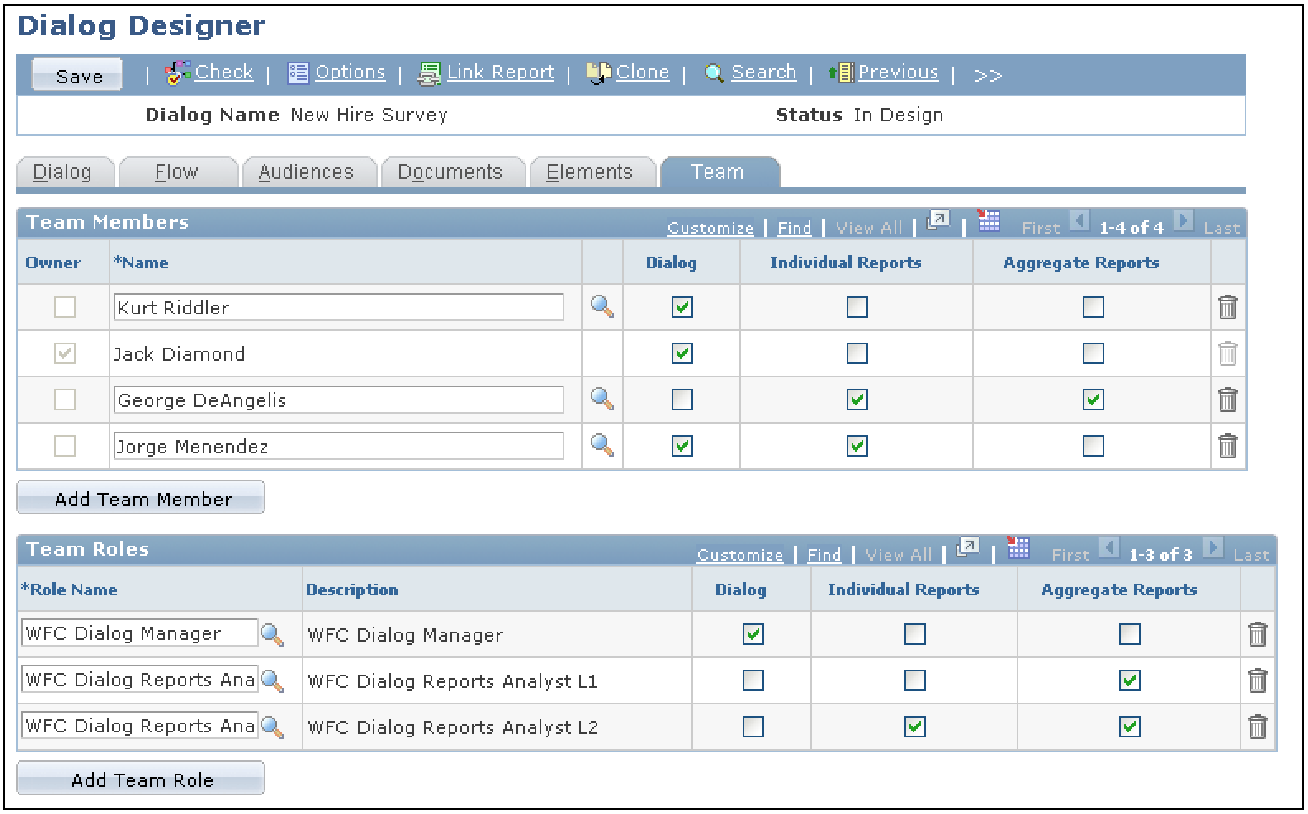
Dialog Designer - Dialog Information page

Secure Dialog by Team Member Select this check box to define the dialog as a secure dialog.

Selecting the Secure Dialog check box on the Dialog Designer page restricts access and visibility to the dialog and its related reports. When a dialog is secured, users will be unable to access the Dialog Designer and dialog reports for the secured dialog. Additionally, the dialog is not returned in configurable search results for the Dialog Designer and dialog related reports.

Specifying Dialog Access

Access the Dialog Designer – Team page (Marketing, Dialog Designer, Team).



Dialog Designer - Team page

Team Members This section displays the list of team members associated with the dialog.

Owner This check box is selected to identify the dialog owner. Only one check box can be selected, because a dialog can only have one owner—by default, this is the person who created the dialog. If there are multiple team members, you can choose a different dialog owner by selecting the check box next to that person's name.

Name Individuals who are manually added as team members. This list initially includes at least one individual—the owner of the list (by default the creator of the dialog).

Add Team Member Click this button to add a team member to the list.

Role Name Select a role name from the list. Roles leverage the PeopleTools security roles. You can create groups of people, assign PeopleTools security roles to the groups, and then reuse the groups in the future.

Dialog	Select this check box to give the user or role authorization to access the dialog and its related programs and campaigns.
Individual Reports	Select this check box to give the user or role authorization to run the individual reports. The user or role is restricted to reports that convey the survey results for each individual respondent for that specific dialog
Aggregate Reports	Select this check box to give the user or role authorization to run the aggregate reports for a specific dialog.
Add Team Role	Click this button to add a new team role. Roles leverage the PeopleTools security roles. You can create groups of people, assign PeopleTools security roles to the groups, and then reuse the groups in the future.

Chapter 5

Analyzing Program and Dialog Results

This chapter provides an overview of workforce reports and discusses how to:

- Set up workforce surveys.
- Stage data for workforce surveys.
- Generate and analyze workforce surveys.

Understanding Workforce Reports

PeopleSoft Workforce Communications 9.1 provides a number of operational and analytic reports allowing decision makers to view survey results, gauge the effectiveness of HR initiatives, make informed recommendations and take appropriate action.

Trends identified among various demographics can be used to cut costs, increase productivity, improve the workplace and retain staff. Program performance metrics can be used to plan future HR programs as well as chalk out the future course of action that needs to be taken by the organization.

PeopleSoft Workforce Communications reports help you answer the following types of questions:

- Which initiatives were most successful?
- Has the initiative resulted in the committed goal of cost reduction?
- What percentage of recipients responded to the survey?
- How many people opened the email communication? Who didn't open it?
- Which workforce demographic is the most and least satisfied or engaged?
- How are satisfaction and engagement related to other factors?
- How do you get the right talent in the right position?
- How many contractors have been hired as a result of alumni programs?

Workforce reports are intended for use by HR management, HR analysts, and management teams that need visibility to survey and dialog response information. Because the reports are available to a broader audience than administrative reports, it is important to maintain security by restricting access only to those who have permission to view their information.

See and Chapter 3, "Creating Audiences with Workforce Communications," page 15.

See and Chapter 4, "Working with Dialogs," page 21.

Available Reports

Workforce Communications includes several reports that you can use to analyze your workforce data. These include:

- Workforce Survey List pagelet.
- Workforce Survey Analysis Report.
- Survey Individual Response Report.
- Survey Overall Response Report.
- Dialog Performance Report.

Note. If you have enabled Marketing Center Security, you can use the Marketing Center hierarchy with the Workforce Survey Analysis Report, Survey Individual Response Report, and Survey Overall Response Report.

See and *PeopleSoft CRM for Higher Education 9.1 PeopleBook*, "Using Marketing Center Security."

Workforce Survey List Pagelet

The Workforce Survey List is a portal pagelet displaying a summary of dialogs showing survey scores across all respondents. From here, users can drill down to the Workforce Survey Analysis Report to perform advanced analysis for a specific dialog. Only those dialogs for which you are identified as a team member appear on this list.

See and Chapter 4, "Working with Dialogs," page 21.

Workforce Survey Analysis Report

The Workforce Survey Analysis Report (an ACE Interactive Report) is accessible from the Workforce Survey List pagelet and from the menu. It allows advanced analysis of survey results across various dimensions. For example, an HR survey could be sent out to an audience consisting of a large number of workers. Every respondent of the survey has unique attributes in terms of their age, gender, experience level, job title, location, and so on. The Survey Analysis interactive report enables HR management to slice and dice results of a scored survey across respondents simply by dragging and dropping these attributes onto the report. Types of questions that can be answered include:

- Which group has reaped the most benefits from a particular campaign?
- Has any improvement been made in worker productivity this year as compared to last year?
- Are employees in a particular office location or department more engaged than others?
- Which department or group scored the highest or lowest?

Survey Individual Response Report

Answers to every individual question in a survey for a respondent can be viewed in the Individual Response report. HR can use this report in cases in which a detailed review of every response needs to be performed. The following types of questions can be answered:

- What stated skill set does a particular worker bring to the table?
- What reason for leaving did an employee enter in her exit interview?

Survey Overall Responses Report

The distribution of answer choices selected by respondents for each question in a survey can be seen in the Overall Responses report. HR users can deduce answers to questions such as:

- How many employees who use the organization use a particular benefit or program?
- What are the three top technical skills that workers in a particular department possess?
- How many people are extremely dissatisfied with their managers?

Dialog Performance Report

The success of an HR communications initiative rolled out as a dialog greatly depends on how effectively it reaches its target audience and how well the audience responds to it. The Dialog Performance interactive report displays key reach and response-related performance measures by dimensions such as dialog actions and audiences. Dialog reach measurements such as email hard and soft bounces, click through counts, ratio of emails opened to emails delivered, and so on are available for reporting purposes. Dialog response measurements such as response count, page visits, number of people submitting a survey, and so on can also be displayed.

Note. The Dialog Performance Report is described in the PeopleSoft Online Marketing documentation.

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Interactive Reports in PeopleSoft Marketing Applications."

Setting Up Workforce Surveys

To define dimension value groups, survey ratings, dimension mapping, and survey setup options, use the Dimension Value Groups, Survey Ratings, Role to Dimension Mapping, and Survey Setup Options components. Use the RSF_ASGN_RY_SVY_GROUP, RY_SVY_RATING, RY_SVY_ROLE_DIM, and RY_SVY_SETUP component interfaces to load data into the tables for these component.

