PeopleSoft HCM 9.2: eProfile Manager Desktop

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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 eProfile Manager Desktop

eProfile Manager Desktop Overview

eProfile Manager Desktop is a collaborative application that gives managers greater control over employee information. With eProfile Manager Desktop, managers in your organization can perform routine tasks necessary to manage direct reports.

eProfile Manager Desktop Business Processes

eProfile Manager Desktop supports the following business processes:

- Review employee information.
- Change employees' reporting manager.
- Transfer employees.
- Promote employees.
- Change employees' location.
- Change employees' full-time or part-time status.
- Retire employees.
- Terminate employees.
- Request job changes requiring Works Council approval.
- Review military rank change requests.
- Add and review hires.

(USF) With this application, you can also:

- Reassign employees.
- Separate employees.

The eProfile Manager Desktop also provides managers with this dashboard functionality:

- Review employee talent summary information.

- Review managerial tasks on the Manager Dashboard.

We discuss these business processes in the business process topics in this documentation.

eProfile Manager Desktop 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 product documentation.

Other Sources of Information

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

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

Related Links

PeopleSoft HCM 9.2: Application Fundamentals

Chapter 2

Setting Up eProfile Manager Pagelets for the Dashboards

Dashboards and the Portal Registry

The Manager Dashboard and the Talent Summary dashboards consist of sets of pagelets that enables managers to quickly and easily view and update human resource and talent related information as needed.

Dashboard pages are PeopleSoft pages that aggregate and display pagelets that share common or similar purposes. Dashboards provide quick access to useful information by presenting concise but feature-rich pagelets to the user.

Dashboards are created and maintained in the Portal Registry. They are accessible in the Portal Registry Structure by navigating to the PeopleTools, Portal, Structure and Content page and traversing the menu hierarchy to Portal Objects, Homepage, Tabs. The dashboard is a Content Reference that is added and maintained under the Tabs folder.

For more information on Portal Registries, see *PeopleTools: Portal Technology*, "Understanding Portal Technology".

Understanding Accessing Direct Line Report Information on the Dashboard Pagelets

The Manager Dashboard and Talent Summary dashboards enables managers to view HCM data about each of their direct reports. A manager's direct and indirect reports are determined by the access type configured in the Direct Reports API. The Direct Reports API is a common HCM data service that obtains a list of employees (including contingent workers and persons of interest) who report to a specific employee job or position number. This data service determines a manager's row-level security to individual employees and validates that the user has security access to the employee.

Direct Reports UI access types are used for determining who reports to whom. The access type defines the reporting relationship between the user and employees reporting to that user. The system confirms direct reports and security access.

There are seven different access types available:

Access Type	***Definition***
By Department Manager ID	Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL).

Access Type	***Definition***
By Dept Security Tree	Determines person data access using information from the security tree.
By Group ID	Determines data access using the group ID set up in the group build feature.
By Part Posn Mgmt Dept Mgr ID	Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on the Reports To field first, and then department Manager ID field.
By Part Posn Mgmt Supervisor	Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on Reports To field first, and then the Supervisor ID field.
By Reports To Position	Defines the reporting relationship based on information in the Reports To field on the Work Location page.
By Supervisor ID	Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page.

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

See "Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*".

For more information about security logic for the HCM Direct Reports API, see *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services”.

Understanding Related Actions and Self Service Transactions

PeopleSoft delivers a number of related actions for Manager Self Service as well as Employee Self Service for different modules. The Manager Dashboard and Talent Summary enables managers to initiate HCM related manager self service actions for an employee through the use of the Actions menu link. This field in located in the header of the Talent Summary page and in the Direct Line Reports pagelet of Manager Dashboard.

PeopleSoft delivers Authorization as a Service (AaaS) framework to provide row level security to different transactions. HCM leverages AaaS framework to secure the different related actions using application classes.

See *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services”.

Delivered Manager Self Service Transactions Available from the Manager Dashboard and Talent Summary Pages

Managers have the ability to access HCM related manager self service transactions using the Actions menu link for his or her subordinates from the Direct Line Reports pagelet of the Manager Dashboard

This table lists the delivered Manager Self Service menus actions available through the Manage Dashboard:

Manager Self Service Menu	***Actions Available from within the Direct Line Reports Pagelet***
Time Management	• Request Absence • View Absence Balances • View Absence History
Job and Personal Information	• View Employee Personal Info • Request Reporting Change • Transfer Employee • Promote Employee • Request Location Change • Change Full/Part Time Status • Retire Employee • Terminate Employee
Compensation and Stock	• Request Ad Hoc Salary Change • View Total Rewards • View Compensation History • View Employee Stock Option Summary
Development	• View Current Team Profiles • View Team Historical Profiles • View Team Interest Lists
Performance Management	• Create Performance Documents • Create Development Documents • View Performance Documents • View Development Documents

Manager Self Service Menu	***Actions Available from within the Direct Line Reports Pagelet***
Career Planning	• Manage Career Plans • View Career Progression Chart
Succession Planning	• Manage Succession Plans • View Succession 360

Manager can also use the Actions menu links to navigate to the Talent Summary and Company Directory pages for an employee using these actions:

- View in Talent Summary
- View in Company Directory

The Actions menu items are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content. When the user clicks the Actions menu drop-down, a list of available related actions appear based on the list of actions registered in Manage Related Content and the access type associated with each action.

Actions are filtered and removed from the list when the logged in manager does not have the correct access type for the Action and employee combination.

Depending on how a transaction's access type is registered, it is possible for the list of available Actions to vary by employee. If only one access type is used for all transactions, the Action lists will be identical for all employees.

Configuring the Manager Dashboard Pagelets

To set up the Manager Dashboard, use the Alerts Pagelet Setup (UX_ALERT_SETUP), Approvals Pagelet Setup (UX_APPR_PLT_CFG), Direct Reports Pagelet Setup (UX_DIR_PLT_CFG) components.

These topics provide an overview of the Manager Dashboard pagelets and setup, alerts, approvals, Direct Line Report pagelet features, and discuss how to:

- Set up the Alerts pagelet.
- Set up the Approvals pagelet.
- Set up the Direct Reports pagelet.
- Define application data for the Manager Dashboard direct line reports.
- Define list sets for the Manager Dashboard direct line reports.
- Identify access types for the Direct Line Reports pagelet.

Understanding the Manager Dashboard Pagelets and Setup

The Manager Dashboard is a set of pagelets that enables managers to quickly and easily view and update human resource information as needed.

The following pagelets are delivered with the Manager Dashboard:

- Alerts
- Objective Alignment (narrow version of the Business Objective information)
- Business Objective Alignment (wide version of the Business Objective information)
- Pending Approvals
- Direct Line Reports
- Learning
- Company Directory
- My Job Openings
- Quick Links
- My Reports

Understanding Alerts

The PeopleSoft system delivers seven manager alert types that can appear on the Alerts pagelet. Alert types include:

- ePerformance

  Checks the document due date for all the performance documents on the Current Documents page that are owned by the manager.

- eCompensation

  Alerts the manager that there are compensation cycle activities on the eCompensation Alert homepage.

- Expiring Licenses/Certificates

  Alerts the manager about licenses or certificates that are about to expire for his or her direct reports, as seen on the Current Team Profiles component, Qualifications tab.

- Expiring Memberships

  Alerts the manager about memberships that are about to expire for his or her direct reports, as seen on the Current Team Profiles component, Qualifications tab.

- Scheduled Training

  Notifies the manager of upcoming training for his or her direct reports.

- Birthday Alerts

Checks and generates alert messages for upcoming birthdays for direct reports.

- Anniversary Alerts

  Checks and generates alert messages for upcoming anniversaries base on the original hire date.

The Alerts pagelet can display alerts and alert level icons next to an alert if selected to show. Alert levels can be informational (no icon displays next to the alert message), warning alerts, and critical alerts. You configure which alert types and levels display.

Alert Message Generation

The Alert messages are generated based on the existing components and data. Therefore, the system checks the access type for each component when access type security is enforced. This ensures that the system fetches the correct list of direct reports for a user. The alerts are generated base on this information:

- For Expiring Licenses/Certificates Alerts and Expiring Memberships Alerts, the access type of Component - Current Team Profiles (JPM_PERS_PTSEL_MGR) is checked. It has all the direct reports that the manager has access to for information regarding Licenses, Certificate, and Membership information.
- For Scheduled Training Alerts, the access type of Component - Training Summary (CO_PE_MGR_TRAINING) is checked. It has all the direct reports training information that current manager has access to.
- For Birthday Alerts and Anniversary Alerts, the access type of Component - View Employee Personal Info (HR_EE_INF_MGR) is checked. It has all the direct reports personal information that current manager has access to.

Understanding Approvals

Approval workflow is triggered when a requester submits a transaction, such as a promotion, for approval. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow.

The system enables you to generate approvals for the following transaction types from the Manager Dashboard:

Manager Self Service Transactions	***(USF) Federal Manager Self Service Transactions***
• Compensation Proposal • Job Offer • Job Opening • Manage Payable Time • Manage Reported Time • Manager Absence Approve • Military Rank Change • Nonperson Profiles • Performance Document • Person Profiles • Promotion • Reporting Change • Transfer	• Federal Employee Addr Change • Federal Employee Mar Change • Federal Employee Name Change • Federal Full Time/Part Time Change • Federal Location Change • Federal Promotion • Federal Reassignment • Federal Reporting Change • Federal Retirement • Federal Separation

Steps to Setting Up the Approvals Pagelet

To ensure that approvals are set up properly for the Manager Dashboard, you will need to perform the following steps to generate approvals:

1. Set up the Approvals Pagelet Setup page (Set Up HCM, Common Definitions, Manager Dashboard, Approvals Pagelet Setup).
   - Set the maximum number of approvals large enough or that the transaction sequence priority is set such that the approval type you are generating will appear in the pagelet.
   - Select to include an approval transaction under the Approval Workflow Engine (AWE) Transactions group box.
2. Confirm user profile settings (PeopleTools, Security, User Profiles, User Profiles).
   - Ensure that only one user ID is associated to an employee. When multiple user IDs are linked to an employee, you cannot guarantee to which user ID the approval process will assign approvals. To change the employee associated to a user ID, access the ID page to view or modify the employee ID assignment.
   - Grant page access to the Manager Dashboard by assign the *Manager Dashboard* role to the user on the Roles page.
3. (USF) Enable Federal functionality on the Installation Table (Set Up HCM, Install, Installation Table, Products).

Select the Federal check box on the Installation Table to generate or approve Federal-based approvals. When you change the settings for this check box, the application server cache must be deleted and all app servers bounced and restarted for changes to take effect.

Related Links

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

Understanding the Direct Line Reports Pagelet Features

The Direct Line Reports pagelet enables managers to view, in a single location, data from across HCM about each of their employees. To manage this large amount of information, the Direct Reports Pagelet Setup page enables you to group the field columns into eight different tab sections in the pagelet grid. The pagelet also enables managers to initiate self service actions for a specific employee through the use of the Actions menu link.

See Understanding Accessing Direct Line Report Information on the Dashboard Pagelets.

This topic discusses the delivered Direct Line Reports pagelet format.

The Delivered Direct Line Reports Pagelet Format

The Direct Line Reports pagelet contains a grid with eight tabs. The labels on the tabs are configurable and you can hide or show fields (columns). The user has the ability to personalize his or her grid by hiding columns and tabs, reordering columns and tabs, and freezing columns of their choice.

This tables list the delivered eight tab names and fields within those tabs for the Direct Line Reports pagelet:

Note: Unless otherwise noted, the fields come delivered on and available.

Summary Tab	***Job Details Tab***	***Contact Tab***	***Career Plan Tab***
Display Name (frozen) First Name (off) Last Name (off) Actions (frozen) Potential Job Title Performance Rating Bar Compa-Ratio (off) Position in Salary Range	Employee ID Job Code Years in Job Job Title Schedule	Telephone Email Department (off) Location (off) Instant Message (off)	Review Date Relocate? International? Travel?

Compensation Tab	***Performance Tab***	***Time Tab***	***Succession Tab***
Annual Salary Salary Currency Salary Range Minimum Salary Range Midpoint Salary Range Maximum Compa-Ratio Quartile Percent Range	Last Rating Period Begin Date Period End Date	Comp Time Balance (from Time & Labor) Vacation Balance (from Time & Labor)(off) Sick Balance (from Time & Labor)(off) Leave Balance 1 (from Absence Management) Leave Balance 2 (from Absence Management) Leave Balance 3 (from Absence Management)(off)	Key Position Successors Risk of Leaving Impact of Loss

Pages Used to Configure the Manager Dashboard Pagelets

Page Name	***Definition Name***	***Navigation***	***Usage***
Alerts Pagelet Setup	UX_ALERT_SETUP	Set Up HCM, Common Definitions, Manager Dashboard, Alerts Pagelet Setup, Alerts Pagelet Setup	Set up the Alerts pagelet for Manager Dashboard. Define what options are available to users when setting personal preferences as well as identify the alert levels and number of alerts you want to display in the Alerts pagelet. The Talent Summary, Licenses and Certificate pagelet uses the setup definitions defined for the *Expiring Licenses/ Certifications* row.
Approvals Pagelet Setup	UX_APPR_PLT_CFG	Set Up HCM, Common Definitions, Manager Dashboard, Approvals Pagelet Setup, Approvals Pagelet Setup	Set up the Approvals pagelet by identifying transactions you want to support and defining date notification rules.
Direct Reports Pagelet Setup.	UX_DIR_PLT_CFG	Set Up HCM, Common Definitions, Manager Dashboard, Direct Reports Pagelet Setup, Direct Reports Pagelet Setup	Set up the Direct Reports pagelet by defining how you want to display information to your managers about their direct reports.

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Application	GP_ELN_APP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define Application, Define Application	Define application data for the Manager Dashboard attributes. The Application Definition page defines the structure of the absence management data that will be mapped to the columns in the Direct Line Reports pagelet grid. This is used in conjunction with a List Set Definition to associate leave types by country to each of the three columns. See "Setting Up Applications *(PeopleSoft HCM 9.2: Global Payroll)*".
Define List Set	GP_ELN_SET	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define List Set, Define List Set	Define list sets for the Manager Dashboard direct line reports by mapping your element groups to the MGR_DASHBOARD list set. The Application field value must be *MGR_DASHBOARD*. See "Define List Set Page *(PeopleSoft HCM 9.2: Global Payroll)*".
Target Information	SS_LINK_TBL	Set Up HCM, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Target Information	Identify access types for the Direct Line Reports pagelet. The employees listed in the Direct Line Reports pagelet are based on the logged in manager and the access type selected for the pagelet component *UX_DIRECTS_PLT* when using setting up data for Manager Dashboard. As delivered, the Access Type field value is set to *By Part Posn Mgmt Supervisor* (by partial position management supervisor). See "Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Alerts Pagelet Setup Page

Use the Alerts Pagelet Setup page (UX_ALERT_SETUP) to set up the Alerts pagelet for Manager Dashboard.

Define what options are available to users when setting personal preferences as well as identify the alert levels and number of alerts you want to display in the Alerts pagelet.

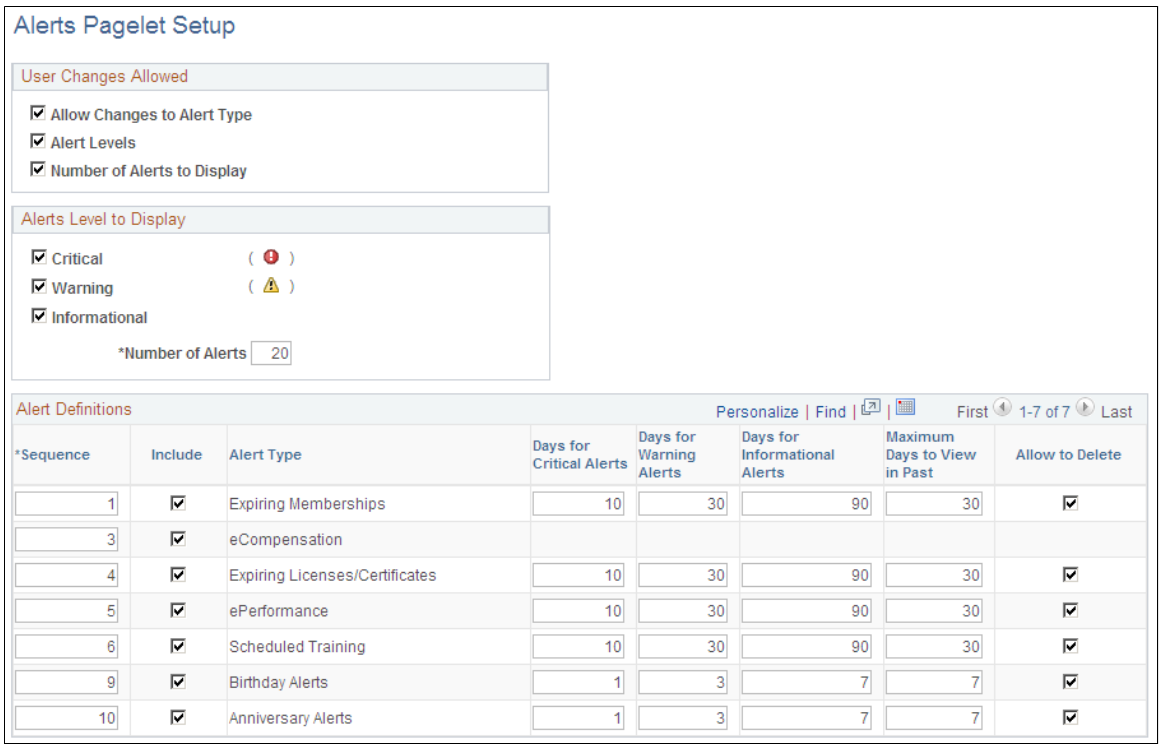
The Talent Summary, Licenses and Certificate pagelet uses the setup definitions defined for the *Expiring Licenses/Certifications* row.

Navigation

Set Up HCM, Common Definitions, Manager Dashboard, Alerts Pagelet Setup, Alerts Pagelet Setup

Image: Alerts Pagelet Setup page

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



User Changes Allowed

Use this section to indicate the options that should be available to a user on the Personalize Alert page.

Allow Changes to Alert Type	Select to enable the manager to specify specific alert types he or she wants to see on the Alerts pagelet. By selecting this check box, the system will display the Alert Types to Include group box on the Personalize Alerts page for the manager. For a list of alert types, see Understanding Alerts. Deselect this check box to have all alert types display on the Alerts pagelet and to remove the ability for the manager to select alert types on his or her personalization page.
Alert Levels	Select to have the Alerts Level to Display group box available on the Personalize Alerts page for the user. This enables

managers to specify which levels of alerts they want or doesn't want to see on the Alerts pagelet. Alert types include:

- Critical
- Warning
- Informational

Deselect this check box to hide the Alerts Level to Display group box on the Personalize Alert page for the user, preventing the manager from choosing which alert level he or she wants to display. With this check box deselected, only those alert levels you select in the Alerts Level to Display group box on this page will display on the Alerts pagelet.

Number of Alerts to Display

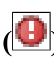
Select to have the Number of Alerts to Display group box available on the Personalize Alerts page for the user. This enables the user the ability to change the number of alerts that will show on the Alerts pagelet.

Deselect this check box to hide the Number of Alerts to Display group box on the Personalize Alert page for the user and prevent managers from identifying the maximum number of alerts that show display on the Alerts pagelet. Instead, the Alerts pagelet will display up to the number of alerts defined in the Number of Alerts field on this page.

See Personalize Alerts Page.

Alerts Level to Display

Use this section to define the alert levels and the number of alerts that should display on the Alerts pagelet.

Critical ()

Select to have critical level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Critical alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.

Warning ()

Select to have warning level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Warning alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.

Informational

Select to have all informational level alerts with the corresponding icon appear on the Alerts pagelet next to the alert type. When you deselect this check box, the Informational alerts option will be unavailable to the user on the Personalize Alerts page and these alerts will not display on the pagelet.

Number of Alerts

Enter the maximum number of alerts that should appear in the Alerts pagelet when user first opens the pagelet. The user can override this number when the Number of Alerts to Display check box is selected on this page. If the number of alerts for the manager exceeds this number, the user can click the View All link on the pagelet to view the additional alerts.

Alert Definitions

Use this section to identify which alert type display priority and behavior definitions.

Note: The Talent Summary - Licenses and Certificate pagelet uses the setup definitions defined for the *Expiring Licenses/Certifications* row. The Talent Summary page does not use the configuration for the other rows or fields on this page.

Sequence

Enter the priority number for the alert type. The alerts on the pagelet are sorted first by alert level, and then by this sequence number.

Include

Select to include this type of alert on the Alerts (Manager Dashboard) and Licenses and Certifications (Talent Summary) pagelets.

When an alert type and the Alert Types check box in User Changes Allowed group box of this page is selected, users can choose to include or exclude this alert type on the Manager Dashboard - Alerts pagelet using the Personalize Alerts page.

Alert Type

Displays the name of the alert type. You can define different options for each of the seven alert types.

Days for Critical Alerts

Enter the number of days prior to an event's due date or expiration date to identify when the system should display the alert type as critical.

Days for Warning Alerts

Enter the number of days prior to an event's due date or expirations date to identify when the system should display the alert type as a warning.

Days for Informational Alerts

Enter the number of days prior to a due date of an event for which the system should define the alert as informational for this alert type.

Maximum Days to View in Past

Enter the number of day after the due date of an event that the system should show this alert type. Overdue alerts will appear as critical. Past due alerts that have exceeded the number of days specified here will not display on the Alerts pagelet.

Allow to Delete

Select this check box to enable the user to delete this type of alert from the Alerts pagelet.

Deselect this option to hide the delete icon for this type of alert from the Alerts pagelet.

Note: The eCompensation alert definition is not performed on this page. The setup is on the eCompensation administration setup pages. You can access these pages by navigating to Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Definition and Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Text.

Approvals Pagelet Setup Page

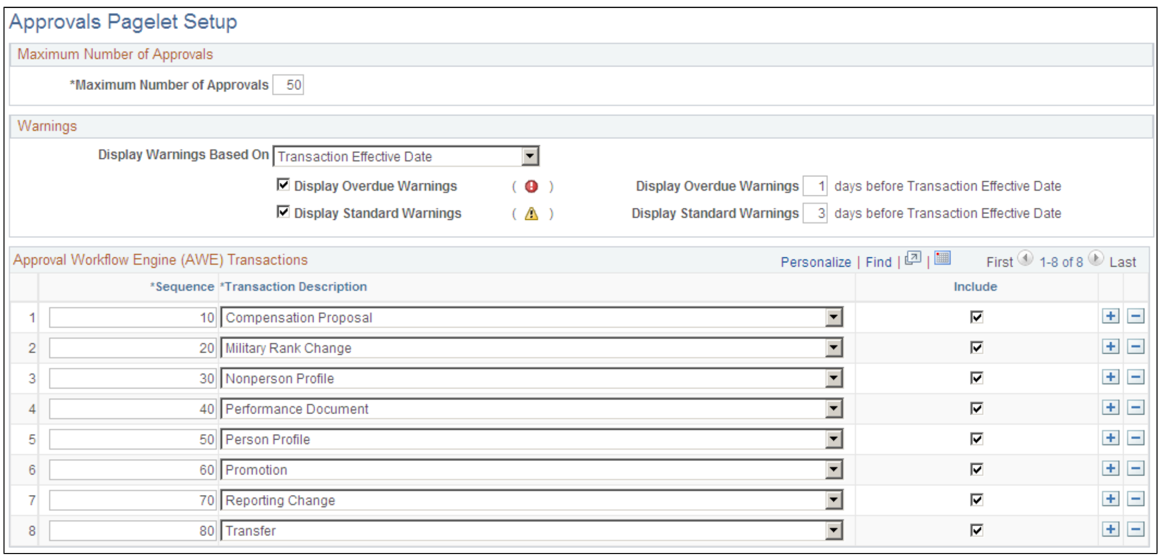
Use the Approvals Pagelet Setup page (UX_APPR_PLT_CFG) to set up the Approvals pagelet by identifying transactions you want to support and defining date notification rules.

Navigation

Set Up HCM, Common Definitions, Manager Dashboard, Approvals Pagelet Setup, Approvals Pagelet Setup

Image: Approvals Pagelet Setup page

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



Maximum Number of Approvals

Maximum Number of Approvals Enter the maximum number of approvals that should appear in the Approvals pagelet on the Manager Dashboard.

Warnings

Display Warnings Based On Chose the method the system should use to notify managers of an upcoming approval that requires their approval. The system uses this information to determine the date to calculate and display the overdue and standard warning icons in the pagelet grid. Valid values are:

- *Approval Receipt Date* - reflects the date the manager received the approval in his or her queue.

- *Transaction Effective Date* - reflects the date on which a transaction becomes effective or occurs. For example, the date on which a promotion will take place.

The value you select here will determine the label text for the overdue and standard warning days fields.

Display Overdue Warnings

Select this check box to have the Response overdue icon display in the Warning column on the Pending Approvals pagelet. This works in conjunction with the overdue warning days field on this page. These approvals will appear first for each approval type.

Display Overdue Warnings -__ days after Approval Receipt Date

This field is available when you select *Approval Receipt Date* in the Display Warnings Based On field and select the Display Overdue Warnings check box.

Enter the number of days after a manager has received an approval request that the system should mark a pending approval as overdue. For example, you enter *7* in this field. An employee submits an approval request on October 20. On October 27, and forward, the system will mark this pending approval with the Response overdue icon.

Note: This number should be larger than the number in the Display Standard Warnings __ days after Approval Receipt Date field, if both warnings are selected to display.

Display Overdue Warnings -__ days before Transaction Effective Date

This field is available when you select *Transaction Effective Date* in the Display Warnings Based On field and select the Display Overdue Warnings check box.

Enter the number of days before a transaction is to take place to mark a pending approval as overdue and requiring a response. For example, you enter *5* in this field. An employee is eligible for a promotion on October 20. On October 15, and forward, the system will mark this pending approval with the Response overdue icon.

Note: This number should be smaller than the number in the Display Standard Warnings __ days before Transaction Effective Date field, if both warnings are selected to display.

Display Standard Warnings

Select this check box to have the Response due icon display in the Warning column on the Pending Approvals pagelet. This works in conjunction with the standard warning days field on this page. These approvals will appear after approvals with overdue warnings for each approval type.

