ORACLE
PEOPLESOFT

# PeopleSoft HCM 9.2: eProfile

March 2013

ORACLE

## Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

## Alpha and Beta Draft Documentation Notice

If this document is in preproduction status:

This documentation is in preproduction status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

# Contents


**Preface........................................................................................................................................vii**
Understanding the PeopleSoft Online Help and PeopleBooks........................................................... vii
PeopleSoft Hosted Documentation................................................................................................. vii
Locally Installed Help..................................................................................................................vii
Downloadable PeopleBook PDF Files............................................................................................vii
Common Help Documentation...................................................................................................... vii
Field and Control Definitions..................................................................................................... viii
Typographical Conventions..........................................................................................................viii
ISO Country and Currency Codes.................................................................................................. ix
Region and Industry Identifiers..................................................................................................... ix
Access to Oracle Support................................................................................................................x
Documentation Accessibility...........................................................................................................x
Using and Managing the PeopleSoft Online Help................................................................................x
Common Elements Used in this PeopleBook....................................................................................... x
PeopleSoft HCM Application Fundamentals....................................................................................... xi
PeopleSoft HCM Related Links........................................................................................................ xi
Contact Us..........................................................................................................................................xi
Follow Us...........................................................................................................................................xi
**Chapter 1: Getting Started with eProfile.................................................................................13**
PeopleSoft eProfile Overview.......................................................................................................... 13
PeopleSoft eProfile Business Processes.......................................................................................... 13
PeopleSoft eProfile Implementation.................................................................................................. 14
**Chapter 2: (USF) Setting Up Approvals................................................................................... 15**
Understanding Transactions and Approvals...................................................................................... 15
Approvals and the Approval Framework.......................................................................................15
Employee Self-Service Transactions With Approvals.................................................................... 15
Work In Progress Statuses for Approval Steps..............................................................................16
PAR Defaults for Approved Transactions.......................................................................................16
Delivered Approval Flows.............................................................................................................. 17
Defining WIP Statuses for Approval Steps..........................................................................................18
Understanding WIP Statuses and Approval Steps........................................................................ 18
Pages Used to Define WIP Statuses for Approval Steps...............................................................19
Transaction Setup Page................................................................................................................ 19
Define Steps Page........................................................................................................................ 20
Defining PAR Tracking Data.............................................................................................................22
Understanding PAR Tracking Data................................................................................................22
Page Used to Define PAR Tracking Data......................................................................................22
Defaults / Admin Page.................................................................................................................. 23
Identifying Self-Service Administrators and Defining Notification Details........................................ 24
Understanding the Self-Service Administrator's Role................................................................... 24
Pages Used to Identify the Self-Service Administrator and Define Notification Details...............25
Defaults / Admin Page.................................................................................................................. 25
CI / Notification Details Page....................................................................................................... 27
**Chapter 3: Using eProfile..........................................................................................................29**
Prerequisites for Using eProfile.........................................................................................................29
Reviewing and Updating Personal Information................................................................................. 30
Understanding Reviewing and Updating Personal Information..................................................... 30

Pages Used to Review and Update Personal Information........................................................... 31
(USF) Requesting Leave of Absences..........................................................................................34
Page Used to Request Leave of Absences....................................................................................34
(USF) Requesting Termination......................................................................................................35
Page Used to Request Termination...............................................................................................35
(USF) Reviewing Change Requests.............................................................................................. 35
Page Used to Review Change Requests....................................................................................... 35
Reviewing Workflow Inquiries......................................................................................................35
Understanding Workflow Inquiries.............................................................................................. 35
Pages Used to Review Self-Service Activity.................................................................................36

# 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.<br><br>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.<br><br>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.

# Common Elements Used in this PeopleBook

| | |
|---|---|
| **administrator** | Refers to PeopleSoft power users. Power users generally have access to the core PeopleSoft Human Resources (HR) Management System. Depending on the organization, any of the following system delivered roles are recognized as a power user: Benefits Administrator, Federal Self-Service Administrator, HR Administrator, HR Processor, Payroll Administrator, and Personnelist. |
| **originator** | The person who makes the initial request. For self-service transactions, this is usually an employee or manager. |
| **reviewer** | The person who either approves or denies a submitted request. |

## PeopleSoft HCM Application Fundamentals

The *PeopleSoft eProfile* provides you with implementation and processing information for your PeopleSoft eProfile system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft HCM 9.2: Application Fundamentals*. Each PeopleSoft product line has its own version of this documentation.

## 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 eProfile

## PeopleSoft eProfile Overview

eProfile is a collaborative application that enables employees to maintain their own profiles, thereby decreasing administrative time, costs and increasing data integrity. eProfile ensures that data changes comply with your organization's requirements.

With this application, employees can view, update, and request changes to their personal data, such as:

- Email address.
- Emergency contacts.
- Ethnicity.
- Home and mailing addresses.
- Instant message IDs.
- Marital status.
- Name change.
- Personal information.
- Phone numbers.
- Completing and submitting I-9 information.

For U.S. federal customers, additional transactions include:

- Checking the status of requests they have submitted.
- Requesting a leave of absence.
- Requesting a termination.

## PeopleSoft eProfile Business Processes

PeopleSoft eProfile supports these business processes:

- Maintaining name, address, phone number, marital status, date of birth, and other data.
- Requesting leaves of absence or terminations (U.S. federal employees).
- Determining how workflow notifications are received.

# PeopleSoft eProfile Implementation

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

## Other Sources of Information

In the planning phase of your implementation, take advantage of all sources of information about the PeopleSoft system, including installation guides, table-loading sequences, data models, and business process maps.