This section discusses how to:

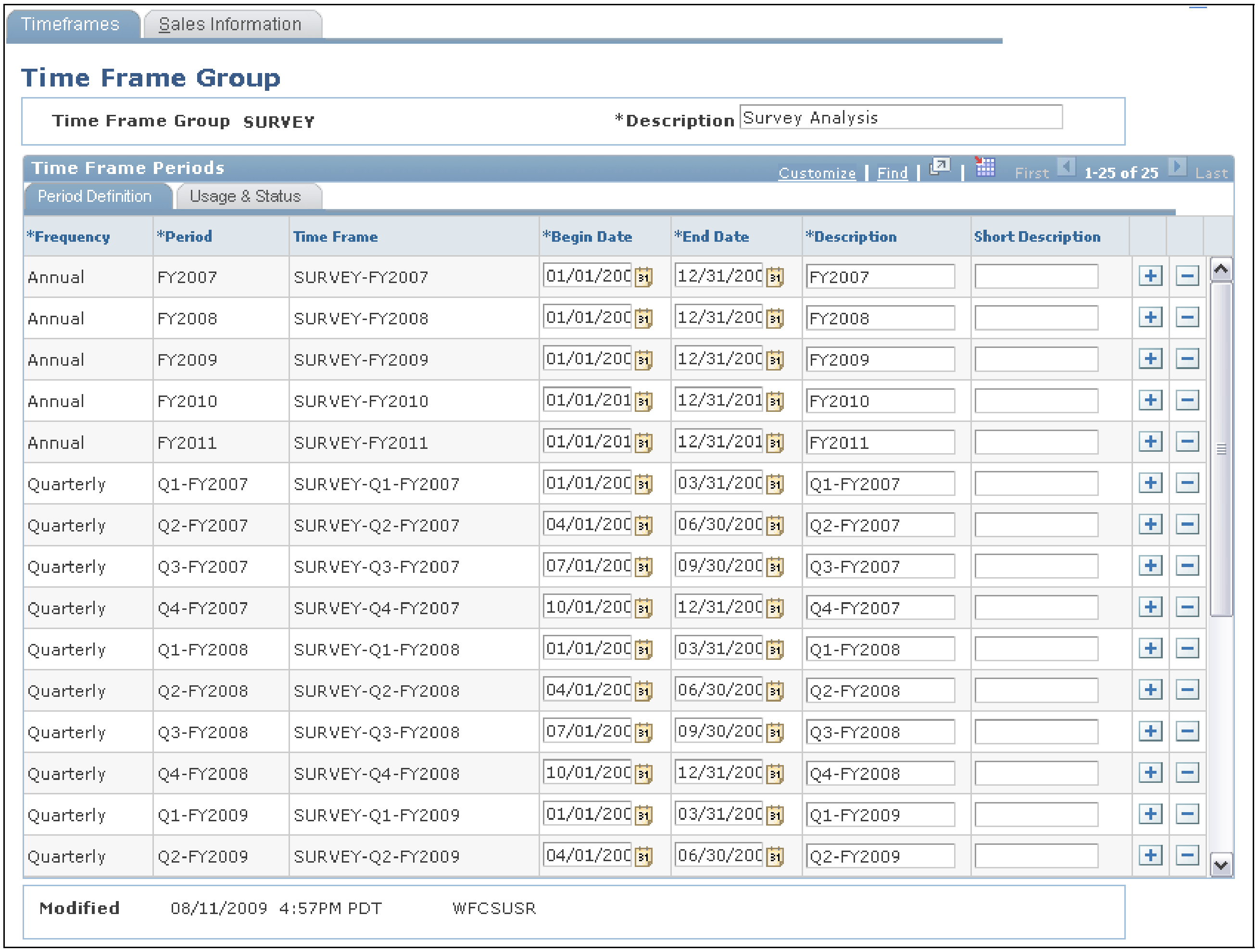
- Set up time dimensions.
- Specify basic setup options.
- Map roles to dimensions.
- Set up the age group dimension.
- Set up the years employed dimension.

Pages Used to Set Up Workforce Surveys

Page Name	***Definition Name***	***Navigation***	***Usage***
Time Frame Group – Period Definition	RSF_TF_MAIN	Set Up CRM, Product Related, Marketing, Surveys, Time Frames	Used to model the Time dimension (quarters and years),
Time Frame Group – Usage and Status	RSF_TF_MAIN	Set Up CRM, Product Related, Marketing, Surveys, Time Frames	Specify that a survey is to be used for Workforce Communications.
Setup Options	RY_SVY_SETUP	Set Up CRM, Product Related, Marketing, Surveys, Setup Options	Specify basic setup information for workforce surveys.
Role to Dimension Mapping	RY_SVY_ROLE_DIM	Set Up CRM, Product Related, Marketing, Surveys, Role to Dimension Mapping	Map reporting dimensions to a role for a given survey type.
Age Groups	RY_SVY_AGE	Set Up CRM, Product Related, Marketing, Surveys, Dimension Value Groups	Enables calculation of the Age Group dimension values.
Years Employed	RY_SVY_YRS	Set Up CRM, Product Related, Marketing, Surveys, Dimension Value Groups, Years Employed	Enables calculation of the Years Employed dimension value.

Setting Up Time Dimensions

Access the Time Frame Group – Period Definition page (Set Up CRM, Product Related, Marketing, Surveys, Time Frames)



Time Frame Group - Period Definition page

Time Frame Groups are set up by WFC System Administrator, and must be set up in order for the Survey Analysis Report to run. After they are created, Time Frame Groups are selected in the Setup Options page. They are used to specify which quarterly and yearly time frames will be used for the Survey Analysis Report.

Time Frame Group	The name of the time frame group. By default, this value is set to *Survey Analysis*, but the name is configurable. This ensures that other applications that use the Time Frame Group component (such as Sales, Strategic Account Planning, and Smart Views) do not display Workforce Communications reporting time periods.

Period Definition

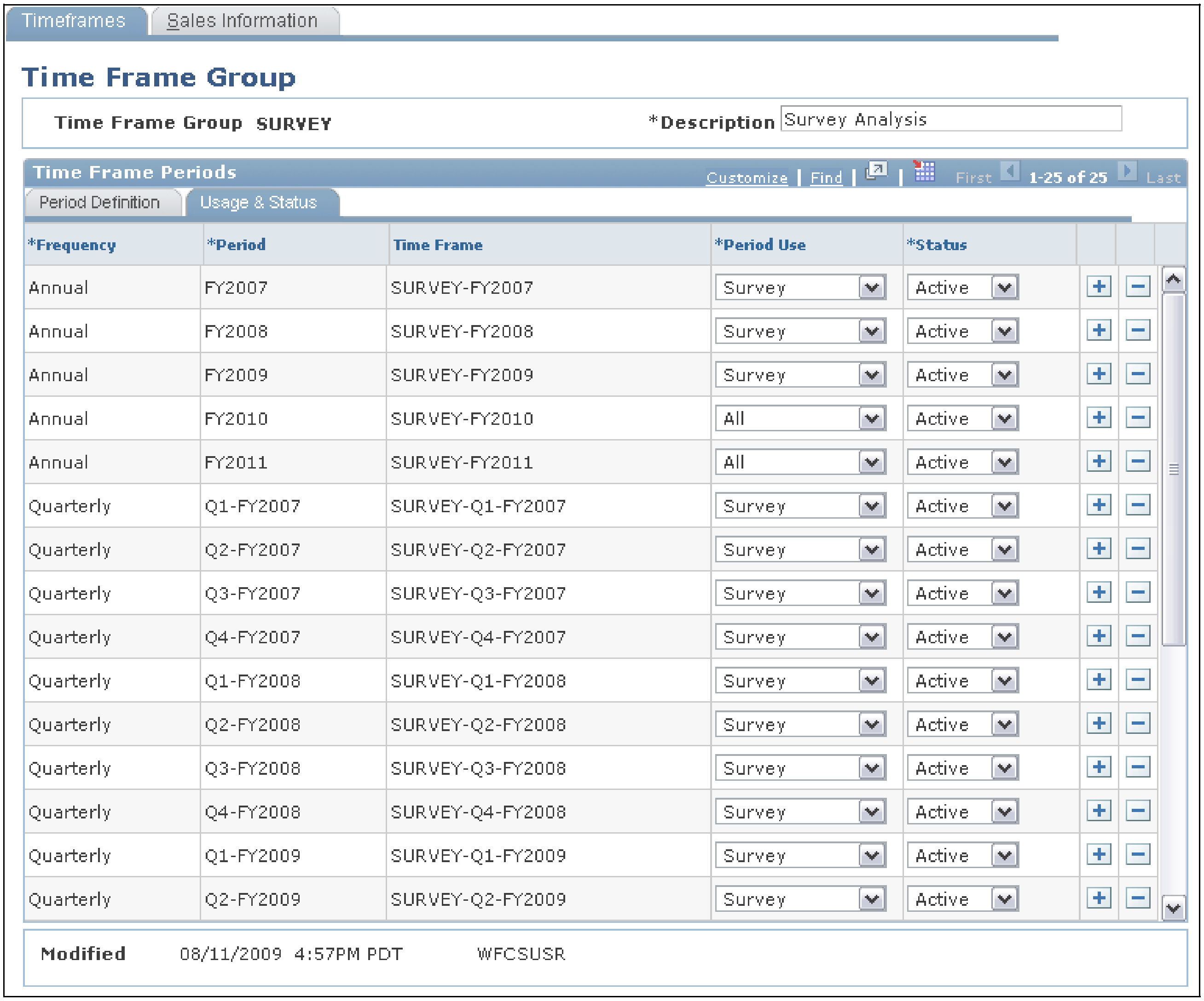
In Workforce Communications analytics, the smallest unit of time (period) tracked for reporting is *Quarter*. Quarters roll up to the corresponding Annual (Year) period (though other time periods are available in CRM, only *Quarter* and *Year* are used with Workforce Communications). The administrator must set up Quarterly and Annual time periods in the Time Frames component so that the Interactive Reports can use them. The periods themselves can be based on the organization's fiscal calendar, regular calendar, or any other calendar.

All the time periods defined must have the usage of *Survey* and must be created within a single Time Frame Group; this Time Frame Group is then specified during setup as the group to be used for Workforce Communications reporting. The administrator should take care to set up time periods accurately so that every Survey Submitted date in the system falls into exactly one quarterly period and exactly one annual period in the specified Time Frame Group. Further, the administrator should ensure that no time periods other than Quarter and Year are defined in a Time Frame Group to be used for Workforce Communications.

Note. Time period names must be 14 characters or fewer.