Display Standard Warnings __ days after Approval Receipt Date

This field is available when you select *Approval Receipt Date* in the Display Warnings Based On field and select the Display Overdue Warnings check box.

Enter the number of days after a manager has received an approval request that the system should mark a pending approval with a standard warning requiring a response. For example, you enter *3* in this field. An employee submits an approval request on October 20. On October 23 the system will mark this pending approval with the Response due icon and it will remain until the warning days number on this page is reached.

Note: This number should be smaller than the number in the Display Overdue Warnings __ days after Approval Receipt Date field, if both warnings are selected to display.

Display Standard Warnings __ days before Transaction Effective Date

This field is available when you select *Transaction Effective Date* in the Display Warnings Based On field and select the Display Standard Warnings check box.

Enter the number of days before a transaction is to take place to mark a pending approval with a standard warning requiring a response. For example, you enter *10* in this field. An employee is eligible for a promotion on October 20. On October 10 the system will mark this pending approval with the Response due icon and remain until the warning days number is reached.

Note: This number should be larger than the number in the Display Overdue Warnings __ days before Transaction Effective Date field, if both warnings are selected to display.

Approval Workflow Engine (AWE) Transactions

Sequence

Enter a priority number for an approval transaction to determine the order in which the approvals should appear in the Pending Approvals pagelet. The lower the number, the earlier the approvals of that type are displayed in the pagelet grid.

Transaction Description

Select the approval transactions you support in your organization. The descriptions come from the Workflow Transactions registry (Set Up HCM, Common Definitions, Approvals, Workflow Transactions). This is also the description that will appear in the pagelet. AWE transactions are listed in the Understanding Approvals topic of the documentation.

See Understanding Approvals.

Include

Select to have the Pending Approvals pagelet display an approval transaction type. An approval transaction will not display on the pagelet if this check box is deselected.

Related Links

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

Direct Reports Pagelet Setup Page

Use the Direct Reports Pagelet Setup. page (UX_DIR_PLT_CFG) to set up the Direct Reports pagelet by defining how you want to display information to your managers about their direct reports.

Navigation

Set Up HCM, Common Definitions, Manager Dashboard, Direct Reports Pagelet Setup, Direct Reports Pagelet Setup

Image: Direct Reports Pagelet Setup page (1 of 2)

This example illustrates the fields and controls on the Direct Reports Pagelet Setup page (1 of 2). You can find definitions for the fields and controls later on this page.

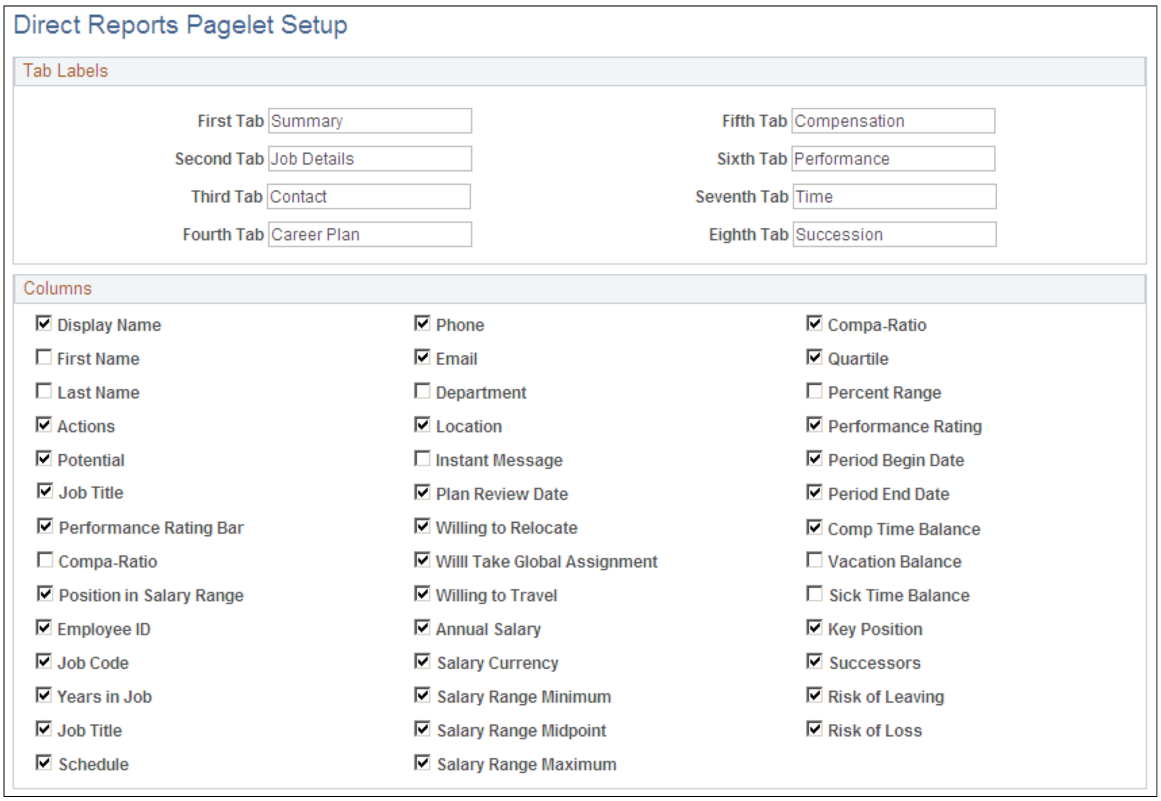
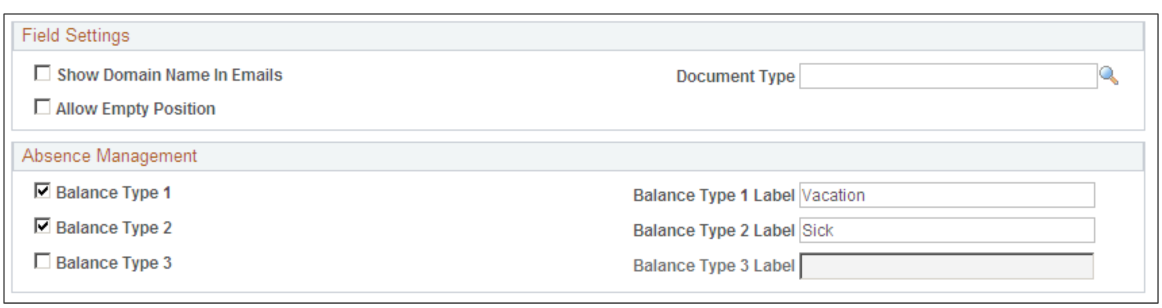


Image: Direct Reports Pagelet Setup page (2 of 2)

This example illustrates the fields and controls on the Direct Reports Pagelet Setup page (2 of 2). You can find definitions for the fields and controls later on this page.



Tab Labels

Use this section to identify the tab names that should appear on the Direct Line Reports pagelet. You can enter up to a total of eight tab names for the grid. If all of the columns under a tab are hidden using this setup page, then the tab label will be hidden as well.

Columns

Select each column (field) name that should be available to the manager when viewing the Direct Line Reports grid. The columns come predefined to map to a tab label, however the user can move or hide these columns on the Direct Line Reports: Personalize page.

Deselect a check box to hide the column from the user on the Direct Line Reports pagelet and on the Personalize page.

The following fields have special considerations:

Actions

Select this check box to make the Action menu drop-down list available in the grid. This enables the user to quickly access the manager self service pages to complete transactions for his or her employees. The Action menu values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content.

See Delivered Manager Self Service Transactions Available from the Manager Dashboard.

See Understanding Related Actions and Self Service Transactions.

For more information, see the product documentation *PeopleTools: Portal Technology*, "Developing and Configuring Related Content Services".

Instant Message

Select this check box to have the grid display IM availability for an employee.

The instant message presence icon must be enabled in the Org Chart Viewer for the *Direct-Line Reports* org view type for the Manager Dashboard to display an IM icon. To activate this functionality for direct line reports, navigate to Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings. Access the component for the org view type *Direct-Line Reports.* The Manager Dashboard first checks the Org Chart Content page to see if the Instant Message Presence Icon field is selected and the IM protocol and IM Domain fields are entered. If these options are not defined, then the system checks the Profile Content page for this same information. If none of these IM options are defined in the Org Chart Viewer for *Direct-Line Reports,* the IM column will not be available on the Direct Line Reports pagelet.

When using the XMPP protocol for instant messaging, you will also need to navigate to My System Profile at the root menu and on the General Profile Information page add the XMPP protocol domain, user ID, and password for the user.

Note: Three additional check boxes related to Absence Management are located in the Absence Management group box on the bottom of this page.

Field Settings

Show Domain Name In Emails

Select this check box to have the domain name appear in the person's email. The domain name is the text that appears after the @ sign in an e-mail address.

Deselect this check box to have the system hide the domain name. This will save space on the page and avoid redundancy, such as when all employees have the same domain name in their business e-mail address.

Document Type

Enter the document type the system should use to retrieve employee performance ratings. The system will retrieve ratings from the last closed document of the document type specified in this field.

If the document type is not specified, or the employee does not have a completed performance rating from the specified document, the performance rating information will not display.

Allow Empty Position

Select to display empty positions on the Direct Line Reports pagelet when using Position Management. Deselect this check box to hide unfilled positions from the manager.

This table indicates whether a person or position will appear in the Direct Line Reports pagelet or My Organization grids:

Type of People or Position	***Direct Line Reports Pagelet Grid***	***My Organization Page H-Grid***
Shows direct reports	Yes	Yes
Shows indirect reports	No	Yes
Shows empty position when Allow Empty Position is selected	Yes	Yes
Show empty position when Allow Empty Position is deselected	No	No
Shows inactive employees	No	Yes, but only when needed for drilling purposes.

Balance Type 1, 2, and 3

Select to enable any one of three user configurable Absence Management Leave Balance fields.

The Balance Type 1 and Balance Type 2 options are selected by default and represent vacation and sick leave. To adjust for this, the Time and Labor Vacation Balance and Sick Balance options are deselected in the Columns group box. The default options for the Balance Type 3 are cleared.

Balance Type 1, 2, and 3 Label

Enter the column label that will appear in the column header for each of the three Absence Manager columns in the Direct Line Reports grid.

The system delivers the Balance Type 1 Label field text as *Vacation* by default and the Balance Type 2 Label field text as *Sick* by default.

Note: Additional setup to map Absence Management leave types, such as *Vacation* and *Sick,* to each of these columns is required. Use the existing Global Payroll and Absence Management Element Application component to map leave type elements for each desired country to the three columns.

Related Links

"Understanding Applications and List Sets *(PeopleSoft HCM 9.2: Global Payroll)*"
"Setting Up Applications *(PeopleSoft HCM 9.2: Global Payroll)*"
"Setting Up List Sets *(PeopleSoft HCM 9.2: Global Payroll)*"

Configuring the Talent Summary Pagelets

To set up the Talent Summary page tables, use the Talent Summary Setup (HCTS_SETUP_CMP), Alerts Pagelet Setup (UX_ALERT_SETUP), and Install Defaults (LM_IN_DFLT_CMP) components.

These topics provide an overview of the Talent Summary dashboard setup, self service transactions, and discuss how to:

- Identify the fields and enable IM in the Talent Summary header.
- Set up the header ratings boxes.
- Define setup data for pagelets within the Talent Summary page.
- Set up alert definitions for the Licenses and Certifications pagelet.

Understanding the Talent Summary Dashboard Pagelets and Setup

The PeopleSoft HCM Talent Summary page provides a collection of talent management pagelets that you can individually select to appear on the Manager Self Service - Talent Summary page for direct or indirect reports. This table lists the individual pagelets that provide information gathered from various PeopleSoft HCM applications:

HCM Product	***Header and Pagelet Content***
HR • Job Data • Plan Careers • Manage Profiles	• Talent Summary header • Impact of Loss vs Risk of Leaving box in the Talent Summary header • Career History • Career Planning • E&G Special Projects • Education • Honors and Awards • Interest Lists • Job Related Competencies • Licenses and Certifications • • Personal Competencies • Responsibilities • Special Projects
Compensation	• Base Salary History • Current Salary • Total Rewards
ePerformance	• Performance vs Potential Ratings box in the Talent Summary header • Performance History (graphical) • Performance History (grid)
Plan Successions	Succession Options
Enterprise Learning Management (ELM)	Learning

The PeopleSoft system enables to you to determine the field content that should appear within the employee header section of the Talent Summary page. The header section on the Talent Summary page displays a photo of the employee, if available, up to two columns of job data related to this person, and up to two ratings boxes associated with a person's performance and career planning.

Image: Example of the header that appears on the Talent Summary page

This example illustrates the fields and controls on the Example of the header that appears on the Talent Summary page. You can find definitions for the fields and controls later on this page.

In addition to setting up the header definitions, you will establish specific pagelet rules the system will use when presenting information to a manager.

Prerequisites

Before you use the Talent functionality, you need to perform the tasks of making sure these features are configured and running:

- Set up the Direct Reports API data service oft Enterprise

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

  See "Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- Configure Related Content Services

  See *PeopleTools: Portal Technology*, "Developing and Configuring Related Content".

- Set up the Org Chart Viewer, Chart and Profile Field Map component to identify fields that you can select for the Talent Summary header.

  See "Chart and Profile Field Map Page *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

- Define alerts on the Manager Dashboard, Alerts Pagelet Setup component.

  See Alerts Pagelet Setup Page.

- Enable instant messaging

  For the instant messaging icon to display on the Talent Summary page, you will perform additional setup tasks for your direct line report settings in the Org Chart Viewer setup pages.

  See Header Fields Page.

- Assign security access roles to the users to view Talent Summary and pagelet data.

- To grant access to the Talent Summary Setup pages, assign the Administer *HR Dashboards* role (permission list *HCCPHR8000*) to your administrators.
- To grant access to the Talent Summary page, assign the *Manager Dashboards* role (permission list *HCCPHR8010*) to your managers.
- To grant access and view the ELM Learning pagelet data, assign the *Manager Dashboard – ELM* role to your manager.

Pages Used to Configure the Talent Summary Pagelets

Page Name	***Definition Name***	***Navigation***	***Usage***
Header Fields	HCTS_SETUP	Set Up HCM, Common Definitions, Talent Summary, Talent Summary Setup, Header Fields.	Identify the fields and the order in which they should display in the header of the Talent Summary page.
Header Rate Boxes	HCTS_SETUP_RATEBOX	Set Up HCM, Common Definitions, Talent Summary, Talent Summary Setup, Header Rate Boxes.	Set up the header ratings boxes for the Talent Summary page.
Other Pagelets	HCTS_SETUP_PAGELET	Set Up HCM, Common Definitions, Talent Summary, Talent Summary Setup, Other Pagelets	Define setup data for pagelets that appear within the Talent Summary page.
Alerts Pagelet Setup	UX_ALERT_SETUP	• Click the Configure Alert Icons link on the Other Pagelets page. • Set Up HCM, Common Definitions, Manager Dashboard, Alerts Pagelet Setup, Alerts Pagelet Setup	Set up the alert rules for the Licenses and Certifications pagelet on the Talent Summary page.

Page Name	Definition Name	Navigation	Usage
Install Defaults - Pagelets	LM_IN_DFLT_DASHBRD	Set Up ELM, Install Defaults, Pagelets	Configure the Learning pagelet rules. The Install Defaults - Pagelet page in ELM contains three configuration options pertaining to the Learning pagelet in the HCM product to define the maximum number of rows the system should retrieve as well as define warning status dates for learning plans and learning objectives. **Note:** This page is accessible through the ELM product database only. See the *PeopleSoft Enterprise Learning Management,* ”Defining Defaults” documentation for more information.

Header Fields Page

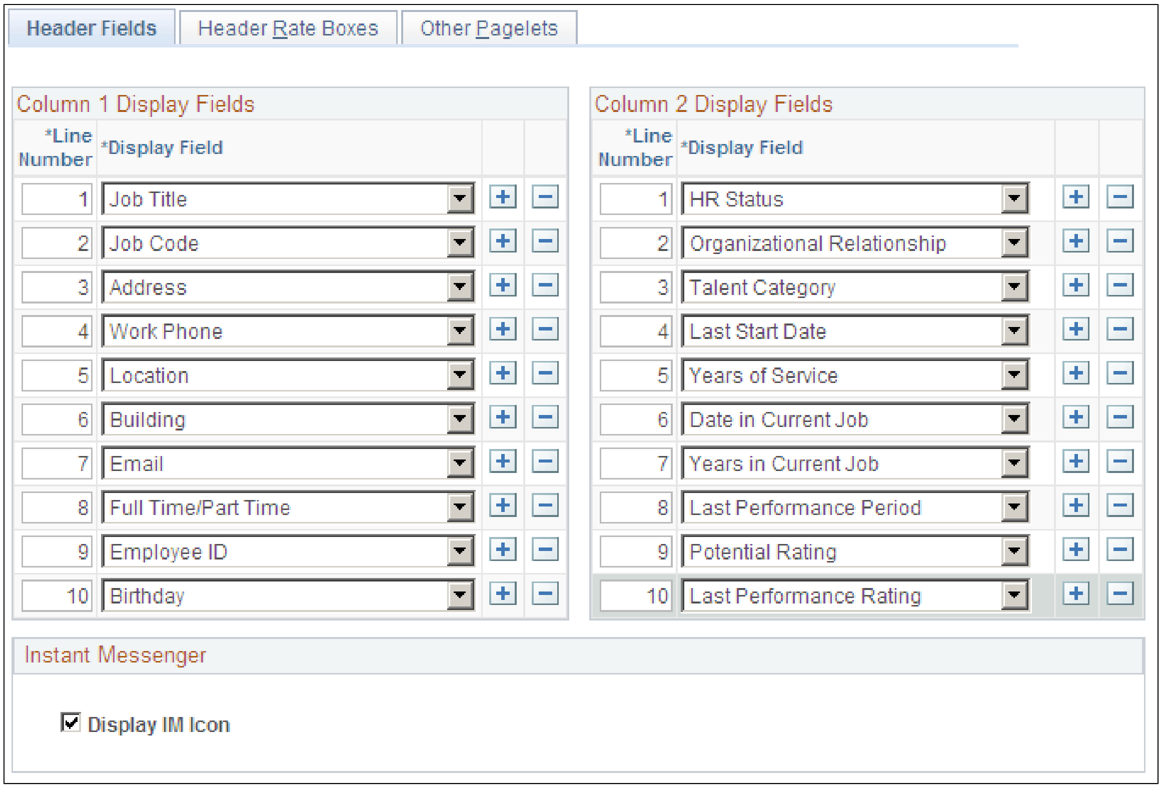
Use the Header Fields page (HCTS_SETUP) to identify the fields and the order in which they should display in the header of the Talent Summary page.

Navigation

Set Up HCM, Common Definitions, Talent Summary, Talent Summary Setup, Header Fields.

Image: Header Fields page

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



The header section on the Talent Summary page contains two field columns. Use the Column 1 Display Fields and Column 2 Display Fields group boxes to identify the column field content as well as the order that the fields should appear in the header on the Talent Summary page.

Line Number	Select the fields in the order you want them to display. If one of the rows is deleted, the line numbers will be automatically re-ordered when the page is saved.
Display Field	Select fields that should appear in the header according to the designated column.

Note: The Talent Summary header fields use the Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Field Map component to define the field mappings in the header. Valid values for the Display Fields are those field mapping IDs that have *General* designated in the Section column.

See "Chart and Profile Field Map Page *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

Display field values that come from Personal and Job Data are:

- *Address*
- *Birthday*
- *Building*
- *Date in Current Job*
- *Email*
- *Employee ID*
- *Full Time/Part Time*
- *HR Status*
- *Job Code*
- *Job Title*
- *Last Start Date*
- *Location*
- *Organizational Relationship*
- *Reports Count - Total*
- *Work Phone*
- *Years in Current Job*
- *Years of Service*

Display field values that come from Succession Planning are:

- *Talent Category*
- *Potential Rating*

Display field values that come from ePerformance are:

- *Last Performance Period*
- *Last Performance Rating*

Display IM Icon (display instant messenger icon)

Select this check box to display or hide the IM presence icon in the header of the Talent Summary page.

The instant message presence icon must be enabled in the Org Chart Viewer for Direct-Line Reports for the Talent Summary page to display a chat icon. To activate this functionality for direct line reports, navigate to Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings. Access the component for the org view type Direct-Line Reports. The Talent Summary page first checks the Org Chart Content page to see if the Instant Message Presence Icon is selected and the IM Protocol and IM Domain fields are entered. If these options are not defined, then the system checks the Profile Content page for this same information. If none of these IM options are defined in the Org Chart Viewer - Chart and Profile Settings page for Direct-Line Reports, the chat icon will not be available on the Talent Summary page header.

See "Org Chart Content Page *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

See "Chart and Profile Settings - Profile Content Page *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

When using the *XMPP* protocol for instant messaging, you will also need to navigate to My System Profile at the root menu and on the General Profile Information page add the *XMPP* protocol domain, user ID, and password for the user.

Header Rate Boxes Page

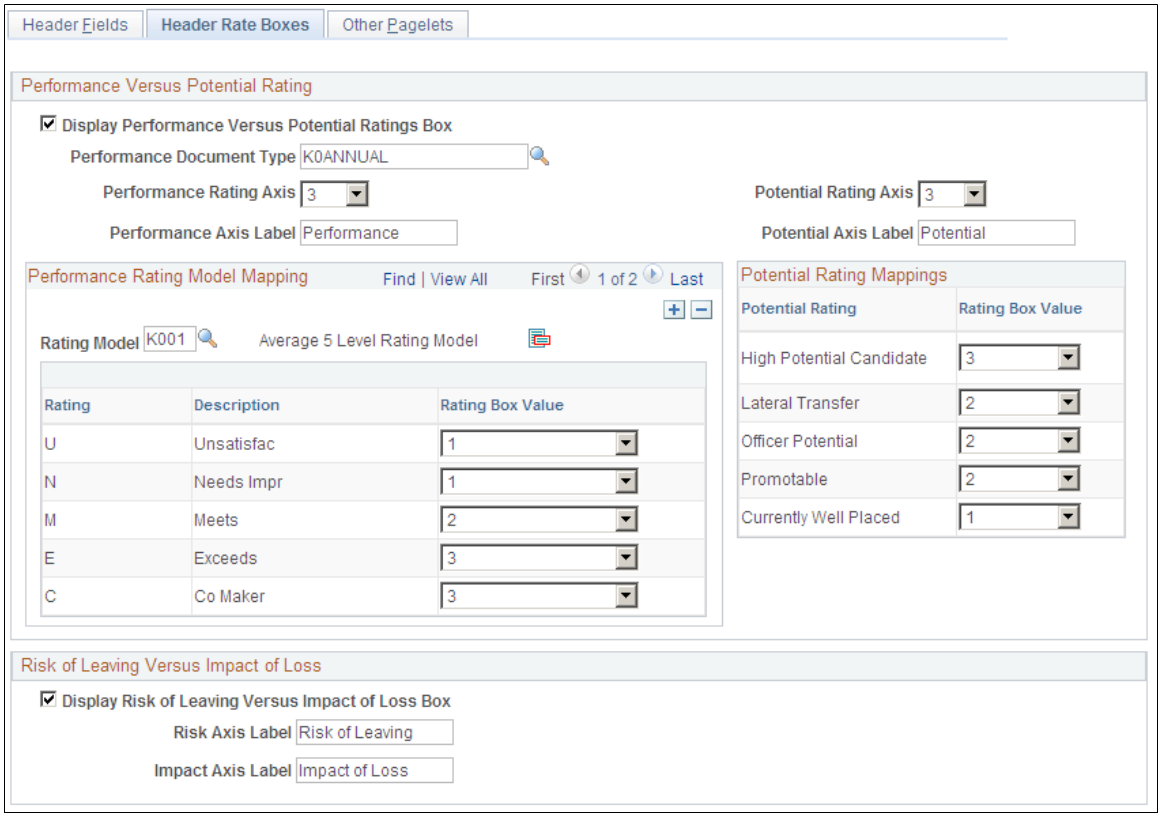
Use the Header Rate Boxes page (HCTS_SETUP_RATEBOX) to set up the header ratings boxes for the Talent Summary page.

Navigation

Set Up HCM, Common Definitions, Talent Summary, Talent Summary Setup, Header Rate Boxes.

Image: Header Rate Boxes page

This example illustrates the fields and controls on the Header Rate Boxes page. You can find definitions for the fields and controls later on this page.



Performance Versus Potential Rating

Display Performance Versus Potential Ratings Box

Select this box to display the Performance versus Potential ratings box on the header of the Talent Summary page. The Performance versus Potential Ratings box displays the performance rating from the most recently completed performance document and the potential rating from career planning.

When no data is available for the ratings box, the box will not appear and the page will display text that performance or potential rating data does not exist.

Performance Document Type

Select the performance document type that should be used for the Overall Performance Rating for the Performance versus Potential ratings box. These values are defined in the Document Types component by navigating to Set Up HCM, Product Related, ePerformance, Document Structure, Document Types.

Performance Rating Axis

Select an option in this field to configure the maximum value for the x-axis. The values in this drop-down are 1-5. This number defines the ratings box size, along with the y-axis.

Performance Axis Label

Specify the label for the performance x-axis.

Potential Rating Axis

Select an option in this field to configure the maximum value for the y-axis. The values in this drop down are 1-5.

Potential Axis Label

Specify the label for the performance y-axis.

Performance Rating Model Mapping

Use this group box to map one or more rating models to the performance ratings axis defined at the top of this page. To standardize performance ratings you use within your organization, which can potentially have different rating values, map each rating model to line up with the values for the performance rating axis.

Rating Model

Identify the rating models you wish to use in the performance rating axis. Rating models are managed in the Rating Model table by navigating to Set Up HCM, Product Related, Profile Management, Content Catalog, Rating Model.

 **(View Detail icon)**

Click this icon to open the Review Rating Model Table page and view details about this rating model.

Performance Rating Model Mapping - Rating Box Value

Map a performance rating axis value to each rating within a rating model. The system uses this information to determine where a person’s performance rating should display in the ratings box on the header of the Talent Summary page when a rating model may not match the performance rating axis values defined on this page. The values run from *1* to the value defined in the Performance Rating Axis field.

