ORACLE
PEOPLESOFT

PeopleSoft HCM 9.2: eDevelopment

March 2013

ORACLE

PeopleSoft HCM 9.2: eDevelopment
CDSKU hcm92pbr0

Third Party Content, Products, and Services Disclaimer

Alpha and Beta Draft Documentation Notice

Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Bold	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: Enter the letter *O*.
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
`Monospace font`	Highlights a PeopleCode program or other code example.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

Typographical Convention	*Description*
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America

- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft HCM Related Links

PeopleSoft Information Portal on Oracle.com

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

HCM Abbreviations

Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

Follow Us

Get the latest PeopleSoft updates on Facebook.

Follow PeopleSoft on Twitter@PeopleSoft_Info.

Chapter 1

Getting Started with eDevelopment

eDevelopment Business Processes

eDevelopment is comprised of self-service transactions that interface with the PeopleSoft Human Resources (HR) system.

Employees use eDevelopment to:

- Maintain their personal profiles.
- View job profiles.
- Search and compare job profiles.
- Create an interest list of job profiles in which they are interested.
- Review approval history of profiles
- Request training.
- Review their training information.

Managers use eDevelopment to:

- Review and update profiles for their direct reports.
- Approve profile changes.
- Search and compare profiles.
- View and maintain job profiles.
- Complete reviews and observations for regulated individual reports.
- Request training for their direct reports.
- Review training information for their direct reports.

Faculty members use eDevelopment to enter the following training and development information:

- Professional training.
- Activities, administrative posts, and teaching responsibilities.
- Presentations and publications.
- Committees.

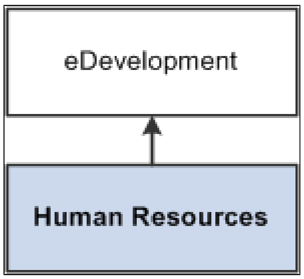
- Student advising.

eDevelopment Integrations

eDevelopment integrates with PeopleSoft HR.

Image: eDevelopment integration with HR

This diagram shows information flowing from HR to eDevelopment.



eDevelopment Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps. A complete list of these resources appears in the *Application Fundamentals* documentation with information about where to find the most current version of each.

See the product documentation for *PeopleSoft HCM: Application Fundamentals*.

Chapter 2

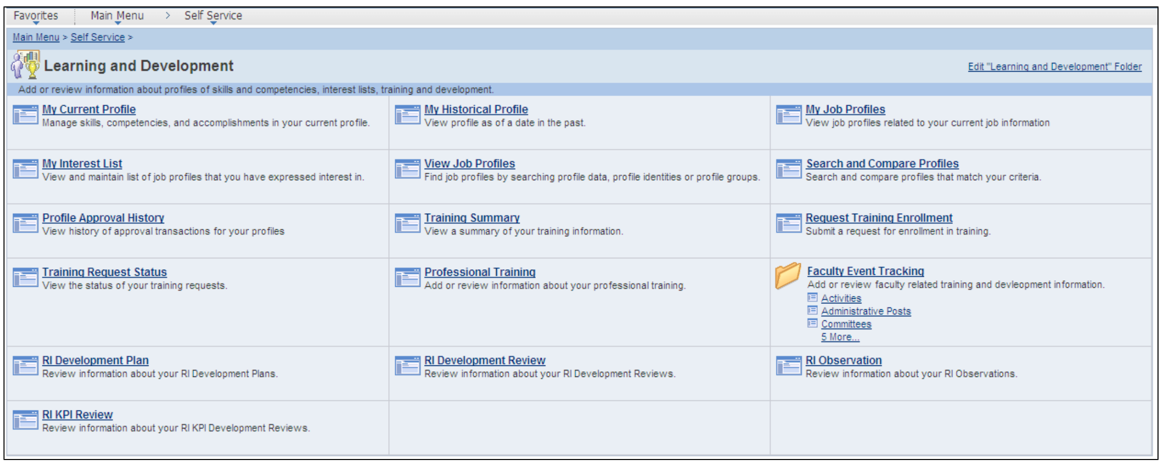
Maintaining My Profiles

Navigating in eDevelopment

The standard menu-driven navigation path is the standard access method for eDevelopment. Employees access eDevelopment by selecting Self Service, Learning and Development. Managers access eDevelopment by selecting Manager Self Service, Learning and Development.

Image: eDevelopment navigation path for an employee

This is an example of an eDevelopment navigation path for an employee.



Roles

The self-service components can be used by both the employee and the manager; therefore, PeopleSoft delivers definitions for these roles and defines a menu for each role.

These delivered roles for employees and managers are configured specifically for profile management self service:

- Profile Mgmt Employee
- Profile Mgmt Manager

Note: In this documentation, the term *employee* refers to all people who work for and report time in the organization. This can include regular employees as well as contractors and other temporary assignment workers.

Security

The user profile that you create for each individual who accesses the self-service components determines the components that the user can access by default. Create user profiles by using the User Profiles component (USERMAINT). Assign a role to each user profile, which is linked to permission lists. Each permission list identifies components that individuals can access. To modify the access for specific components for each role, modify the permission list for the user's role. Define which data the user can access in the user profile.

See the product documentation for *PeopleTools: Security Administration*.

Understanding Profile Maintenance

eDevelopment provides employees and managers with self-service options that integrate with the Manage Profiles business process in PeopleSoft HR. eDevelopment profiles are divided into two categories:

- Person profiles.

  Person profiles describe a person's skills, competencies, accomplishments and performance. Person profiles are linked to a person ID.

- Job profiles.

  Job profiles (known as non-person profiles in the Manage Profiles business process) describe the competencies, qualifications, and responsibilities of a job. You can link job profiles to a variety of entities, not just job codes. For example, job profiles can be linked to job codes, positions, job families, and salary grades.

The format of profiles is the same in eDevelopment and the Manage Profiles business process. Profile content is divided into tabs and content sections that are defined by the profile type used to create the profile.

See "Maintaining Profiles *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

The next topics discuss the self-service profile management options available to employees and managers that enable them to:

- Create and maintain person profiles.

  Employees use the My Current Profile transaction to view and edit their existing person profiles and create new profiles. Employees also use the My Historical Profile option to view historical rows of their profile.

  Managers can create, view, and update the person profiles for their team. The manager Team Historical Profile transaction displays historical profile items in effect for direct reports as of the as of date.

  Depending on the configuration of your profile types, approvals workflow is triggered when employees update their person profiles and changes are typically approved by managers.

- Approve changes to person profiles.

Managers use the Approve Profiles option to review changes to their employees' person profiles that require approval, and approve or deny the changes.

- View approval history.

  Employees use the Profile Approval History option to view the approval status of profile changes that they have submitted for approval and view the history of profile approvals.

- Manage interest lists.

  An interest list is a collection of job profiles that is associated with an employee. Typically interest lists are used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile, or jobs that an employee wants to include in a career planning discussion with their manager. Employees can add to and remove job profiles from their interest list. Managers can also view and update their employees' interest lists.

- View job profiles.

  Employees have two options for viewing job (non-person) profiles, My Job Profiles lists job profiles related to their current jobs, and View Job Profiles is a general option for viewing any job profile.

- Create and maintain job profiles (manager only).

  Managers can create and update job profiles. Depending on the configuration of your profile types, approvals workflow is triggered when managers update job profiles. The typical approver for job profiles is the profile administrator, although this can be configured according to your business needs.

- Search and compare profiles.

  Employees and managers use Search and Compare Profiles to run any of the search types that have been configured for them.

Prerequisites

Before employees and managers can use the profile management self-service transactions, you must set up the following:

- Define the content catalog.
- Define your profile types.
- (Optional). Define profile groups.
- (Optional). Define and configure approvals for profiles.

  The use of approval processing for profiles is optional. You associate approvals workflow to profile types.

- Define search types and run the Build Manager List and Build Profile Search Indexes processes required by the profile search and compare feature.
- Set up the text on the self-service pages.

The profile management self-services pages use the Text Catalog. You can modify the delivered text to meet your organization's business needs. See "Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- Configure the Direct Reports functionality for your organization.

  The manager self-service options for profile management use the direct reports functionality to determine managers' direct reports. See "Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Related Links

"Understanding the Content Catalog *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"
"Understanding Profile Management *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"
"Understanding Search and Compare Profiles *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"
"Understanding PeopleSoft HCM Common Components *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Maintaining Person Profiles

This topic provides an overview of person profiles and lists pages to review and update personal profiles.