Defining Survey Usage

Access the Time Frame Group – Usage and Status page (Set Up CRM, Product Related, Marketing, Surveys, Time Frames, Usage and Status)



Time Frame Group - Usage and Status page

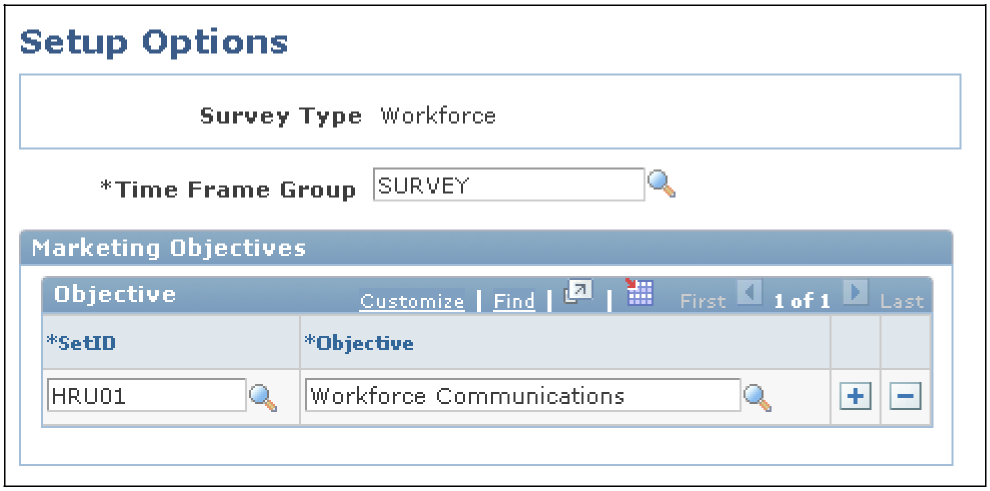
Period Use

Select the Workforce Communications Time Frame Group from the available list. You can create a Time Frame Group with any name for Workforce Communications, but you should ensure that the name you choose does not conflict with other time frames (such as those used in the Sales component) so that these components do not use the Workforce Communications time frames.

All Workforce Communications time periods must be created within a single Time Frame Group.

Specifying Basic Setup Options

Access the Setup Options page (Set Up CRM, Product Related, Marketing, Surveys, Setup Options)



Setup Options page

This page allows administrators to associate a Time Frame Group and a list of marketing objectives to a survey type. The setup is performed by the administrator; for the Survey Type of *Workforce*, you specify the time frame group to be used for the report's time frame.

Survey Type

For the Workforce Survey Analysis Report in Workforce Communications, this value is set to *Workforce*.

Time Frame Group

Specifies which Time Frame Group is to be used in the Survey Analysis report.

Note. The Time Frame Group name must be 14 characters or fewer.

SetID

The SetID to which the Objective is associated.

Objective	When a new dialog is created in Online Marketing, a marketing objective can be assigned to it. Objectives are SetID-specific and can be user defined. For example, a user could create an objective called "Employee Satisfaction Survey" and assign it to all survey dialogs that are Employee Satisfaction related, and another user could create another objective called "New Hire Survey" and assign it to all survey dialogs that are meant to be sent to new hires. The Setup Option screen allows association of a survey type to a set of marketing objectives (for different Set IDs). This allows all dialogs belonging to a particular survey type to be identified. In the above example, the Employee Satisfaction Survey and New Hire Survey marketing objectives can be associated with the Workforce survey type. This would mean that the Workforce Survey List Pagelet and Workforce Survey Analysis Report that belong to the Workforce survey type will only report on dialogs assigned to either of these two objectives. You can assign as many Objectives as you like to be associated with Workforce Communications surveys, and any dialog that has an Objective that matches an Objective that you have defined on the Setup Options page will be visible in the Workforce Survey Analysis report for that dialog. At least one Objective must be associated with the Workforce survey type in order for the report to function correctly. By default, an Objective named Workforce Communications is delivered, but you can define more. Refer to the Online Marketing and Marketing Applications documentation for more information about defining Objectives.

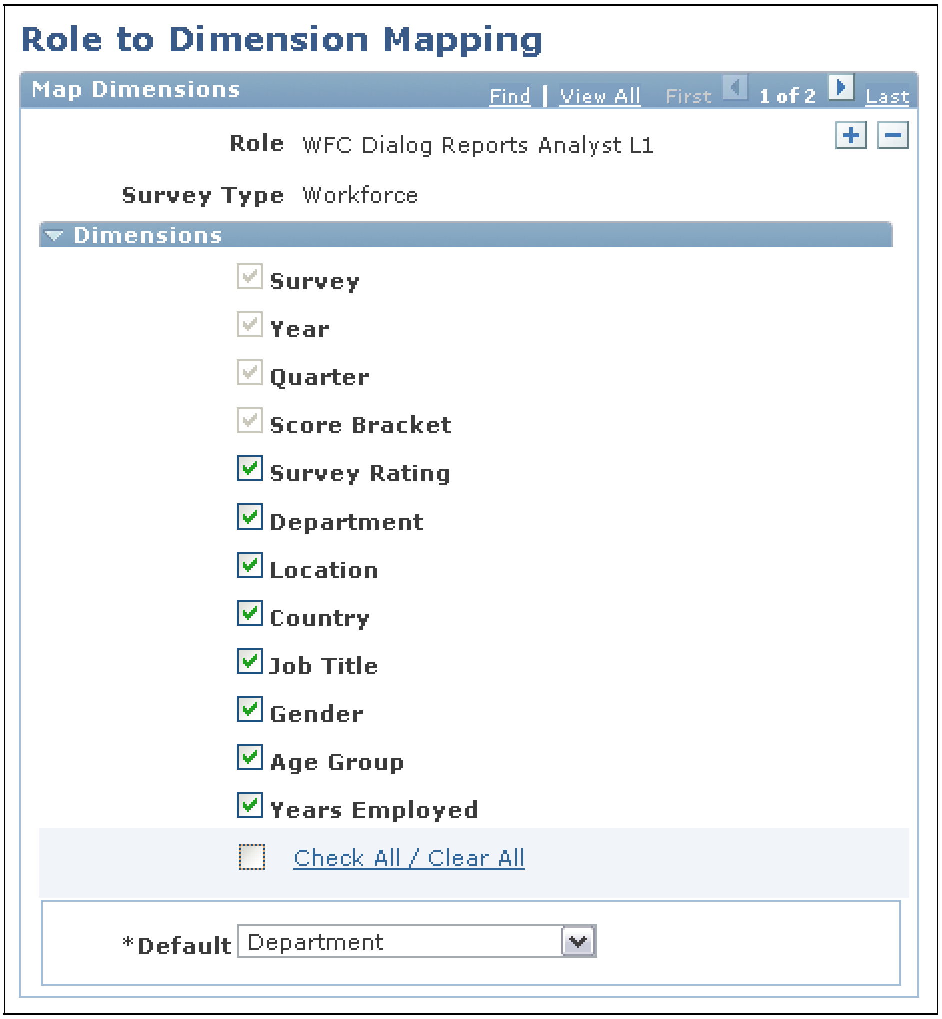
See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Setting Up PeopleSoft Marketing and TeleSales."

See and *PeopleSoft Online Marketing 9.1 PeopleBook*, "Designing Email Documents."

See and Chapter 5, "Analyzing Program and Dialog Results," Setting Up Time Dimensions, page 34.

Mapping Roles to Dimensions

Access the Role to Dimension Mapping page (Set Up CRM, Product Related, Marketing, Surveys, Role to Dimension Mapping).



Role to Dimension Mapping page

The Role to Dimension Mapping page is used to define which roles will able to see specified reporting dimensions in the Workforce Survey Analysis Interactive Report. For example, you might want to allow entry-level HR analysts to see results by location, but not by age group or gender.

Survey Type	For the purposes of Workforce Communications, the Survey Type is always set to *Workforce*.

Dimensions

For the Survey Type of Workforce, the following dimensions are available for selection:

- Country
- Gender
- Age Group
- Department
- Job Title
- Location
- Years Employed
- Survey Rating

The following dimensions are mandatory and their check boxes cannot be cleared:

- Quarter
- Year
- Survey
- Score Bracket

Hiding certain dimensions helps to make the report less cluttered for people who do not need to see particular dimensions (for example, an executive might not need to break down survey results by gender, but an analyst might). Also, hiding dimensions can be used to provide a simple security mechanism in case where breakdown of measures by certain dimensions should not be allowed. For example, a user can be prevented from slicing data by job title if there is no business need to do so.

Note that if a user's role does not have access to a particular dimension, that dimension will not be available for that user in the Survey Analysis Report. Further, if a user has more than one role used in Workforce Communications analytics, each with different Role to Dimension mappings, then the *less restrictive* setting takes precedence. For example, if a user belongs to two custom end user roles named Role 1 and Role 2, where Role 1 does not have permission to view the Job Title dimension but Role 2 does have permission, then the user will see the Job Title dimension in the Survey Analysis Report.

Users assigned to custom roles that do not have Role to Dimension mappings created will only see the four mandatory dimensions (Quarter, Year, Survey, and Score Bracket).