Potential Rating Mappings

Potential Rating Mappings - Rating Box Value

Map a rating box value to each potential rating type. The system uses this information to determine where a person’s potential rating should display in the ratings box on the header of the Talent Summary page. The values run from *1* to the value defined in the Potential Rating Axis field.

Risk of Leaving Versus Impact of Loss

Display Risk of Leaving Versus Impact of Loss

Select this box to display the Risk of Leaving Versus Impact of Loss ratings box on the header pagelet of the Talent Summary page. When no data is available for the ratings box, the box will not appear and the page will instead display text that risk of leaving or impact of loss data does not exist.

Risk Axis Label

Specify a label for the risk of leaving x-axis.

Impact Axis Label Specify a label for the impact of leaving y-axis.

Other Pagelets Page

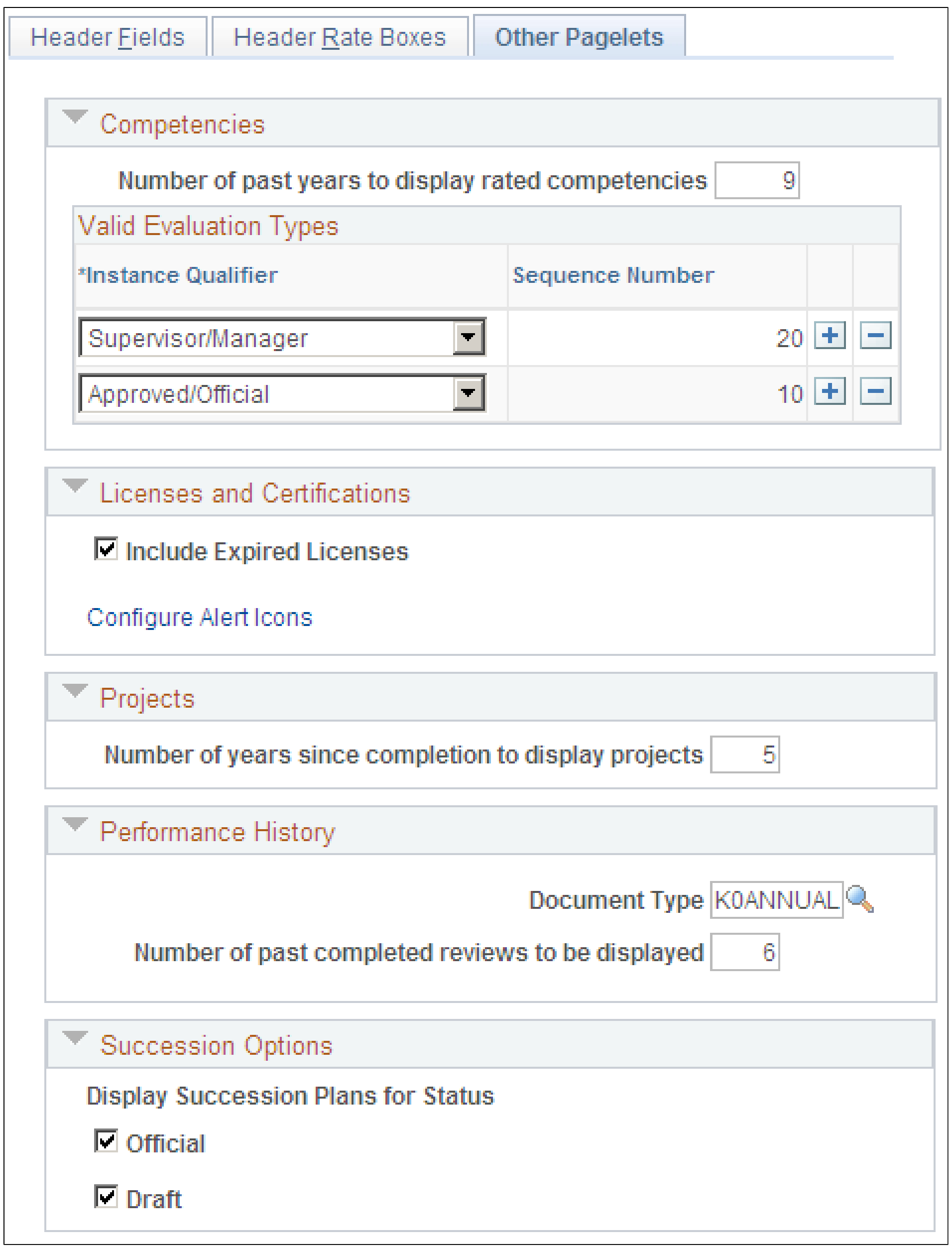
Use the Other Pagelets page (HCTS_SETUP_PAGELET) to define setup data for pagelets that appear within the Talent Summary page.

Navigation

Set Up HCM, Common Definitions, Talent Summary, Talent Summary Setup, Other Pagelets

Image: Other Pagelets page

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



Number of past years to display rated competencies	Enter the number of years the system should go back and show rated competencies. The competency related pagelets will display competencies within the years entered here. **Note:** Regardless of the number of years you enter the pagelet displays only the most current ratings. Limiting the number of years to display data eliminates old data that may no longer be relevant.
Valid Evaluation Types - Instance Qualifier	Identify which evaluation types should appear in the competency pagelets.
Sequence Number	Specify the priority for the evaluation type. If a competency has more than one valid evaluation type, the type with the lowest priority number is considered to have the highest priority.
Include Expired Licenses	Select to show the expired licenses and certifications on the Talent Summary - Licenses and Certifications pagelet. Expired licenses and certificates will display with the critical alert icon. Deselect this check box to hide the expired licenses and certificates from the user in the Licenses and Certifications pagelet.
Configure Alert Icons	Click this link to open the Alert Pagelet Setup page and define how alerts should display in your pagelets. The Alert Pagelet Setup page is also used by the Manager Dashboard.
Number of years since completion to display projects	Enter the number of years the system should display a completed project. This number year applies to the Special Projects and E&G Special Projects pagelets.
Document Type	Select the performance document type that should be used for the graphical or grid Performance History pagelets.
Number of past completed reviews to be displayed	Specify the number of past completed reviews to appear in the graphical or grid Performance History pagelets.
Display Succession Plans for Status	Identify key positions, anticipate organizational bottlenecks, and develop multiple career paths for individuals who are ready for promotion. Values are: *Official* and *Draft.* This information is shown in the Succession Options pagelet.

Alerts Pagelet Setup Page

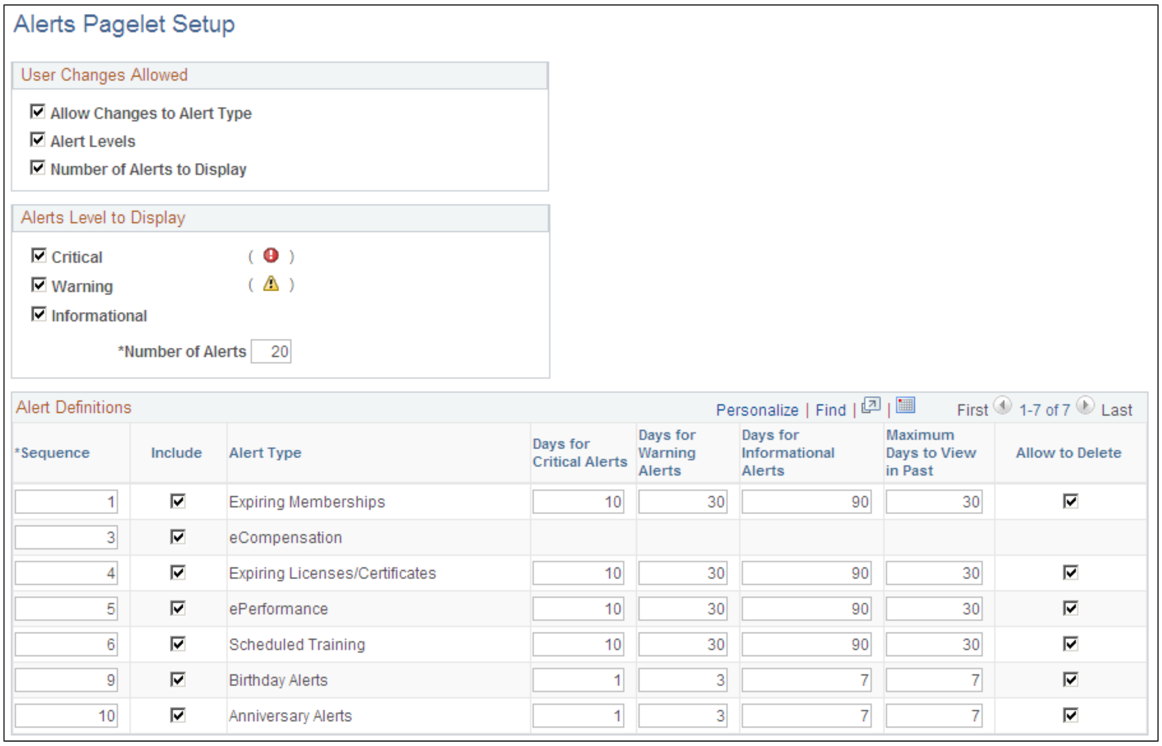
Use the Alerts Pagelet Setup page (UX_ALERT_SETUP) to set up the alert rules for the Licenses and Certifications pagelet on the Talent Summary page.

Navigation

- Click the Configure Alert Icons link on the Other Pagelets page.
- Set Up HCM, Common Definitions, Manager Dashboard, Alerts Pagelet Setup, Alerts Pagelet Setup

Image: Alerts Pagelet Setup page

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


Alerts Pagelet Setup

User Changes Allowed

☑ Allow Changes to Alert Type
☑ Alert Levels
☑ Number of Alerts to Display

Alerts Level to Display

☑ Critical
☑ Warning
☑ Informational

*Number of Alerts 20

Alert Definitions — Personalize | Find | First 1-7 of 7 Last

*Sequence	Include	Alert Type	Days for Critical Alerts	Days for Warning Alerts	Days for Informational Alerts	Maximum Days to View in Past	Allow to Delete
1	☑	Expiring Memberships	10	30	90	30	☑
3	☑	eCompensation					
4	☑	Expiring Licenses/Certificates	10	30	90	30	☑
5	☑	ePerformance	10	30	90	30	☑
6	☑	Scheduled Training	10	30	90	30	☑
9	☑	Birthday Alerts	1	3	7	7	☑
10	☑	Anniversary Alerts	1	3	7	7	☑

Note: This setup page is primarily used for the Alerts Pagelet on the Manager Dashboard. What you change here will be reflected in the Alerts Pagelet on the Manager Dashboard.

The Licenses and Certifications pagelet on the Talent Summary page uses the definition setup defined for the *Expiring Licenses/Certifications* row of the Alert Definitions group box.

Chapter 3

Managing Direct Reports

Understanding the Management of Direct Reports

These topics provide an overview of eProfile Manager Desktop transactions, the process flow for these transactions, and list prerequisites.

Understanding eProfile Manager Desktop Transactions

Managers can use the following eProfile Manager Desktop transactions to:

- View a direct report's information on one page.
- Change an employee's status to full-time or part-time.
- Change an employee's reporting manager.
- Assign an employee to another work location.
- Promote an employee.
- Initiate the employee retirement process.
- Initiate the employee termination process.
- Transfer an employee.
- Request an employee job change that requires works council approval.
- Review military rank change requests.
- Add employees and contingent workers using templates and view the hire status.

Understanding the Process Flow for Transactions

Most of the transactions in eProfile Manager Desktop can be configured to either:

- Use an approval process.
- Automatically update the database.
- Send notifications to an administrator.

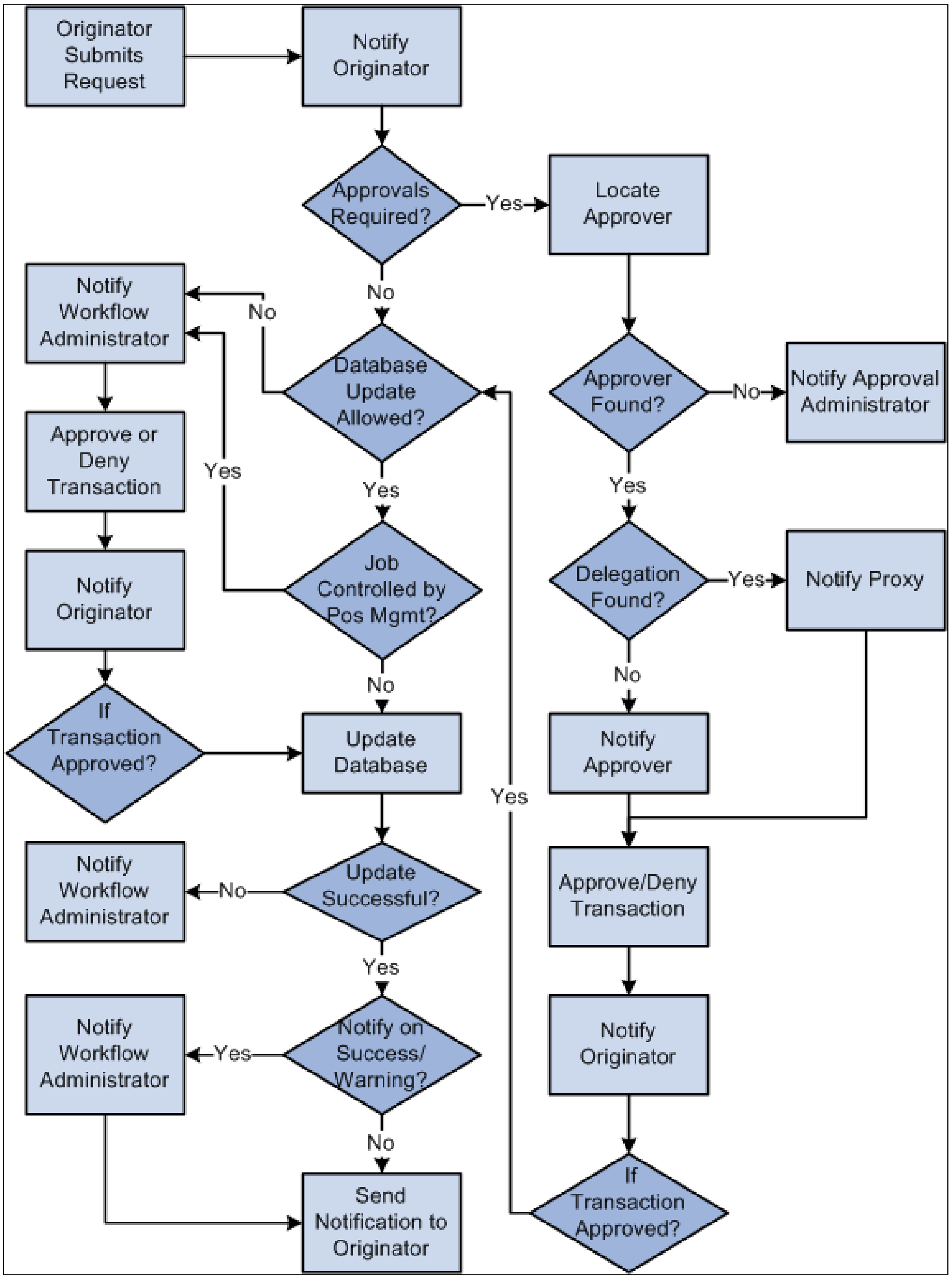
The following table lists each of the self service transactions and the features that can be configured for each:

Transaction	***Use Approval Process***	***Automatic Database Update***	***Send Notifications***
Change Full/Part Time Status	No	Yes	Yes
Change Reporting Managers	Yes	Yes	Handled by approval process.
Change Work Locations	No	Yes	Yes
Promote Employees	Yes	Yes	Handled by approval process.
Retire Employees	No	Yes	Yes
Terminate Employees	No	Yes	Yes
Transfer Employees	Yes	Yes	Handled by approval process.
View Employees' Information	Not Applicable	Not Applicable	Not Applicable
Change Jobs (Works Council)	Not Applicable	Not Applicable	Not Applicable
Military Rank Change	Yes	Yes, based on Military Processing Definition See "Setting Up Military Rank Change Notification and Documentation *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".	Handled by approval process.

Transaction	***Use Approval Process***	***Automatic Database Update***	***Send Notifications***
Template-Based Hire	Not Applicable	Yes, based on the Template Create - Configuration See "Setting Up Smart HR Templates *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".	Not Applicable

Image: Process flow for self-service transactions with optional approvals, database updates, and notifications

The following diagram illustrates the process flow that begins when a self-service user submits a request. The diagram shows both the basic process flow and the alternate flows for approvals, database updates, and notifications:



There are four main sections to this process flow:

- A request is submitted.
- The request uses an approval process.

- The request allows automatic updates to the database.
- The request doesn't allow automatic updates to the database.

Request is Submitted

When a manager submits a request, an email notification confirming that the request was successfully submitted may be sent to the manager. The following table lists the eProfile Manager Desktop transactions, the criteria that determines whether a notification is sent, and the template that is used:

Transaction	***Criteria***	***Notification Template***
Change Full/Part Time Status Change Location Retire Employee Terminate Employee	Notify User - Entry check box is selected on the System Workflow Rules page.	
Promotion Transfer	Handled by approval process. The email that is sent depends on is determined by the following conditions: • Are approvals required? • Are database updates allowed? • Is the changed controlled by position management?	For requests that: • Require an approval process, HR_SUBMIT_SINGLE_EE • Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_SINGLE_EE. The notification is sent when the transaction is saved successfully to the database. • Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_APV_MANUAL_PROC_SINGL. • Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_SINGLE_EE

Transaction	***Criteria***	***Notification Template***
Reporting Change	Handled by approval process. The email that is sent depends on is determined by the following conditions: • Are approvals required? • Are database updates allowed? • Is the changed controlled by position management?	For requests that: • Require an approval process, HR_SUBMIT_MULTI_EE. • Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_MULTI_EE. The notification is sent when the transaction is saved successfully to the database. • Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_MANUAL_PROC_REPCH. • Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_REPCHG_EE.

Approval Process Required

Approvals apply only to the Change Reporting Manager, Promote Employee, Transfer Employee, and Military Rank Change transactions. PeopleSoft delivers the following approval process IDs that are set up using the Register Transactions (EOAW_TXN) component.

- ReportingChgEmployee
- PromoteEmployee
- TransferEmployee
- MilitaryRankChange

When approvals are required, the system uses the following rules to identify the approving manager:

- For promotions and transfers, the originator must select a promotion or transfer method. If the method is By Position, the Reports To field on the Job Information page determines the approving manager. If the method is By Job Title/Department, the Supervisor ID field on the Job Information page for the new position determines the approving manager.
- For reporting changes, the Supervisor ID corresponding to the reporting change determines the approving manager.
- For rank changes, the Career Manager (or clerk) creates the rank change request, identifying approvers and reviewers by role in the Rank Change MIL component. The unit commanders method is configured on the Military Processing Definition page. If the method is By Position, the Reports To

field on the Job Information page determines the approving manager. If the method is By Job Title/ Department, the Supervisor ID field on the Job Information page for the new position determines the approving manager.

See "Rank Change MIL - Military Rank Change Page *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*", "Military Processing Definition Page *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

Note: If an approving manager cannot be found, Approval Framework automatically routes the transaction to any person who is in the administrator role listed on the process definition.

Once the approving manager is determined, the system checks to see if a proxy is active for the manager. If so, that proxy becomes the approving manager. A notification is sent to either the approving manager or the proxy that states there is a request that requires his or her attention.

For	***Notification Template***
Promote Employee Transfer Employee	HR_APPROVAL_REQUEST_SINGLE_EE
Reporting Change	HR_APPROVAL_REQUEST_MULTI_EE
Military Rank Change	MIL_RANK_CHNG_APPROVAL_REQUEST

The approving manager either approves or denies the request. If the manager approves the request, the following notification is sent to the originator stating that the request has been approved.

For	***Notification Template***
Promote Employee Transfer Employee	HR_STEP_APPROVAL_SINGLE_EE
Reporting Change	HR_STEP_APPROVAL_MULTI_EE

If the manager denies the request, the following notification is sent to the originator stating the request has been denied.

For	***Notification Template***
Promote Employee Transfer Employee	HR_STEP_DENY_SINGLE_EE
Reporting Change	HR_STEP_DENY_REPCHG_EE

You can add more approvers to the approval process by modifying the approval process.

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

Database Update Not Allowed

The system checks to see if automatic updates to the database are allowed. If the Allow DB Update check box on the self service Workflow Configurations page is not selected, the system sends the following notification to the administrator stating the transaction requires their approval:

For	*Notification Template*
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_ADMIN_APV_REQ_SINGLE_EE
Reporting Change	HR_ADMIN_APV_REQ_MULTI_EE

If the administrator approves the transaction, the system sends the following email to the originator stating the request has been approved and applied to the database:

For	*Notification Template*
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_ADMIN_APV_MANUAL_PROC_SINGL
Reporting Change	HR_ADMIN_APV_MANUAL_PROC_REPCH

If the administrator does not approve the transaction, the system sends the following email to the originator stating the request has been denied:

For	*Notification Template*
Change Full/Part Status Change Location Retire Employee Terminate Employee	

For	***Notification Template***
Promote Employee Transfer Employee	HR_ADMIN_DENY_SINGLE_EE
Reporting Change	HR_ADMIN_DENY_REP_CHG_EE

Database Updates Allowed

The system checks to see if automatic updates to the database are allowed. This processing occurs if the Allow DB Update check box on the self service Workflow Configurations page is selected.

If automatic updates are allowed, the system also checks to see if the transaction involves an employee whose job is controlled by position management. If the job is controlled by position management, an administrator must update the database. The following email notification is sent to the workflow administrator stating that a transaction requires his or her attention:

For	***Template***
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_MANUAL_PROC_REQ_SINGLE_EE
Reporting Change	HR_MANUAL_PROC_REQ_REPCHG_EE

If the update to the database is a success, the system sends the following email to the originator:

For	***Template***
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_TRANSACTION_SAVED_SINGLE_EE
Reporting Change	HR_TRANSACTION_SAVED_MULTI_EE

If the update to the database is a success, the system checks to see if the administrator needs to be notified. The system sends the following email, if the check boxes for Notify On Success or Notify on Warnings on the Admin Notification Setup page are selected, or if the system updated the database with a future dated row:

For	***Template***
Change Full/Part Status Change Location Retire Employee Terminate Employee	
Promote Employee Transfer Employee	HR_CI_UPDATE_SUCCESS HR_CI_WARNINGS_SINGLE HR_CI_FUTURE_ROWS_EXIST
Reporting Change	HR_CI_UPDATE_SUCCESS_MULT HR_CI_WARNINGS_MULTI HR_CI_FUTURE_ROWS_EXIST_MULTI

Prerequisites for Managing Direct Reports

Before you can use the eProfile Manager Desktop transactions you must:

1. Activate eProfile Manager Desktop 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 only occur 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 Manager Desktop uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. PeopleSoft delivers the following permission lists and roles for eProfile Manager Desktop:

Permission Lists	***Roles***
HCCPSS2000	Manager

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

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

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

4. Define whether a transaction uses an approval process.

   You can activate an approval process for the Promote Employee, Reporting Change, and Transfer Employee transactions using the self service Workflow Configurations page. If the system identifies that an approval process is used by a transaction, the HCM Approval Framework for the transaction is followed. PeopleSoft delivers the PromoteEmployee, TransferEmployee, and ReportingChgEmployee approval processes.

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

5. Define if 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)*".

6. Link the self-service transaction to the approval process ID in the Approve Workflow Engine (AWE) and Transaction section on the Workflow Transactions page.

   PeopleSoft delivers the PromoteEmployee, ReportingChgEmployee, and TransferEmployee approval processes already linked to their appropriate self-service transaction.

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

7. 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)*".

8. Set up the manager's data access to their direct reports.

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

   Note: This does not apply to the Promote Employee, Reporting Change, and Transfer Employee transactions.

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

Viewing Direct Reports' Personal Information

These topics provide an overview of viewing personal information for direct report and list the pages used to view employees' personal information for those direct reports.

Understanding Viewing Personal Information

The View Employee Personal Information transaction enables managers to view information about their direct reports. The Employee Information page displays basic job information and provides links to other information such as:

- Home, mailing, and email addresses.
- Phone numbers.
- Emergency contacts.
- Instant message IDs.
- Profile information.
- Training information.
- Compensation information and history.

Pages Used to View Personal Information

Page Name	***Definition Name***	***Navigation***	***Usage***
View Employee Personal Information	HR_DR_DIRECTREPORT	• Manager Self Service, Job and Personal Information, View Employee Personal Info, View Employee Personal Information • Click the Return to Select Employees link at the bottom of the Employee Information page or the Employee Information linked pages.	Select the direct employee whose information you want to review as of a reporting date.

Page Name	***Definition Name***	***Navigation***	***Usage***
Employee Information	HR_EE_INF_HOME	Click the Select button for one of your employees on the View Employee Personal Information page.	View job information for a specific direct report. To view another employee's information, click the Return to Select Employees link at the bottom of the page. The system displays the View Employee Personal Information page, where you need to enter the as of date you wish to view the employee's information prior to selecting the employee.
Home and Mailing Addresses	HR_EE_ADDRESS_MGR	Click the Home and Mailing Addresses link on the Employee Information page.	View the employee's home and mailing address information.
Email Addresses	HR_EMAIL_ADDRESSES	Click the Email Addresses link on the Employee Information page.	View the employee's home and mailing address information.
Phone Numbers	HR_PERSONAL_PHONE	Click the Phone Numbers link on the Employee Information page.	View the employee's phone numbers.
Emergency Contacts	HR_EMERGENCY_CNTCT	Click the Emergency Contacts link on the Employee Information page.	View the employee's emergency contact information.
Instant Message IDs	HR_IM_CHAT_IDS	Click the Instant Message IDs link on the Employee Information page.	View the employee's instant message IDs.
Birthday	HR_EE_BIRTHDATE	Click theBirthday link on the Employee Information page.	View the employee's birth date information.
Total Compensation	HR_SS_TC_MG_REVIEW	Click the Total Compensation link on the Employee Information page.	View the employee's total compensation information.
Compensation History	HR_SS_MG_COMP_HIST	Click the Compensation History link on the Employee Information page.	View the employee's salary, variable cash, and variable noncash information.
Training Summary	HR_TRN_SUMMARY	Click the Training link on the Training page.	View the employee's internal and professional training information.
Current Person Profile	JPM_JP_PROFL2_EMP	Click the Person Profile link on the Employee Information page.	View the employee's profile information, such as competencies, education, and so forth.