Pages Used to Review and Update Person Profiles

Page Name	*Definition Name*	*Navigation*	*Usage*
Current Team Profiles Team Historical Profiles	HR_DR_ADDL_INFO	• Manager Self Service, Learning and Development, Current Team Profiles, Current Team Profiles • Manager Self Service, Learning and Development, Team Historical Profiles, Team Historical Profiles	Displays the instructions for the transaction and the effective date field. Managers can change the default effective date to view profiles of a different effective date.
Current Team Profiles - Select Employees to Process Team Historical Profiles - Select Employees to Process	HR_DR_SELECT_EMPS	• Click Continue on the Current Team Profiles page. • Click Continue on the Team Historical Profiles page.	Displays a list of the people who report to the manager. Managers select the person whose profile they want to view and click Continue.

Page Name	***Definition Name***	***Navigation***	***Usage***
Select Profile Type	JPM_JP_SEL_PRF_EMP	• Self Service, Learning and Development, My Current Profile, Select Profile Type • Select an employee on the Current Team Profiles – Select Employees to Process page and click Continue. • Select an employee on the Team Historical Profiles – Select Employees to Process page and click Continue. • Select the Profile Actions field value *Select Another Profile Type,* and click Go on an employee or team current or historical profile page.	Displays a list of the person profile types. Employees and managers select the profile type. This page is only displayed if there are two or more active person profile types. If there is only one active person profile type, this page is not displayed.

Page Name	**_Definition Name_**	**_Navigation_**	**_Usage_**
My Current Profile View Historical Profile Current Team Profiles Team Historical Profiles	JPM_JP_PROFL2_EMP	Select a profile type on the Select Profile Type page and click the Continue button.	Displays the profile of the person. Employees or managers can add items on the profile or they can view item detail, modify, and delete existing profile items they entered themselves. The structure of a profile and the items that are available to add to the profile are determined by the profile type and the content catalog. When employees and managers click the Save and Submit buttons, approval processing is initiated for those changes that require approval. The profile type definition determines which changes require approval. The profile pages shows only approved items in the content sections. Any new profile items, changes to existing items, or deletions of profiles that need approval do not appear within the profile content section tabs after clicking Save and Submit. Links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or have been denied approval. Use these links to view the items that are unapproved.

Page Name	***Definition Name***	***Navigation***	***Usage***
Copy Items from Job Profile	JPM_COPY_PROFL_SEC	Select the Profile Actions field value *Copy From Job Profile,* and click Go on the My Current Profile or Current Team Profiles page.	Displays the job profiles associated with the employee's job data. The system determines which job profiles are related to the employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the active jobs for matching job profiles. Employees or managers select the job profile that they want to copy items from, and click the Select button. This page only appears if there are two or more active job profiles associated with the employee's job data. The system copies and adds the profile item keys in the job profile that are not already in the employee's profile.
Search for Profiles	JPM_SRCH_TRANSFER	Select the Profile Actions field value *Search and Compare Profiles,* and click Go on the employee or team current or historical profile page.	Lists the profile search types that are defined for employees or managers. Select the type of search that you want to run.
Select New As Of Date	JPM_JP_SELECT_DATE	• Select the Profile Actions field value *View As Of Another Date,* and click Go on the View Historical Profile page. • Select the Profile Actions field value *View As Of Another Date,* and click Go on the Team Historical Profiles page.	Employees and managers enter a different effective date and click OK to view the profile as of the new effective date. All profile items in effect as of that date will display as long as the employee is still a direct report of the manager."
Profile Information	JPM_PROF_INFO_SEC	Select the Profile Information icon on any of the profile pages.	Enter or view additional profile information such as comments or the owner ID for job profiles.

Page Name	***Definition Name***	***Navigation***	***Usage***
Add New <content type> View <content type> Update <content type>	JPM_ITM_EMPDTL_SEC	• Click the Add New <content type> link on the My Current Profile or Current Team Profiles page. • Click a profile item description link within the content section of the My Current Profile or Current Team Profiles page. • Click a edit icon on the My Current Profile or Current Team Profiles page.	Employees and managers use this page to add, view, or update profile item details. The fields on the page vary according to the content type of the item and the profile type definition. Changes that require approval are submitted for approval processing when the employee or manager clicks the Submit button on the Summary of Changes page.
Content Item Details	JPM_CAT_ITEMS_DSP	• Click the content item name link on the Update <content type> page. • Click the content item name link on the View <content type> page. • Click the content item name link on the Add New <content type> page.	View details about a specific content item.
Rating Model	HCR_RATEMDL_POPUP	• Click the Rating Detail icon on the Update <content type> page. • Click the Rating Detail icon on the View <content type> page. • Click the Rating Detail icon on the Add New <content type> page.	Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, the you can modify the rating as well.
Related Items	JPM_PROF_SSRELITMS	• Click the Related Content item link on the Update <content type> page. • Click the Related Content item link on the View <content type> page. • Click the Related Content item link on the Add <content type> page.	Displays details of the selected profile item that is related to the profile item.

Page Name	***Definition Name***	***Navigation***	***Usage***
Items Awaiting Submission Pending Items Denied Items	JPM_JP_PRF_VW_CHGS	• Click the <number> item(s) awaiting submission for approval link on the My Current Profile page or the Current Team Profiles page. • Click the <number> item(s) pending approval link on the My Current Profile page or the Current Team Profiles page. • Click the <number> item(s) denied (since <date>)link on the My Current Profile page or the Current Team Profiles page.	This page lists saved items awaiting to be submitted for approval, items awaiting approval (pending items), or items that were not approved (denied items). Employees and managers can only delete their own saved items; the Pending Items page and the Denied Items page are display-only.
View Historical Items	JPM_PROF_HIST_SEC	• Click the View History icon on the My Current Profile page. • Click the View History icon on the Job Profile - Profile Details page. • Click the View History icon on the Historical Profiles page.	View all effective-dated rows for an item on a person's profile or a job profile. This page lists the current, future, and historical rows for a profile item. Employees and managers use this page to track the history of a profile item. They click the profile item link to view details of the profile item for the selected effective date. Future dated rows do not appear in the Historical Profiles page. Only the Current Profile page displays future dated rows.
View <content type>	JPM_APR_DTL_SEC	• Click a profile item link on the Items Awaiting Submission page. • Click a profile item link on the Pending Items page. • Click a profile item link on the Denied Items page. • Click a profile item link on the Summary of Changes page.	Displays the details of the saved but not submitted, pending, or denied item. Employees and managers can delete saved items. However, they cannot update pending or denied items.

Page Name	***Definition Name***	***Navigation***	***Usage***
Summary of Changes	JPM_JP_PERSUMM_SEC	Click the Save button on the My Current Profile or Current Team Profiles page when there are items that need to be submitted for approval.	Lists the changes made to the profile. There is a scroll area for each section of the profile that was modified, which lists any items added, deleted, or edited. Only items requiring approval are displayed on this page. Changes to items not requiring approval have already been saved. Employees and managers can enter comments for the approver before clicking the Submit button. The comments box is only displayed if there are items requiring approval.
Submit Confirmation	JPM_JP_PROFL_APPR	Click the Submit button on the Summary of Changes page.	Displays a confirmation of the approval submission. The Approval Routing group box provides a summary of the approval routing.