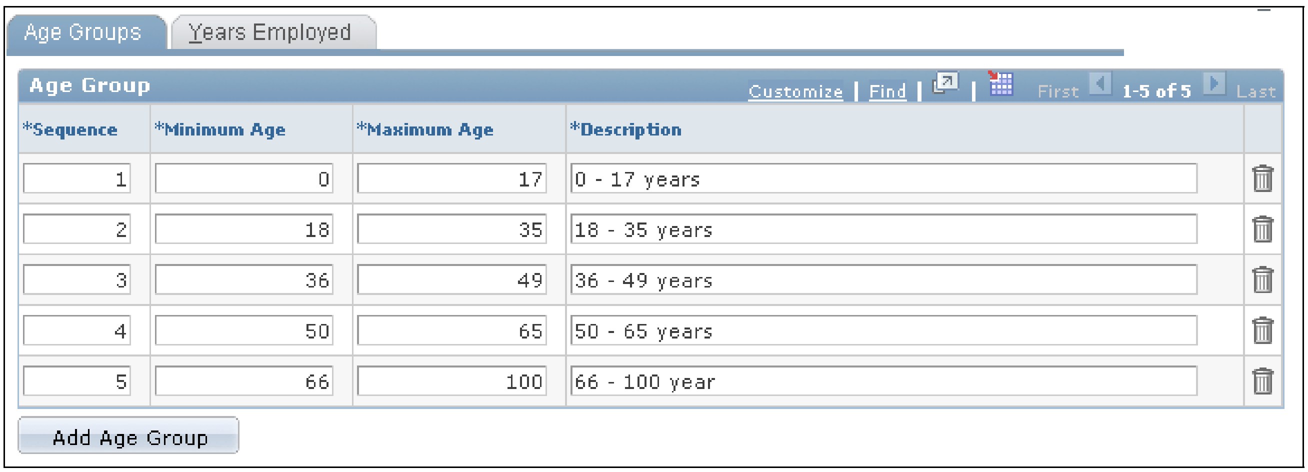
Default

Specify the default dimension that should appear on interactive grid on the Survey Analysis tab of the Workforce Survey Analysis Interactive Report for the user with specified role. Any one of the selected dimensions except Score Bracket and Survey Rating can be specified as the default dimension for the role. As delivered, Department is set as the default.

Note. It is possible, though very unlikely, that a user can belong to two or more end user roles, with each assigned a different default dimension. If this occurs, the dimension name that appears first on the Role to Dimension Mapping page is chosen as the default dimension to display on the interactive grid.

Setting Up the Age Group Dimension

Access the Age Groups page (Set Up CRM, Product Related, Marketing, Surveys, Dimension Value Groups).



Age Groups page

Age groups are a one-time setup, defined by the WFC System Administrator. Age group setup is used to specify the age group into which a particular survey respondent falls.

Sequence

Age groups are sorted by Sequence number by default. When a new row is added, the Sequence number for that row is calculated by incrementing the highest existing Sequence number on the page by 1. Users can change Sequence numbers, but they should have unique values and must be whole numbers (including 0).

Minimum Age

The lower end of an age group. This value must be a whole number (including 0).

Maximum Age

The higher end of an age group. This value must be a whole number and must be greater than the Minimum Age value.

Description	The description of the Age Group—the value that is displayed in the Survey Analysis Report filter for Age Group. When Minimum Age and Maximum Age values are specified, the Description field is automatically populated with the value Minimum Age – Maximum Age (for example, *18 – 20*), but the user can change this (for example, *18 to 20 years*).
Add Age Group	Click this button to add a new age group to the list.

How Age Group is Computed

The system computes a respondent's Age Group by doing the following:

1. Calculate the age of the person in years by taking the date the person submitted the survey and subtracting the Date of Birth, then converting this value to years.

2. Using the defined age groups, determine the age group range into which the person should be placed.

Updating Age Groups

You can safely update age groups for a survey before it has any responses. However, if you want to update an age group (that is, update a row that already exists on the Age Groups page) and if any survey responses exist in the system, a warning message will display if you try to do any of the following:

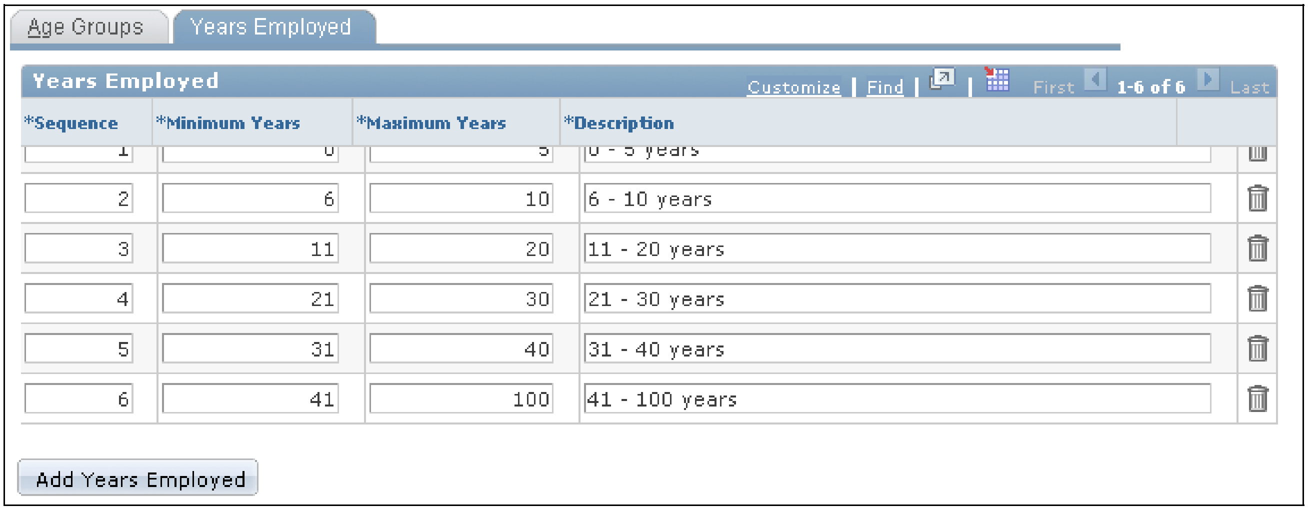
- Update the Minimum Age value.
- Update the Maximum Age value.
- Update the Description.
- Delete the row.

The warning message will indicate that deleting or updating age groups can result in the generation of an incorrect Survey Analysis Report. In order to prevent this from happening, you should save changes on the Age Groups page and then run the Stage Data for Reporting Application Engine program with the Refresh Dimension References option selected.

See and Chapter 5, "Analyzing Program and Dialog Results," Staging Data for Workforce Surveys, page 45.

Setting Up the Years Employed Dimension

Access the Years Employed page (Set Up CRM, Product Related, Marketing, Surveys, Dimension Value Groups, Years Employed).



Years Employed page

Years Employed is a one-time setup, defined by the WFC System Administrator. Years Employed setup is used to specify a range of years into which a particular survey respondent falls.

Sequence

Years Employed values are sorted by Sequence number by default. When a new row is added, the Sequence number for that row is calculated by incrementing the highest existing Sequence number on the page by 1. Users can change Sequence numbers, but they should have unique values and must be whole numbers (including 0).

Minimum Years

The lower end of a Years Employed tier. This value must be a whole number (including 0).

Maximum Years

The higher end of a Years Employed tier. This value must be a whole number and must be greater than the Minimum Years value.

Description

The description of the Years Employed tier—the value that is displayed in the Survey Analysis Report filter for Years Employed. When Minimum Years and Maximum Years values are specified, the Description field is automatically populated with the value Minimum Years– Maximum Years (for example, *1 – 5*), but the user can change this (for example, *1 to 5 years*).

Years Employed

Click this button to add a new Years Employed tier to the list.

How Years Employed is Computed

The system computes a respondent's Years Employed tier by doing the following:

1. Calculate the number of years the person was employed by taking the date the person submitted the survey and subtracting the Hire Date, then converting this value to years.
2. Using the defined Years Employed tier, determine the tier into which the person should be placed.

Updating Years Employed

You can safely update Years Employed tiers for a survey before it has any responses. However, if you want to update a tier (that is, update a row that already exists on the Years Employed page) and any survey responses exist in the system, a warning message will display if you try to do any of the following:

- Update the Minimum Years value.
- Update the Maximum Years value.
- Update the Description.
- Delete the row.

The warning message will indicate that deleting or updating Years Employed tiers can result in the generation of incorrect interactive reports. In order to prevent this from happening, you should save changes on the Years Employed page and then run the Stage Data for Reporting Application Engine program with the Refresh Dimension References option enabled.

See and Chapter 5, "Analyzing Program and Dialog Results," Staging Data for Workforce Surveys, page 45.

Staging Data for Workforce Surveys

Before data from Workforce Communications surveys can be analyzed, it must be extracted in raw form from the tables where it is stored, transformed by retrieving and calculating various dimension values, and loaded into a table that is used for reporting purposes. This extract, transform, and load (ETL) process improves the performance of the Workforce Survey List pagelet and the Workforce Survey Report. It also allows a "snapshot" of a person's HR attributes (such as job, location, and department) to be stored, since these attributes change over time.

Workforce Communications uses an Application Engine program named Stage Data for Reporting to implement the ETL process. The program can be run on demand or scheduled to run periodically (for example, nightly). You should run the program with the Incremental Refresh option when survey responses come in, and with the Refresh Dimension References option when you make changes to your setup data (for example Age Group, Score Bracket, or Years Employed definitions).

Workforce survey data is staged by the WFC System Administrator.

Page Used to Stage Data for Workforce Surveys

Page Name	***Definition Name***	***Navigation***	***Usage***
Stage Data for Reporting	RY_EE_STG	Set Up CRM, Product Related, Marketing, Surveys, Stage Data for Reporting	Transforms survey response data and stores it in tables used for reporting.

Staging Data for Reporting

Access the Stage Data for Reporting page (Set Up CRM, Product Related, Marketing, Surveys, Stage Data for Reporting).

Stage Data for Reporting page

Incremental Refresh

When the Application Engine program is run with this option, only the previously unprocessed rows in the Online Marketing tables holding survey responses will be processed and added to the reporting table. This is the default option.

Refresh Dimension References

When this option is chosen, the Age Group, Years Employed, and Score Bracket IDs in each row in the reporting table are updated with the latest values if changes were made to any of these since the last Application Engine program was run in this mode.

The Application Engine program must be run in this mode after changes are made to the Age Groups, Years Employed, or Score Brackets setup information so that the reporting table correctly reflects the changes made.

Incremental Refresh Mode

When Incremental Refresh mode is selected and the Stage Data for Reporting program is run, the following actions occur.

Determine Rows to be Processed

The program first determines which rows in the survey data table need to be processed. Only rows belonging to dialogs that have the following considerations are eligible for processing:

- The Objective value is associated with the Survey Type of *Workforce.*
- At least one Survey document exists in the dialog.
- The survey response row has a Status of *Complete.*

The program also checks whether a person has submitted the same survey multiple times. If two or more unprocessed rows in completed status are found for the same survey and for the same person in a single Quarter (as defined in the Time Frames setup), then only the latest row is processed. When adding this row to the reporting table, the program checks to ensure that a row for the same person, for the same survey, and for the same Quarter does not already exist due to previous processing. If such a row does exist, then that row is replaced with the new row.