Changing Full-Time or Part-Time Status

These topics provide an overview of part-time or full-time status changes and list the pages used to change part- or full-time status.

Understanding Changing Full-Time or Part-Time Status

PeopleSoft provides the Change Full/Part Time Status transaction that enables managers to change employees from part-time status to full-time status and back. To change the full or part-time status, managers.

1. Access the Change Full/Part Time Status page.
2. Enter the effective date for the change and click the Continue button.
3. Select the employee and click the Continue button.

   You may select more than one employee.
4. Select the new status and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Change Part- or Full-Time Status.

See Understanding the Management of Direct Reports.

Pages Used to Change Part- or Full-Time Status

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Full/Part Time Status - Employee Selection Criteria	HR_DR_DIRECTREPORT	Manager Self Service, Job and Personal Information, Change Full/Part Time Status, Change Full/Part Time Status	Enter the employee reporting as of date and select the employee whose status you want to change.
Change Full/Part Time Status Change	HR_MGR_FULL_PART	Click theSelect button for an employee on the Change Full/ Part Time Status - Employee Selection Criteria page.	Select a status and initiate the request to change an employee's status to full or part-time.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Change Full/Part Time Status page.	Confirms the request was successfully submitted.

Changing Reporting Managers

These topics provide an overview of change reporting managers and list the pages used to change reporting managers.

Understanding Changing Reporting Managers

PeopleSoft provides three transactions to facilitate the changing of an employee's reporting manager:

- Request Reporting Change.
- Approve Reporting Change.
- View Reporting Change Status.

Requesting a Reporting Change

To request a change in an employee's reporting manager, managers:

1. Access the Reporting Change page.
2. Enter the effective date for the change and click the Continue button.
3. Select the check box next to the name of the employee or employees for which the change is to be made and click the Continue button.
4. Select the new Supervisor or Department ID and click the Submit button.

Approving a Reporting Change

To approve a request:

1. Access the Approve Reporting Change - Select a Reporting Change Request page.
2. Select the reporting change you want to approve.
3. Enter a comment relevant to the approval or denial of the request.
4. Click the Approve or Deny button.

Viewing a Reporting Change Status

To view the status of a reporting change request:

1. Access the Reporting Change Status - Select a Reporting Change Request page.
2. Select the transaction you want to view.

Pages Used to Change Reporting Managers

Page Name	***Definition Name***	***Navigation***	***Usage***
Reporting Change - Employee Selection Criteria	HR_DR_DIRECTREPORT	Manager Self Service, Job and Personal Information, Request Reporting Change, Reporting Change	Enter the employee reporting as of date and select the employee whose reporting you want to change.

Page Name	***Definition Name***	***Navigation***	***Usage***
Request Reporting Change	HR_MGR_REPORT_CHNG	Select from a list of employees and click the Continue button on the Reporting Change - Employee Selection Criteria page.	Enter the ID of the new manager or supervisor.
Approve Reporting Change - Select a Reporting Change Request	HR_MGR_REP_APPR_L	Manager Self Service, Job and Personal Information, Approve Reporting Change, Approve Reporting Change - Select a Reporting Change Request	Select the transaction to approve or deny.
Reporting Change Details	HR_MGR_REPORT_CHNG	Click the transaction number link on the Approve Reporting Change - Select a Reporting Change Request page or the Reporting Change Status - Select a Reporting Change Request page	Approve or deny the request. View the status of reporting change requests that you have submitted.
Submit Confirmation	HR_REPORT_CONFIRM	• Click the Submit button on the Request Reporting Change page. • Click the Approve or Deny button on the Reporting Change Details page.	Confirms the request was successfully submitted.
Reporting Change Status - Select a Reporting Change Request	HR_MGR_REP_VW_L	Manager Self Service, Job and Personal Information, View Reporting Change Status, Reporting Change Status - Select a Reporting Change Request	Select the transaction to view.

Changing Work Locations

These topics provide an overview of the changing work locations process and list the pages used to change work locations.

Understanding Changing Work Locations

PeopleSoft provides the Request Location Change transaction that enables managers to initiate the work location change process. To change the work location for an employee, managers:

1. Access the Change Location page.
2. Enter the effective date for the change and click the Continue button.
3. Select the employee and click the Continue button.

You may select more than one employee.

4. Select the new location and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Change Locations.

See Understanding the Management of Direct Reports.

Pages Used to Change Locations

Page Name	*Definition Name*	*Navigation*	*Usage*
Location Change - Employee Selection Criteria	HR_DR_DIRECTREPORT	Manager Self Service, Job and Personal Information, Request Location Change, Location Change	Enter the employee reporting as of date and select an employee or employees whose location you want to change.
Request Location Change	HR_MGR_LOCATION	Click the Continuebutton on the Location Change - Employee Selection Criteria page.	Initiate the request to change the employee's location by entering the new location and clicking Submit.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Request Location Change page.	Confirms the request was successfully submitted.

Promoting Employees

These topics provide an overviews of employee promotions, promoting employees, approving promotions, and viewing promotion status, and list the pages used for employee promotions.

Understanding Employee Promotions

PeopleSoft provides three self-service transactions to facilitate employee promotions:

- Promote Employees, which enables managers to submit a promotion request.
- Approve Promotion, when enables approving managers to either approve or deny the request.
- View Promotion Status, which enables managers to review where the request stands in the approval process.

Requesting a Promotion

To request an employee's promotion, managers:

1. Access the Promote Employee page.
2. Enter the effective date and click the Continue button.

3. Select the employee or employees to promote and click the Continue button.

4. Enter the reason for the promotion and the promotion method, and click the Submit button.

   If position management is set to None, then the only promotion method allowed is *By Department and/or Job Title.* If position management is set to Full, then *By Position* is the only promotion method allowed.

Approving a Promotion

To approve a promotion, the approving manager or proxy:

1. Access the Approve Promotion page.

2. Click the Approve or Deny button.

3. To add an approver, click the (+) plus button and select the approver from the list.

4. Click the Submit button.

Viewing a Promotion Status

To view the status of an employee's promotion:

1. Access the Promotion Status - Select a Transaction page.

2. Select the transaction you want to view.

Pages Used to Promote Employees

Page Name	***Definition Name***	***Navigation***	***Usage***
Promote Employee - Employee Selection Criteria	HR_DR_DIRECTREPORT	Manager Self Service, Job and Personal Information, Promote Employee, Promote Employee	Enter the employee reporting as of date and select the employee to promote.
Promote Employee	HR_PROMOTE_EE	• Click the Select button on the Promote Employee - Employee Selection Criteria page. • Select a person's name from the Approve Promotion page.	Request a promotion for one of your direct report employees or approve or deny a promotion request for an employee.
Submit Confirmation	HR_PROMOTE_CONFIRM	Click the Submit button on the Promote Employee page.	Confirms the request was successfully submitted.
Approve Promotion	HR_PROMOTE_APPR_L	Manager Self Service, Job and Personal Information, Approve Promotion, Approve Promotion	Select an employee that has a promotion transaction request to approve or deny the promotion for that employee.

Page Name	Definition Name	Navigation	Usage
Select a Transaction - Employee Promotion Requests	HR_PROMOTE_VW_L	Manager Self Service, Job and Personal Information, View Promotion Status, Select a Transaction - Employee Promotion Requests	View the status of an employee's promotion request that you have submitted.

Retiring Employees

These topics provide an overview of retiring employees and list the pages used to retire employees.

Understanding Retiring Employees

PeopleSoft provides the Retire Employee transaction that enables managers to initiate the retirement process. To retire an employee, managers

1. Access the Retire Employee page.
2. Enter the effective date for the retirement and click the Continue button.
3. Select the employee to retire and click the Continue button.
4. Enter the reason for the retirement and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Retire Employees.

See Understanding the Management of Direct Reports.

Pages Used to Retire Employees

Page Name	Definition Name	Navigation	Usage
Retire Employee - Employee Selection Criteria	HR_DR_DIRECTREPORT	Manager Self Service, Job and Personal Information, Retire Employee, Retire Employee	Enter the employee reporting as of date and select an employee for retirement.
Retire Employee	HR_RETIRE_EE	Click the Select button for an employee on the Retire Employee - Employee Selection Criteria page.	Initiate the retirement process for one of your direct reports.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Retire Employee page.	Confirms the request was successfully submitted.

Terminating Employees

These topics provide an overview of terminating employees and lists the pages used to terminate employees.

Understanding the Terminating Employees Process

PeopleSoft provides the Terminate Employee transaction that enables managers to initiate the termination process. To terminate an employee, managers

1. Access the Terminate Employee page.
2. Enter the effective date for the termination and click the Continue button.
3. Select the employee to terminate and click the Continue button.
4. Enter the reason for the termination and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Terminate Employees.

See Understanding the Management of Direct Reports.

Pages Used to Terminate Employees

Page Name	***Definition Name***	***Navigation***	***Usage***
Terminate Employee - Employee Selection Criteria	HR_DR_DIRECTREPORT	Manager Self Service, Job and Personal Information, Terminate Employee, Terminate Employee	Enter the employee reporting as of date and select the employee to terminate.
Terminate Employee	HR_EE_TERMINATE	Click theSelect button for an employee on the Terminate Employee - Employee Selection Criteria page.	Initiate the termination process for one of your direct reports.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Terminate Employee page.	Confirms the request was successfully submitted.

Transferring Employees

These topics provide an overview of transferring employees and list the pages used to transfer employees.

Understanding Transferring Employees

PeopleSoft provides three transactions to facilitate the transfer of an employee:

- Transfer Employee

- Approve Transfer
- View Transfer Status

Transferring an Employee

To request an employee transfer:

1. Access the Transfer Employee page.
2. Enter the effective date for the transfer and click the Continue button.
3. Select the employee to transfer and click the Continue button.
4. Enter the detail information about the transfer and click the Submit button.

Note: If you enter a supervisor ID that indicates that the employee would report to him or herself, the system issues a warning message to confirm that this is what you intended to do. If you do not change the supervisor ID and click Submit again, the system will process this request with the employee reporting to him or herself.

Approving a Transfer

To approve an employee transfer:

1. Access the Approve Transfer - Select a Transaction page.
2. Select the transaction you want to approve or deny.
3. Click the Approve or Deny button.

Viewing a Transfer Status

To view an employee transfer:

1. Access the Transfer Status - Select a Transaction page.
2. Select the transaction you want to view.

Pages Used to Transfer Employees

Page Name	***Definition Name***	***Navigation***	***Usage***
Transfer Employee - Employee Selection Criteria	HR_DR_DIRECTREPORT	Manager Self Service, Job and Personal Information, Transfer Employee, Transfer Employee	Enter an employee reporting as of data and Select the employee to transfer.

Page Name	***Definition Name***	***Navigation***	***Usage***
Transfer Employee Approve Transfer Transfer Status Details	HR_TRANSFER_EE	• Click theSelect button for an employee on the Transfer Employee - Employee Selection Criteria page. • Click the OK button on the Submit Confirmation page. • Click the name link on the Approve Transfer page. • Click the name link on the View Transfer Status page.	Request a transfer for one of your direct report employees. Approve or deny a transfer. View summary information for submitted transfers.
Submit Confirmation	HR_TRANSFER_CONFRM	• Click theSubmit button on the Transfer Employee page. • Click the Approve or Deny button on the Approve Transfer page.	Confirms the request was successfully submitted.
Approve Transfer - Employee Transfer Requests	HR_TRANSFER_APPR_L	Manager Self Service, Job and Personal Information, Approve Transfer, Approve Transfer	Select a transaction to approve or deny.
Transfer Status - Employee Transfer Requests	HR_TRANSFER_VW_L	Manager Self Service, Job and Personal Information, View Transfer Status, View Transfer Status	Select a transfer transaction to view.

Changing Jobs Requiring Works Council Approval

These topics provide an overview of requesting job changes requiring Works Council approval and list the pages used to request job changes requiring Works Council approval.

Understanding Job Changes

The Request Job Change transaction is the self-service transaction that works with Manage Labor Administration. Managers use this transaction to enter the regulatory region, action code, and reason for the action. The HR administrator is notified and reviews the request. If the HR administrator approves the request, the Works Council is notified.

Managers can use the Review Job Change Request transaction to see the status of the request.

See "Understanding the Works Councils Approval Business Process *(PeopleSoft HCM 9.2: Manage Labor Administration)*".

Pages Used to Change Jobs

Page Name	***Definition Name***	***Navigation***	***Usage***
Job Change Request - Select Employee	WC_JCR_SEARCH	• Manager Self Service, Job and Personal Information, Request Job Change, Job Change Request - Select Employee • Workforce Administration, Job Information, Manager Self Service, Job and Personal Information, Request Job Change, Job Change Request - Select Employee	Enter the required data and initiate the job change request. The Job Change Request page requires different data entry depending on the type of request—either hire, transfer or termination.
Job Change Request Status Review My Job Change Request	WC_JCR_STATUS_INQ	• Manager Self Service, Job and Personal Information, Review Job Change Request, Review Job Change Request • Workforce Administration, Labor Administration, Review My Job Change Request, Review My Job Change Request	Review Job Change requests. Enter the search criteria and click Search.
Review My Job Change Request	WC_JCR_STATUS2_INQ	Workforce Administration, Job Information, Review My Job Change Request, Review My Job Change Request	Review the status of a job change request requiring Works Councils approval.
Job Change Request	WC_JOB_CHG_REQ	Workforce Administration, Job Information, Review All Job Change Request, Job Change Request	Review the status of job change requests requiring Works Councils approval.
Job Change Request Approval	WC_JCR_APPR_INQ	Workforce Administration, Labor Administration, Job Change Request Approval, Job Change Request Approval	Mass-approve job change requests.

Reviewing Military Rank Change Requests

These topics provide an overview of reviewing military rank change requests and list the page used to review military rank change requests.

Reviewing Military Rank Change Requests

Stakeholders view rank change request transactions on the Review Rank Change Request MIL page, where they can approve or deny the request.

See "Managing Military Rank Change Requests *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

Page Used to Review Military Rank Change Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Review Rank Change Request MIL	MIL_RANK_CHNG_APPR	Manager Self Service, Job and Personal Information, Review Rank Change Request MIL, Review Rank Change Request MIL	Review, approve, or deny a rank change request. View the status monitor of the approval chain.

Adding and Reviewing Hires

These topics provide an overview of adding and reviewing hires, personal data, job data, or profile transactions and list the pages used to add and review hires, personal data, job data, or profile transactions.

Adding and Reviewing Hires, Personal Data, Job Data, or Profile Transactions

The Smart HR process (template-based transactions) offers a way to streamline the repetitive data entry by reducing the current data entry and enabling managers to expedite the hiring or other transaction update processes without needing to access the Personal, Job Data, or Profile pages. Transaction templates are set up by a template administrator and are intended for end-user to enters data for persons being added to or updated in the database. The amount of data an end-user enters is dependant on the types of templates created. The template determines whether the end-user's data will automatically update the HR system, or if it requires an HR administrator to review it first. Also, the HR administrator is sent any errors that occur when the end-user saves a person's data to the database for completion.

To view a detailed description of the Smart HR Transactions pages, see "Using Smart HR Templates and Transactions *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

Page Used to Add and Review Hires, Personal Data, Job Data, or Profile Transactions

Page Name	***Definition Name***	***Navigation***	***Usage***
Smart HR Transactions	HR_TBH_EULIST	Manager Self Service, Job and Personal Information, Smart HR Termplate, Smart HR Transactions	Select a template or person to process a template-based transaction.

Page Name	***Definition Name***	***Navigation***	***Usage***
Enter Transaction Details	HR_TBH_ADD	• Select a template from the Select Template field on the Template-Based Hire page and click Create Transaction. • Select a name link from the Name field on the Template-Based Hire page.	Enter transaction details to start the Smart HR transaction process for a person, such as the persons's job effective date.
Enter Transaction Information	HR_TBH_DATA	Click Continue on the Enter Transaction Details page	Enter worker information details for the person for whom you are performing a transaction. Only the fields that have been defined on the template you associated with this employee will display for data entry.
Person Match Found	HR_TBH_SRMATCH	Click Save and Submit on the Enter Transaction Information page.	Select an existing person in the database if a match is found on the person, or continue with the transaction. Complete a transacton when a person match is found.
Select an Action	HR_TBH_ACTION	Click the Select button on the Person Match Found page.	Select an action if a matching person is found in the database.
Confirmation Further Processing Required	HR_TBH_CONFIRM	Click Save and Submit on the Smart HR Transactions pages.	Displays the type of confirmation after saving a Smart HR transaction. When the transaction is saved successfully and automatic database updates is turned on, the Contract Data link appears, which enables users with security access to the contract pages to update contract information for a person.
Transaction Status	HR_TBH_STATUS	• Manager Self Service, Job and Personal Information, Smart HR Transactions, Transaction Status • Click the Transaction Status link on the Smart HR Transactions page.	View the status of a Smart HR transaction of transactions with a pending, cancelled, or processed status.

Chapter 4

(USF) Managing Direct Reports

Understanding Self-Service Transactions and Approvals

This overview describes:

- Manager self-service transactions.
- Approvals and the Approval Framework
- Work-in-progress statuses for approval steps.
- Personnel Action Request (PAR) defaults for approved transactions

Manager Self-Service Transactions

PeopleSoft eProfile Manager Desktop provides seven self-service transactions for managing direct reports.

- Change part-time or full-time status.
- Change work location.
- Promote employees.
- Reassign employees.
- Request reporting changes.
- Retire employees.
- Separate employees.

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 transactions and to perform various actions on submitted transactions.

Related Links

"Understanding Approvals *(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 framework is necessary so that you can associate federal work-in-progress statuses with approval steps. The setup for manager self-service transactions is the same as the setup for employee transactions.

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.

Related Links

"Defining WIP Statuses for Approval Steps *(PeopleSoft HCM 9.2: eProfile)*"
"Understanding WIP Management System Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*"

PAR Defaults for Approved Transactions

In PeopleSoft HR, the 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.

Four of the seven manager self-service transactions are automatically transferred to the PAR system after all approvals are complete. The system uses a component interface for this transfer. 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. You provide these defaults in the Transaction Setup component (the same component where you associate approval steps with WIP statuses).

See "Defining PAR Tracking Data *(PeopleSoft HCM 9.2: eProfile)*", "Understanding WIP Management System Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Three other transactions are position-controlled, so changes are made to the position and then propagated out to the persons in the positions. These transactions are not automatically pushed to the PAR system. Instead, the Personnelist / Federal Self Service Administrator must enter the information in the PAR system manually.

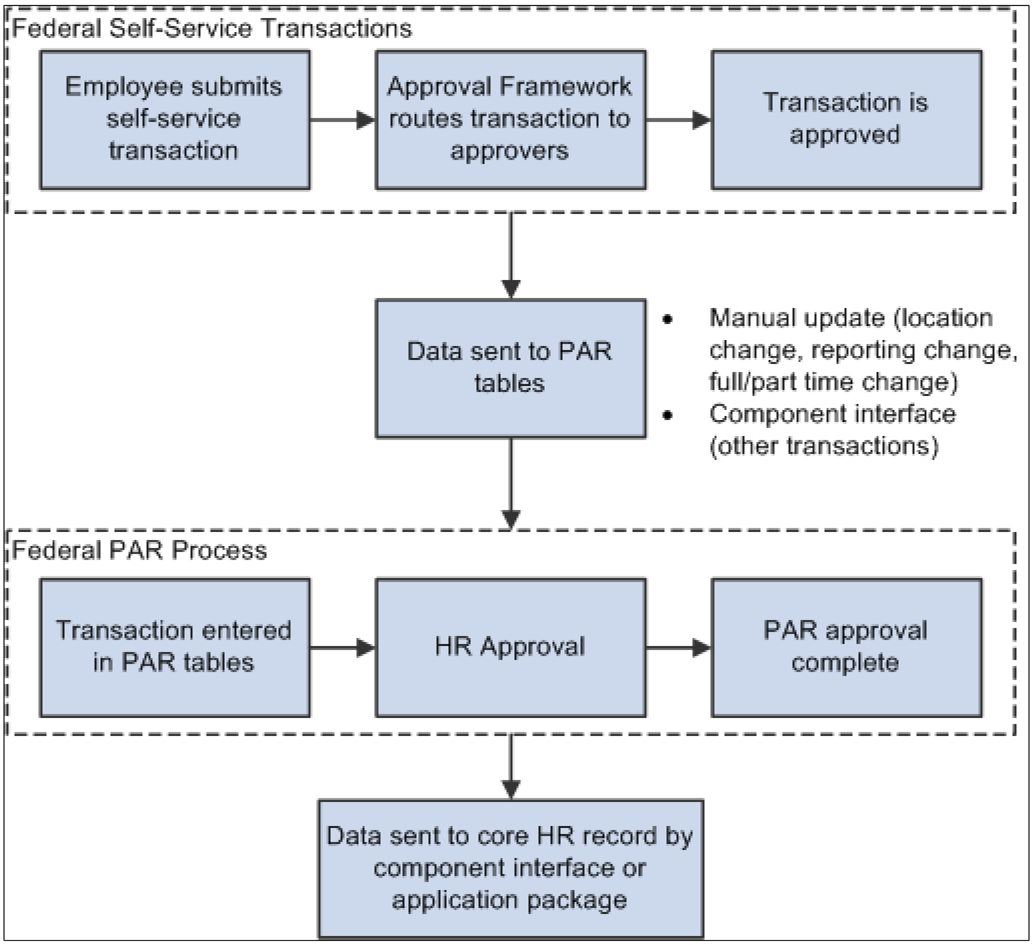
The following table shows which transactions are automatically pushed to the PAR tables and which ones require an administrator to manually enter data into the PAR tables:

PAR Table Update Method	***Transactions***
Manual (administrator)	• Request reporting changes. • Change part-time or full-time status. • Change work location.

PAR Table Update Method	***Transactions***
Automatic (component interface)	• Promote employees. • Reassign employees. • Retire employees. • Separate employees.

Image: Process flow for federal self-service transactions

This process flow diagram illustrates how 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:



Prerequisites for Managing Direct Reports

Before you can use the eProfile Manager Desktop transactions, you must:

1. Activate eProfile Manager Desktop 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 when 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 Manager Desktop uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. The following tables lists the delivered permission lists and roles for eProfile Manager Desktop:

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; the email routings that are used by workflow will not work.

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

4. Configure the Approval Framework for approval processing.

   Oracle delivers preconfigured approval processing for all U.S. federal manager self-service transactions, but you should review the delivered configuration and modify it as necessary.

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

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

   eProfile Manager Desktop 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.

6. Set up group build if you plan to use Group ID as the access type for a manager's direct reports.

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

7. Configure the USFED WIP transaction.

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

Changing Part-Time or Full-Time Status

These topics provide an overview of the process flow for part-time or full-time status changes and list the pages that are used to change part-time or full-time status.

Understanding the Process Flow for Part-Time or Full-Time Status Changes

To change an employee's part-time or full-time status, managers:

1. Access the Change Full/Part-time Status page.
2. Enter the effective date for the change, and click Continue.
3. Select the employee for whom the change in part-time or full-time status is being requested, and click Continue.

   The Change Full/Part-time Status page appears with the employee's current job data. The New Status fields are populated by default with the new status for the employee.
4. Enter any relevant comments, and click Submit.

   When the Submit button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Pages Used to Change Part-Time or Full-Time Status

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Full/Part-time Status	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Change FTPT Status (USF), Change Full/Part time Status	Enter the effective date for the change.
Change Full/Part-time Status – Select Employee	HR_DR_SELECT_EMPS	Click Continue on the Change Full/Part-time Status page.	Select the employee to have the full/part-time status changed.
Full/Part Time Status Change	FE_MGR_FULL_PART	Click Continue on the Change Full/Part-time Status - Select Employee page.	Submit a change to the employee's full/part-time status. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Changing Work Location

These topics provide an overview of work location changes and list the pages that are used to change work location.

Understanding Work Location Changes

Requests can be made for an individual employee or a group of employees. To request a change to work location, managers:

1. Access the Location Change page.
2. Enter the date that the change in reporting structure goes into effect, and click Continue.
3. Select the employee or employees for whom the change in location is being requested, and click Continue.

   The Location Change page appears with the employee or employees' current job row data.
4. Enter the new location and any relevant comments, and then click Submit.

   When the Submit button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Pages Used to Change Work Location

Page Name	***Definition Name***	***Navigation***	***Usage***
Location Change	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Location Change (USF), Location Change	Enter the effective date for the change.
Location Change - Select Employees	HR_DR_SELECT_EMPS	Manager Self Service, Job and Personal Information, Location Change (USF), Location Change - Select Employees	Select one or more employees requiring a change in their work location.
Location Change - Employee	FE_MGR_LOC_CHG	Click the Continue button on the Location Change - Select Employees page.	Enter the location and submit the location change request. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Promoting Employees

These topics provide an overview of employee promotions and list the pages that are used to promote employees.

Understanding Employee Promotions

To request a promotion, managers:

1. Access the Promote Employee page.
2. Enter the date that the promotion goes into effect, and click Continue.
3. Click the name of the employee for whom the promotion is being requested.

   The Promote Employee page appears and displays the employee's current job data.
4. Enter the information on the page, and click Submit.

   When the Submit button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Pages Used to Promote Employees

Page Name	***Definition Name***	***Navigation***	***Usage***
Promote Employee	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Promote Employee (USF), Promote Employee	Enter the effective date for the change.
Promote Employee - Select Employee	HR_DR_SELECT_EMPS	Click the Continue button on the Promote Employee page.	Select an employee for whom you want to request a promotion.
Promote Employee - Employee	FE_MGR_PROMOTE	Click the Continue button on the Promote Employee - Select Employee page.	Submit a promotion request.
Promote Employee - Confirm	FE_PROMOTE_CONFIRM	Click the Submit button on the Promote Employee - Employee page.	Confirm that the transaction has been submitted and review the approval process for the transaction.

Reassigning Employees

These topics provide an overview of employee reassignments and list the pages that are used to reassign employees.