See product documentation for *PeopleTools: PeopleSoft Setup Manager*.

## Related Links

*PeopleSoft HCM 9.2: Application Fundamentals*

Chapter 2

# (USF) Setting Up Approvals

## Understanding Transactions and Approvals

This overview discusses:

- Approvals and the Approval Framework.
- Employee self-service transactions with approvals.
- Work in progress statuses for approval steps.
- PAR defaults for approved transactions.
- Delivered approval flows.

### Approvals and the Approval Framework

The system uses the generic Approval Framework to manage approvals for federal self-service transactions. The Approval Framework is a tool for creating, running, and managing approval processes. Approval workflow is triggered when a requester submits a transaction, such as a promotion. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow. The approval process definition controls who must approve the transaction and in what order. Administrators have the ability to monitor the status of Approval Framework approval transactions and to perform various actions on submitted transactions.

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

### Employee Self-Service Transactions With Approvals

PeopleSoft eProfile includes three federal self-service transactions that include Approval Framework approval processing:

- Name change.
- Address change.
- Marital status change.

---

**Note:** The Change Phone Number transaction does not use the approval process. When the request is submitted, it automatically updates the PeopleSoft HR tables.
The Request Leave of Absence and Request Termination transactions use the USFED approval transaction definitions that write directly to the PAR tables. The USFED transaction uses PeopleSoft Workflow (and not the Approval Framework) to manage approvals

---

See "Understanding WIP Management System Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*".

## Work In Progress Statuses for Approval Steps

The federal work-in-progress (WIP) management system works in tandem with approval processing to automate the tracking and processing of personnel action requests as they move through the steps of the approval process. Each transaction is configured to use specific WIP statuses at each stage of the approval process.

Because the Approval Framework is a generic workflow approval engine, additional setup outside of the Approval Framework is necessary so that you can associated federal work in progress statuses with approval steps.

---

**Note:** When associating WIP statuses with approval steps, you manually set up the steps that represent your approval processing steps. If you modify the delivered approval process, take care to keep these step definitions in sync with the Approval Framework process definitions.

---

See Defining WIP Statuses for Approval Steps.

## PAR Defaults for Approved Transactions

In PeopleSoft HR, the Personnel Action Request (PAR) system automatically routes a wide variety of requests to reviewing officials in human resources. PAR processing is separate from the Approval Framework approval process and occurs only after all Approval Framework approvals are complete, at which point a component interface automatically pushes the transaction data to the PAR tables.

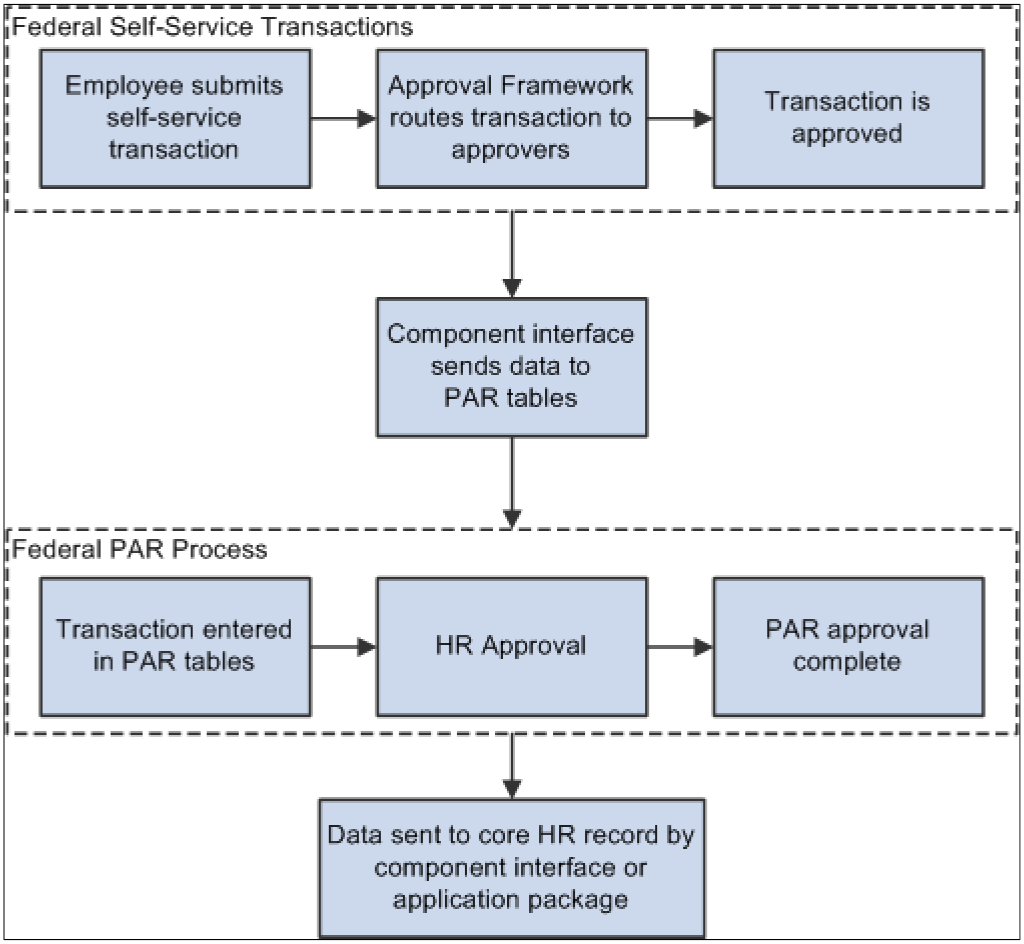
To support the push to the PAR system, you must provide default values for certain fields that are required in the PAR tables and that are not normally entered by the employee who originates the self-service request.