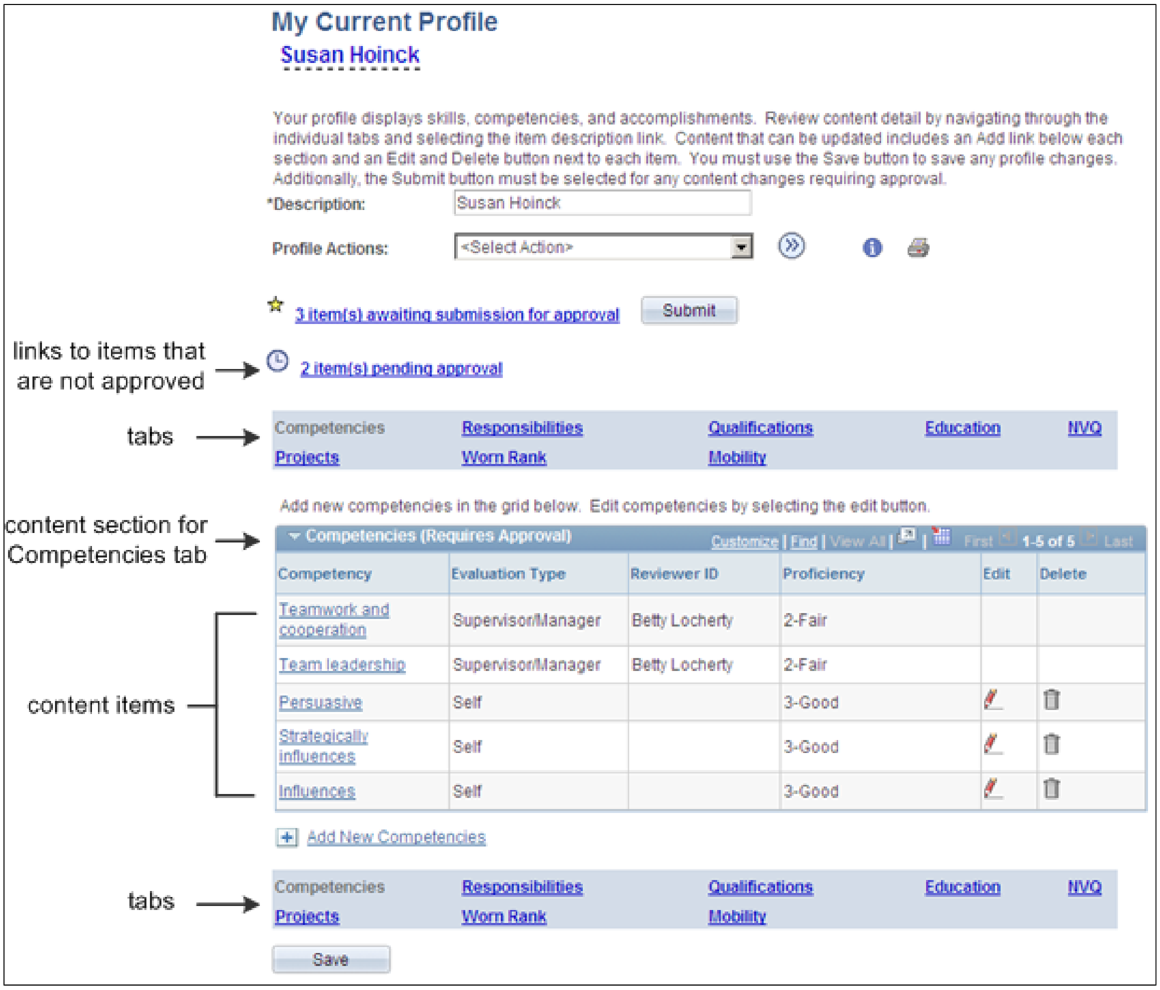
Understanding Person Profiles

Employees can have one or more profiles, but only one profile per profile type. The PeopleSoft application delivers the profile type PERSON to create person profiles, but you can create other profile types according to your organizational requirements. For further information about creating profile types see "Creating Profile Group Types and Profile Groups *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

Employees and managers use the Profile Details page to view and update person profiles.

Image: Example of a person profile and its structure

This is an example of a person profile.



Profile content is divided into tabs which appear as links in navigation bars. Between the navigation bars, the page lists the content sections of the tab that is currently selected. When the employee or manager selects a different tab, the system updates the page to show the content sections for that tab. The content sections that employees and managers can view and update is determined by the security settings for the content sections in the profile type definition. This means that the profile content can vary according to the role accessing the profile.

Employees and managers add items to the person profile from the content catalog that you set up in Manage Profiles. They can also copy items from job profiles that are related to the employee's job, by selecting *Copy From Job Profile* in the Profile Actions field and clicking the Go icon. The system searches for job profiles that match the employee's job data. There could be more than one profile related to the employee's job data. For example, if you have set up profiles for job codes and positions and the person has a position selected in job data, the system lists these profiles and the employee or manager selects the profile that they want to use.

The profile pages list the approved items only within the content sections of the page. If changes have been made to the profile but not yet approved, links appear on the profile pages to indicate that there are items that are saved but awaiting submission for approval, pending approval, or denied. When the employee or manager clicks the link, the system displays a list of the items with that approval status.

Content requiring approval whose items are added, updated, or deleted from a profile are assigned a saved status when the employee or manager clicks the Save button. The changes are submitted for approval when they click the Submit button.

For changes that don't require approval, the items are automatically set to approved when the employee or manager clicks the Save button and the profile page is updated with the changes.

Warning! After those items requiring approval are submitted, the content section on the profile page is refreshed to show approved items only. This means that the changes that were saved are no longer visible because these items do not have an approved status. However, a link appears to indicate that there are items pending approval.

Related Links

"Understanding the Content Catalog *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"
"Understanding Profile Management *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"

Approving Person Profile Changes and Viewing Approval History

This topic provides an overview of profile approvals and lists the pages used to approve profile changes and view approval history.

Pages Used to Approve Profile Changes and View Approval History

Page Name	***Definition Name***	***Navigation***	***Usage***
Select Approval Transaction	JPM_JP_MNG_APPRVL	Manage Self Service, Learning and Development, Approve Profiles, Select Approval Transaction	Managers use this page to view a list of profiles that are waiting for approval. Managers click the profile name to view the Approve Profiles page that lists the changes and approve or deny pending changes.
Profile Approval History	JPM_JP_APPRVL_HIST	Self Service, Learning and Development, Profile Approval History, Profile Approval History	Lists profile approval transactions that the employee submitted. Employees can search for transactions within a specific date range and restrict the search to transactions with a specific status *(Pending, Denied,* or *Approved).*

Page Name	***Definition Name***	***Navigation***	***Usage***
Approve Profiles	JPM_JP_PERS_APPR	• Click the profile name link on the Approve Profiles - Select Approval Transaction page. • Click the profile name link on the Profile Approval History page.	View a list of the changes to the person profile and details of the approvals processing. Managers click the Approve button to approve the changes or click the Deny button to reject the changes.
Approval Confirmation Deny Confirmation	JPM_JP_PER_APR_CNF	Click the Approve or the Deny button on the Approve Profiles page.	Displays a confirmation message when managers click the Approve button to approve profile changes or click the Deny button to reject profile changes submitted for approval

Understanding Profile Approvals

The use of approvals processing with profiles is optional. If your organization uses approvals processing, it is configured at the profile type level. An approval definition is selected for a profile type on the Profile Types - Attributes page and you then specify whether a role for a content section requires approval on the Content Section page. For further information about defining profile types see "Creating Profile Group Types and Profile Groups *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

If approval is required for a content section role, any additions, updates or deletions trigger approvals workflow. The PeopleSoft application delivers approval definitions for person profiles that are configured so that when employees update or create a profile, their manager approves changes. However, you can create approval definitions to configure approvals according to your requirements.

Managers use the Approval Profiles page to view approvals and they approve or deny changes at the profile level. Employees can track their own approvals using the Profile Approval History component - Approve Profiles page.

Related Links

"Understanding Profile Management *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"

"Understanding Approvals *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Viewing and Updating Job Profiles

This topic lists the pages used to view job profiles.

Pages Used to View Job Profiles

Page Name	***Definition Name***	***Navigation***	***Usage***
Select Profile	JPM_JP_REL_PRF_EMP	• Self Service, Learning and Development, My Job Profiles, Select Profile • Select the Profile Actions field value *View Related Job Profiles,* and click Go on the My Current Profile, View Historical Profile, Current Team Profiles, or Team Historical Profiles page. • Select a search on the Search for Profiles page that has a non-person profile type defined as the source profile type and a criteria rule of *Default and Display* or *Default, No Display.*	Lists the profiles that are associated with the employee's job. Employees select the job profile that they want to view or use in the search and compare. This page is only displayed if there are two or more active job profiles related to the employee. If there is only one active job profile, this page is not displayed. The system determines which job profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching profiles.
Select a Profile Add Profiles Add Profiles for a team member	JPM_COM_PROF_SRCH	• Manager Self Service, Learning and Development, Maintain Job Profiles, Select a Profile • Self Service, Learning and Development, View Job Profiles, Select a Profile • Click the Add Profile link on the My Interest List page or the Team Interest Lists page.	Employees and managers search for a job profile by either selecting a profile type or entering a profile name. They can view job profiles that are defined as end profiles. This is defined in the profile type definition on the Profile Type - Attributes page. From the list of profiles, employees and managers click the profile name to view the profile details. Managers can create a new profile by clicking the Add a Profile link on this page through the Maintain Job Profiles component. This link is not available to employees.