Understanding Employee Reassignments

To reassign an employee, managers:

1. Access the Reassign Employee page.
2. Enter the effective date for the reassignment, and click Continue.
3. Select the employee for whom the reassignment is being requested, and click Continue.

   The Reassign Employee page appears with the employee's current job data.
4. Enter the new position number, the reason for the reassignment, any comments, and click Submit.

   When the Submit button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Pages Used to Reassign Employees

Page Name	*Definition Name*	*Navigation*	*Usage*
Reassign Employee	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Reassign Employee (USF), Reassign Employee	Enter the effective date for the change.
Reassign Employee - Select Employee	HR_DR_SELECT_EMPS	Click the Continue button on the Reassign Employee page.	Select an employee for whom you want to request a reassignment.
Reassign Employee	FE_MGR_REASSIGN	Select an employee on the Reassign Employee - Select Employee page.	Submit a request for reassignment.
Reassign Employee - Employee	FE_REASSIGN_CONFRM	Click the Submit button on the Reassign Employee page.	Confirm that the transaction has been submitted and review the approval process for the transaction.

Requesting Reporting Changes

These topics provide an overview of reporting changes and list the pages that are used to request reporting changes.

Understanding Reporting Changes

Requests can be made for an individual employee or a group of employees. To request a reporting change, managers:

1. Access the Reporting Change page.
2. Enter the date that the change in reporting structure goes into effect, and click Continue.

3. Select the employee or employees for whom a change in reporting structure is being requested, and click Continue.

   The Reporting Change page appears with the employee or employees' current job data.

4. Enter the new reporting position, any relevant comments, and then click Submit.

   When the Submit button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Pages Used to Request Reporting Changes

Page Name	***Definition Name***	***Navigation***	***Usage***
Reporting Change	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Reporting Change (USF), Reporting Change	Enter the effective date for the change.
Reporting Change - Select Employees	HR_DR_SELECT_EMPS	Click the Continue button on the Reporting Change page.	Select one or several employees for whom you want to request a reporting change.
Reporting Change - Employee	FE_MGR_REPORT_CHNG	Click the Continue button on the Reporting Change - Select Employees page.	Submit the request for a reporting change. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction.

Retiring Employees

These topics provide an overview of retiring employees and list the pages that are used to retire employees.

Understanding Retiring Employees

To request an employee's retirement, managers:

1. Access the Retire Employee page.

2. Enter the effective date for the retirement, and click Continue.

3. Select the employee for whom the retirement is being requested, and click Continue.

   The Retire Employee page appears with the employee's current job data.

4. In the Retirement Type field, select the reason for the retirement and click Submit.

When the Submit button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Pages Used to Retire Employees

Page Name	***Definition Name***	***Navigation***	***Usage***
Retire Employee	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Retire Employee (USF), Retire Employee	Enter the effective date for the change.
Retire Employee - Select Employee	HR_DR_SELECT_EMPS	Click the Continue button on the Retire Employee page.	Select one or several employees for whom you want to request a retirement.
Retire Employee - Employee	FE_MGR_RETIRE	Click the employee name link on the Retire Employee - Select Employee page.	Submit the retirement request.
Retire Employee - Confirm	FE_RETIRE_CONFIRM	Click the Submit button on the Retire Employee page.	Confirm that the transaction has been submitted and review the approval process for the transaction.

Separating Employees

These topics provide an overview of separating employees and list the pages that are used to separate employees.

Understanding Separating Employees

To request an employee's separation, managers:

1. Access the Separate Employee page.
2. Enter the effective date for the separation, and click Continue.
3. Select the employee for whom the separation is being requested, and click Continue.

   The Separate Employee page appears with the employee's current job data.
4. Select the reason for the separation.

   If Transfer to New Agency is selected as the reason for the separation, the Agency field appears.
5. If Transfer to New Agency was selected as the reason for the separation, select an agency.
6. Enter any relevant comments, and click Submit.

When the Submit button is clicked, the system invokes the Approval Framework approval process and displays a confirmation page that shows the chain of approvers.

Pages Used to Separate Employees

Page Name	***Definition Name***	***Navigation***	***Usage***
Separate Employee	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Separate Employee (USF), Separate Employee	Enter the effective date for the change.
Separate Employee - Select Employee	HR_DR_SELECT_EMPS	Click Continue on the Separate Employee page.	Select the employee to be separated.
Separate Employee - Employee	FE_MGR_SEPARATE	Select the employee on the Separate Employee - Select Employee page.	Submit a request for separation.
Separate Employee - Confirm	FE_SEPARATE_CONFRM	Click the Submit button on the Separate Employee - Employee page.	Confirm that the transaction has been submitted and review the approval process for the transaction.

Approving Change Requests

These topics provide an overview of approvals and list the pages that are used to approve change requests.

Understanding Approvals

This topic describes how you approve change requests that have been submitted by employees or managers.

Employee and Manager Transactions

Managers approve change requests submitted by their direct reports, whether those direct reports are employees who submit requests through PeopleSoft eProfile or other managers who submit requests through eProfile Manager Desktop.

The Approval Framework controls the approval processes for both manager and employee transactions. PeopleSoft delivers fully configured approval processes 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.

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

These are the delivered U.S. federal self-service transactions and their Approval Framework process definitions:

Transaction	***Transaction Type***	***Navigation***	***Approval Process ID***
Name change	Employee	Self Service, Personal Information, Name Change (USF)	FederalNameChg
Address change	Employee	Self Service, Personal Information, Address Change (USF)	FederalAddrChg
Marital status change	Employee	Self Service, Personal Information, Marital Status (USF)	FederalMarChg
Full time/part-time status change	Manager	Manager Self Service, Job and Personal Information, Change FTPT Status (USF)	FederalFTPTChange
Location change	Manager	Manager Self Service, Job and Personal Information, Location Change (USF)	FederalLocationChg
Promote employee	Manager	Manager Self Service, Job and Personal Information, Promote Employee (USF)	FederalPromoteEmployee
Reassign employee	Manager	Manager Self Service, Job and Personal Information, Reassign Employee (USF)	FederalReassignEmployee
Reporting change	Manager	Manager Self Service, Job and Personal Information, Reporting Change (USF)	FederalRportingChg
Retirement	Manager	Manager Self Service, Job and Personal Information, Retire Employee (USF)	FederalRetireEmployee
Separation	Manager	Manager Self Service, Job and Personal Information, Separate Employee (USF)	FederalSeparateEmployee

Transaction Review and Approval

To review status information for transactions that use the Approval Framework to manage approval processing, use the generic Approval Framework transaction review pages. These pages displays grids that list all of the user's approval transactions, including transactions that the user submitted and transactions that the user is being asked to approve. There are separate grids for each transaction type.

Links in the grids provide access to detail pages where you can see a graphical representation of the approval steps.

If you are the current approver, there is an Approve/Deny link that you use for accessing the detail page. In this mode, the detail page displays buttons that you use to either approve or deny the request.

If you are not the current approver, there is a View Details link instead of an Approve/Deny link. In this mode, the detail page displays transaction and approval details, but the Approve and Deny buttons are not available.

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

Pre-Approval Framework Approval Data

Before federal self-service transactions began using the Approval Framework to manage approval processing, managers used a federal-specific review component to view lists of submitted transactions. This component is still available, but it does not display approval processes that use the Approval Framework. Use this component only to review transactions that were submitted for approval before implementation of the Approval Framework.

Like the page for reviewing Approval Framework transactions, the page for reviewing pre-Approval Framework transactions lists the user's transactions and provides links to detail pages. The detail pages display the approval steps in a grid format rather than using the Approval Framework's graphical representation.

Note: Pre-Approval Framework transactions are view-only; you cannot take any approval-related action.

Pages Used to Approve Change Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Review Transactions	HCM_APPR_STATUS	• Manager Self Service, Review Transactions • Self Service, Review Transactions	Search for and view summary information for self-service transactions that you submitted or for which you are an approver. This page supports only transactions that were submitted *after* implementation of the Approval Framework.

Page Name	*Definition Name*	*Navigation*	*Usage*
Name Change Marital Status Change Address Change Full/Part Time Status Change Approve Location Change Promote Employee Reassign Employee Approve Reporting Change Separate Employee	FE_EE_NAME_STS FE_MARITAL_STS FE_ADDRESS_STS FE_MGR_FULL_PART FE_MGR_LOC_CHG FE_PROMOTE_APPROVE FE_REASSIGN_APPROV FE_MGR_REPORT_CHNG FE_SEPARATE_APPRVE FE_RETIRE_APPROVE	On the Review Transactions page, click the Approve Deny link or the View Details link for an approval transaction.	Review transaction details and the status of the approval process. If you are the current approver, use this page to approve or deny the transaction.
Review Change Requests - Select a Request	FE_MGR_CHG_REQ_STA	Manager Self Service, Job and Personal Information, Review Change Requests (USF), Review Change Requests - Select a Request	Review information about change requests that were processed before federal self-service transactions began using the Approval Framework to manage approval processing. This page supports only transactions that were submitted *before* implementation of the Approval Framework.

Administering Approvals

These topics provide an overview of approval administration and list the pages used to administer approvals.

Understanding Approval Administration

The Approval Framework provides its own approval monitor that you can use to review and, if necessary, perform the actions that have been configured as allowable for the federal transactions.

Additionally, the Workflow Inquiry (USF) page that you use to monitor federal self-service transactions supports both Approval Framework approval transactions and transactions that predate the conversion to Approval Framework processing.

Related Links

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

"(USF) Reviewing Federal Self-Service Transactions *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Pages Used to Administer Approvals

Page Name	*Definition Name*	*Navigation*	*Usage*
Monitor Approvals	EOAW_ADM_MON_SRC	Workforce Administration, Self Service Transactions, Approvals and Delegation, Administer Approvals	Review all Approval Framework transactions, including federal-self service transactions, and take action to resolve routing errors.
Workflow Inquiry (USF)	FE_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry (USF), Workflow Inquiry	Review activity for federal self-service transactions

Chapter 5

Using the Manager Dashboard

Understanding the Manager Dashboard Content and Layout

The Manager Dashboard displays various pagelets showing a quick synopsis of information about your direct report. Many of the links within the pagelets will direct you to actually components throughout the HCM system with links on those pages to return you to the dashboard.

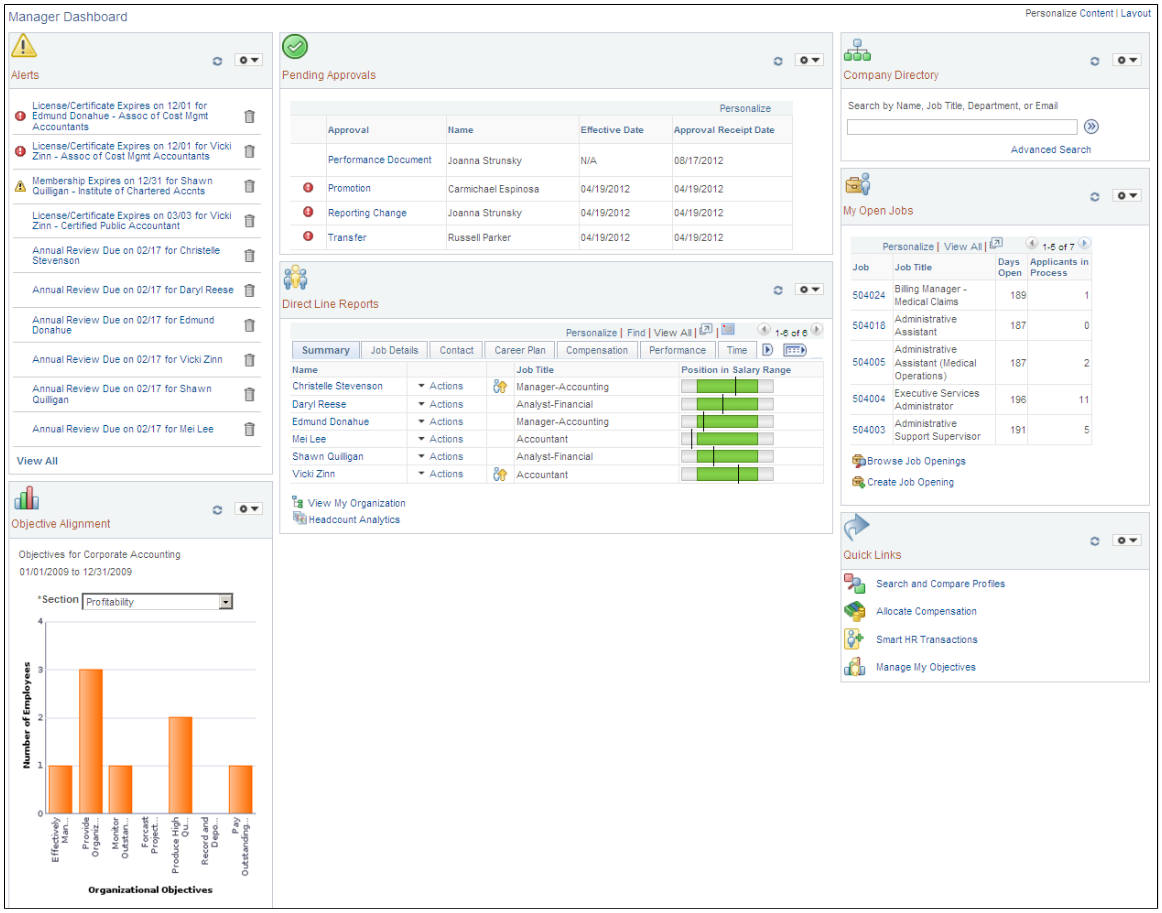
The Manager Dashboard provides actionable summaries of information for a manager's direct and indirect reports. A number of pagelets display information specific to the user. From the pagelets, managers have the ability to focus on items needing their attention and to act on those items by providing an immediate update from within the dashboard or by transferring to a specific application component. For example, managers can complete approval requests or initiate manager self service transactions for a specific employee by clicking on the Actions link all from the Manager Dashboard.

Manager Dashboard

You can access the Manager Dashboard from the root menu, Manager Self Service, and the Direct Line Reports page in the Org Chart Viewer.

Image: Example of the Manager Dashboard page

This example illustrates the Manager Dashboard page.



Use this dashboard to manage and analyze information about your direct report workforce. The Manager Dashboard enables you to:

- View important upcoming dates and events.
- Analyze company and employee objectives.
- Approve pending requests.
- Search for individuals in your company directory.
- Manage your current job openings.
- Examine details about your direct reports, such as job details, compensation, performance, career and succession plans, and time reporting.
- Initiate self service actions, such as creating a performance document or request a reporting change, which you would typically perform from Manager Self Service.
- Access and analyze a summary of your employee's abilities on the Talent Summary page.

- Manage your employee's learning.
- Access quick links to perform additional managerial tasks in the system.
- View reports that you run.

You can determine the dashboard content and layout. Use the Personalize Content and Layout links to access the Personalize Content: Manager Dashboard and Personalize Layout: Manager Dashboard pages respectively.

- The Personalize Content: Manager Dashboard page enables you to select or deselect pagelets you wish to view on your dashboard.
- The Personalize Layout: Manager Dashboard page enables you to determine whether you want your dashboard to display in a 2- or 3-column layout. You will also select which pagelets should appear in which column.

Click the header of each pagelet and drag it to manually move pagelets around on the dashboard. You can also minimize or remove pagelets from the dashboard by using the corresponding icons in the header. To have a pagelet appear after deleting it from the dashboard, access the Personalize Content: Manager Dashboard page to select the pagelet.

Defining the Manager Dashboard Content and Layout

These topics discuss how to:

- Identify the Manager Dashboard pagelets to display.
- Define the Manager Dashboard layout.

Pages Used to Define the Manager Dashboard Content and Layout

Page Name	***Definition Name***	***Navigation***	***Usage***
Manager Dashboard	UX_MGR_DASHBOARD	• Manager Dashboard, Manager Dashboard • Manager Self Service, Manager Dashboard, Manager Dashboard	View frequently-accessed manager information such as important manager alerts, messages, and employee details through various pagelets on one page.
Personalize Content: Manager Dashboard	PORTAL_HPCOMP	• Click the Personalize Content link at the top of the Manager Dashboard page. • Click the Personalize Content link on the Personalize Layout: Manager Dashboard page.	Define the Manager Dashboard pagelet content by selecting or deselecting pagelets that should appear on your Manager Dashboard page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Layout: Manager Dashboard	PORTAL_HPLAYOUT	• Click the Personalize Layout link at the top of the Manager Dashboard page. • Click the Personalize Layout link on the Personalize Content: Manager Dashboard page.	Define the Manager Dashboard pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Manager Dashboard page. Identify the pagelets that should appear in each column.

Personalize Content: Manager Dashboard Page

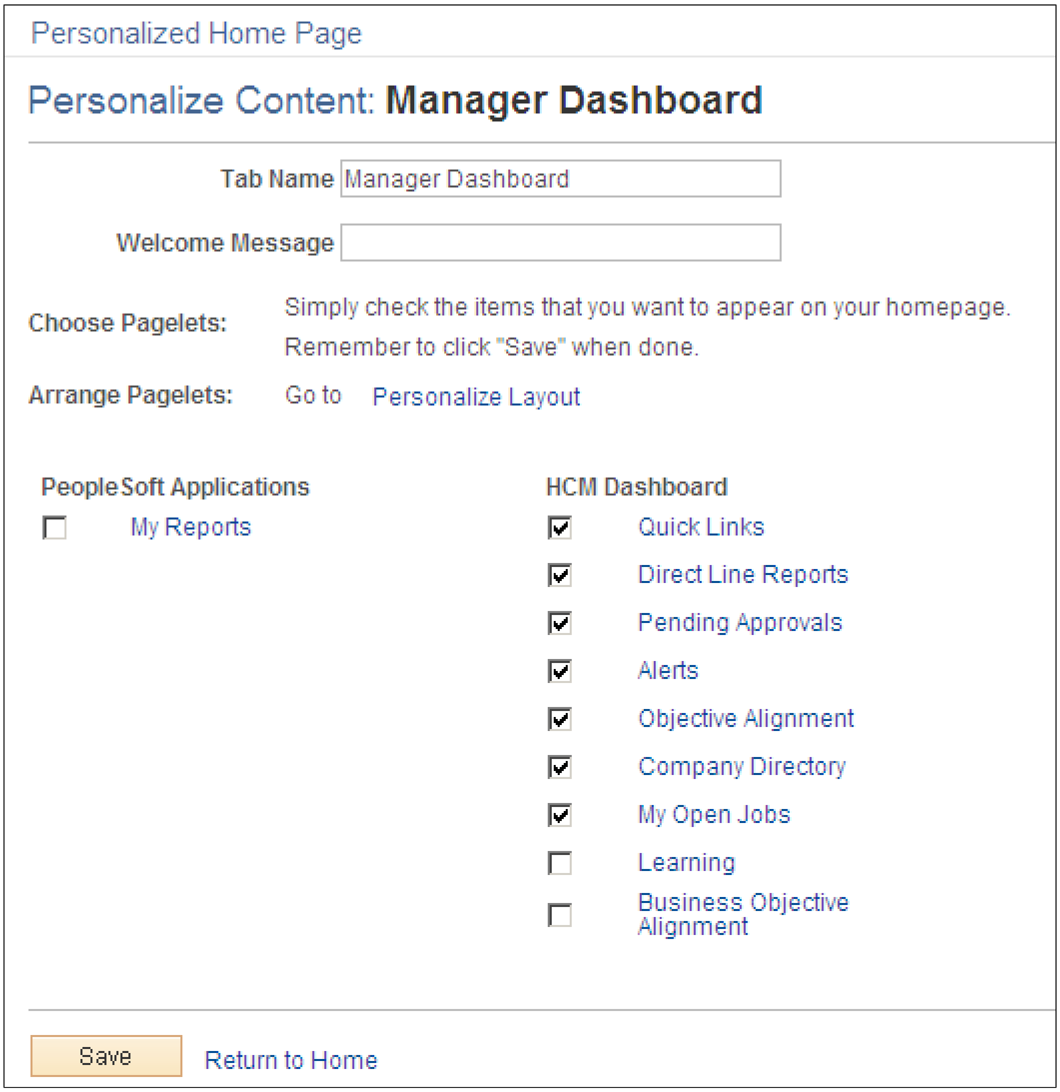
Use the Personalize Content: Manager Dashboard page (PORTAL_HPCOMP) to define the Manager Dashboard pagelet content by selecting or deselecting pagelets that should appear on your Manager Dashboard page.

Navigation

- Click the Personalize Content link at the top of the Manager Dashboard page.
- Click the Personalize Content link on the Personalize Layout: Manager Dashboard page.

Image: Personalize Content: Manager Dashboard page

This example illustrates the fields and controls on the Personalize Content: Manager Dashboard page. You can find definitions for the fields and controls later on this page.



Use this page to select or deselect pagelets you want to display on your Manager Dashboard page. Click the pagelet name link to preview the pagelet.

The following pagelets display the same information but in different formats:

- *Objective Alignment:* Displays a narrow graph illustrating the number of employees that are in alignment with the department business objectives.
- *Business Objective Alignment:* Displays a wide graph illustrating the number of employees that are in alignment with the department business objectives.

Personalize Layout: Manager Dashboard Page

Use the Personalize Layout: Manager Dashboard page (PORTAL_HPLAYOUT) to define the Manager Dashboard pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Manager Dashboard page.

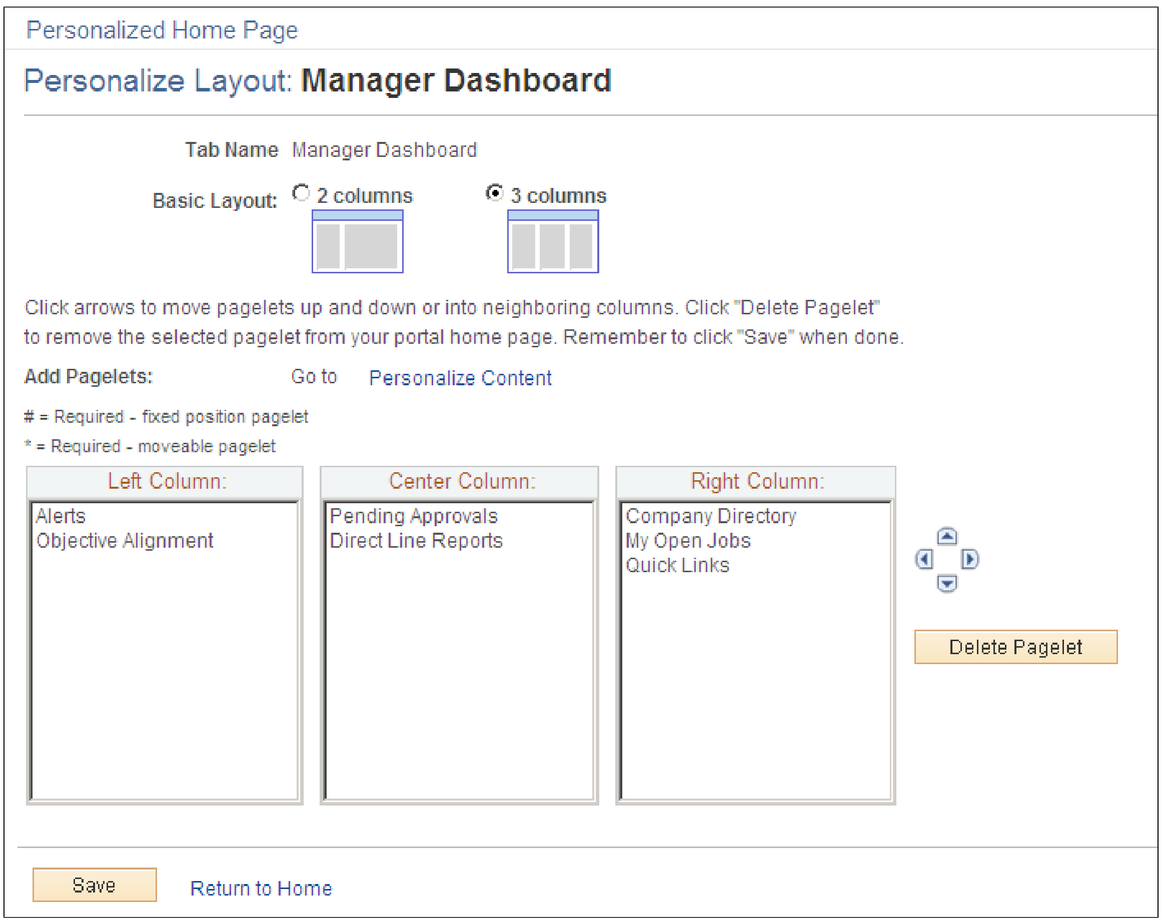
Identify the pagelets that should appear in each column.

Navigation

- Click the Personalize Layout link at the top of the Manager Dashboard page.
- Click the Personalize Layout link on the Personalize Content: Manager Dashboard page.

Image: Personalize Layout: Manager Dashboard page

This example illustrates the fields and controls on the Personalize Layout: Manager Dashboard page. You can find definitions for the fields and controls later on this page.



Use this page to determine the number of columns you want on the dashboard. Move pagelets from one column to the next.

The columns will list only those pagelets you have selected on your personalization page to appear on the dashboard.

Viewing the Manager Dashboard Pagelets

These topics discuss:

- Viewing the Alerts pagelet.
- Viewing the More Alert Information page.
- Viewing the Objective Alignment pagelet.
- Viewing the Business Objective Alignment pagelet.
- Viewing the Objective Alignment Progress page.
- Viewing the Pending Approvals pagelet.
- Responding to an approval request.
- Viewing the Company Directory pagelet.
- Viewing the My Job Openings pagelet.
- Viewing the Quick Links pagelet.
- Viewing the My Reports pagelet.
- Viewing the Learning pagelet.
- Viewing the Direct Line Reports pagelet.

Note: You can personalize many of these pagelets so they appear differently on the dashboard.

See Personalizing Pagelets.

See Personalizing Column and Sort Order within the Pagelet Grids.