See Defining PAR Tracking Data.

**Image: Process flow for employee self-service transactions**

This process flow diagram illustrates how employee self-service transactions first go through Approval Framework approvals, then get sent to federal PAR processing before any data changes are made to core HR tables:




## Delivered Approval Flows

The Approval Framework controls the approval processes for both manager and employee transactions. PeopleSoft delivers fully configured approval processes (including WIP statuses) for all of the U.S. federal self-service transactions. As long as you use the delivered approval processes, no additional configuration is necessary, but you can use the common Approval Framework pages to review (or modify) the delivered configuration.

### Approval Framework Process Definitions

These are the Approval Framework process definitions for the PeopleSoft eProfile federal transactions:

| ***Transaction*** | ***Approval Framework Process ID*** |
|---|---|
| Name change | FederalNameChg |

| ***Transaction*** | ***Approval Framework Process ID*** |
|---|---|
| Address change | FederalAddrChg |
| Marital status change | FederalMarChg |

Approval Framework process definitions include steps for each approver. (The initial request does not get defined as a step.) All three of the delivered process definitions provide a two-step approval process, and each approver has the option to approve or deny the transaction. If either approver denies the transaction, the system closes the request and notifies the originator of the denial.

If both approvers approve the transaction, the system updates the PAR tables (the Federal Job, Federal Personal Data, and the employee tracking tables), which in turn triggers a workflow notification to the person assigned to the Personnelist role.

# Defining WIP Statuses for Approval Steps

To define WIP statuses for approval steps, use the Approval Transactions (GVT_WIP_RECORD) and Approval Flow (GVT_WIP_ACTVTY) components.

These topics provide an overview of WIP statuses and approval steps and discuss how to:

- Define WIP statuses for a transaction.
- Associating WIP statuses with approval steps and actions.

## Understanding WIP Statuses and Approval Steps

You define the approval steps for your self-service transactions using the Approval Framework. However, additional setup is necessary so that you can associate federal WIP statuses with approval steps.

To define the WIP statuses for approval steps, you must first set up the WIP statuses. Each self-service transaction has its own set of WIP statuses. Oracle delivers a complete set of statuses, but you can review and modify them as necessary.

After defining WIP statuses for each transaction, you need to associate the statuses with the possible actions that can be taken during specific approval steps. When you do this, you to create a row of data for each approval step in the Approval Framework process definition *and* create one additional row to represent the initial request, which does not exist as a step in the Approval Framework process definition. Then, for each approval step, you create a matrix that associates possible actions (such as request, approve, or deny) with the available WIP statuses.

**Note:** When associating WIP statuses with approval steps, you manually set up the steps that represent your approval processing steps. If you modify the delivered approval process, take care to keep these step definitions in sync with the Approval Framework process definitions.

## Pages Used to Define WIP Statuses for Approval Steps

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Transaction Setup | GVT_WIP_RECORD1 | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup | Define statuses and status types. |
| Define Steps | GVT_WIP_ACTVTY4 | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, Define Steps<br><br>Select a transaction beginning with *FE* as the Transaction value in the search page. | Associate WIP statuses with steps in the approval process for federal self-service transactions.<br><br>You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Framework to define the approval process. |

## Transaction Setup Page

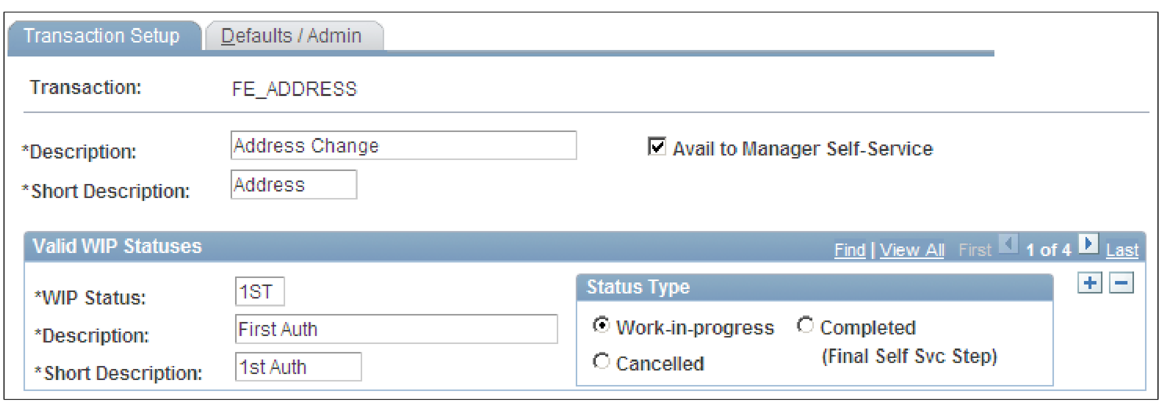
Use the Transaction Setup page (GVT_WIP_RECORD1) to define statuses and status types.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup

**Image: Transaction Setup page**

This example illustrates the fields and controls on the Transaction Setup page. You can find definitions for the fields and controls later on this page.




**Transaction** Displays the self-service transaction whose WIP statuses you are defining.

**Avail to Manager Self-Service (available to manager self-service)** — Select this option when setting up approvals for self-service transactions. It is recommended that you not change this field for the delivered self-service transactions.

### Valid WIP Statuses

**WIP Status (work-in-progress status)** — Enter a three-character code to represent the status. Each code represents a WIP status that is available for use as the transaction goes through the approval process. Each WIP status has a status type that indicates whether the status represents work in progress, completed work, or cancelled work.