Determine Information About Respondent

Next, the system checks to see if the respondent can be identified (that is, if a BO_ID exists in the database) or is anonymous. If the respondent is not anonymous, the following information is determined:

- Department
- Job Title
- Location
- Gender
- Country
- Date of Birth
- Hire Date
- Role (Worker or Person of Interest)

If the respondent is anonymous, these values are considered to have a default value of *Unknown.* This is also true of any dimensions that are not supplied for a particular identifiable respondent (for example, if a respondent with the Role of *Person of Interest* does not have a Department value).

Next, the respondent's Age Group is calculated by using the Date of Birth and then computing the Age Group into which he or she falls. If the respondent is anonymous, the Age Group is given the value of *Unknown.*

Similarly, the respondent's Years Employed tier is calculated using the most recent Hire Date on the person's record and then computing the Years Employed tier into which this value falls. As with Age Group, this value is set to *Unknown* for anonymous respondents.

Next, the Score Bracket into which the survey score falls is calculated by comparing the respondent's answers with the Score Brackets that were set up for the survey.

Finally, the Quarterly and Annual time periods into which the survey completion date falls is calculated.

All of the calculated data is stored as a row in the reporting table.

Refresh Dimension References Mode

When Refresh Dimension References mode is selected and the Stage Data for Reporting program is run, the following actions occur:

1. Determine whether changes were made to any of the following setup values since the last time the Application Engine program was run:
   - Age Groups
   - Years Employed
   - Score Bracket
2. If the Age Group setup values were changed, the Age Group IDs in the reporting table are updated to match the new setup values.
3. If the Years Employed setup values were changed, the Years Employed Tier IDs are updated on all rows of the reporting table.
4. If the Score Bracket setup values for any survey were changed, then the Score Bracket ID is updated in the reporting table, but only for those surveys affected. Surveys that were not affected remain as they were.

Analyzing Workforce Reports

Workforce Communications includes the following reports that you can use to analyze your survey data. These are:

- Workforce Survey List Pagelet.
- Workforce Survey Analysis Report.
- Survey Individual Response Report.
- Survey Overall Response Report.
- Dialog Performance Report.

Note. The Dialog Performance Report is described in the PeopleSoft Marketing Applications documentation.

See and Chapter 5, "Analyzing Program and Dialog Results," Understanding Workforce Reports, page 31.

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Interactive Reports in PeopleSoft Marketing Applications."

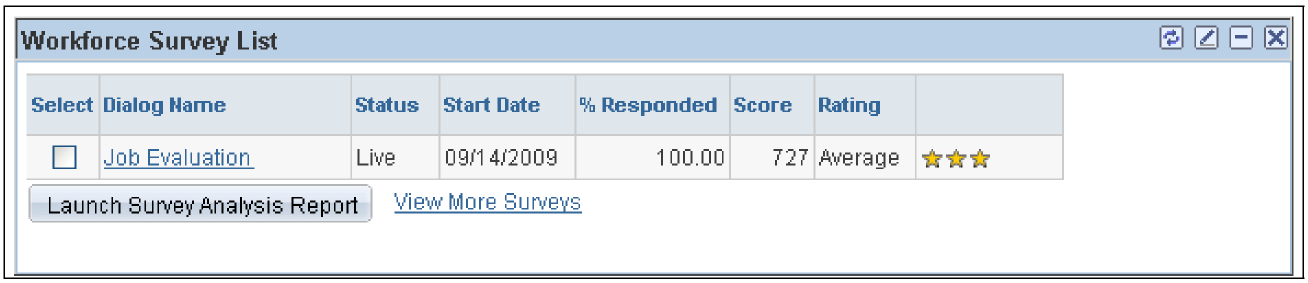
Pages Used to Analyze Workforce Reports

Page Name	***Definition Name***	***Navigation***	***Usage***
Workforce Survey List pagelet	N/A	Personalize, Content Select the Workforce Survey List check box in the Marketing group box.	Displays the dialog surveys to which the user has access.

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize	RY_EE_PRSNL	Click the Edit icon in the upper right corner of the Workforce Survey List pagelet	Personalize the items to appear on the Workforce Survey List pagelet.
Workforce Survey Analysis Report	RY_EE_SRY_RPT	Marketing, Interactive Reports, Workforce Survey Analysis	Displays workforce survey data in graphical form.

Workforce Survey List Pagelet

Access the Workforce Survey List pagelet (Personalize, Content, select Workforce Survey List under the Marketing group box).



Workforce Survey List

The Workforce Survey List pagelet displays the list of Workforce Communications Survey Dialogs available to the user for analysis. The pagelet is available in the Marketing section of the CRM homepage; you display it by selecting it in the Personalize Content page accessible through the Marketing section.

Select

Select one or more surveys for analysis by selecting the check boxes next to their names.

Dialog Name

The name of the Workforce Communications survey dialog. Click the dialog name to display the Survey Analysis Report for that dialog.

Status

The dialog's current status.

Start Date

The dialog's start date.

% Responded

This value is calculated by taking the number of respondents and dividing it by the number of people to whom the survey was sent, then multiplying the result by 100. Note that this value will be blank if the number of people the survey was sent to cannot be determined, because no audiences are tied to it.

Score

The average survey score, calculated across all survey respondents.

Rating

The survey rating derived from the Score Bracket into which this calculated average score falls.

Image

This column displays the image associated with the specified Rating on the Score Brackets setup page. If no image was associated, this column is blank.

Launch Survey Analysis Report

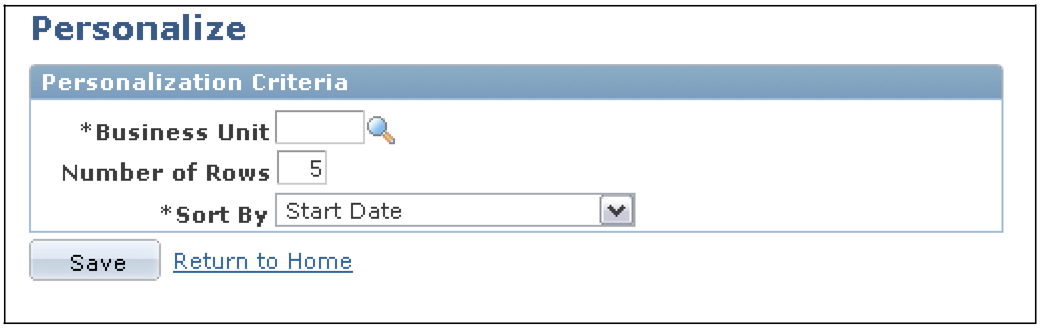
Click this button to display the Workforce Survey Analysis Report for the selected surveys.

View More Surveys

Click this link to display a configurable search page. The default values on this page are the Business Unit, Start Date, and End Date defined in the pagelet's Personalize page.

Personalizing the Workforce Survey List Pagelet

Access the Personalize page (click the Edit icon in the upper right corner of the Survey List pagelet).



Personalize page

Pagelet personalization is performed by each individual user, to specify the items they want to view on the page and how they want to sort them.

Business Unit

The business unit containing the survey dialogs accessible to users. This field is required.

Number of Rows

The number of rows to be displayed on the pagelet.

Sort By

Select *Start Date* or *Dialog Name* to specify how you want to sort the surveys that appear on the pagelet.*Start Date* is the default value.

Remember that survey dialogs will only appear on the pagelet for users or roles who are authorized to view them.

Viewing the Workforce Survey Analysis Report

Access the Workforce Survey Analysis Report (Marketing, Interactive Reports, Workforce Survey Analysis.)

Launching the Workforce Survey Analysis Report

When you access the Workforce Survey Analysis Report, a configurable search page is displayed, showing the surveys that the user or role can view. Only those users or roles with the Aggregate Reports permission (defined on the Dialog Designer – Team setup page). You must specify a business unit for the search; all other fields are optional.

After the search has completed, you can view one or more surveys (for example, if you wanted to compare a previous year's survey with this year's version. Choose one or more surveys by selecting their Select check boxes, then click the Launch Survey Analysis Report button to launch the reports. You can also click a dialog name in the result list to launch the report for that survey.

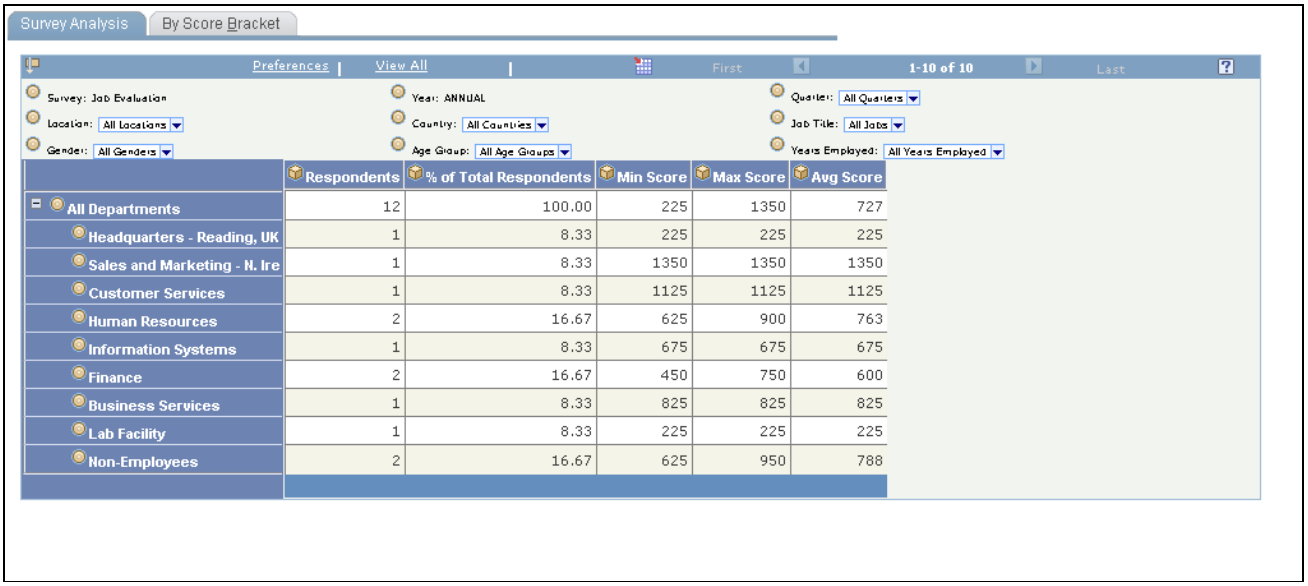
Viewing the Workforce Survey Analysis Report

The Workforce Survey Analysis Report contains two tabs:

- Workforce Survey Analysis.
- By Score Bracket.