Pages Used to View Additional Manager Dashboard Pagelet Content

Page Name	***Definition Name***	***Navigation***	***Usage***
More Alert Information	UX_ALERT_DTL	Click the View All link in the Alerts pagelet on the Manager Dashboard.	View details regarding all alerts associated with your direct reports.
Objective Alignment Progress	UX_EPO_ALIGN_DET	• Click a bar from within the Objective Alignment pagelet. • Click a bar from within the Business Objective Alignment pagelet.	View the detailed alignment information and the progress of the employee goals compared to the business objective.

Page Name	Definition Name	Navigation	Usage
My Organization	UX_DIRECTS_HGRID	Click the View My Organization link in the Direct Line Reports pagelet on the Manager Dashboard.	View information about your direct and indirect reports in a hierarchical list (or Hgrid) format.

Alerts Pagelet

The Alerts pagelet displays alerts associated with direct reports.

Image: Alerts pagelet

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

Use this pagelet to view past or upcoming events and dates related to your direct reports. These alerts are grouped by alert level: critical appearing first, then by all warning alerts, and finally informational alerts. Within each level, the pagelet then sorts the alerts by type. There are seven alert types delivered for the Alerts pagelet:

- ePerformance
- eCompensation

- Expiring Licenses/Certificates
- Expiring Memberships
- Scheduled Training
- Birthday Alerts
- Anniversary Alerts

The administrator defines the rules for when an alert moves to another level for each alert type. All alerts are time sensitive and the system generates them by comparing the current date to the date specified for each alert type and level.

<alert message link>	Click the link of any of the alert messages to have the system display the appropriate application detail page to provide more information about the alert. These secondary pages are view only.
View All	Click this link to open the More Alert Information page and view all alerts associated with your direct reports.

More Alert Information Page

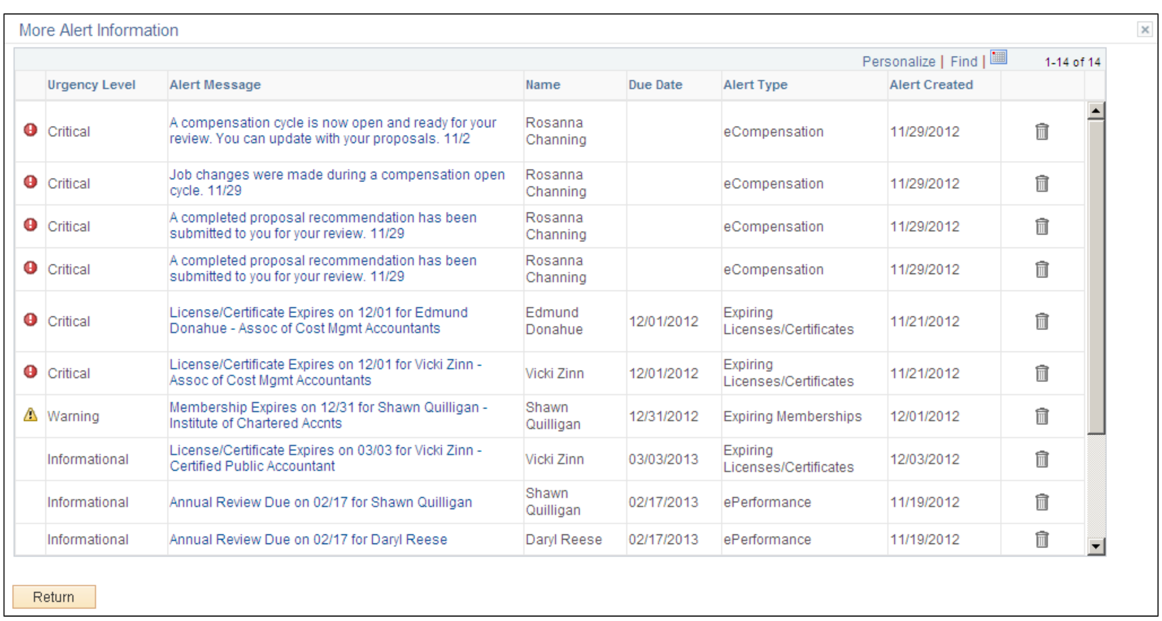
Use the More Alert Information page (UX_ALERT_DTL) to view details regarding all alerts associated with your direct reports.

Navigation

Click the View All link on the Alerts pagelet in Manager Dashboard.

Image: More Alert Information page

This example illustrates the fields and controls on the More Alert Information page. You can find definitions for the fields and controls later on this page.



Use this page to view details regarding all alerts associated with your direct reports.

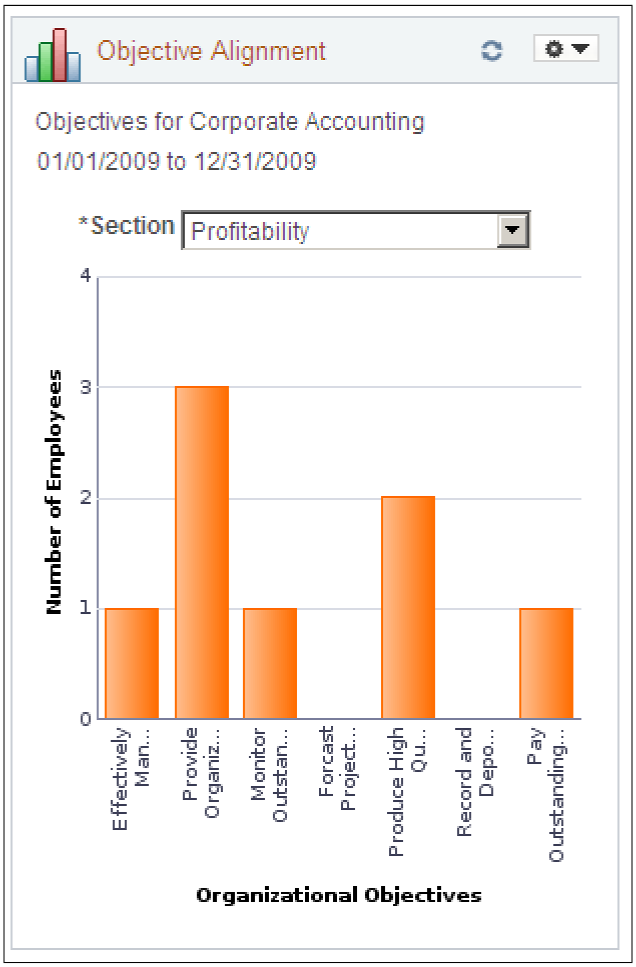
If you have set the number of alerts to appear on the pagelet as a number less than all the alerts in your queue, you can view all remaining alerts on this page.

Objective Alignment Pagelet

The Objective Alignment pagelet displays narrow version of the manager's department business objectives.

Image: Objective Alignment pagelet

This example illustrates the fields and controls on the Objective Alignment pagelet. You can find definitions for the fields and controls later on this page.



The business objective is listed at the top of the pagelet, with the business objective beginning and end date below it. If you have not saved a default value through the Personalize Business Objectives Alignment page, the system will display the most recently created business objective.

Select the Pagelet Settings drop-down list in the header and select the Personalize option to open the Personalize Business Objectives Alignment page and define a default business objective and section. If you are associated with more than one department objective, you would select the business objective through this page.

See Personalize Business Objectives Alignment Page.

Section

Chose a section from the business objective of this department. The pagelet refreshes and displays a graphical representation of the corresponding Business Objective Alignment data.

The chart is a 2D bar chart. The X-Axis lists all the objectives under the selected section. When you pause over a bar in the graphic, the objective name shows as well as the number of employee aligned to this objective. The Y-Axis gives the number of employees that currently have their goals aligned to the business objective. If no employees aligned, the bar does not appear, but the objective label still appears on the X-Axis.

Click an objective bar within the graphic to open the Objective Alignment Progress page and see the detailed alignment information and the progress of the employee goals.

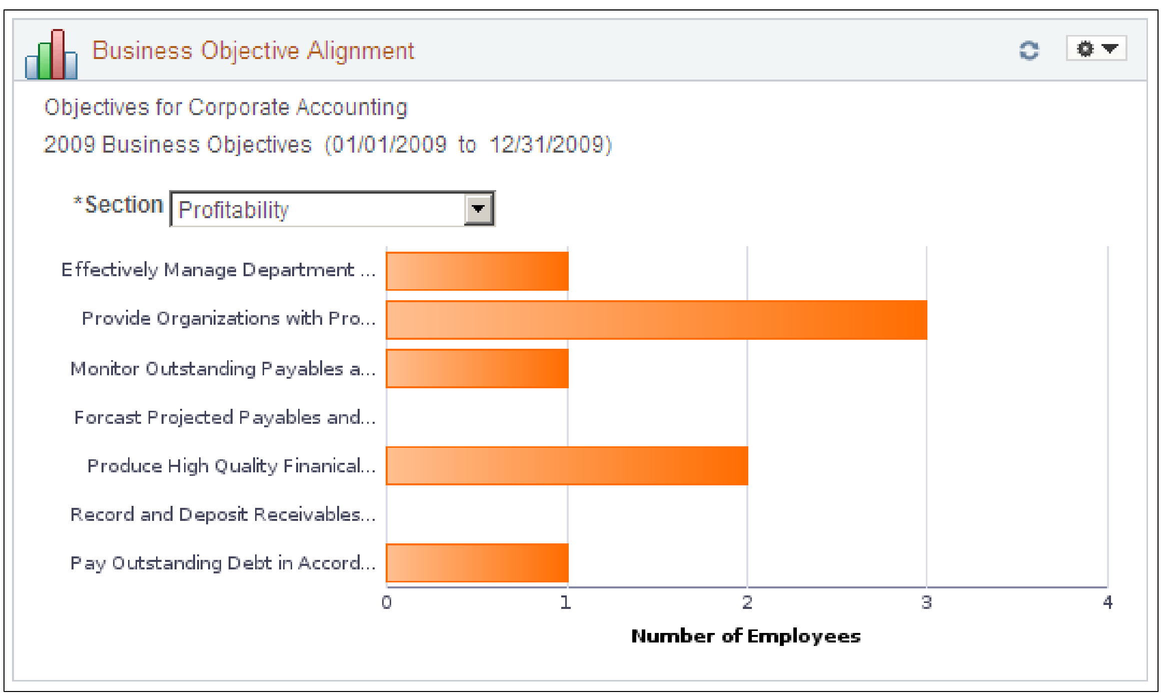
See Objective Alignment Progress Page.

Business Objective Alignment Pagelet

The Business Objective Alignment pagelet displays wide version of the manager's department business objectives.

Image: Business Objective Alignment pagelet

This example illustrates the fields and controls on the Business Objective Alignment pagelet. You can find definitions for the fields and controls later on this page.



The Business Objective Alignment pagelet works the same as the Objective Alignment Pagelet, but the graph and bars are displayed in a horizontal, wide view with longer objective labels and the X- and Y-axis reversed.

See Objective Alignment Progress Page.

Objective Alignment Progress Page

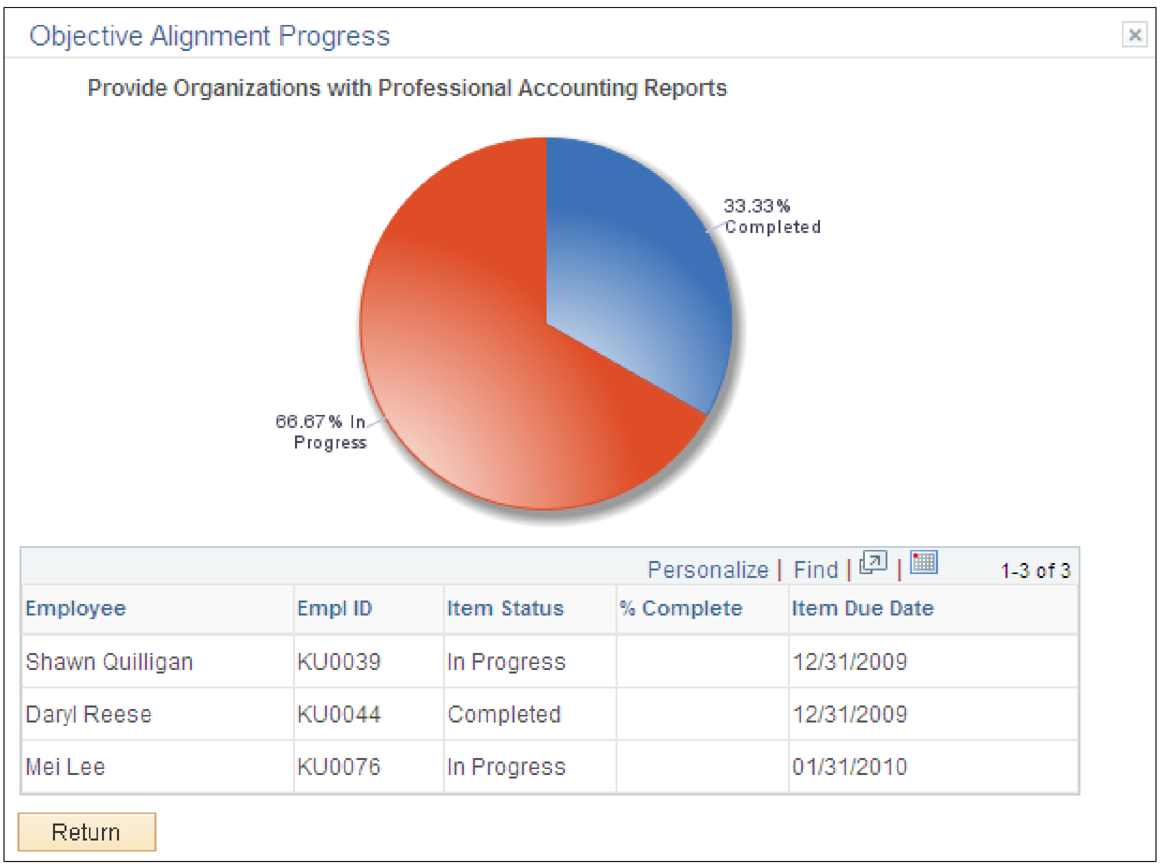
Use the Objective Alignment Progress page (UX_EPO_ALIGN_DET) to view the detailed alignment information and the progress of the employee goals compared to the business objective.

Navigation

- Click a bar from within the Objective Alignment pagelet.
- Click a bar from within the Business Objective Alignment pagelet.

Image: Objective Alignment Progress page

This example illustrates the fields and controls on the Objective Alignment Progress page. You can find definitions for the fields and controls later on this page.



The objective name that corresponds to the bar you clicked. The page displays the goal progress chart for the department employees as a 2D pie chart.

The grid at the bottom shows all the employees that have their goal aligned to the objective. It includes the employee name, employee ID, status, percentage complete, and due date of the objective.

Pending Approvals Pagelet

The Pending Approvals pagelet displays time sensitive approvals requiring action by the manager.

Image: Pending Approvals pagelet

This example illustrates the fields and controls on the Pending Approvals pagelet. You can find definitions for the fields and controls later on this page.


Pending Approvals

Personalize

	Approval	Name	Effective Date	Approval Receipt Date
	Performance Document	Joanna Strunsky	N/A	08/17/2012
	Promotion	Carmichael Espinosa	04/19/2012	04/19/2012
	Reporting Change	Joanna Strunsky	04/19/2012	04/19/2012
	Transfer	Russell Parker	04/19/2012	04/19/2012

Use this pagelet to view the pending approvals for your direct reports and determine what approval actions must be taken right now. Only approvals that use the Approval Workflow Engine (AWE) framework appear in this pagelet. If enabled by the administrator, the pagelet can display the Response due or Response overdue icon, indicating that the date upon which an approval is required is nearing. These dates are set by the administrator.

When there are no pending approvals in your queue, then the Pending Approvals pagelet will display the text *No approvals are pending at this time.*

<warning level icon>

The first column displays a warning icon when warning levels are associated with transactions. When no warnings are associated with any of the transactions appearing in the grid, this column is hidden.

The warning icons that can appear in the first column are determine using the rules the administrator defines on the Approvals Pagelet Setup page, and are based on the number of days before a transaction effective date or days after the approval receipt date. The two levels of warnings are:

- The Standard Warning or Response due icon.
- The Overdue Warning or Response overdue icon.

Approval

Click the approval transaction name link in the Approval column to view the application specific transaction approval page. Here you can view transaction details, approve or deny the transaction request, and enter comments regarding your response.

See Page"?>.

Name	Displays the name of the employee associated with the approval transaction. If multiple employees are linked to the same transaction, then the field will display the text Transaction Number X (where X is the number of transactions), with the exception of the Reporting Change approval. For Reporting Change approvals, the system will fetch the name of the first employee tied to the transaction and display it in this column, if there is more than one, an ellipsis (...) is added to indicate more employees are tied to the approval transaction. When there is no employee associated with an approval transaction, such as a nonperson job profile, then the field will display N/A (not applicable).
Effective Date	Displays the date on which a transaction is scheduled to take place. For example, the date an employee is scheduled for a promotion, and still needing your approval, will display here. When there is no transaction date associated with the approval transaction, then the field will display N/A (not applicable). The transaction effective date for Compensation approvals is the budget start date.
Approval Receipt Date	Displays the date the approval was sent to you.

You can refresh your queue as by clicking the Refresh icon on the pagelet header.

Note: You can also personalize the columns of the grid in this pagelet by clicking the Personalize link above the grid in the pagelet.

Related Links

Understanding Approvals

Approvals Pagelet Setup Page

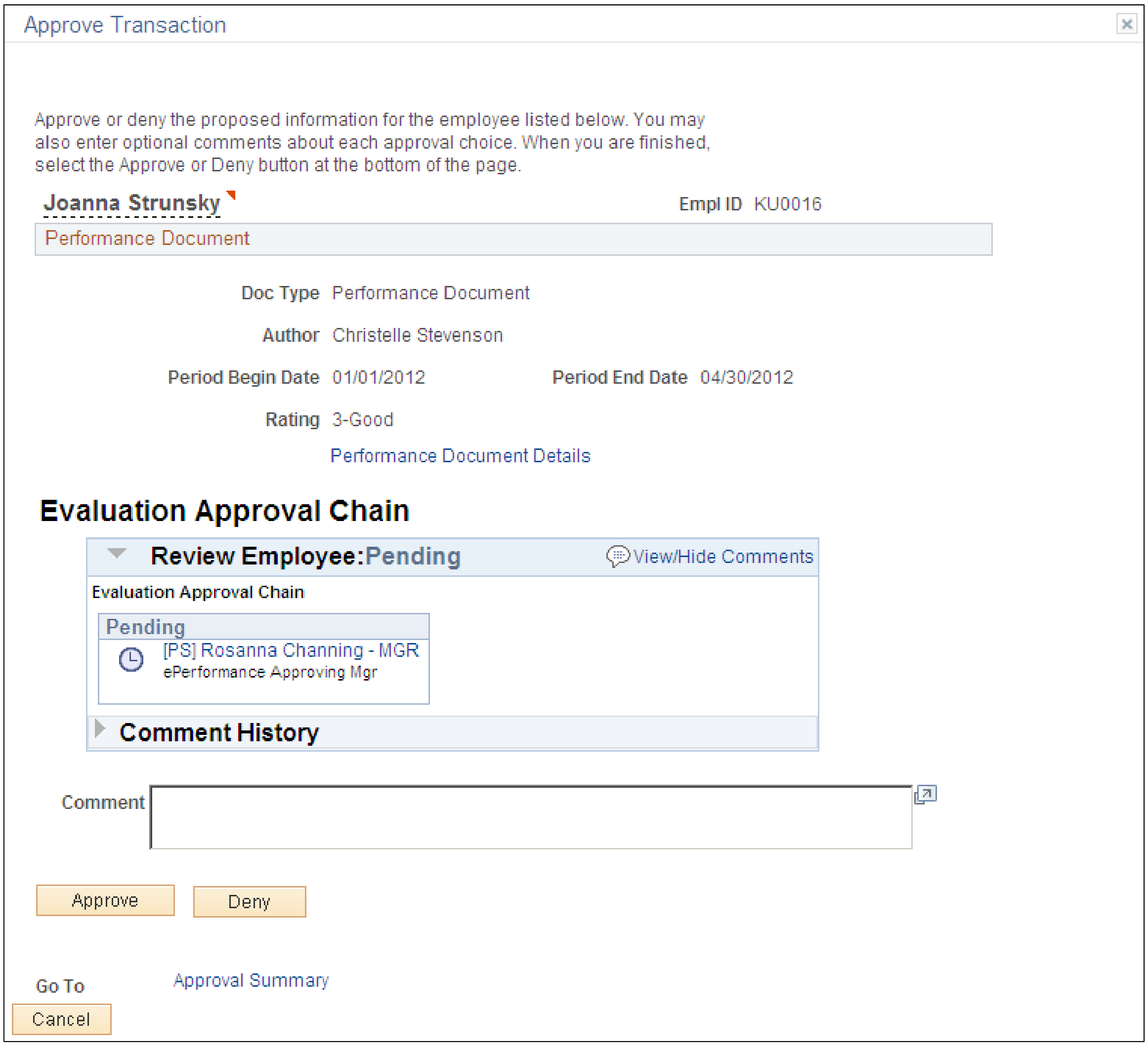
Personalizing Column and Sort Order within the Pagelet Grids

Approve <Transaction> Page

Access the application specific transaction approval page (click the approval transaction name link in the Approval column of the Pending Approvals pagelet).

Image: Example of an application specific approval page for a Performance document

This example illustrates an example of an application specific approval page for a Performance document.



Use the approval page specific to the business process to approve, deny, or perform any other response to an approval. This approval page is identical to the application page you would typically access using the standard menu navigation.

The page displays who the approval has been routed to and the approval status. Click the approver's name or the text Multiple Approvers to see a list of approvers.

The Approve, Deny, and other actions options appear at the bottom of the page. After clicking Approve or Deny, you should receive the appropriate confirmation. To return to the Pending Approvals pagelet and the Manager Dashboard, click the Cancel button.

Company Directory Pagelet

The Company Directory pagelet enables managers to search for employees in the company directory.

Image: Company Directory pagelet

This example illustrates the fields and controls on the Company Directory pagelet. You can find definitions for the fields and controls later on this page.

 **(Search)**

Enter search criteria and click the Search button to retrieve a person in the Org Chart Viewer - Company Directory pages.

My Org Chart or My Profile

Click one of these links to access either the Org Chart page or your Profile page in the Company Directory. The link that appears here is determined by your personal preferences for the Org Chart Viewer - Company Directory.

Advanced Search

Click this link to open the Advanced Search page and enter multiple search criteria, like a name and department, to locate a person.

My Open Jobs Pagelet

The My Job Openings pagelet displays all job openings assigned to the manager.

Image: My Job Openings pagelet

This example illustrates the fields and controls on the My Job Openings pagelet. You can find definitions for the fields and controls later on this page.

Use this pagelet to view your job openings with an *Open* status. You must be designated as the assigned hiring manager to have a job opening visible in this pagelet. Job openings in which you are assigned as the recruiter, interviewer, screener, approver, or reviewer, but not as the hiring manager, will not appear in this list.

If you are not assigned as a hiring manager to any open job openings, the grid will be hidden and the following will be displayed: *You are not assigned to any open jobs.*

The pagelet displays the job openings in sets of five. To view additional job openings, use the Find link, View All link, Zoom icon, or scroll arrows at the top of the grid. Job openings are listed in descending job number order by default but can personalize the columns and sort order by clicking the Personalize link.

Job	Click the job number link to access the Find Job Opening - Job Opening page in the Talent Acquisition Manager application. Manage all aspects of a job opening, including managing applicants, finding applicants, reviewing activity, creating notes, attachments, and expenses, and viewing or updating the job opening itself from this page.
Browse Job Openings	Click this link to open the Browse Job Openings page to view all existing job openings in the Talent Acquisition Manager

application. This link is hidden if you do not have security access to the Browse Job Openings page.

 **Create Job Opening**

Click this link to open the Enter Primary Job Opening Information page to enter the primary job opening details in the Talent Acquisition Manager application. This link is hidden if you do not have security access to create job openings.

Related Links

"Searching for Job Openings *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*"
"Managing Job Openings *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*"
"Understanding Job Openings *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*"
Personalizing Column and Sort Order within the Pagelet Grids

Quick Links Pagelet

The Quick Links pagelet provides navigation links to menu items frequently used by the manager.

Image: Quick Links pagelet

This example illustrates the fields and controls on the Quick Links pagelet. You can find definitions for the fields and controls later on this page.

Use this pagelet as an alternative to navigating to frequently used pages. This enables you to access these pages with one click as opposed to traditional navigation. You must have security permission to access these quick link pages.

The administrator can create or add quick links to this pagelet by using Navigation Collections and Pagelet Wizard. To add additional links, you would use the following steps:

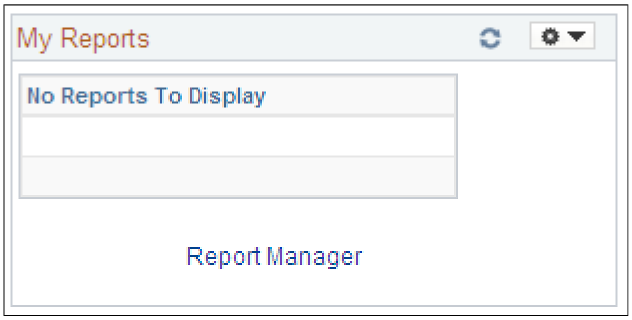
1. Navigate to PeopleTools, Portal, Portal Utilities, Navigation Collections.
2. Search for Quick Links and click the Edit link. Navigate to PeopleTools, Portal, Portal Utilities, Navigation Collections.
3. Click the Add Link button to add additional links to this pagelet.

My Reports Pagelet

The My Reports pagelet enables manager to display selected reports on the dashboard.

Image: My Reports pagelet

This example illustrates the fields and controls on the My Reports pagelet. You can find definitions for the fields and controls later on this page.