---

**Note:** These codes must be defined as valid statuses for the USFED transaction. This enables the system to process the request using the existing HR Processing USF component when the request has reached final approval in the self-service approval process.

---

**Status Type** — Select one of these values for each WIP status:

- *Work-in-progress:* The status is used for a request that is neither complete nor canceled.
- *Cancelled:* The status is used for a request that has been denied.
- *Completed (Final Self Svc Step):* The status is used for a request that has been approved.

## Define Steps Page

Use the Define Steps page (GVT_WIP_ACTVTY4) to associate WIP statuses with steps in the approval process for federal self-service transactions.

You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Framework to define the approval process.

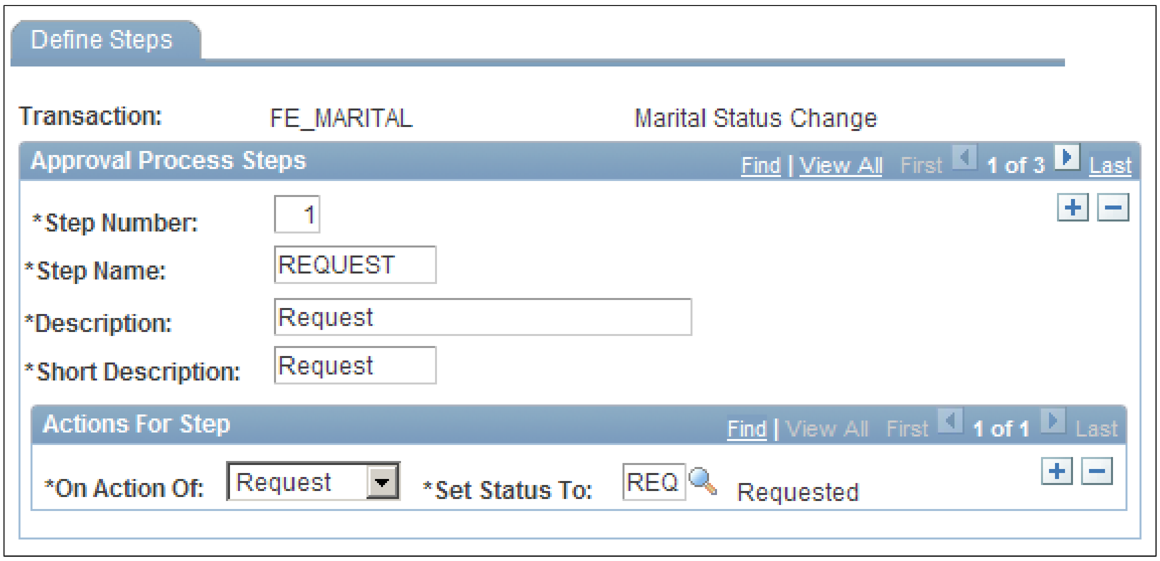
**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, Define Steps

Select a transaction beginning with *FE* as the Transaction value in the search page.

**Image: Define Steps page**

This example illustrates the fields and controls on the Define Steps page. You can find definitions for the fields and controls later on this page.




## Approval Process Steps

**Step Number**

Enter a number that identifies the order that the approval process will follow. The numbering of the approval steps must be sequential and begin with the number 1. Step 1 must represent the initial request, and subsequent steps must represent the approval steps as defined in the Approval Framework.

**Important!** For each federal self-service transaction, this page must list every approval step that was defined in the Approval Framework process definition and an additional step for the initial transaction request.

**Step Name**

Enter a name for this step. The name can be up to 10 characters long.

## Actions For Step

**On Action Of**

Add or modify the action for which you are defining a WIP status. Valid actions are *Approve, Deny,* or *Request.*

For the first step (which always represents the initial request), create one row for the Request action. For subsequent steps, which represent approver actions, create one row for the

| | |
|---|---|
| | Approve action and one row for the Deny action. (The other action in the drop-down list box, *Pending,* is not valid for the Approval Framework approval process, so you do not need to define a WIP status for this action for any of the approval steps.) |
| **Set Status To** | Select the WIP status to assign to the transaction when the selected action takes place. This field prompts against the transaction-specific WIP statuses that you define on the Transaction Setup page. As delivered, the transactions that you configure using this page (that is, all transactions other than USFED) have these four statuses: *1st* (first authorization), *2nd* (second authorization), *DNY* (denied), and *REQ* (requested). |

# Defining PAR Tracking Data

To define PAR tracking data, use the Approval Transactions (GVT_WIP_RECORD) component.

These topics provide an overview of default PAR data and describe how to enter the PAR tracking data for federal self-service transactions.

## Understanding PAR Tracking Data

Self-service transactions are designed so that employees can easily enter requests to change their own personal data and managers can enter requests to change their direct reports' job data. The government requires that certain information be included with each personnel action request. However, this data would not ordinarily be known by the self-service user.

To ensure that this information is recorded accurately, the system enables you to define the appropriate action/reason codes, Notice of Action (NOA) codes, legal authorities, and PAR remarks for each transaction. This default information is automatically written to the government PAR records when the federal component interface is run at the completion of the final self-service step for the transaction.