Survey Analysis Tab

The Survey Analysis tab shows measures by dimensions other than Score Bracket, assuming that they have been enabled for the user's role. The default dimension chosen for the user's role in the Role to Dimension Mapping screen appears by default on the Y axis of the analytic grid.

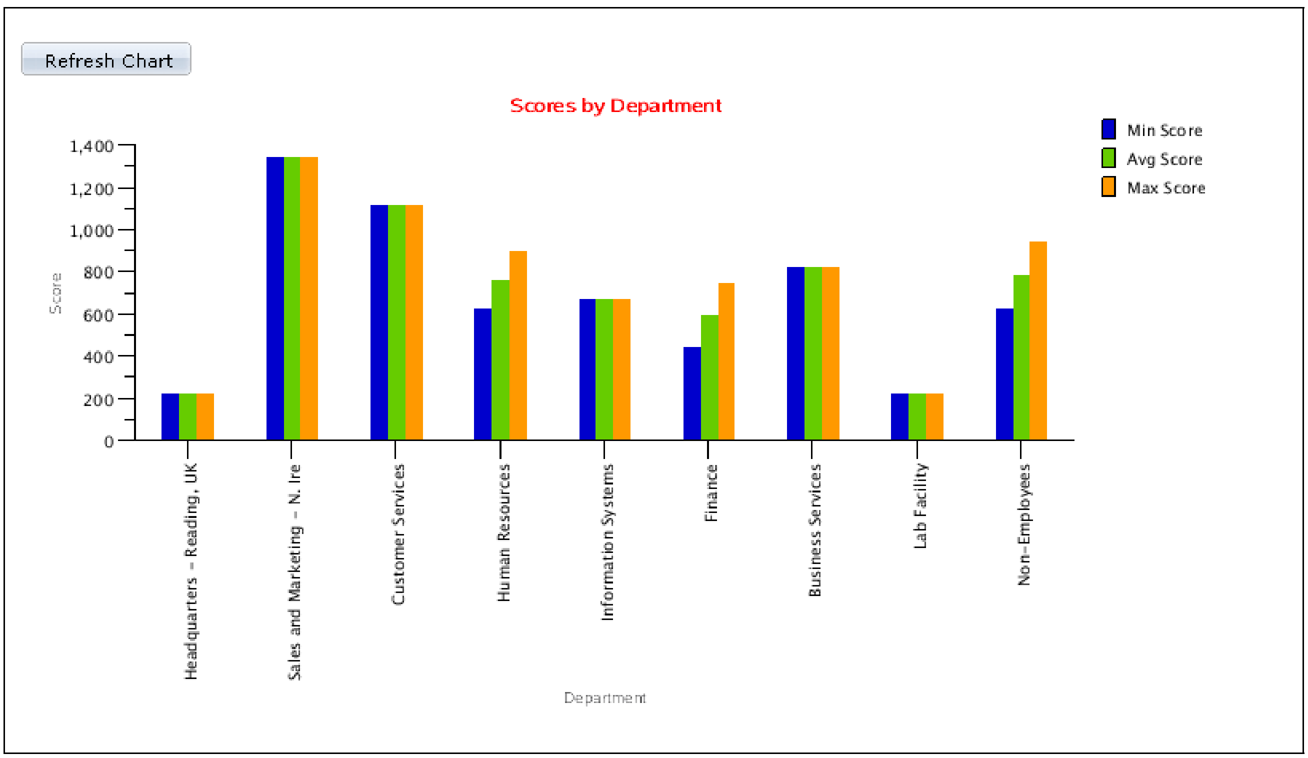

Survey Analysis | By Score Bracket

Preferences | View All | First | 1-10 of 10 | Last

Survey: Job Evaluation | Year: ANNUAL | Quarter: All Quarters
Location: All Locations | Country: All Countries | Job Title: All Jobs
Gender: All Genders | Age Group: All Age Groups | Years Employed: All Years Employed

	Respondents	% of Total Respondents	Min Score	Max Score	Avg Score
All Departments	12	100.00	225	1350	727
Headquarters - Reading, UK	1	8.33	225	225	225
Sales and Marketing - N. Ire	1	8.33	1350	1350	1350
Customer Services	1	8.33	1125	1125	1125
Human Resources	2	16.67	625	900	763
Information Systems	1	8.33	675	675	675
Finance	2	16.67	450	750	600
Business Services	1	8.33	825	825	825
Lab Facility	1	8.33	225	225	225
Non-Employees	2	16.67	625	950	788

Survey Analysis tab (1 of 2)



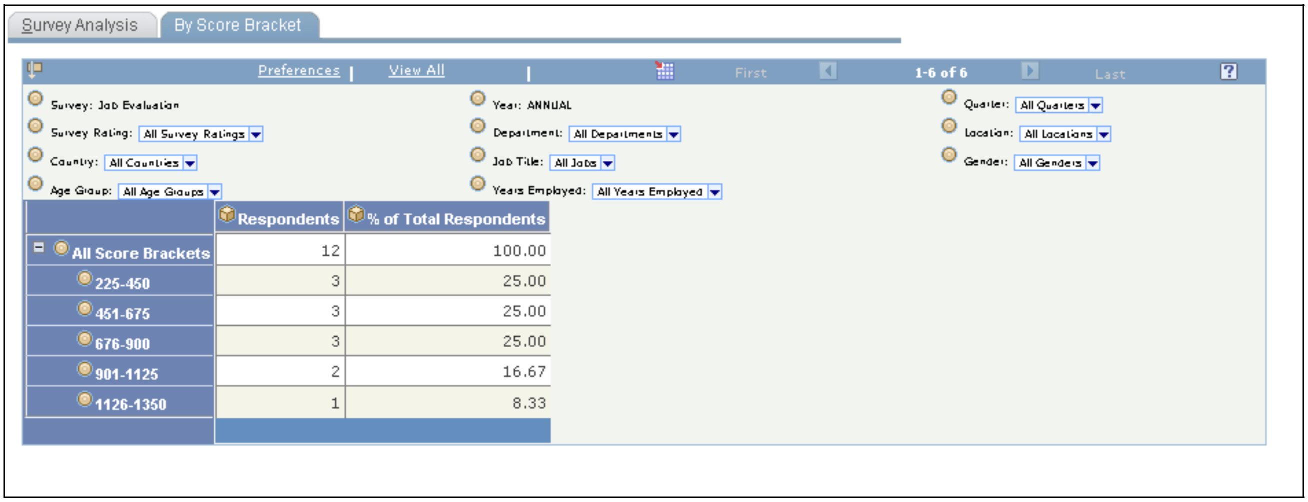
Survey Analysis tab (2 of 2)

The following data is displayed in the analytic grid:

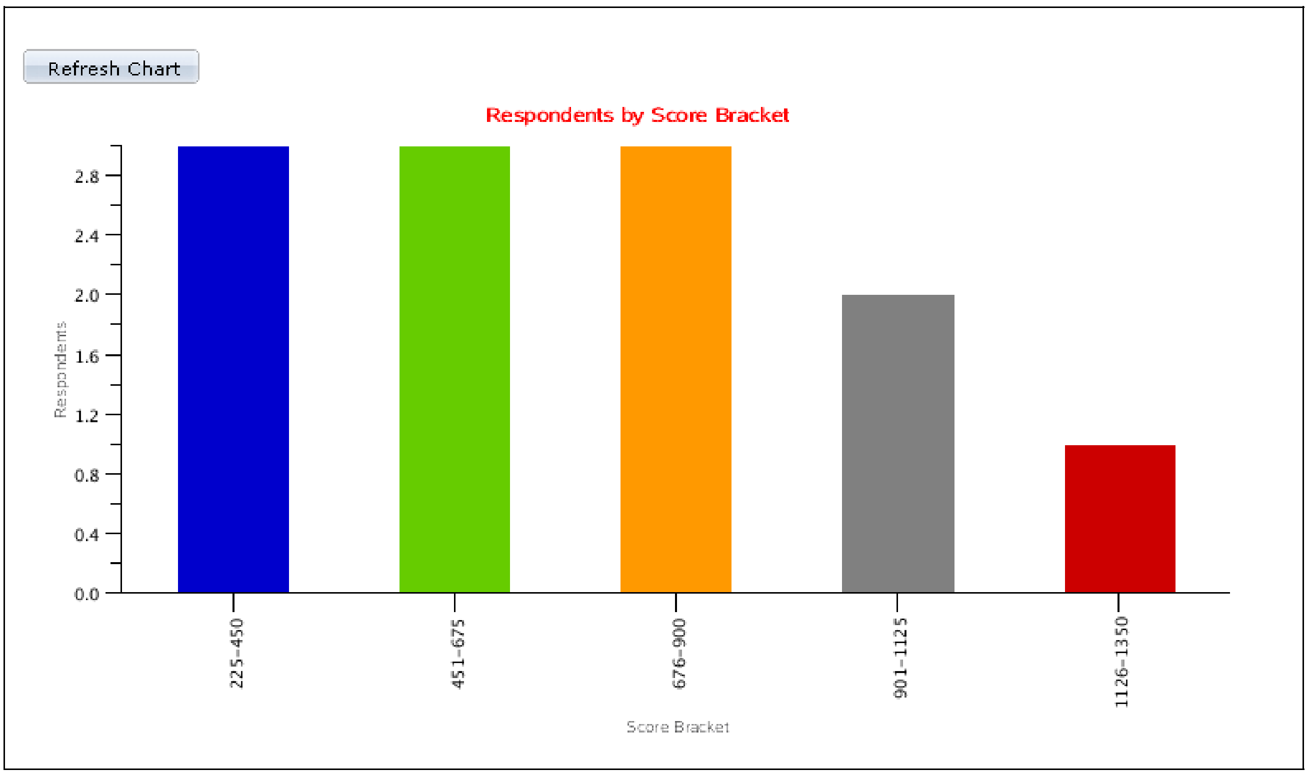
Filters	*Survey*: The selected survey. *Year*: The year in which the survey falls. *Quarter*: The quarter in which the survey falls. *Other dimensions*: The other dimensions that have been enabled for the user's role on the Role to Dimension Mapping setup page, with the exception of *Score Brackets* and *Survey Rating.*
Grid	The grid's Y axis shows the default dimension chosen on the Role to Dimension Mapping page for the user's role. The X axis shows the measures: • Respondents. • % of Total Respondents (which is the Respondent Count for the cell divided by the total number of respondents to the survey * 100). • Min Score. • Max Score. • Average Score.
Refresh Chart	Click this button to refresh the graphical chart from data in the grid. You should click this button any time the data in the grid changes to ensure that the grid and the chart are displaying the same data.
Chart	This bar chart plots Average, Min, and Max Scores on the Y axis. The X axis of the chart is determined by the Y axis dimension of the grid. If there are multiple dimensions on the grid's Y axis, then the outermost dimension is displayed on the chart's X axis.