Page Name	***Definition Name***	***Navigation***	***Usage***
Maintain Job Profiles	JPM_MGRSS_PROFL1C	Click the Add a Profile link on the Maintain Job Profiles - Select a Profile page.	Managers select the profile type for the new profile. The system then displays the content sections that are set up for the selected profile type. The system displays only those content sections that are authorized for the manager role in the profile type definition. Managers can also use this page to create and edit job profiles. If the manager clicks the Edit icon for the item, the system opens up the Update <content type> page and makes the fields available for edit. Managers can only update content sections to which they have update access, as defined on the Content Section page in the profile type definition.
My Job Profiles	JPM_MGRSS_PROFL1C	Select a job profile from the My Job Profiles - Select Profile page.	Displays the job profile that the employee selected. The system displays only those content sections that are authorized for the employee role in the profile type definition.
View Job Profiles	JPM_MGRSS_PROFL1C	Select a job profile from the View Job Profiles - Select a Profile page.	Displays the job profile that the employee selected. The system displays only those content sections that are authorized for the employee role in the profile type definition.

Page Name	***Definition Name***	***Navigation***	***Usage***
View <content type> Add New <content type> Update <content type>	JPM_ITM_EMPDTL_SEC	• Select a profile item link from the content grid on the My Job Profiles page and View Job Profiles page in Self Service. • Select a profile item link from the content grid on the Manage Job Profiles page in Manager Self Service. • Click the Add New <content type> link on the Manage Job Profiles page in Manager Self Service. • Click the Edit icon on the Manage Job Profiles page in Manager Self Service.	Displays the details of a profile item. The fields on this page vary according to the content type of the item. Managers can update this information. Changes that require approval are submitted for approval processing when the manager clicks the Submit button on the Job Profiles - Summary of Changes page.
Content Item Details	JPM_CAT_ITEMS_DSP	• Click the content item name link on the Update <content type> page. • Click the content item name link on the View <content type> page. • Click the content item name link on the Add New <content type> page.	View details about a specific content item.
Rating Model	HCR_RATEMDL_POPUP	• Click the Rating Detail icon on the Update <content type> page. • Click the Rating Detail icon on the View <content type> page. • Click the Rating Detail icon on the Add New <content type> page.	Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, the you can modify the rating as well.
Related Items	JPM_PROF_SSRELITMS	• Click the Related Content item link on the Update <content type> page. • Click the Related Content item link on the View <content type> page. • Click the Related Content item link on the Add <content type> page.	Displays details of the selected profile item that is related to the profile item.

Page Name	***Definition Name***	***Navigation***	***Usage***
Add New Profile Identity Update Profile Identity	JPM_MGRPID_SEC	Click the Add Profile Identity link or the Edit Identity icon in the Profile Identities grid area on the Maintain Job Profiles page.	Add or edit profile identities associated with the profile.
Summary of Changes	JPM_JP_NPSUMM_SEC	Click the Save button or the Submit button on the Maintain Job Profiles page when there are items that need to be submitted for approval.	Lists the changes that the manager has made to the job profile that require approval. The manager clicks the Submit button next to the Items awaiting submission link to submit the changes for approval or click Cancel to return to the Maintain Job Profiles page. The Cancel button will retain the changed items with a *Saved* status.

Maintaining Interest Lists

This topic provides an overview of interest lists and lists the pages used to maintain employee interest lists.

Page Used to Maintain Employee Interest Lists

Page Name	***Definition Name***	***Navigation***	***Usage***
Team Interest List	HR_DR_ADDL_INFO	• Manager Self Service, Learning and Development, Team Interest Lists, Team Interest List • Select the Profile Actions field value *Express Interest for Employee,* and click Go on the Maintain Job Profiles page.	Displays the instructions for the transaction and the effective date field. Managers can change the default effective date.
Team Interest List - Select Employees to Process	HR_DR_SELECT_EMPS	Click Continue on the Team Interest List page.	Displays a list of the people who report to the manager. Managers select the person whose interest they want to view and click Continue. Managers can also click the Drill Down icon to view employees under the employee listed on that row.

Page Name	*Definition Name*	*Navigation*	*Usage*
My Interest List Team Interest Lists	JPM_INTEREST	• Select an employee on the Team Interest List - Select Employees to Process page and click Continue. • Self Service, Learning and Development, My Interest List, My Interest List	Lists the job profiles in the employee's interest list. The Assigned By column shows who added the profile to the interest list. Employees can add profiles to their interest list, managers can add job profiles to their employees' interest lists, and profile administrators can add profiles to employees' interest lists. Employees and managers can only delete a job profile from the interest list if they added the profile to the list.

Understanding Interest Lists

Interest lists enable employees and managers to identify jobs that are of interest to the employee. Each employee has one interest list that is accessed by the employee, the employee's manager, and the profile administrator.

Employees can add profiles to their interest list using the My Interest List component, when viewing job profiles, or from the Search Results page. Similarly, managers can view and update their employees' interest lists using the Team Interest Lists component or they can add a profile to an employee's interest list while viewing job profiles.

Employees and managers can only delete a job profile from the interest list if they added the profile to the list (shown in the Assigned By field).

Related Links

Viewing and Updating Job Profiles

Searching and Comparing Profiles

This topic provides an overview of search and compare profiles and lists pages used to search and compare profiles.

Pages Used to Search and Compare Profiles

Page Name	***Definition Name***	***Navigation***	***Usage***
Search for Profiles	JPM_SRCH_TRANSFER	• Self Service, Learning and Development, Search and Compare Profiles, Search for Profiles • Select the Profile Actions field value *Search and Compare Profiles,* and click Go on the My Current Profile or My Job Profile, page. • Manager Self Service, Learning and Development, Search and Compare Profiles, Search for Profiles • Select the Profile Actions field value *Search and Compare Profiles,* and click Go on the Current Team Profiles or Maintain Job Profiles page.	Lists the search types that are available to the employee or manager. Searches are defined on the Search Configuration page. Employees or managers select the search that they want to run by clicking the search name link.
Search and Compare Profiles - Select a Profile	JPM_COM_PROF_SRCH	Click a search link for a non-person profile on the Search for Profiles page.	This page is displayed if an employee or manager selects a search that has a source profile type with profile usage of *End/Final/Job* (non-person profile). The page displays the default source profile type that is defined for the search. Employees and managers use this page to search for, and select, the profile that they want to use as the source profile.

Page Name	***Definition Name***	***Navigation***	***Usage***
My Job Profiles - Select Profile	JPM_JP_REL_PRF_EMP	Employees select a search on the Search for Profiles page that has a non-person profile type defined as the source profile type and a criteria rule of *Default and Display* or *Default, No Display.*	Lists the profiles that are associated with the employee's job. Employees select the job profile that they want to use in the search and compare. This page is only displayed if there are two or more active job profiles related to the employee. If there is only one active job profile, this page is not displayed. The system determines which job profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching profiles.
Search and Compare Profiles	HR_DR_ADDL_INFO	Managers can click a search link for a person profile on the Search for Profiles page.	This page is available when a manager selects a search that populates criteria from a team member's profile. Displays the instructions for the transaction and the effective date field. Managers can change the default effective date.
Search and Compare Profiles - Select Employees to Process	HR_DR_SELECT_EMPS	Click the Continue button on the Search and Compare Profiles page.	Displays a list of the people who report to the manager. Managers select the person to use in the search and click Continue.