### Related Links

"Understanding the Administering PAR System *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*"

## Page Used to Define PAR Tracking Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Defaults / Admin | GVT_WIP_RECORD3 | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin | Define PAR tracking data. |

## Defaults / Admin Page

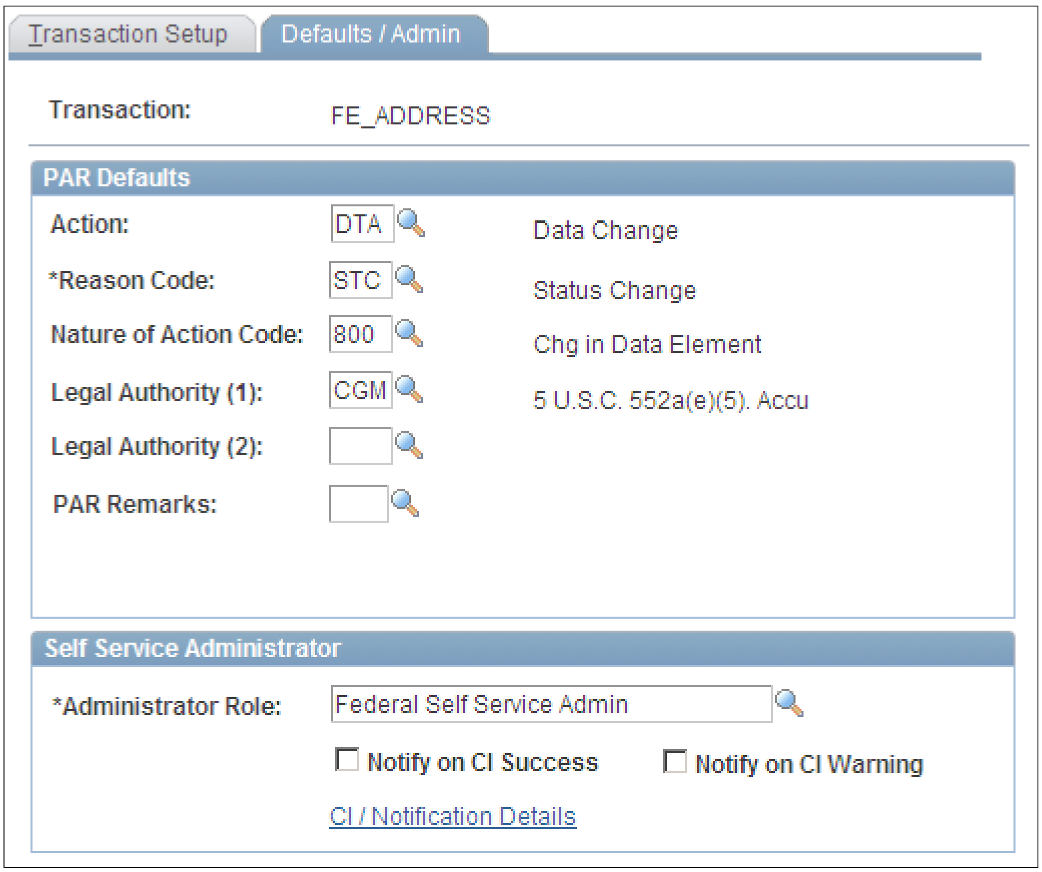
Use the Defaults / Admin page (GVT_WIP_RECORD3) to define PAR tracking data.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin

**Image: Defaults / Admin page**

This example illustrates the fields and controls on the Defaults / Admin page. You can find definitions for the fields and controls later on this page.




### PAR Defaults

**Action**

Select the action that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reasons page.

**Reason Code**

Select the reason code that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reasons page.

**Nature of Action Code**

Select the nature of action code that you want written to the government PAR tables for the transaction. These codes are defined on the Nature of Action Table page.

| | |
|---|---|
| **Legal Authority (1)** | Select the legal authority (1) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page. |
| **Legal Authority (2)** | Select the legal authority (2) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page. |
| **PAR Remarks** | Select the PAR remarks that you want written to the government PAR tables for the transaction. These codes are defined on the Personnel Action Rqst Rmks page. |

# Identifying Self-Service Administrators and Defining Notification Details

To identify self-service administrators and define notification details, use the Approval Transactions (GVT_WIP_RECORD) component.

These topics provide an overview of the self-service administrator's role and discuss how to:

- Identify the self-service administrator.
- Define notification details.

## Understanding the Self-Service Administrator's Role

Problems may occur when the federal component interface updates the federal PAR tables. The system is designed to recognize:

- Errors
- Warnings
- Successful completions

You use the Defaults / Admin page to define the role of the person that you want to receive the notification when any of these conditions occur.

### Related Links

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

## Pages Used to Identify the Self-Service Administrator and Define Notification Details

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Defaults / Admin | GVT_WIP_RECORD3 | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin | Identify the self-service administrator and define PAR tracking data. |
| CI / Notification Details (component interface / notification details) | FE_CI_DETAIL | Click the CI / Notification Details link on the Defaults / Admin page. | Define notification and self-service administrator details. |