By Score Bracket Tab

This report uses Score Bracket as the default dimension of the Y axis of the analytics grid. All other dimensions enabled for the user's role are also displayed.



By Score Bracket tab (1 of 2)



By Score Bracket tab (2 of 2)

Filters

Survey: The selected survey.

Year: The year in which the survey falls.

Quarter: The quarter in which the survey falls.

Other dimensions: The other dimensions that have been enabled for the user's role on the Role to Dimension Mapping setup page.

Grid	The grid's Y axis shows the Score Brackets. The X axis shows: • Respondents. • % of Total Respondents (Respondent count (for cell) divided by the total number of survey respondents * 100).
Refresh Chart	Click this button to refresh the graphical chart from data in the grid. You should click this button any time the data in the grid changes to ensure that the grid and the chart are displaying the same data.
Chart	This bar chart plots Respondents (# of Respondents) on the Y axis. The X axis is specified by the Y-axis dimension of the analytics grid. If there are multiple dimensions on the Y axis of analytic grid, then the outermost dimension is shown on the chart's X axis.

Appendix A

Data Synchronized from HR to CRM

The following tables outline all the data that is synchronized from HR to CRM via the Workforce Sync EIP. This data is included as custom profiles and custom profile groups, but is not added as Basic Profiles to BO_BASICS.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Oracle's PeopleSoft CRM Business Object Management Preface"

Worker Profile Group

These fields are grouped in the Profile Group named Worker Profile. The navigation is Workforce, Worker, Details.

Profile Name	***Profile Folder***	***Field Label Name***	***Use Type***	***Field Name***
Worker	Individuals	Person ID	Map Field Choice to Prompt	PERSON_ID
		Employee ID	Map Field Choice to Prompt	EMPLID
		Contact Flag	Map Field Choice to Prompt	CONTACT_FLAG
		Language	Map Field Choice to Prompt	RB_LANGUAGE_CD
		Driver's License		
		License Issued By		
		License Expires		
		PIM Account Name		

Profile Name	Profile Folder	Field Label Name	Use Type	Field Name
		Pref. Contact		
		Pref. Notification		

Worker - Job Information Profile Group

In CRM, one Employee can have multiple Jobs. One row of data exists for each Job that an Employee has. Only the most current effective dated Job information for each Employee is stored as Profile fields. These fields are grouped in the Profile Group named Job Information. The navigation is Workforce, Worker, Job.

Profile Name	Profile Folder	Field Label Name	Use Type	Field Name
Worker Job Information	Individuals	Worker Role		
		Assignment Start		
		Effective Date	Date	EFFDT
		Effective Sequence	Integer	SEQUENCE_NUMBER
		Employee Status	Map Field Choice to Prompt	EMPL_STATUS
		HR Status	Map Field Choice to Prompt	HR_STATUS
		Job Indicator	Map Field Choice to Prompt	JOB_INDICATOR
		Source Indicator	Map Field Choice to Prompt	SOURCE_IND
		Regular or Temp	Map Field Choice to Prompt	REG_TEMP
		Full Time or Part Time	Map Field Choice to Prompt	FULL_PART_TIME
		Job Code SetID	Map Field Choice to Prompt	SETID_JOBCODE
		Job Code	Map Field Choice to Prompt	JOBCODE
		Job Description		

Profile Name	***Profile Folder***	***Field Label Name***	***Use Type***	***Field Name***
		Department SetID	Map Field Choice to Prompt	SETID_DEPT
		GL Business Unit		
Worker Job Information *(continued)*	Individuals	Department ID	Map Field Choice to Prompt	DEPTID
		Dept. Description		
		Location SetID	Map Field Choice to Prompt	SETID_LOCATION
		Location Code	Map Field Choice to Prompt	LOCATION
		Location Desc		
		Physical Location		
		Time Zone		
		Holiday Schedule		
		Supervisor ID	Map Field Choice to Prompt	SUPERVISOR_ID
		Supervisor		
		Office Code		
		Manager Level		
		Manager ID		
		Manager Group		
		Manager Dept		
		Manager Position		

Worker Provider Groups Profile Group

In CRM, an Employee can be a member of multiple Provider Groups. One row of data exists for each Provider Group to which an Employee is a member. Only Provider Groups with a Status of Active are stored. The fields are grouped in the Profile Group named "Provider Groups." The navigation is Workforce, Worker, Groups.

Profile Name	Profile Folder	Field Label Name	Use Type	Field Name
Worker Provider Groups	Individuals	SetID	Map Field Choice to Prompt	SETID
		Provider Group Name		
		Status		
		Person ID	Map Field Choice to Prompt	PERSON_ID
		Provider Group ID	Map Field Choice to Prompt	PROVIDER_GRP_ID

Person of Interest Profile Group

For Persons of Interest, the information about the individual is contained within the Person record in CRM. Most Person fields that are needed are already contained in the Person Basic table and are available for use as Profiles. The following field is needed in addition to those already available. This field is grouped in the Profile Group named "Persons of Interest." The navigation is Customers CRM, Search Person.

Profile Name	Profile Folder	Field Label Name	Use Type	Field Name	Description
Person of Interest	Individuals	POI Type	Map Field Choice to Prompt	POI_TYPE	Identifies the type of Person of Interest (COBRA, External Payroll, and so on).

Appendix B

Profiles Containing HR Data

In order to build audiences based on the HR attributes of an employee or person of interest, or to personalize email or survey content with HR data, the HR data must exist in CRM as profiles. The following tables show data elements that do not exist in CRM, but that are brought over using the Workforce Sync EIP. This data is available for the purpose of building audiences and for personalization of email and survey content.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Oracle's PeopleSoft CRM Business Object Management Preface"

Job Data

Job data is information about an employee's job—for example, hiring, promotion, change of position, salary increase, and so forth. Each employee will have one or more changes occurring to his or her Job Data record.

The Job Data folder is a subfolder of the Individuals folder when building selection criteria for an audience.

Field Label Name	***Field Name***	***Use Type***
Employee ID	EMPLID	Map Field Choice to Prompt
Employee Record Number	RA_EMPL_RCD	Text
Effective Date	EFFDT	Date
Effective Sequence	RA_EFFSEQ	Text
Department ID	DEPTID	Map Field Choice to Prompt
Job Code	JOBCODE	Map Field Choice to Prompt
Position Number	POSITION_NBR	Text
Employee Status	EMPL_STATUS	Map Field Choice to Prompt
Action	ACTION	Map Field Choice to Prompt
Action Date	ACTION_DT	Date

Field Label Name	***Field Name***	***Use Type***
Action Reason	ACTION_REASON	Text
Location	LOCATION	Map Field Choice to Prompt
Tax Location Code	TAX_LOCATION_CD	Text
Job Entry Date	JOB_ENTRY_DT	Date
Department Entry Date	DEPT_ENTRY_DT	Date
Position Entry Date	POSITION_ENTRY_DT	Date
Shift	SHIFT	Map Field Choice to Prompt
Regular or Temp	REG_TEMP	Map Field Choice to Prompt
Full or Part Time	FULL_PART_TIME	Map Field Choice to Prompt
Company	COMPANY	Text
Pay Group	PAYGROUP	Text
BAS Group ID	BAS_GROUP_ID	Text
Benefits Employee Status	BEN_STATUS	Text
Benefits Administration Action	BAS_ACTION	Text
COBRA Action	COBRA_ACTION	Text
Employee Type	EMPL_TYPE	Text
Holiday Schedule	HOLIDAY_SCHEDULE	Text
Standard Hours Frequency	STD_HRS_FREQUENCY	Text
Officer Code	OFFICER_CD	Map Field Choice to Prompt
Employee Class	EMPL_CLASS	Map Field Choice to Prompt
Salary Administration Plan	SAL_ADMIN_PLAN	Text
Salary Grade	GRADE	Text
Grade Entry Date	GRADE_ENTRY_DT	Date
Step Entry Date	STEP_ENTRY_DT	Date
Salary Matrix Code	SALARY_MATRIX_CD	Text

Field Label Name	***Field Name***	***Use Type***
Rating Scale	RATING_SCALE	Text
Review Rating	REVIEW_RATING	Text
Review Date	REVIEW_DT	Date
Compensation Rating	COMP_FREQUENCY	Map Field Choice to Prompt
Currency Code	CURRENCY_CD	Map Field Choice to Prompt
Business Unit	BUSINESS_UNIT	Text
Department SetID	SETID_DEPT	Map Field Choice to Prompt
Job Code SetID	SETID_JOBCODE	Map Field Choice to Prompt
Location SetID	SETID_LOCATION	Map Field Choice to Prompt
Salary SetID	SETID_SALARY	Text
Regulatory Region	REG_REGION	Text
Tipped	DIRECTLY_TIPPED	Map Field Choice to Prompt
FLSA Status	FLSA_STATUS	Map Field Choice to Prompt
EEO Classification	EEO_CLASS	Map Field Choice to Prompt
Function Code	FUNCTION_CD	Text
Establishment ID	ESTABID	Text
Paid Work Period	PAID_HRS_FREQUENCY	Text
Benefit Program	BENEFIT_PROGRAM	Text
Union Full or Part Time	UNION_FULL_PART	Text
Union Position	UNION_POS	Text
Productive Unit	UNITA_PROD_CD	Text
Union Code	UNION_CD	Text
Bargaining Unit	BARG_UNIT	Text
Union Seniority Date	UNION_SENIORITY_DT	Date
Date Entered	ENTRY_DT	Date