Page Name	***Definition Name***	***Navigation***	***Usage***
Search Criteria	JPM_SRCH_CRITERIA	• Click one of the search links on the Search for Profiles page. • Click the Modify Search Criteria link on the Search Results page.	Displays the search criteria for the search that the employee or manager selected on the Search for Profiles page. If the search selected has a criteria rule of *Default, No Display* the system runs the search without displaying this page; for this type of search employees and managers can view the search criteria after running the search by selecting the Modify Search Criteria link on the Search Results page. Employees and managers use this page to view and modify the search criteria before running the search. They also use this page after running a search to modify the search criteria and rerun a search. When the employee or manager clicks the Search button, the system runs the search using the criteria defined on the page.
Search Results	JPM_SRCH_RESULT	• Click one of the search links on the Search for Profiles page. • Click the Search button on the Search Criteria page.	Displays the results of the search. The page lists the profiles that best match the search criteria. The value in the score column indicates how well the profile matches the criteria. The system lists the matching profiles according to their score, the highest score listed first and then in descending order of score.
Match Result	JPM_COMPARE_RESULT	• Click a score link on the Search Results page. • Click the Compare Profiles button on the Search Results page.	Displays a comparison of the search criteria and the selected profiles. The left hand column lists each search criterion. The remaining columns list the percentage scores for each profile that indicate how well the profile matches that criterion.

Page Name	**Definition Name**	**Navigation**	**Usage**
Add to Interest List - Confirmation	JPM_INT_CONFIRM	• Click the Add to Interest List button on the Search Results page. • Select the Profile Actions field value *Express Interest,* and click Go on the My Job Profiles, View Job Profiles, or Team Interest List page.	Displays the profiles that have been added to the employee's interest list.

Understanding Search and Compare Profiles

Employees and managers use the Search and Compare Profiles component to search for profiles that match certain search criteria. When employees and managers select this option, the system lists the search types that are defined for their role. Search types are configured on the Search Configuration page (Set Up HCM, Product Related, Profile Management, Define Search Configuration) for the profile types that you have defined. For further information about setting up Search and Compare Profiles, see "Understanding Search and Compare Profiles *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

Depending on how the search is configured, employees and managers can set up or modify the search criteria before running the search. The system assigns matching profiles a score that indicates how well the profile matches the search criteria. For further information about how the system calculates the scores, see "Understanding Search and Compare Profile Scores *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

The Search Results page lists the matching profiles in descending score order, with the highest scoring profile listed first. Employees and managers can compare profiles listed on the Search Results page with the search criteria either by clicking the score link for a profile or using the Compare Profiles button to compare more than one profile. The comparison provides a list of each item in the search criteria with the score for the matching profile.

Chapter 3

Entering Faculty Member Training and Development Information

Entering Training Information

This topic lists the pages used to enter training information.

Pages Used to Enter Training Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Professional Training	EG_SSTRAINING_L	Self Service, Learning and Development, Faculty Event Tracking, Professional Training, Professional Training	Faculty members add detailed information about the training course.
Professional Training - Change a Course Professional Training - Add a Course Professional Training - Training Detail	EG_SSTRAINING_D	Click Edit, Add a Course, or a course link on the Professional Training page.	Faculty members add detailed information about the training course.

Managing Activity Information

This topic provides an overview of the Activities transaction and lists the pages used to manage activity information.

Pages Used to Manage Activity Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Activities	EG_SSACTIVITY_LIST	Self Service, Learning and Development, Faculty Event Tracking, Activities, Activities	Faculty members review, add, update, or delete information about their academic activities, such as activity type, sponsor, and beginning and end dates.

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Activity Add Activity Activity Detail	EG_SSACTIVITY_DET	Click Edit, Add Activity, or an activity link on the Activities page.	Faculty members create new activity records, and review and edit details about activity records already assigned to them.

Understanding the Activities Transaction

Faculty members use the Activities self-service transaction to review, add, update, or delete records about their academic activities. The Activity Detail page enables faculty members to record information about their academic activities, such as activity type, sponsor, and beginning and end dates.

Setting Up Administrative Post Information

This topic provides an overview of the Administrative Posts self-service transaction and lists the pages used to review and update administrative post information.

Pages Used to Set Up Administrative Post Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Administrative Posts	EG_SSADMIN_POSTS_L	Self Service, Learning and Development, Faculty Event Tracking, Administrative Posts	Faculty members review, add, update, or delete information about their administrative posts, such as post type, begin and end dates, and organization.
Change Administrative Post Add Administrative Post Administrative Post Detail	EG_SSADMIN_POSTS_D	Click Edit, Add Administrative Post, or an administrative post link on the Administrative Posts page.	Faculty members create new administrative post records, and review and edit details of administrative post records already assigned to them.

Understanding the Administrative Posts Self-Service Transaction

Faculty members use the Administrative Posts self-service transaction to review, add, update, or delete Administrative Post records. The Administrative Post Detail page enables faculty members to enter details about their administrative posts, such as post type, begin and end dates, and organization.

Before you can track administrative posts, define administrative posts on the Administrative Post Table. Examples of an administrative post are Department Head and Chairperson.

Related Links

"Tracking Faculty Events *(PeopleSoft HCM 9.2: Human Resources Track Faculty Events)*"

Manage Committee Information

This topic provides an overview of the Committee self-service transaction and lists the pages used to manage committee information.

Pages Used to Manage Committee Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Committees	EG_SSCOMMIT_MBR_L	Self Service, Learning and Development, Faculty Event Tracking, Committees, Committees	Faculty members review their committee membership information.
Committee Details	EG_SSCOMMIT_MBR_D	Click a committee start date link on the Committees page.	Faculty members review details about administrative post records already assigned to them.

Understanding the Committee Self-Service Transaction

Faculty members use the Committee self-service transaction to review their committee membership information. The Committee Detail page displays the committee name, the dates of membership, and role in the committee.

For faculty members to view their committee memberships, you need to set up these tables:

- Use the Committee Type Table page to maintain different committee types and committee roles within each type.

  The committee types that you set up on this page are used in the Committee page.

- Use the Committee page to establish a committee and attach a committee type to it.

  For example, you can establish the research Committee Type and attach it to the research and development committee.

- Use the Committee Members page to assign faculty members to a committee type within the committee.

Related Links

"Tracking Faculty Events *(PeopleSoft HCM 9.2: Human Resources Track Faculty Events)*"

Managing Presentation Information

This topic provides an overview of the Presentations transaction and lists the pages used to manage presentation information.

Pages Used to Manage Presentation Information

Page Name	**Definition Name**	**Navigation**	**Usage**
Presentations	EG_SSPRESENTATN_L	Self Service, Learning and Development, Faculty Event Tracking, Presentations, Presentations	Faculty members review, add, update, or delete information about the presentations they have given.
Change Presentation Add Presentation Presentation Detail	EG_SSPRESENTATN_D	Click Edit, Add Presentation, or a presentation link on the Presentations page.	Faculty members create new presentation records, and review and edit details about presentation records already assigned to them. This includes the presentation type, date, title, and the audience or function at which they gave the presentation.

Understanding the Presentations Transaction

Faculty members use the Presentations self-service transaction to review, add, update, or delete records of their presentations. The Presentation Detail page enables faculty members to record information about the presentations they have given, including the presentation type, date, title, and the audience or function at which they gave the presentation.

Reviewing, Updating, and Adding Student Advising Information

This topic provides an overview of the Student Advising self-service transaction and lists the pages used to review, update, and add student advising information.

Pages Used to Review, Update, and Add Student Advising Information

Page Name	**Definition Name**	**Navigation**	**Usage**
Student Advising	EG_SSADVISING_LIST	Self Service, Learning and Development, Faculty Event Tracking, Student Advising	Faculty members review, add, update, or delete information about their student advisees.
Change Student Advising Add Student Advising Student Advising Detail	EG_SSADVISING_DET	Click Edit, Add Student Advising, or click a student name link on the Student Advising page.	Faculty members create new student advising records, and review and edit details about student advising records already assigned to them. This includes the level at which they are advising the students, the dates they will be advising the students, and the student's projects.

Understanding the Student Advising Self-Service Transaction

Faculty members use the Student Advising self-service transaction to review, add, update, or delete student advisee records. The Student Advising Detail page enables faculty members to record information about their student advisees, including the level at which they are advising the students, the dates they will be advising the students, and the student's projects.

Entering Teaching Responsibility Information

This topic provides an overview of the Teaching Responsibilities self-service transaction and lists the pages used to enter teaching responsibility information.