## Defaults / Admin Page

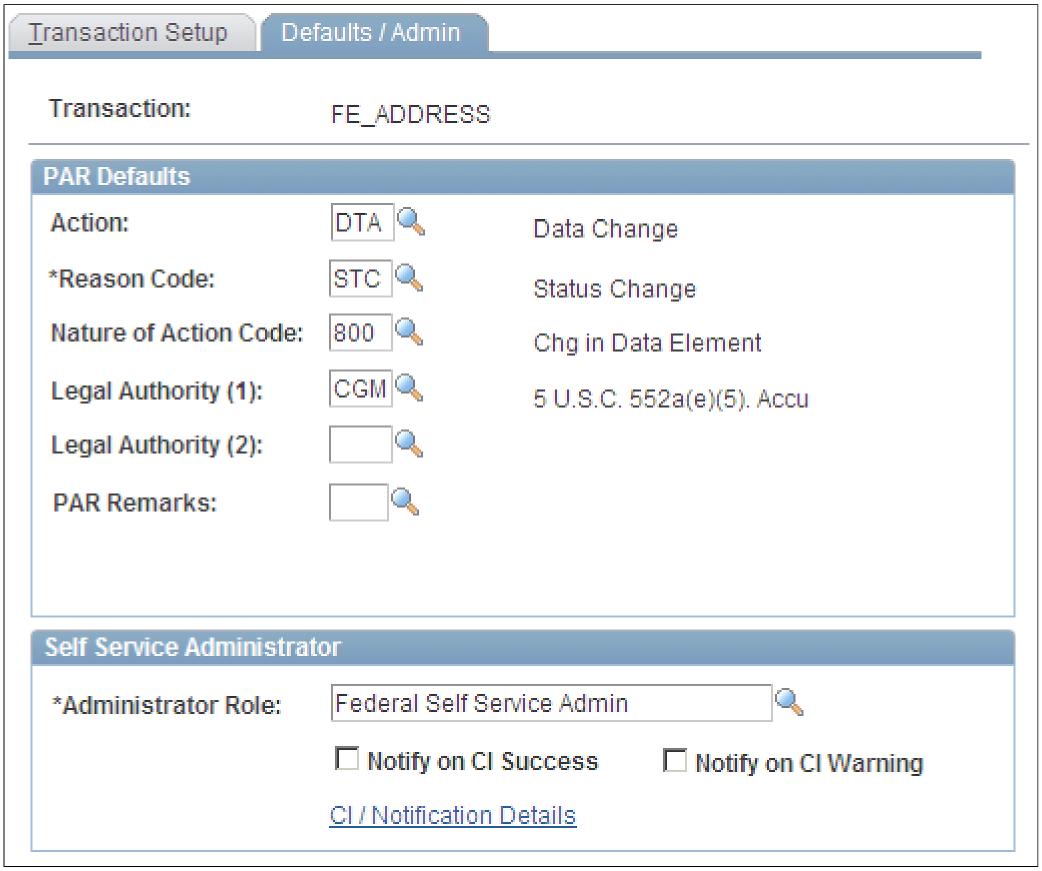
Use the Defaults / Admin page (GVT_WIP_RECORD3) to identify the self-service administrator and define PAR tracking data.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin

**Image: Defaults / Admin page**

This example illustrates the fields and controls on the Defaults / Admin page. You can find definitions for the fields and controls later on this page.




## Self-Service Administrator

| | |
|---|---|
| **Administrator Role** | Select the role that you want notified when an error, warning, or success occurs. |
| **Notify on CI Success (notify on component interface success)** | Select this check box to have the person who is identified in the Administrator Role field notified when the process runs successfully. |
| **Notify on CI Warning (notify on component interface warning)** | Select this check box to have the person who is identified in the Administrator Role field notified when a warning occurs during processing. |
| **CI / Notification Details** | Click this link to open the CI / Notification Details page. |

## CI / Notification Details Page

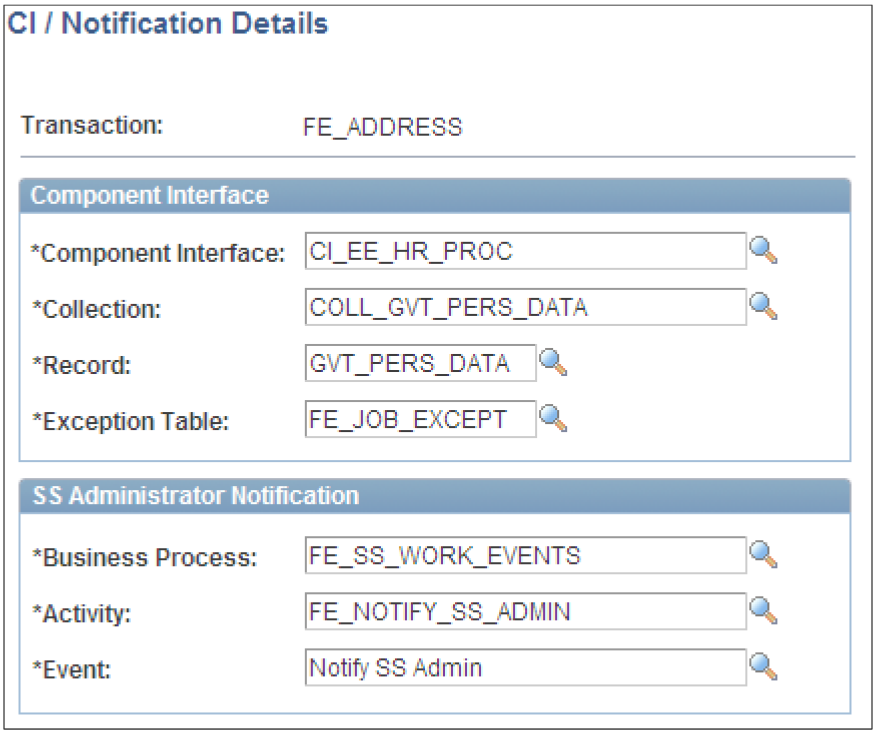
Use the CI / Notification Details (component interface / notification details) page (FE_CI_DETAIL) to define notification and self-service administrator details.

**Navigation**

Click the CI / Notification Details link on the Defaults / Admin page.

**Image: CI / Notification Details page**

This example tablellustrates the fields and controls on the CI / Notification Details page. You can find definitions for the fields and controls later on this page.




---

**Note:** It is recommended that you not change the information on this page for the delivered federal self-service transactions.