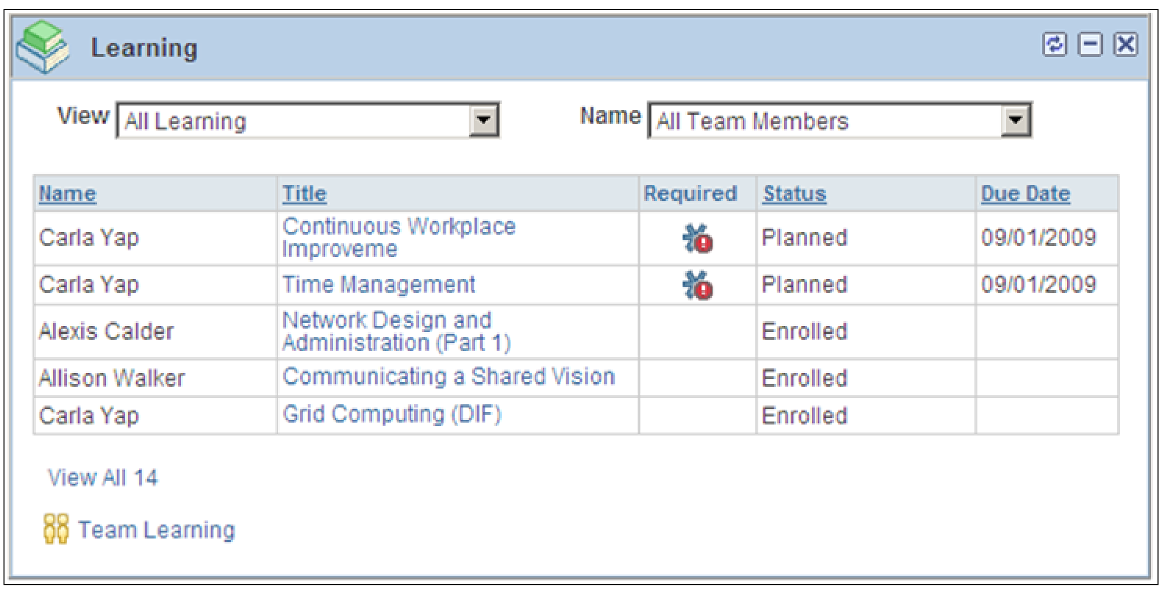
Click the report name to access the report run control page. Click the Report Manager link to access the Report Manager.

Learning Pagelet

The Learning pagelet displays the training status of employees. This information comes from the Enterprise Learning Management (ELM) system.

Image: Learning pagelet

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



Use this pagelet to see an overview of learning events for direct reports. This pagelet highlights required learning and certifications which are expired or in warning status, with the Past Due and Due Soon warnings appearing first. The pagelet presents the classes, programs, and courses in *Planned* status for each direct report.

The View and Name drop-down fields enable you to filter the data that you see in the grid.

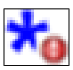
View — Select which view of data you wish to display in the grid. Choices are:

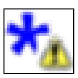
- *All Learning* - does not filter out information but shows all learning scheduled for your employees.
- *Required Learning* - filters the grid to show only training that is marked as required, in warning status, or expired.

Name — Select the individuals you want to display in the grid. You can chose to display all team members by selecting *All Team Members,* or you can select an individual direct report team member by name. Indirect team member will not be available in this pagelet.

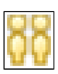
Title — Click the title link to open an application page that corresponds to the type of learning item it is, for example, a class, course, or program.

Note: The data for ELM Learning is pulled from ELM database via IB Integration setup.

 **(Past Due icon)** — Indicates that this learning event is required and past due.

 **(Due Soon icon)** — Indicates that this learning event is required and due soon.

View All <number> — The pagelet displays five rows of information in the grid. Click this link to open a modal Learning grid page to view all rows of employee learning. The number of employees that appear in the page grid will appear in the link name.

 **Team Learning** — Click this link to open the Team Learning page in Manager Self Service.

See the documentation for *PeopleSoft Enterprise Learning Management*.

Direct Line Reports Pagelet

The Direct Line Reports pagelet displays data about a manager's direct reports from information stored across the HCM product line. Managers can view various details about their employees from this single location. Managers will use this pagelet to view job details, contact information, career and succession plans, compensation, performance reviews, and time tracking for their direct reports. This data comes from a number of PeopleSoft HCM products including ePerformance, Career Planning, Succession Planning, Time and Labor, Absence Management, Compensation, and ELM.

The HCM data that is brought into the pagelet is organized into a grid with tabs, as defined on the Direct Reports Pagelet Setup page and the user preferences. Each tab contains a group of fields displaying employee data from a specific area from within HCM. See Understanding the Direct Line Reports Pagelet Features.

Note: Users can personalize the tabs and columns of the grid in this pagelet by clicking the Personalize link above the grid in the pagelet. Because of this, columns and tabs shown in this document may vary from your application. The tabs and columns shown here are the delivered default values.

See Personalizing Column and Sort Order within the Pagelet Grids.

The Direct Line Reports pagelet uses access types to determine which employees report to a manager. The Direct Line Reports pagelet component uses the access type registered in the Direct Reports Setup under Set Up HCM, Common Definitions, Direct Reports for Managers.

See Understanding the Direct Line Reports Pagelet Features.

These topics discuss the:

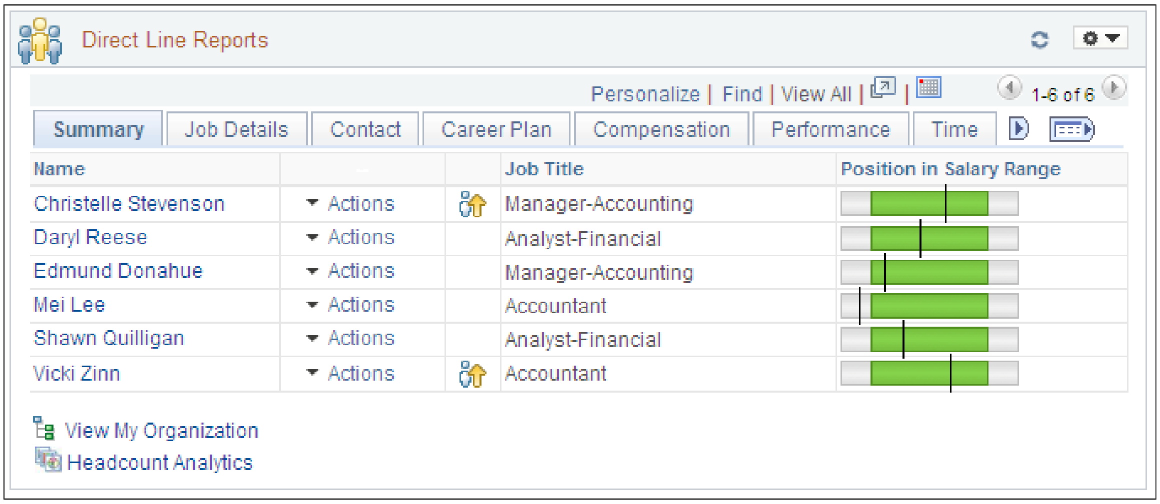
- Direct Line Reports pagelet: Summary tab.
- My Organization page.
- Direct Line Reports pagelet: Job Details tab.
- Direct Line Reports pagelet: Contact tab.
- Direct Line Reports pagelet: Career Plan tab.
- Direct Line Reports pagelet: Compensation tab.
- Direct Line Reports pagelet: Performance tab.
- Direct Line Reports pagelet: Time tab.
- Direct Line Reports pagelet: Succession tab.

Direct Line Reports Pagelet: Summary Tab

The Summary tab displays a high level overview of employee’s job and rankings.

Image: Direct Line Reports pagelet: Summary tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Summary tab. You can find definitions for the fields and controls later on this page.



The grid displays your direct reports based on the reporting structure specified in the Direct Reports Setup Access Type Security.

The employee Name and the Action columns are frozen in the grid and these columns will be available on every tab in the grid.

Name

Displays the employee’s full name. Click the employee’s name link in the Name column to access the Talent Summary page for a person. The Talent Summary page displays various pagelets displaying much of the information available in the Direct Line Reports grid in greater detail.

Employees with an Inactive status in HR will be shown on the My Organization page, by clicking the View My Organization link, only when it is necessary, to display the name so that drilling down to direct reports is possible. An inactive employee will not appear if he or she does not have direct reports.

When you are using Position Management and the administrator has selected to allow empty positions, the text Empty Position will appear in the name field. When the administrator has set the system not to allow empty position, the inactive employee name will display in the name field through the View My Organization link, My Organization page, if the employee has direct reports.

First Name and Last Name

Displays the first and last names of the employee. These fields are delivered hidden but can be added using the Direct Reports Pagelet Setup page. Click the employee’s first or last name link to access the Talent Summary page for a person.

Actions

Click this menu drop-down list to select manager self service actions to perform for your employees. The system will direct you to the appropriate manager self service page.

PeopleSoft delivers various manager self service transactions to work in conjunction with the Manager Dashboard that enables managers to view or manage employee information in the PeopleSoft database, as they would from the manager self service pages. This menu list also enables you to quickly access the Company Directory and Talent Summary pages for an employee.

For a list of manager self service action available through the Manager Dashboard, see the “Related Actions” subtopic under Understanding the Direct Line Reports Pagelet Features.

 **(high potential icon)**

This column displays the High Potential icon if an employee is identified as a high potential in the career plan. You can access this information by navigating to Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan.

Job Title

Displays the employee’s job title. For example, an employee who holds two jobs and reports to the same manager for both of those jobs will have two rows of data in the grid, one for each job title.

The Job Title field is available in both the Summary tab and the Job Details tab. The administrator has the ability to hide the Summary tab job title column separately from the Job Details tab job title column.

Performance Rating

Displays a graphical representation of the most recent performance review rating for an employee. The number of stars is determined by the rating model that is being used. There will be one star for each value in the rating model. The performance rating that is shown is taken from the last completed performance review of the document type specified in the Direct Reports Pagelet Setup page. Pause over the star image to see the rating as text.

To get the column to display the stars, you must enter numeric values in the Numeric Rating column on the Rating Model page. The pagelet uses the Numeric Rating value to determine the number of stars that should appear for each rating. If there is no Numeric Rating value for a rating in the rating model, the stars will not display.

Note: The Numeric Rating field is not a required field, so be sure to enter numeric values to get the star ratings to appear.

See "Rating Model Page *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

Position in Salary Range

Displays a graphical representation of an employee’s position in the salary range for that job. The vertical bar depicts where the employee’s salary falls in that range.

Pause on the graphic to view the actual salary of the employee and view the minimum, midpoint, and maximum salary values for the job.

View My Organization

Click this link when you are a higher level manager to access the My Organization page and view the same data for direct and indirect reports in an hierarchical grid.

Note: You will not see the View My Organization link when you do not have indirect reports.

Headcount Analytics

Select this link to display a list of headcount analytic reports: Headcount Movement and Current Headcount. Select the appropriate report from the list. See "Viewing Quick Analytics Headcount Pivot Grids *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

My Organization Pagelet

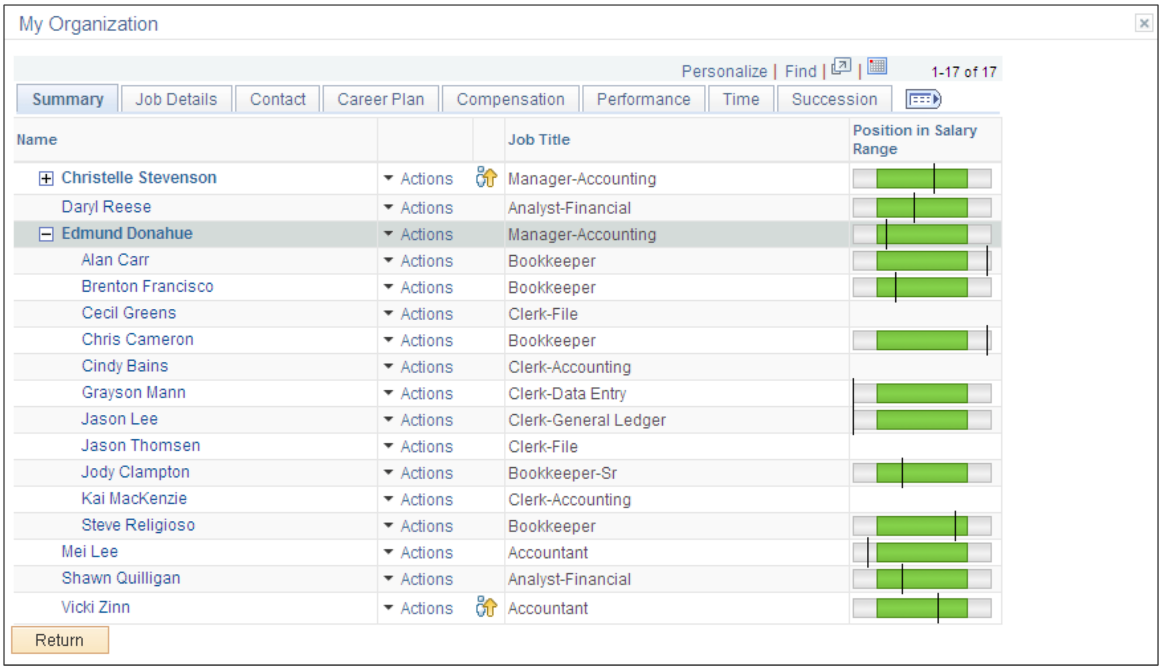
Use the My Organization pagelet (UX_DIRECTS_HGRID) to view information about your direct and indirect reports in a hierarchical list (or Hgrid) format.

Navigation

Click the View My Organization link in the Direct Line Reports pagelet on the Manager Dashboard.

Image: My Organization pagelet

This example illustrates the fields and controls on the My Organization pagelet. You can find definitions for the fields and controls later on this page.



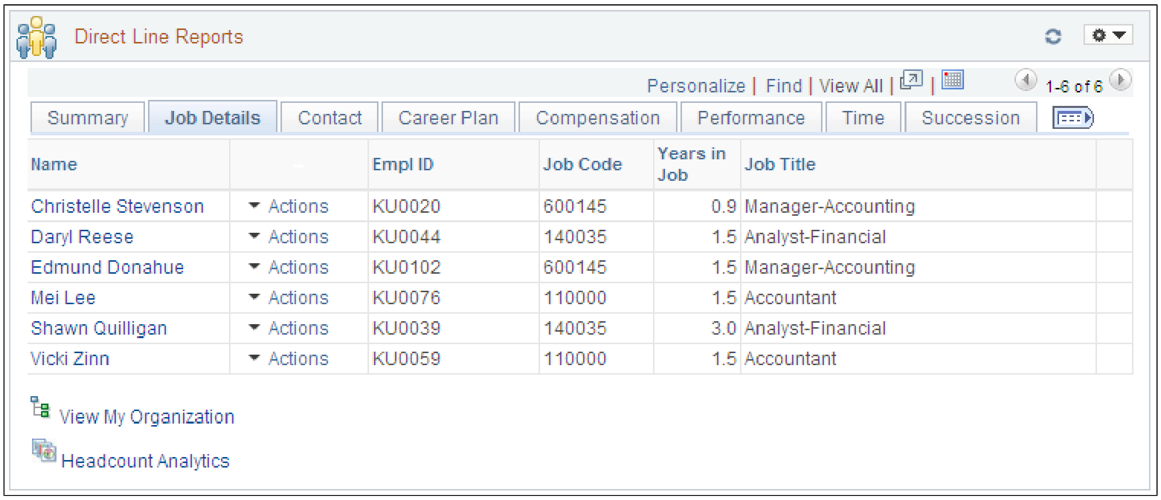
Higher level managers have the ability to view and complete actions for their direct and indirect employees. The page displays the hierarchy in an hierarchical list (Hgrid) format, where you can expand or collapse views of your reporting structure and managers that report to you.

Direct Line Reports Pagelet: Job Details Tab

The Job Details tab displays information about the employee's current job and work history.

Image: Direct Line Reports pagelet: Job Details tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Job Details tab. You can find definitions for the fields and controls later on this page.



The last column displays a schedule icon, if applicable. This indicates where an employee is today. The column displays only one icon to indicate the employee schedule for the day, even if more than one schedule applies. There are five icons and the grid determines which icon to display using this priority sequence:

 **(planned absence)**

Indicates that the employee has a planned absence for today.

 **(holiday)**

Indicates that the employee is on a holiday break today.

hierarchical

 **(not scheduled)**

Indicates that the employee is not scheduled to work today based on the employee's holiday schedule in Job Data.

 **(training)**

Indicates that the employee is in training today. Information is obtained from ELM or HR Training.

 **(no show)**

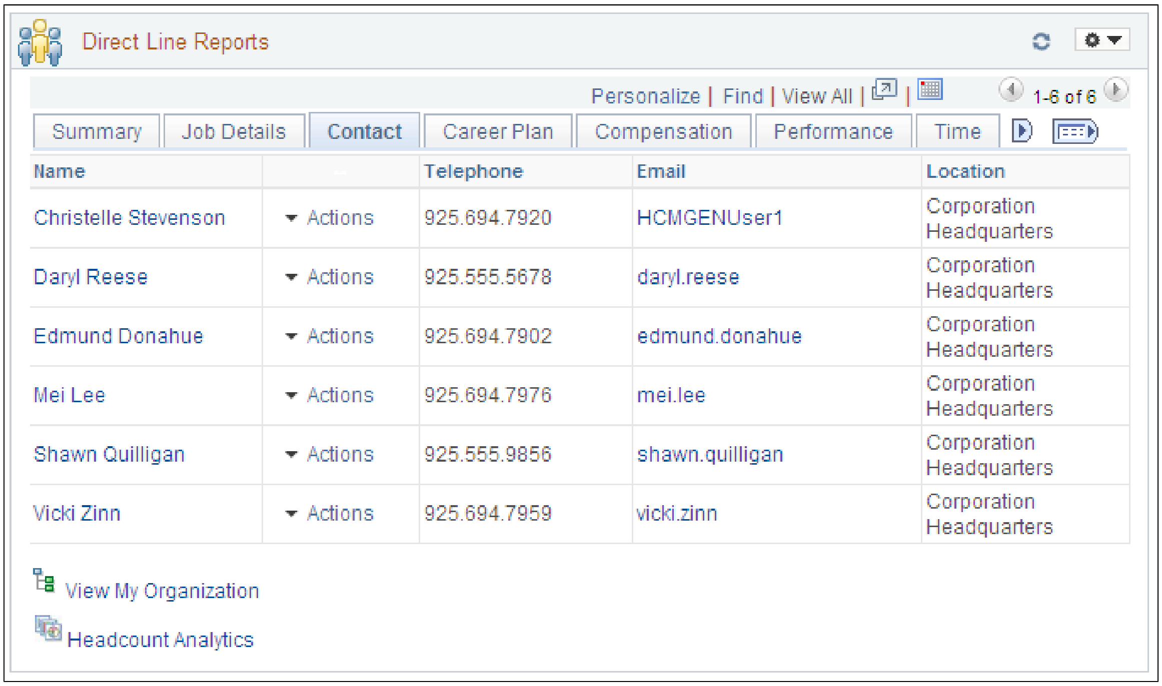
Indicates that the employee did not show up to work today when he or she is scheduled to work.

Direct Line Reports Pagelet: Contact Tab

The Contact tab displays different methods for contacting an employee.

Image: Direct Line Reports pagelet: Contact tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Contact tab. You can find definitions for the fields and controls later on this page.



The employee's preferred phone number and email that appear on this page come from personal data in HR. The Department and Chat columns are hidden when delivered and must be enabled by the system administrator.

The last column displays an IM chat icon if the employee has defined an instant messaging ID in HR. A green icon will appear when the employee is active, or will be grayed out when the employee is not online. The icon will appear under the following conditions:

1. The employee has defined an instant messaging ID in HR.
2. The Instant Message Presence Icon is selected for direct line reports in the Org Chart Viewer.
3. The employee's IM protocol and IM domain matches the protocol and domain for the direct line reports in the Org Chart Viewer.

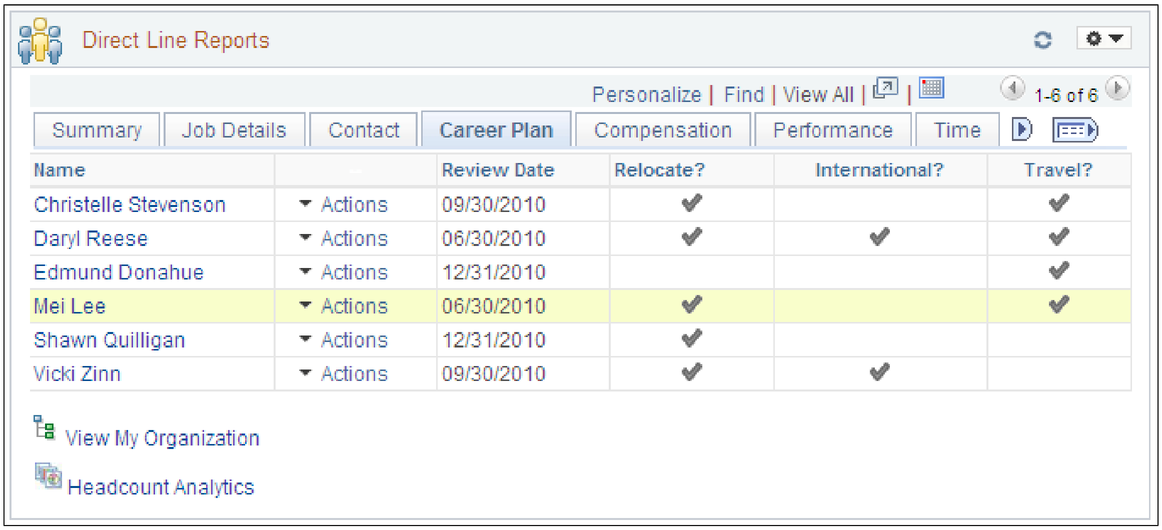
For more information about enabling the IM chat icon for direct reports, see the Columns field definition for instant messaging under Direct Reports Pagelet Setup Page.

Direct Line Reports Pagelet: Career Plan Tab

The Career Plan tab displays information about the employee's mobility preferences and last review date.

Image: Direct Line Reports pagelet: Career Plan tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Career Plan tab. You can find definitions for the fields and controls later on this page.



Name		Review Date	Relocate?	International?	Travel?
Christelle Stevenson	Actions	09/30/2010	✓		✓
Daryl Reese	Actions	06/30/2010	✓	✓	✓
Edmund Donahue	Actions	12/31/2010			✓
Mei Lee	Actions	06/30/2010	✓		✓
Shawn Quilligan	Actions	12/31/2010	✓		
Vicki Zinn	Actions	09/30/2010	✓	✓	

Use this page to view the data from the most recent effective dated career plan. The Review Date reflects the Career Plan Review Date for this current career plan. Mobility preferences are seen in the career plan, but are maintained in the person's profile. A check mark identifies that an employee is willing to relocate, take an international assignment, or travel for a job.

Direct Line Reports Pagelet: Compensation Tab

The Compensation tab displays how employees fit into the salary range for their jobs.

Image: Direct Line Reports pagelet: Compensation tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Compensation tab. You can find definitions for the fields and controls later on this page.

Name		Annual Salary	Currency	Minimum	Midpoint	Maximum	Compa-Ratio	Quartile
Christelle Stevenson	Actions	32,240.00	USD	24,452.00	30,565.00	36,678.00	105	3
Daryl Reese	Actions	40,560.00	USD	33,372.00	41,715.00	50,058.00	97	2
Edmund Donahue	Actions	62,400.00	USD	58,916.00	73,645.00	88,374.00	85	1
Mei Lee	Actions	40,040.00	USD	41,905.00	52,381.00	62,857.00	76	1
Shawn Quilligan	Actions	48,006.40	USD	41,905.00	52,381.00	62,857.00	92	2
Vicki Zinn	Actions	56,160.00	USD	41,905.00	52,381.00	62,857.00	107	3

Minimum, Midpoint, and Maximum

Displays the minimum, midpoint and maximum amounts suggested for the salary range for the job code of the employee. If no salary grade is associated with the job code, no information will display. This information, along with the annual salary can be seen visually on the Summary tab in the Position in Salary Range column.

Compa-Ratio

Indicates as a percentage where workers' salaries lie in relation to the midpoint range for their salary grades. The compa-ratio displays *100* percent, when the salary is exactly at the midpoint of the salary range. It is a number less than *100* when the salary is below the midpoint of the salary range. It is a number greater than *100* when the salary is greater than the midpoint.

This field is delivered as available in both the Summary tab and the Compensation tab and displays the same information. The administrator has the ability to hide the Summary tab Compa-Ratio column separately from the Compensation tab Compa-Ratio column on the Direct Reports Pagelet Setup page.

Quartile

Indicates where the employee's salary relates to the salary range when the range is divided into quarters. Values are *1, 2, 3,* or *4,* the higher the number, the higher the employee is within the salary range.

%Range

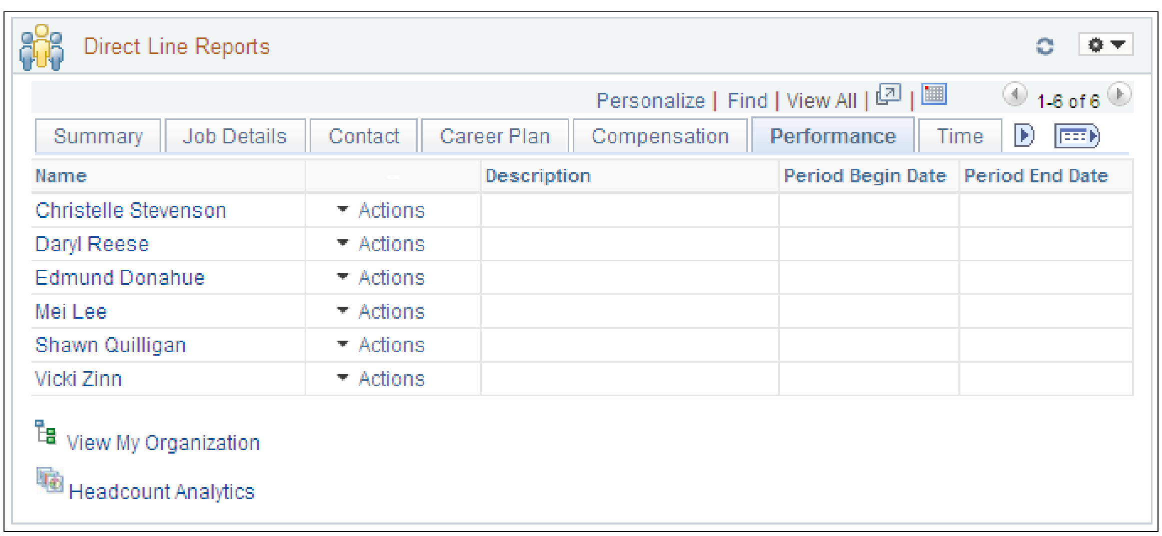
Displays how close the employee's salary is to the midpoint of the salary range. This field is delivered hidden by default.