Pages Used to Enter Teaching Responsibility Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Teaching Responsibilities	EG_SSTEACH_RESP_L	Self Service, Learning and Development, Faculty Event Tracking, Teaching Responsibilities, Teaching Responsibilities	Faculty members review, add, update, or delete information about their teaching responsibilities.
Change Teaching Responsibility Add Teaching Responsibility Teaching Responsibility Detail	EG_SSTEACH_RESP_D	Click Edit, Add Teaching Responsibility, or teaching responsibility link on the Teaching Responsibilities page.	Faculty members create new teaching responsibility records, and review and edit details about teaching responsibility records already assigned to them.

Understanding the Teaching Responsibilities Self-Service Transaction

Faculty members use the Teaching Responsibilities self-service transaction to review, add, update, or delete Teaching Responsibilities records. The Teaching Responsibility Detail page enables faculty members to record information about their teaching responsibilities, including course type and description, units, term, percent taught (if they are sharing teaching with another faculty member) and the type of enrollment.

Chapter 4

Requesting Employee Training

Understanding the Self-Service Training Development Process

This topic lists prerequisites and discusses the self-service training development process.

Prerequisites

Before employees and managers can submit training requests, complete the following:

1. Activate workflow.
2. Set up group build if you plan to use group ID as the access type for a manager to request training for his or her direct reports.
3. Set up the access type for HR_DR_TRN_SUMMARY and TRN_REQUEST_LNK on the Direct Reports Setup page.
4. Define the rules for Training Enrollment and Training Enrollment by Manager on the Configuration Options, Notification Setup, and Component Interface Setup pages.

Related Links

"Configuring Self-Service Transactions *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding Group Build *(PeopleSoft HCM 9.2: Application Fundamentals)*"

The Self-Service Training Development Process

eDevelopment provides four self-service transactions that improve the efficiency of employee development:

- Request Training Enrollment.

  An employee, person of interest (POI) with a Job record, or manager accesses the Request Training Enrollment transaction. Employees or POIs request training on their own behalf and managers request training for their direct reports. Whether you are an employee, POI, or manager submitting the request, the system considers you the originator.

  The originator selects a method for searching for course sessions that are set up in PeopleSoft HR: Administer Training. The system displays a list of available courses and the originator can pick the course and session that meets their needs.

  The system checks to see if there are any prerequisites that must be met. For managers, the system displays either a list of their direct reports who meet the prerequisites and or a list of those who don't. If an employee is scheduled to take a course that meets the prerequisite for the selected course, the system considers this employee as meeting the requirement.

Managers select the employees they want to enroll in the course. The system displays a summary of the course. Employees or managers can enter any relevant comment and request to be placed on a waiting list if the course is full.

- Approve Training Request.

  Managers use the Approve Training Request transaction to either approve or deny a request. Information about the request cannot be changed; however, the approver can enter a comment.

- Training Request Status.

  Employees and managers can check the status of a request using the View Training Request Status transaction.

- Training Summary.

  Employees and managers can access the Training Summary transaction. Employees can view a summary of the training courses that they have completed, and courses for which they are enrolled or on the waiting list. Managers view the same information for their direct reports.

Note: If a manager requests training for a group of direct reports and the class exceeds the number allotted during the enrollment process, the system enrolls the entire group into the class and updates their statuses to enrolled. The system then notifies an administrator to handle this situation.

Submitting Training Requests

This topic lists the pages used to submit training requests.

Pages Used to Submit Training Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Request Training Enrollment	TRN_SELCOURSE_MGR	• Self Service, Learning and Development, Request Training Enrollment, Request Training Enrollment • Manager Self Service, Learning and Development, Request Training Enrollment, Request Training Enrollment	Employees, POI's with a Job record, or managers select the method by which they want to search for training courses. Any training enrollment through eDevelopment requires a job record for the candidate requesting the training.
Course Search	HR_TRN_SRCH_COURSE	Click one of the four search method links on the Request Training Enrollment page.	Employees or managers enter the appropriate information to display a list of courses that match their criteria.

Page Name	***Definition Name***	***Navigation***	***Usage***
Course Detail	HR_TRN_ENROLL_DESC	Click the Course Detail icon on the Course Search page.	Employees or managers review detailed information about the course.
View Available Sessions	HR_TRN_COURSE_SESS	Click the View Available Sessions link on the Course Search page.	Employees or managers review the available course sessions and select the desired session.
Prerequisites Not Met	EO_ERR_CONTINUE	Click a session ID link on the View Available Sessions page for a course for which you haven't met the prerequisites.	Displays the prerequisites for the course selected. This page is displayed if the employee does not meet the prerequisites.
Session Detail	HR_TRN_SESS_DETAIL	Click a session ID link on the View Available Sessions page.	Employees or managers review the details of a course session. This page displays the session location, start date, and language of the session. Employees click Continue to process the training request or be placed on the waiting list. Managers click Continue to select the employees that they want to enroll in this course or place on a waiting list.
Select Employees	TRN_OPRROWS_MULTI	Click Continue on the Session Detail page.	Lists the manager's direct reports who meet the course prerequisites and those who don't meet the prerequisites. Managers select the employees that they want to enroll in the selected course from the list of employees who meet the course prerequisites.
Submit Request	TRN_REQUEST_MGR	Click Continue from the Select Employees page or the Session Detail page.	Managers or employees enter any comments and click the Submit button to submit the request. If the request was successfully submitted, this page is re-displayed with details of the submitted request.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click Submit from the Submit Request page.	View the submission status of your request.

Approving Training Requests

This topic provides an overview of training request approval processing and lists the pages used to approve training requests.

Pages Used to Approve Training Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Approve Training Request	SS_LIST	Manager Self Service, Learning and Development, Approve Training Request, Approve Training Request	Managers view a list of employees that require training approval.
Approve Transaction	TRN_REQUEST_MGR	Click the Training Enrollment related link.	Managers approve or deny each employee's training request and enter comments.
Save Confirmation	EO_SAVE_CONFIRM	Select Approve or Deny on the Approve Transaction page and click Save.	Managers approve or deny the request.
Administer Training Request	TRN_REQUEST_ADM	Enterprise Learning, Administer Training Requests, Administer Training Requests	Training administrators use this page to approve or deny training requests. In the Administrator Actions group box, the administrator has three options: To approve the training request and allow the system to automatically enroll or add the employee to the waiting list for the selected course session. To approve the training request, without the automatic update. If the training administrator selects this option, the system does not enroll the employee. The training administrator must do this manually. To deny the training request.

Understanding Training Request Approval Processing

When employees and managers submit training requests, the requests may require one or both of the following before the employee is enrolled in, or added to the waiting list for, a course session:

- Manager approval.

Managers approve training requests for their employees using the Approve Training Request self-service transaction.

- Processing by the training administrator.

  Training administrators use the Administer Request page (Enterprise Learning, Approve Training Request) to approve the training request. Depending on the option selected on the Administer Request page, the training administrator may also need to manually enroll the employee in the session.

You configure training request processing on the Self Service Workflow Configurations page (Set Up HCM, Common Definitions, Self Service, Workflow Configuration, Self Service Workflow Configurations).

The training request self-service transactions are:

- Training Enrollment.
- Training Enrollment by Manager.

The check boxes Approval Process? and Allow DB Update on the Self Service Workflow Configurations page affect the way that the training requests are processed. This table describes the training request processing for the different configurations:

Approval Process?	***Allow DB Update***	***Manager Approval***	***Training Administrator Approval***
Selected	Not Selected	Required	Required
Not Selected	Not Selected	Not required	Required
Selected	Selected	Required	Required
Not Selected	Selected	Not required	Not required

Related Links

"Workflow Configurations Page *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Viewing the Status of Training Requests

This topic lists the pages used to view the status of training requests.

Pages Used To View the Status of Training Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Training Request Status Training Request Status List	SS_LIST	• Self Service, Learning and Development, Training Request Status, Training Request Status • Manager Self Service, Learning and Development, View Training Request Status, Training Request Status List	Displays current status summary information for each training request.
Training Request Status	TRN_REQUEST_MGR	Click the Training Enrollment related link on the Training Request Status or Training Request Status List page.	Displays details of the current status for the selected training request.

Reviewing Training History Information

This topic lists the page used to review training history.