Field Label Name	***Field Name***	***Use Type***
Labor Agreement	LABOR_AGREEMENT	Text
Employee Category	EMPL_CTG	Text
Employee Subcategory	EMPL_CTG_L1	Text
Employee Subcategory 2	EMPL_CTG_L2	Text
FICA Status - Employee	FICA_STATUS_EE	Map Field Choice to Prompt
Supervisor ID	SUPERVISOR_ID	Map Field Choice to Prompt
Reports To	REPORTS_TO	Text
HR Status	HR_STATUS	Map Field Choice to Prompt
Organization Relationship	PER_ORG	Map Field Choice to Prompt
POI Type	POI_TYPE	Text
Hire Date	HIRE_DT	Date
Termination Date	TERMINATION_DT	Date
Assignment Start	ASGN_START_DT	Date
Assignment End	ASGN_END_DT	Date
Last Date Worked	LAST_DATE_WORKED	Date
Compensation Rate	COMPRATE	Decimal
Change Amount	CHANGE_AMT	Decimal
Annual Rate	ANNUAL_RT	Decimal
Monthly Rate	MONTHLY_RT	Decimal
Daily Rate	DAILY_RT	Decimal
Hourly Rate	HOURLY_RT	Decimal
Annual Benefits Base Rate	ANNL_BENEF_BASE_RT	Decimal
Shift Differential Rate	SHIFT_RT	Decimal
Standard Hours	RA_STD_HOURS	Text
Step	RA_STEP	Text

Field Label Name	Field Name	Use Type
Change Percent	RA_CHANGE_PCT	Text
Shift Factor	RA_SHIFT_FACTOR	Text
Category Rate	RA_CTG_RATE	Text
Paid Hours	RA_PAID_HOURS	Text
Paid FTE	RA_PAID_FTE	Text
FTE	RA_FTE	Text
Work Day Hours	RA_WORK_DAY_HOURS	Text

Job Data – Global

The following table shows the data from the Job Data – Global Table that is available as selection criteria for building audiences. It appears as a subfolder of the Individuals folder.

Field Label Name	Field Name	Use Type
Employee ID	EMPLID	Map Field Choice to Prompt
Employee Record	RA_EMPL_RCD	Text
Effective Date	EFFDT	Date
Effective Sequence	RA_EFFSEQ	Text
Tariff	TARIFF_GER	Text
Tariff Area	TARIFF_AREA_GER	Text
Performance Group	PERFORM_GROUP_GER	Text
Labor Type	LABOR_TYPE_GER	Text
Spokesman Committee ID	SPK_COMM_ID_GER	Text
Works Council Member	WRKS_CNCL_MEM_GER	Text
Hours Type	HOURLY_RATE_FRA	Text
Work Accident Type Code	ACCDNT_CD_FRA	Text

Field Label Name	***Field Name***	***Use Type***
Value 1	VALUE_1_FRA	Text
Value 2	VALUE_2_FRA	Text
Value 3	VALUE_3_FRA	Text
Value 4	VALUE_4_FRA	Text
Value 5	VALUE_5_FRA	Text
Turnover Action	ACTION_ITA	Text
Turnover Action Reason	ACTION_REASON_ITA	Text
Works Council Function	WRKS_CNCL_FUNCTION	Text
Intercenter Works Council Function	INTERCTR_WRKS_CNCL	Text
Pay Group	GP_PAYGROUP	Text
Use Pay Group Value	GP_DFLT_ELIG_GRP	Text
Eligibility Group	GP_ELIG_GRP	Text
Use Pay Group Value 2	GP_DFLT_CURRTTYP	Text
Use Pay Group Value 3	GP_DFLT_EXRTDT	Text
Use Rate As Of	GP_ASOF_DT_EXG_RT	Text
Cross Border Worker	BORDER_WALKER	Text
Work Council Role	WRKS_CNCL_ROLE_CHE	Text
Works Council ID	WRKS_CNCL_ID_LCL	Text
Matricula Number	RA_MATRICULA_NBR	Text

Job Data – Federal

The following table shows the data from the Job Data – Global Table that is available as selection criteria for building audiences. It appears as a subfolder of the Individuals folder.

Field Label Name	***Field Name***	***Use Type***
Employee ID	EMPLID	Map Field Choice to Prompt
Employee Record	RA_EMPL_RCD	Text
Effective Date	EFFDT	Date
Effective Sequence	RA_EFFSEQ	Text
Effective Date - Government	GVT_EFFDT	Date
Proposed Effective Date	GVT_EFFDT_PROPOSED	Date
Work In Progress Status	GVT_WIP_STATUS	Text
Status Type	GVT_STATUS_TYPE	Map Field Choice to Prompt
Nature of Action Code	GVT_NOA_CODE	Text
Legal Authority (1)	GVT_LEG_AUTH_1	Text
Authority 1 Description - Part 1	GVT_PAR_AUTH_D1	Text
Authority 1 Description - Part 2	GVT_PAR_AUTH_D1_2	Text
Legal Authority (2)	GVT_LEG_AUTH_2	Text
Authority 2 Description - Part 1	GVT_PAR_AUTH_D2	Text
Authority 2 Description - Part 2	GVT_PAR_AUTH_D2_2	Text
Not to Exceed Date	GVT_PAR_NTE_DATE	Date
Work Schedule	GVT_WORK_SCHED	Map Field Choice to Prompt
Sub-Agency	GVT_SUB_AGENCY	Text
Eligible for FEHB	GVT_ELIG_FEHB	Text
FEHB Eligibility Date	GVT_FEHB_DT	Date
Pay Rate Determinant	GVT_PAY_RATE_DETER	Text
US Federal Step	GVT_STEP	Text
Retained Pay Plan	GVT_RTND_PAY_PLAN	Text
Retained Pay Table	GVT_RTND_SAL_PLAN	Text
Retained Grade	GVT_RTND_GRADE	Text

Field Label Name	***Field Name***	***Use Type***
Retained US Federal Step	GVT_RTND_GVT_STEP	Text
Pay Basis	GVT_PAY_BASIS	Text
Transferred from Agency	GVT_XFER_FROM_AGCY	Text
Transferred to Agency	GVT_XFER_TO_AGCY	Text
Retirement Plan	GVT_RETIRE_PLAN	Text
Annuitant Indicator	GVT_ANN_IND	Text
FEGLI Code	GVT_FEGLI	Text
FEGLI Living Benefits	GVT_FEGLI_LIVING	Yes/No
CSRS Frozen Service	GVT_CSRS_FROZN_SVC	Text
Previous Retirement Coverage	GVT_PREV_RET_COVRG	Text
FERS Coverage	GVT_FERS_COVERAGE	Map Field Choice to Prompt
Type of Appointment	GVT_TYPE_OF_APPT	Text
Personnel Office ID	GVT_POI	Text
Position Occupied	GVT_POSN_OCCUPIED	Map Field Choice to Prompt
Contact Emplid	GVT_CONT_EMPLID	Map Field Choice to Prompt
Route to Next	GVT_ROUTE_NEXT	
Change Flag	GVT_CHANGE_FLAG	Yes/No
TSP Status	GVT_TSP_UPD_IND	Text
PI Update Indicator	GVT_PI_UPD_IND	Map Field Choice to Prompt
SF-52 Request Number	GVT_SF52_NBR	Text
SF-113G Ceiling	GVT_S113G_CEILING	Yes/No
LEO / Fire Position	GVT_LEO_POSITION	Map Field Choice to Prompt
Annuity Commencement Date	GVT_ANNUIT_COM_DT	Date
Post 65 Basic Life Reduction	GVT_BASIC_LIFE_RED	Text
4 Day Date	GVT_DED_PRORT_DT	Date

Field Label Name	***Field Name***	***Use Type***
Retroactive Pay Flag	GVT_RETRO_FLAG	Text
Retroactive Deduction Flag	GVT_RETRO_DED_FLAG	Text
Retroactive Job Flag	GVT_RETRO_JOB_FLAG	Text
Retroactive Base Flag	GVT_RETRO_BSE_FLAG	Text
Other Pay Change Flag	GVT_OTH_PAY_CHG	Text
Detail Position Number	GVT_DETL_POSN_NBR	Text
Annual Benefit Base Rate Override	ANNL_BEN_BASE_OVRD	Yes/No
Benefit Program	BENEFIT_PROGRAM	Text
Update Payroll Flags	UPDATE_PAYROLL	Text
Pay Plan	GVT_PAY_PLAN	Text
Pay Flag	GVT_PAY_FLAG	Text
NID Change	GVT_NID_CHANGE	Text
Base Pay	GVT_COMPRATE	Decimal
Hourly Rate with out Location	GVT_HRLY_RT_NO_LOC	Decimal
No Locality - Monthly Rate	GVT_MNLY_RT_NO_LOC	Decimal
No Locality - Annual Rate	GVT_ANNL_RT_NO_LOC	Decimal
Transaction Number	RA_GVT_TRANS_NBR	Text
Sequence Number	RA_GVTRANS_NBR_SEQ	Text
Retained Step	RA_GVT_RTND_STEP	Text
Locality Adjustment	RA_GVTLOCALITY_ADJ	Text
Biweekly Rate	RA_GVT_BIWEEKLY_RT	Text
Daily Rate	RA_GVT_DAILY_RT	Text
Daily Rate no Locality	RA_GVTDLY_RTNO_LOC	Text
No Locality Biweekly Rate	RA_GVTBW_RT_NO_LOC	Text

Field Label Name	*Field Name*	*Use Type*
Living Benefit Coverage Amount	RA_GVT_LIVING_AMT	Text
CSRS Annuity Offset Amount	RA_GVT_ANNUITY_OFF	Text
FEGLI Basic Percent	RA_GVT_FEGLI_BASC	Text
FEGLI Optional Percent	RA_GVT_FEGLI_OPT_P	Text
FEHB Percent	RA_GVT_FEHB_PCT	Text

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