---

### Component Interface

| | |
|---|---|
| **Component Interface** | Select the name of the component interface process that is used for this transaction. |
| **Collection** | Select the name collection that is used by the component interface process for this transaction. |
| **Record** | Select the name of the record that is used by the component interface process for this transaction. |
| **Exception Table** | Select the name of the exception table that is used by the component interface process to store errors and warnings for this transaction. |

### SS Administrator Notification

| | |
|---|---|
| **Business Process** | Select the name of the business process that is triggered to send component interface notifications to the self-service administrator. |
| **Activity** | Select the name of the activity that is triggered to send component interface notifications to the self-service administrator. |
| **Event** | Select the name of the event that is triggered to send component interface notifications to the self-service administrator. |

## Chapter 3

# Using eProfile

## Prerequisites for Using eProfile

Before you can use the eProfile transactions,

1. Activate eProfile on the Installation Table.

   See "Products Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

2. Define position management on the HCM Options page.

   The position management setting determines whether automatic updates, by nonadministrators, are allowed for certain transactions. Automatic updates can occur only if position data is not affected.

   See "HCM Options Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

   See "Configuring Self-Service Transactions *(PeopleSoft HCM 9.2: Application Fundamentals)*".

3. Set up security.

   eProfile uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. The following table lists the permissions and roles delivered with eProfile:

   | ***Permission Lists*** | ***Roles*** |
   |---|---|
   | HCCPSS2000 | Manager |
   | HCCPFE2000 | Manager Self Service - Fed |
   | HCCPFE1060 | Personal Info-Employee - Fed |

   **Note:** Remember to enter an email address for each user profile; otherwise, email routings that are used by workflow will not work.

   See "Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*" and "Understanding Data Permission Security for HCM *(PeopleSoft HCM 9.2: Application Fundamentals)*".

4. Define whether a transaction automatically updates the database.

   Use the Self Service Workflow Configurations page to define whether the transaction will update the database without an administrator's intervention.

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

5. Define rules for workflow notifications.

Workflow can be set up to notify the administrator when a transaction successfully updates the database and when the system detects a warning with the update.

See "Admin Notification Setup Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

6. Set up the manager's data access to his or her direct reports.

   eProfile uses access types to control a manager's access to employee data. Normally, the manager who initiates a transaction can view only data for his or her direct reports. Access types enable the system to determine who reports to the initiating manager.

   See "Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*".

7. Configure the USFED WIP transaction.

   See "Understanding WIP Management System Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*".

# Reviewing and Updating Personal Information

These topics provide an overview of reviewing and updating personal information and list the pages that are used to review and update personal information.

## Understanding Reviewing and Updating Personal Information

PeopleSoft delivers the following transactions that enable employees to view, add, change, and delete personal information in the PeopleSoft database.

| ***Commercial*** | ***Federal*** |
| --- | --- |
| Personal Information Summary | Personal Information Summary |
| Complete and Submit I-9 Form | Address Change |
| Email Addresses | Email Addresses |
| Emergency Contacts | Emergency Contacts |
| Ethnic Groups | Ethnic Groups |
| Home and Mailing Address | Marital Status |
| Instant Message IDs | Name Change |
| Marital Status | Phone Number Change |
| Name Change | |
| Phone Numbers | |

The following transactions can be configured to automatically update the database and send notifications to the administrator:

- Name change
- Marital status change
- Address change

If workflow is activated, when a user performs one of these transactions, the system automatically routes the transaction request to the appropriate person for approval. Updating your personal information becomes a two-step process:

1. The employee submits the change request.
2. The administrator finalizes the change request.

(USF) When the request has been submitted, employees can review the status of the change requests that they have submitted.