Page Used to Review Training History

Page Name	***Definition Name***	***Navigation***	***Usage***
Select Employee	OPRROWS	Manager Self Service, Learning and Development, Training Summary, Select Employee	Displays a list of the employees who report to the manager. Managers select the employee whose training summary they want to review.
Training Summary	HR_TRN_SUMMARY	• Click an employee's name link in the Name column on the Select Employee page. • Self Service, Learning and Development, Training Summary, Training Summary	Displays a summary of training courses that the employee has completed, is enrolled in, or on the waiting list. You can also initiate enrollment into another course by clicking the Internal Training Enrollment link.
Training Summary - Course Detail	HR_TRN_CRSDESC	Click a link in the Course Name column on the Training Summary page.	Displays detailed information about the training course.

Reviewing Workflow Information

This topic lists the page used to review workflow information for the self service transactions.

Page Used to Review Workflow Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry, Workflow Inquiry	Administrators use this page to review transactions that successfully updated the database or require further processing. This page also provides an audit trail of who made the update to the database. Administrators either enter an employee ID or select a transaction name. For training requests, select either HR_TRAIN_ENROLL for employee requests or HR_ TRAIN_ENROLL_ MGR for manager requests. For training requests, if you click the Go to Enrollment link the Course Session Enrollment page is displayed with the request information.

Chapter 5

Managing Professional Compliance

Understanding Professional Compliance

Manage Professional Compliance is a PeopleSoft HR business process that enables you to manage the professional certification of both employees and non-employees.

With Manage Professional Compliance, you can:

1. Define the certification requirements established by a regulatory authority.
2. Set up classifications used to define the status of regulated individuals.

   For example, an individual can be classified as compliant or noncompliant with the requirements for certification.
3. Assign regulated individuals to compliance managers/supervisors.
4. Enroll regulated individuals in development plans designed to help individuals obtain a level of competence to attain a specified classification.
5. Monitor individuals in their progress by completing reviews, observations, KPIs, and checks.

Using Self-Service Transactions with Manage Professional Compliance

The Manage Professional Compliance business process provides self-service transactions for both compliance supervisors/managers and regulated individuals (RI):

- Supervisors/managers can view the status of their regulated individuals and perform actions such as completing development reviews, entering observations, and completing KPI reviews.
- Regulated individuals can view key data related to their compliance status and development plans.

Note: All RI direct reports display on the RI pages regardless of their assignment statuses. The assignment status also displays in the Direct Reports grids on the RI pages.
For Manage Professional Compliance transactions, individuals that a manager/supervisor can view in the Direct Reports grid are their regulated individuals. It is possible for a manager/supervisor to have direct reports who are not RIs in which case the direct report would not display in the grid.
It is also possible for a manager/supervisor to be responsible for an RI, who is not one of their direct reports. In this case, the RI would still display in the grid since it is an RI transaction. Regulated individuals who are not also a direct report of a manager/supervisor will not display in the Direct Reports grid for any self-service transactions other than those for Manage Professional Compliance.

Related Links

"Understanding Regulated Individual Data *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

"Understanding Regulated Individual Data *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Completing Regulated Individual Development Reviews

This topic provides an overview of RI development reviews and lists the pages used to complete development reviews.

Pages Used to Complete Regulated Individual Development Reviews

Page Name	***Definition Name***	***Navigation***	***Usage***
Complete RI Development Review - Select Regulated Individual	PCMP_OPRROWS PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI Development Review, Complete RI Development Review - Select Regulated Individual Click to access an employee ID list on the Complete RI Development Review - Select Regulated Individual page.	Displays a list of the compliance manager/ supervisor's regulated individuals. Managers/ supervisors select the regulated individual for whom they want to complete a development review.
RI Development Review	HR_PCMP_T_DEVREV HR_PCMP_T_DEVREV2 HR_PCMP_T_DEVREV3	Select a regulated individual on the Complete RI Development Review - Select Regulated Individual page.	Managers complete development reviews. Using the pages, managers select statuses for development plan areas, and add optional comments about a particular area. They can also update review dates and the review status.

Understanding RI Development Reviews

Compliance managers and supervisors use the Complete RI Development Review transaction to select regulated individuals from a list and then review their development plans. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor, and the development plans available for review include only those for which the expected completion date (defined on the Development Record page) has not yet passed.

Before you can complete this transaction, you must define your development plans and enroll individuals in these plans as part of Manage Professional Compliance setup in HR.

Related Links

"Understanding Manage Professional Compliance Business Processes *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Completing RI Observations

This topic provides an overview of RI observations and lists the pages used to complete observations.

Pages Used to Complete RI Observations

Page Name	***Definition Name***	***Navigation***	***Usage***
Complete a Regulated Individual Observation - Select Regulated Individual	PCMP_OPRROWS PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI Observation, Complete a Regulated Individual Observation - Select Regulated Individual Click to access an employee ID list on the Complete a Regulated Individual Observation - Select Regulated Individual page.	Displays a list of the compliance manager/ supervisor's regulated individuals. Managers/ supervisors select a regulated individual for whom they want to complete an observation.
RI Observation	HR_PCMP_T_RIOBS HR_PCMP_T_RIOBS2 HR_PCMP_T_RIOBS3	Select a regulated individual on the Complete a Regulated Individual Observation - Select Regulated Individual page.	Compliance managers/ supervisors enter the observation information, including the observation models, the observation date, the statuses of observation model elements, and optional comments.

Understanding RI Observations

Compliance managers and supervisors use the Complete RI Observation transaction to select a regulated individual from a list and complete an observation. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete an observation, you must define observation elements and construct observation models as part of the setup of Manage Professional Compliance in HR.

Related Links

"Observing Regulated Individuals *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Completing RI Key Performance Indicator Reviews

This topic provides an overview of RI key performance indicator reviews and lists the pages used to complete KPI reviews.

Pages Used to Complete RI Key Performance Indicator Reviews

Page Name	***Definition Name***	***Navigation***	***Usage***
Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual	PCMP_OPRROWS PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI KPI Review, Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual Click to access an employee ID list on the Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page.	Displays a list of the compliance manager/ supervisor's regulated individuals. Managers/ supervisors select a regulated individual for whom they want to complete a KPI review.
RI KPI Review	HR_PCMP_T_RIKPI HR_PCMP_T_RIKPI2 HR_PCMP_T_RIKPI3	Select a regulated individual on the Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page.	Compliance managers/ supervisors perform a key performance indicator review by completing details for each indicator, entering the date of the review, the frequency, and optional comments about the review.

Understanding RI Key Performance Indicator Reviews

Compliance managers and supervisors use the Complete RI KPI Review transaction to select a regulated individual from a list and then enter KPI review details. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete a review of an individual's progress against KPIs, you must define the specific indicators that you want to use as part of the setup of Manage Professional Compliance in HR. PeopleSoft includes the following broad categories of performance indicators as part of the delivered application; within these categories, however, you must choose (and in some cases set up) the exact indicators that you want to use:

- Complaints – Number of complaints against the individual versus those against the company.
- Persistency (of business sold) – Percentage of business sold that is still in force.
- Spread of Business – Measure the range of applications being sold by the individual.
- Not Taken Up (NTU) – Number of proposals submitted, but not put into force.
- Factfind Completion – Check on accuracy, completeness and quality of service.

Note: The KPIs listed here are directly targeted at the U.K. financial services arena. However, the key structure of the KPI records, and the way that the functionality is incorporated within Professional Compliance, can be used as a guide for creating additional, modified KPIs.

Related Links

"(GBR) Monitoring KPIs *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Viewing RI Development Records

This topic provides an overview of the view RI development records transaction and lists the pages used to view RI development records.

Pages Used to View RI Development Records

Page Name	***Definition Name***	***Navigation***	***Usage***
View a Regulated Individual Development Record - Select Regulated Individual	PCMP_OPRROWS	Manager Self Service, Learning and Development, View RI Development Record, View a Regulated Individual Development Record - Select Regulated Individual Click to access an employee ID list on the View a Regulated Individual Development Record - Select Regulated Individual page.	Displays a list of the compliance manager/ supervisor's regulated individuals. Managers/ supervisors select a regulated individual whose development plan they want to view.
RI Development Record (regulated individual development record) Development Record	HR_PCMP_DEVREC2	• Select a regulated individual on the View a Regulated Individual Development Record - Select Regulated Individual page. • Self Service, Learning and Development, RI Development Plan, Development Record	Compliance managers/ supervisors view details of development plans for regulated individual. Employees can view details of their own development plans.

Understanding the View RI Development Records Transaction

Compliance managers and supervisors use the View RI Development Record transaction to view details of a development plan for regulated individuals, and employees use this transaction to view details of their own development plans.

Before you can view details of a development plan, you must define your development plans and enroll individuals in them as part of the setup of Manage Professional Compliance in HR.

Related Links

"Understanding Manage Professional Compliance Business Processes *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Viewing RI Development Reviews

This topic provides an overview of the View RI Development Review transaction and lists the pages used to view development reviews.

Pages Used to View RI Development Reviews

Page Name	***Definition Name***	***Navigation***	***Usage***
View a Regulated Individual Development Review - Select Regulated Individual	PCMP_OPRROWS	Manager Self Service, Learning and Development, View RI Development Review, View a Regulated Individual Development Review - Select Regulated Individual Click to access an employee ID list on the View a Regulated Individual Development Review - Select Regulated Individual page.	Select a regulated individual whose development review you want to view.
Development Review	HR_PCMP_DEVREV2	• Select a regulated individual on the View a Regulated Individual Development Review - Select Regulated Individual page. • Self Service, Learning and Development, RI Development Review, Development Review	Compliance managers/ supervisors view development review histories of regulated individual. Employees can view details of their own development reviews.

Understanding the View RI Development Review Transaction

Compliance managers and supervisors use the View RI Development Review transaction to view the development review history of regulated individuals, and regulated individuals use this transaction to see details of their own development reviews.

To view a development review, you must have already created the review using the RI Development Review page in eDevelopment, or the RI Dev Review and RI Dev Area Review pages in HR.

Related Links

"Understanding the Monitoring Process *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Viewing RI Observation History

This topic provides an overview of the View RI Observation transactions and lists the pages used to view RI observation history.

Pages Used to View RI Observation History

Page Name	***Definition Name***	***Navigation***	***Usage***
View a Regulated Individual Observation - Select Regulated Individual	PCMP_OPRROWS	Manager Self Service, Learning and Development, View RI Observation, View a Regulated Individual Observation - Select Regulated Individual Click to access an employee ID list on the View a Regulated Individual Observation - Select Regulated Individual page.	Select a regulated individual whose observation history you want to view.
RI Observation Regulated Individual Observation	HR_PCMP_RIOBS	• Select a regulated individual on the View a Regulated Individual Observation - Select Regulated Individual page. • Self Service, Learning and Development, RI Observation, Regulated Individual Observation	Compliance managers/ supervisors view observation history. Employees view details of their own observation history.

Understanding the View RI Observation Transaction

Compliance managers/supervisors use the View RI Observation transaction to view observations of regulated individuals, and regulated individuals use this transaction to view details of their own observations.

To view an observation, you must have already created the observation using the RI Observation page in eDevelopment, or the RI Observation and Observation Elements pages in HR.

Related Links

"Understanding the Monitoring Process *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Viewing Regulated Individual KPI Review History

This topic provides an overview of the View RI KPI Review transaction and lists the pages used to view regulated individual KPI review history.

Pages Used to View Regulated Individual KPI Review History

Page Name	***Definition Name***	***Navigation***	***Usage***
View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual	PCMP_OPRROWS	Manager Self Service, Learning and Development, View RI KPI Review, View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual Click to access an employee ID list on the View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page.	Select a regulated individual whose KPI review you want to view.
RI KPI Review (regulated individual key performance indicators review) Regulated Individual KPI Review	HR_PCMP_RIKPI	• Select a regulated individual on the View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page. • Self Service, Learning and Development, RI KPI Review, Regulated Individual KPI Review	Compliance managers/ supervisors view regulated individual KPI reviews. Employees can view details of their own KPI reviews.

Understanding the View RI KPI Review Transaction

Compliance managers and supervisors use this transaction to view the KPI reviews of regulated individuals, and regulated individuals use this transaction to view details of their own KPI reviews.

To view a KPI review, you must have already created the review using the RI KPI Review page in eDevelopment, or the KPI Review and KPI Statistics pages in HR.

Related Links

"Understanding the Monitoring Process *(PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)*"

Appendix A

Delivered Workflow for eDevelopment

Delivered Workflow for eDevelopment

This topic discusses eDevelopment workflow.

Understanding Delivered Profile Approval Workflow

Profile approvals processing uses the Approval Framework. The delivered approval definitions provide the following approval processing:

- When employees make changes to their personal profiles, the changes that require approval (as defined by the profile type definition) are routed to their manager for approval.
- When managers create or update non-person profiles, the changes are routed to the profile administrator for approval.

The delivered definitions enable you to set up a one-step or two-step profile approval process. You can use the delivered definitions or set up new approval definitions according to your business requirements. Approval definitions are linked to profile types on the Profile Types — Attributes page.

Related Links

"Understanding Profile Management *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"

Non-Person Profile Approval Workflow

This topic discusses the non-person approval workflow.

Description

Information Type	***Description***
Event Description	A manager creates a new job profile or updates an existing job profile using the View Job Profiles self-service option.
Action Description	When the profile administrator selects the worklist entry or clicks the link in the email, the system links the profile administrator to the Non-person Profile — Approval page.
Notification Method	Email and worklist.

Approval Workflow Definitions

Information Type	***Description***
Process ID	JPMNonpersonProfiles
Workflow Transaction	JPMNonpersonProfiles
Definition ID	Two delivered definition IDs: ByProfileAdministrator is a one-step approval by the profile administrator (user list JPMApprovalAdministrator). ProfileAdminThenCompAdmin is a two-step approval. The first approver is the profile administrator (user list JPMApprovalAdministrator) and the second approver is the compensation administrator (user list JPMCompensationAdministrator).
Email Templates	JPMApproveNonpersonProfile JPMDenyNonpersonProfile JPMErrorNonpersonProfile JPMSubmitNonpersonProfile JPMPushbakNonpersonProfile **Note:** The pushback email template JPMPushbakNonpersonProfile is not enabled in eDevelopment as delivered.

Person Profile Approval Workflow

This topic discusses the person profile approval workflow.

Description

Information Type	***Description***
Event Description	An employee creates a new person profile or updates an existing person profile using the My Profile self-service option.
Action Description	When the employee's manager selects the worklist entry is selected or clicks the link in the email, the system links the manager to the Person Profile — Approval page.
Notification Method	Email and worklist.

Approval Workflow Definitions

Information Type	***Description***
Process ID	JPMPersonProfiles
Workflow Transaction	JPMPersonProfiles
Definition ID	Six delivered definition IDs for the different reporting structures: ByDepartmentManager for approval by the department manager defined by the Manager ID field on the Department Profile page (user list JPMDepartmentManager). ByReportsToOrDepartmentMgr for approval by the manager defined by the Reports To field on the Job Information page, or, if that manager is not found, the Manager ID for that department on the Department Profile page (user list JPMPartPosnMgmtDeptMgr). ByReportsToOrSupervisorID for approval by the manager defined by the Reports To field on the Job Information page, or, if that manager is not found, the Supervisor ID for that person (user list JPMPartPosnMgmtSupervisor). ByReportsToPosition for approval by the manager defined by the Reports To field on the Job Information page (user list JPMReportsToPosition). BySupervisorID for approval by the supervisor defined by Supervisor ID field on the Job Information page (user list JPMSupervisorID) TwoLevelManager is a two-step approval process. The approval is routed to the employee's manager (user list JPMPartPosnMgmtSupervisor) and then the manager's manager (user list JPMPartPosnMgmtSupervisor)
Email Templates	JPMApprovePersonProfile JPMPushbackPersonProfile JPMDenyPersonProfile JPMErrorPersonProfile JPMSubmitPersonProfile **Note:** The pushback email template JPMPushbackPersonProfile is not enabled in eDevelopment as delivered.

Professional Training

This topic discusses the Professional Training workflow that is based on PeopleTools workflow; it does not use the approvals workflow engine.

See the product documentation for *PeopleTools: Workflow Technology*.

Description

Information Type	***Description***
Event Description	An employee uses self-service to update their personal development information for professional training. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to the page where she can view changed personal development information for professional training.
Notification Method	Email, worklist, or both.

Workflow Objects

Information Type	***Description***
Event	HR_PROF_TRAINING
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Professional Training
Business Activity	HR_PROF_TRAINING
Business Event	Training