## Pages Used to Review and Update Personal Information

| **Page Name** | **Definition Name** | **Navigation** | **Usage** |
|---|---|---|---|
| Personal Information Summary | HR_EE_PERS_INFO | Self Service, Personal Information, Personal Information Summary, Personal Information Summary | Employees view a summary of and are able to change their personal information in the PeopleSoft database.<br><br>Available fields for an employee may vary by country. |
| Address Change | HR_HOME_MAILING | Self Service, Personal Information, Address Change (USF), Address Change | Initiate the address change request.<br><br>You can enter only current or future effective-dated address changes to avoid processing issues with benefits and payroll. |
| Address Change - Submit | FE_ADDRESS_STS | Click the Submit button on the Address Change page. | Confirms that the request was submitted. |
| Email Addresses | HR_EMAIL_ADDRESSES | • Self Service, Personal Information, Email Addresses, Email Addresses<br><br>• Click the Change email addresses button on the Personal Information Summary page. | Employees view, add, change, and delete email addresses in the PeopleSoft database. Employees can view business emails, if available, but cannot add, change, or delete business email addresses; only the system administrator can do this. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Emergency Contacts | HR_EMERGENCY_CNTCT | • Self Service, Personal Information, Emergency Contacts, Emergency Contacts<br>• Click the Change emergency contacts button on the Personal Information Summary page. | Employees view, add, change, and delete emergency contact information in the PeopleSoft database. |
| Emergency Contact Detail | HR_EMERG_CNTCT_DET | • Click a contact name on the Emergency Contacts page.<br>• Click the Add Emergency Contact button on the Emergency Contacts page.<br>Click the edit icon on the Emergency Contacts page. | View, add, and change emergency contact address and telephone information. |
| Ethnic Groups | HR_ETHNIC_GROUPS | • Self Service, Personal Information, Ethnic Groups, Ethnic Groups<br>• Click the Change ethnic groups button on the Personal Information Summary page. | Employees self-identify their ethnic groups by adding data to the Ethnic Groups grid.<br><br>Non-U.S. employees always see this version of the Ethnic Groups page, but U.S. employees see this version only if the Two-Question Format (Ethnicity) check box on the Installation Table - Country Specific page is *not* selected. |
| Ethnic Groups (USA) | HR_ETHNIC_GROUPS2 | Self Service, Personal Information, Ethnic Groups, Ethnic Groups | U.S. Employees self-identify their ethnic groups by answering two questions about their race and ethnicity.<br><br>U.S. employees see this version of the Ethnic Groups page only if the Two-Question Format (Ethnicity) check box on the Installation Table - Country Specific page is selected. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Home and Mailing Address | HR_HOME_MAILING | • Self Service, Personal Information, Home and Mailing Address, Home and Mailing Address<br>• Click the Change home/ mailing addresses button on the Personal Information Summary page. | Employees view and change home and mailing addresses in the PeopleSoft database. |
| Instant Message IDs | HR_IM_CHAT_IDS | • Self Service, Personal Information, Instant Message IDs, Instant Message IDs<br>• Click the Change Instant Message Ids button on the Personal Information Summary page.<br>• Manager Self Service, Job and Personal Information, View Employee Personal Info, Employee Information<br>Click the Instant Message IDs link on the Employee Information page | Add or update your own instant message IDs through the self-service pages. When you save this page, the system updates the Contact Information page for personal data in HR.<br>Managers can view the instant message IDs through the manager self-service pages for their employees. |
| Marital Start | W3EB_MARR_START | • Self Service, Personal Information, Marital Status, Marital Start<br>• Click the Change marital status button on the Personal Information Summary page. | Employees view current marital status and can begin the process to request a change to marital status in the PeopleSoft database. |
| Marital Status Change | HR_EE_MAR_STATUS | Click Start on the Marital Start page. | Employees view current marital status and submit a request to change marital status in the PeopleSoft database. |
| Marital Status Change (USF) | FE_MARITAL | Self Service, Personal Information, Marital Status ( USF), Marital Status Change | Submit a marital status change. |
| Marital Status Change | FE_MARITAL_STS | Click the Submit button on the Marital Status Change ( USF) page. | Confirms that the request was submitted. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Name Change | HR_EE_NAME | • Self Service, Personal Information, Name Change, Name Change<br>• Click the Change name button on the Personal Information Summary page. | Employees submit a name change request.<br>(USA) All name changes for USA employees must match the name provided on their social security card. |
| Name Change (USF) | FE_EE_NAME | Self Service, Personal Information, Name Change ( USF), Name Change | Federal employees submit a name change request. |
| Name Change (USF) | FE_EE_NAME_STS | Click the Submit button on the Name Change (USF) page. | Confirms that the request was submitted. |
| Phone Numbers | HR_PERSONAL_PHONE | • Self Service, Personal Information, Phone Numbers, Phone Numbers<br>• Click the Change phone numbers button on the Personal Information Summary page. | Employees view, add, change, and delete personal phone numbers in the PeopleSoft database. |
| Phone Number (USF) | FE_EE_PHONE_CHG | Self Service, Personal Information, Phone Number Change (USF), Phone Numbers | Submit a phone number change. |
| Save Confirmation | EO_SAVE_CONFIRM | Click the Save button on the Phone Numbers (USF) page. | Confirm that the phone number change was saved. |

# (USF) Requesting Leave of Absences

This topic lists the page that is used to request leave of absences.

## Page Used to Request Leave of Absences

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Federal Request for Leave | FG_EE_LEAVE_REQ | Self Service, Personal Information, Request Leave of Absence (USF), Federal Request for Leave | Enter a request for leave of absence. |

# (USF) Requesting Termination

This topic lists the page that is used to request termination.

## Page Used to Request Termination

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Federal Termination Request | FG_EE_TERMINATION | Self Service, Personal Information, Request Termination, Federal Termination Request | Federal employees enter a request for termination. |

# (USF) Reviewing Change Requests

This topic lists the page that is used to review change requests.

## Page Used to Review Change Requests

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Select a Request | FE_EE_CHG_REQ_STAT | Self Service, Personal Information, Review Change Requests (USF), Select a Request | Select a change request to review. |

# Reviewing Workflow Inquiries

These topics provide an overview of workflow inquiries and list the pages that are used to review self-service activity.

## Understanding Workflow Inquiries

The Workflow Inquiry page enables the self-service administrator to:

- Review the status of any self-service transaction, except phone number changes.
- Review errors and warnings that occurred during the component interface processing.
- Change the workflow status of a transaction.

### Reviewing the Status

Workflow Inquiry enables the self-service administrator to review a transaction for any employee for whom the self-service administrator has security. The self-service administrator searches by transaction name, request date, workflow status, or employee ID.

### Reviewing Errors and Warnings

The Workflow Inquiry enables the self-service administrator to review errors or warnings that occur during the processing of the component interface. The self-service administrator must process the request using the Workflow Inquiry page.

Errors can occur when:

- The email or worklist notification fails to be generated.
- The system tried to route the transaction to the next reviewer in the approval process, but could not find that person. This means a problem occurred in the reporting structure based on what was entered in the Route To field on the Define Steps page.

If a warning occurs, the self-service administrator can be notified if the Notify on CI Warning check box is selected on the Defaults / Admin page. Warnings don't stop the tables from being updated.

### Related Links

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

## Pages Used to Review Self-Service Activity

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Workflow Inquiry | WF_SS_STAGED | Workforce Administration, Self Service Transactions, Workflow Inquiry, Workflow Inquiry | Review submitted requests and correct errors and warnings. |
| Workflow Inquiry | FE_SS_STAGED | Workforce Administration, Self Service Transactions, Workflow Inquiry (USF), Workflow Inquiry | (USF) Review submitted requests and correct errors and warnings. |
| Transaction Errors/Warning | FE_JOB_ERR_WRN_ALL | Click the Error link on the Workflow Inquiry page. | Review error and warning messages. |