Direct Line Reports Pagelet: Performance Tab

The Performance tab displays the latest performance review information for a manager's employees.

Image: Direct Line Reports pagelet: Performance tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Performance tab. You can find definitions for the fields and controls later on this page.



Last Rating

Identifies the rating that the employee received on his or her last completed performance document for the document type that is specified on the Direct Reports Pagelet Setup page by the administrator. The rating is taken from the overall rating section of the performance document. If the document type has not been specified in the setup or the employee does not have a completed performance rating from the specified document, the performance rating information will not display.

Period Begin Date and Period End Date

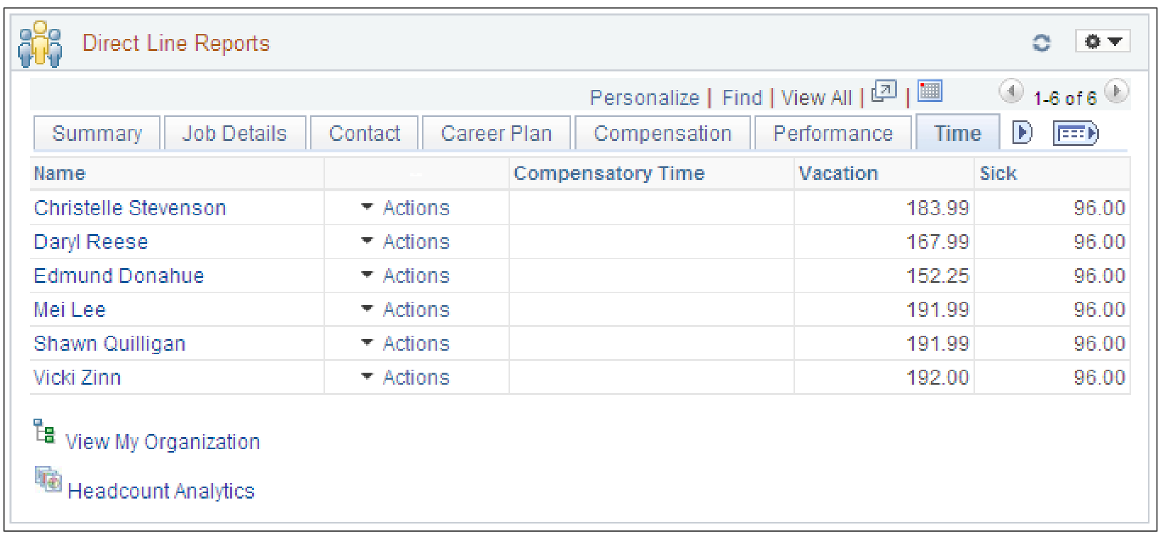
Displays the dates the performance period began and ended where the employee received their Last Rating.

Direct Line Reports Pagelet: Time Tab

The Time tab displays the employee's available compensatory, vacation, and sick hours.

Image: Direct Line Reports pagelet: Time tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Time tab. You can find definitions for the fields and controls later on this page.



Compensatory Time

Shows the number of comp time hours available to the employee. The comp time balance is retrieved from Time and Labor. An employee must be enrolled in Time and Labor to accrue compensatory time. You enroll employees in the Time and Labor by navigating to Time and Labor, Enroll Time Reporters, Maintain Time Reporter Data or by clicking the Time Reporter Data link on the Job Data - Employment Data page.

Vacation and Sick

Displays the number of vacation or sick hours available to the employee and balances are retrieved from Time and Labor. These fields are delivered hidden by default.

Absence Management Leave Balance 1, 2, and 3 (column label names will vary)

Displays user defined information from Absence Management. The administrator identifies these fields on the Direct Reports Pagelet Setup page in conjunctions with the Global Payroll and

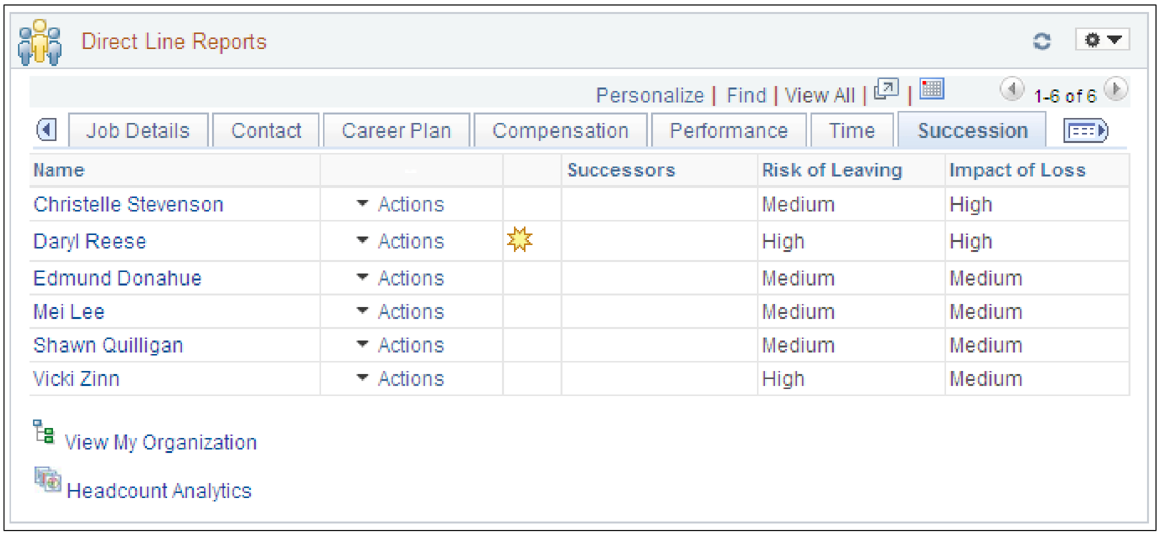
Absence Management pages. The Absence Management Leave Balance 3 field is delivered hidden by default.

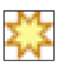
Direct Line Reports Pagelet: Succession Tab

The Succession tab displays employee's succession plan information.

Image: Direct Line Reports pagelet: Succession tab

This example illustrates the fields and controls on the Direct Line Reports pagelet: Succession tab. You can find definitions for the fields and controls later on this page.



 **(key person)**

The first column after the Actions field displays the Key Person icon to indicate that an employee has been identified as a vital, or key, employee within the organization for succession planning.

Successors

Displays the number of candidates that have been identified as successors in the Succession Plan. The number of successors is the sum of the candidates listed on a succession plan for a key person.

To add succession candidates to a person's succession plan, create or modify a succession plan by navigating to Organizational Development, Succession Planning, Maintain Succession Plan and entering the candidates on the Candidates page.

Risk of Leaving and Impact of Loss

Show the employee's risk of leaving and the impact of that loss, as defined in the career plan for an employee.

Personalizing Pagelets

Each individual user can personalize the content for their pagelets by clicking the Pagelet Settings drop-down menu list on the pagelet headers. These topics discuss how to:

- Personalize the Alerts pagelet.
- Personalize the Objective Alignment pagelet.
- Personalize the My Reports pagelet.

Pages Used to Personalize Pagelets

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Alerts	UX_ALERTS_PRS	Select the Pagelet Settings drop-down menu list in the Alerts pagelet header, and select Personalize.	Select alert types and urgency levels that should display in your Alerts pagelet. You can define the maximum number of rows to display on the pagelet.
Personalize Business Objectives Alignment	UX_EPO_ALIGN_PRS	• Select the Pagelet Settings drop-down menu list in the Objective Alignment pagelet header, and select Personalize. • Select the Pagelet Settings drop-down menu list in the Business Objective Alignment pagelet header, and select Personalize.	Select the default objective to appear on the objective pagelets.
Personalize My Reports	PSRF_PGLT_OPTIONS	Select the Pagelet Settings drop-down menu list in the My Reports pagelet header, and select Personalize.	Personalize the My Reports pagelet.

Personalize Alerts Page

Use the Personalize Alerts page (UX_ALERTS_PRS) to select alert types and urgency levels that should display in your Alerts pagelet.

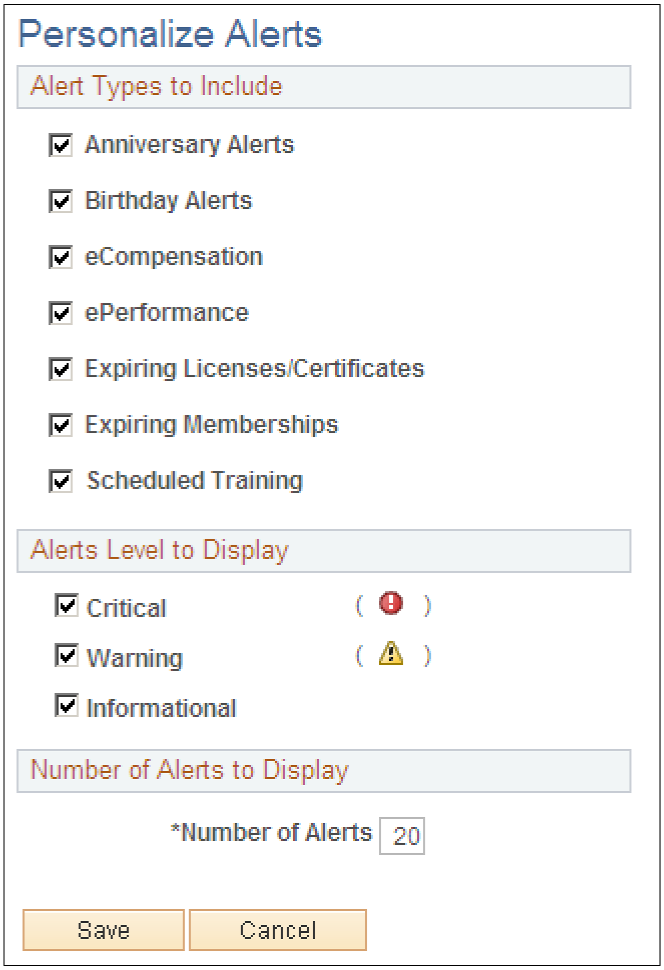
You can define the maximum number of rows to display on the pagelet.

Navigation

Select the Pagelet Settings drop-down menu list in the Alerts pagelet header, and select Personalize.

Image: Personalize Alerts page

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



Use this page to personalize which alert types and level should appear on the Alerts pagelet. This page can contain these three sections, if enabled by the administrator:

Alert Types to Include — Select which alert types that the Alerts pagelets should display. Only those enabled by the administrator will be available for selection. Deselect an alert type to not have it appear on the Alert pagelet.

Alerts Level to Display — Select urgency levels to have only those alerts associated with these levels appear in the pagelet.

Number of Alerts — Define how many of alerts should appear in the pagelet. If your alerts exceed this number, you can click the View All link on the pagelet to view all alerts.

Related Links

Alerts Pagelet Setup Page

Personalize Business Objectives Alignment Page

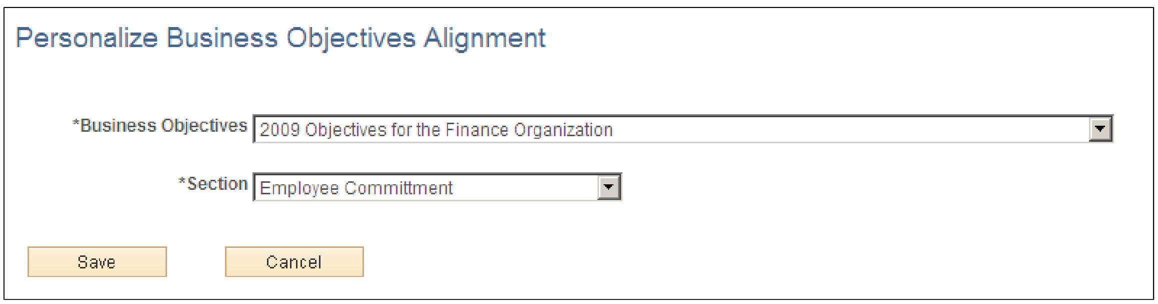
Use the Personalize Business Objectives Alignment page (UX_EPO_ALIGN_PRS) to select the default objective to appear on the objective pagelets.

Navigation

- Select the Pagelet Settings drop-down menu list in the Objective Alignment pagelet header, and select Personalize.
- Select the Pagelet Settings drop-down menu list in the Business Objective Alignment pagelet header, and select Personalize.

Image: Personalize Business Objectives Alignment page

This example illustrates the fields and controls on the Personalize Business Objectives Alignment page. You can find definitions for the fields and controls later on this page.



Business Objectives	Select the preferred business objective to show on the Objective Alignment and Business Objective Alignment pagelets when you are associated with more than one objective. The default objective you select here will show on both pagelets. If you have not defined a default value, the system will display the most recently created business objective.
Section	Select the preferred section of the business objective to show on the Objective Alignment and Business Objective Alignment pagelets. The default section you select here will show on both pagelets.

Personalize My Reports Page

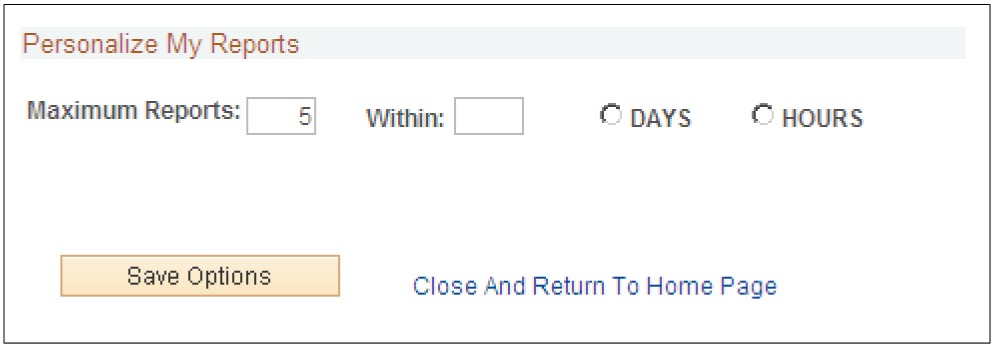
Use the Personalize My Reports page (PSRF_PGLT_OPTIONS) to personalize the My Reports pagelet.

Navigation

Select the Pagelet Settings drop-down menu list in the My Reports pagelet header, and select Personalize.

Image: Personalize My Reports page

This example illustrates the fields and controls on the Personalize My Reports page. You can find definitions for the fields and controls later on this page.



Identify the number of reports that the My Reports pagelet should display in the grid as well and the time frame in which to display them.

Personalizing Column and Sort Order within the Pagelet Grids

Managers can personalize the columns that appear in many of the Manager Dashboard pagelets. You do this by clicking the Personalize link on the pagelet above the grid. These pagelets allow you to change column and sort order within the pagelet grids:

- Pending Approvals
- Direct Line Reports
- My Job Openings

This topic discusses how to personalize the content of the pagelet grids.

Personalize Column and Sort Order Page

Use the Personalize Column and Sort Order page to manage the column and sorting order of a grid within a pagelet.

Navigation

Select the Personalize link above the pagelet grid

Image: Example of the Personalize Column and Sort Order page for the Direct Line Report pagelet (1 of 2)

This example illustrates the Personalize Column and Sort Order page for the Direct Line Report pagelet (1 of 2).

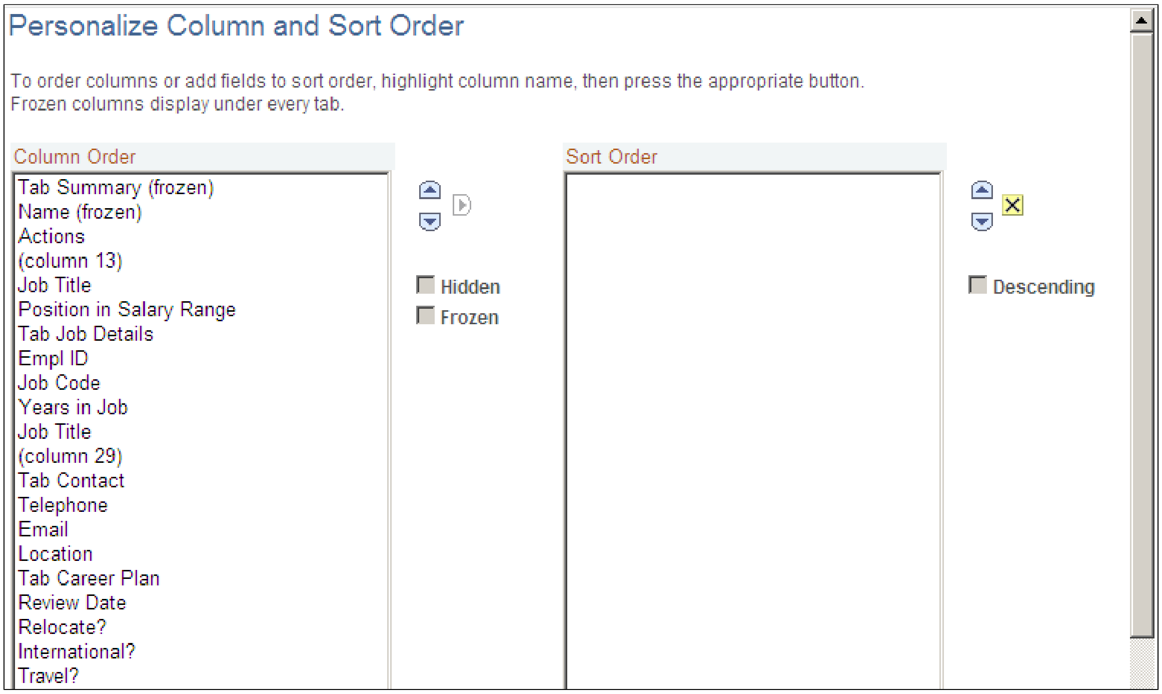


Image: Example of the Personalize Column and Sort Order page for the Direct Line Report pagelet (2 of 2)

This example illustrates the Example of the Personalize Column and Sort Order page for the Direct Line Report pagelet (2 of 2).

Use this page to hide, freeze, or reorder columns in your pagelet. All the dashboard Personalize Column and Sort Order pages are similar to the example shown here, where the fields that available for personalizing are specific to the grid columns available in the pagelet.

To hide a column, click a column name in the left column and select the Hidden check box. When you freeze a column, all the columns that precede it will also be frozen.

The rows in a grid typically sort by a predefined order. For example, the My Job Openings pagelet displays rows of data in descending order of job opening number. To override this default sort order, click the column or columns you want to sort data by. Click the Add to Sort right arrow button to move the rows to the Sort Order group box. The grid rows sort by the order you have the columns listed here. Click a column name in the Sort Order group box and select the Descending check box to have the rows sort in descending order.

To change the order of columns, click the column and use the Move Up and Move Down arrows to change the column order.

Changing the Column Order to a Different Tab for Direct Line Reports

The Direct Line Reports pagelet is different in that the columns are grouped by tabs on the pagelet grid for ease of viewing. The page lists the tab names preceded by the word *Tab.* Columns that should appear in this tab are listed under this tab name. To change a column to a different tab, click the column name and move it under the designated Tab name.

Previewing Your Column Personalizations

To view your changes before saving them to the system, click the Preview button at the bottom of the page.

Chapter 6

Using the Talent Summary Pagelets

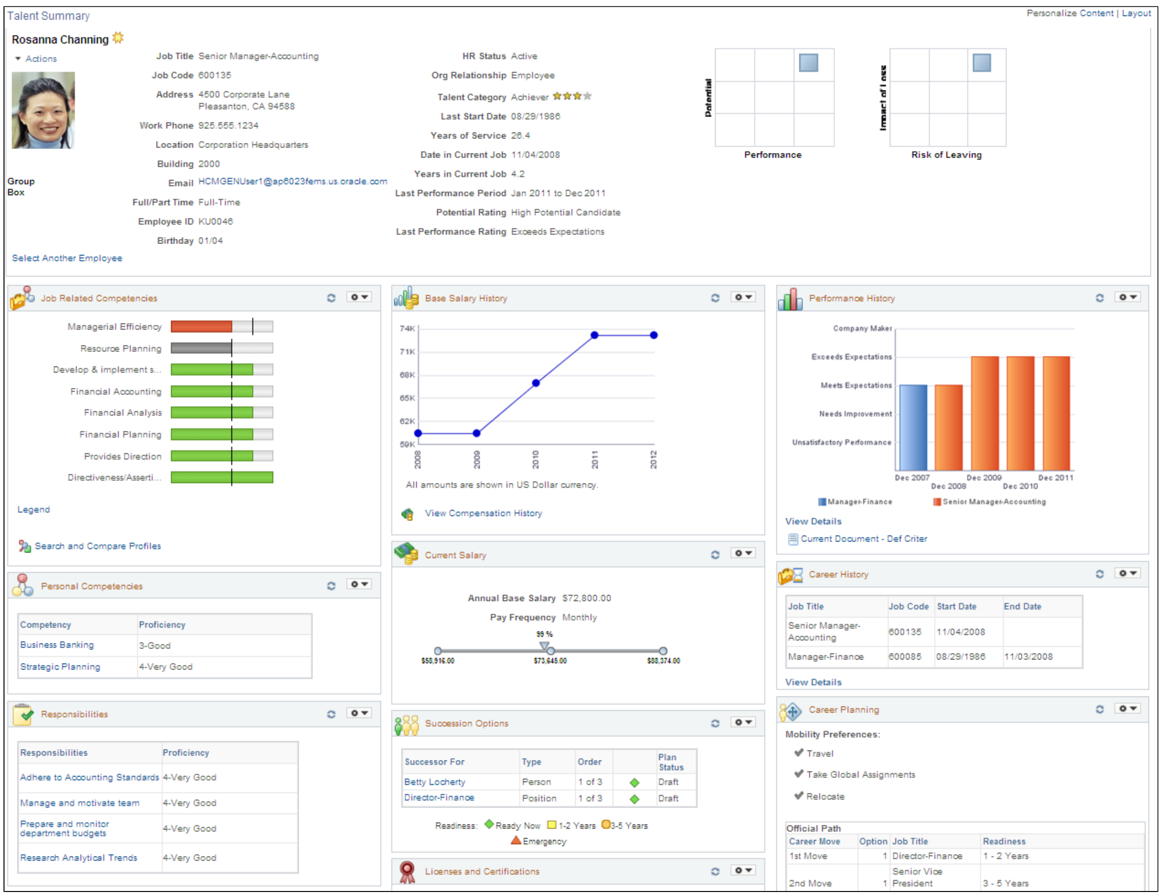
Understanding the Talent Summary Content and Layout

The Talent Summary page provides managers with a comprehensive view of talent data related to an individual employee through the use of a dashboard. With the Talent Summary pagelets, managers have access to an employee's talent data from one location instead of accessing several components separately.

Talent Summary

Image: Example of the Talent Summary page

This example illustrates an example of the Talent Summary page.



Use the Talent Summary page to manage and analyze information about your workforce. This page enables you to:

- View an employee's profile details such as competencies, responsibilities, and certifications.

- Examine career and succession plans for your employees.
- View employee compensation data and compare it to the job salary range.
- Analyze performance history.
- Assess your staff's learning and education.

Note: The system checks direct report access for the Talent Summary page as a whole as well as for access to the contents of each pagelet. If a manager does have security access to the component, the related pagelets will not show up in the dashboard. If a manager has access to the component, but not to the direct reports access needed for the component, then the related pagelet will display a message that the manager does not have access to this information for the employee.

For a list of pagelets delivered with the Talent Summary feature, see Understanding the Talent Summary Dashboard Pagelets and Setup.

Customizing the Talent Summary Page

You can also customize the look of your Talent Summary page. On the Talent Summary dashboard, you can drag and drop pagelets to a desired location on the page. You can also minimize or remove pagelets from the dashboard by using the corresponding icons in the header. To have a pagelet appear after deleting it from the dashboard, access the Personalize Content: Talent Summary page to select the pagelet.

To further personalize Talent Summary dashboard content and layout, use the Personalize Content and Layout links:

- *The Personalize Content: Talent Summary page*–enables you to select or deselect pagelets you wish to view on your Talent Summary page.
- *The Personalize Layout: Talent Summary page*–enables you to determine whether you want your Talent Summary page to display in a 2- or 3-column layout. You will also select which pagelets should appear in which column.

Note: The pagelets available on the Personalize Content page are based on permission lists. If a user does not have access to a permission list, for example, if the Manager Dashboards - JPM *(HCCPJP2200)* permission list is removed from the Manager Dashboard role, the profile based pagelets may not be listed for selection from the Personalize content page.

Related Links

Understanding Accessing Direct Line Report Information on the Dashboard Pagelets

Defining the Manager Dashboard Content and Layout

Displaying the Talent Summary Page and Pagelets

These topics discuss how to:

- Select a direct or indirect report to view on the Talent Summary page.

- View the Talent Summary page and header.

Pages Used to Display the Talent Summary Page and Pagelets

Page Name	Definition Name	Navigation	Usage
Talent Summary - Employee Selection Criteria	HR_DR_DIRECTREPORT	• Talent Summary • Manager Self Service, Talent Summary	Select a direct or indirect report from this page to view the employee's talent summary data.
Talent Summary	HC_TALENT_SUMMARY	• Click Select for an employee on the Talent Summary - Employee Selection Criteria page. • Click the name link of an employee from the Direct Line Reports pagelet of the Manager Dashboard. • Click the View in Talent Summary link from the Actions menu of an employee in the Direct Line Reports pagelet of the Manager Dashboard. • Click the View in Talent Summary link from the Actions menu of an employee within the Org Chart Viewer pages.	View the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Content: Talent Summary	PORTAL_HPCOMP	• Click the Personalize Content link at the top of the Talent Summary page. • Click the Personalize Content link on the Personalize Layout: Talent Summary page.	Define the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page. Standard PeopleSoft role-based security ensures that managers can access only the pagelets appropriate to their roles. The Talent Summary page delivers two performance history pagelets: a graphical view of performance history and a table view of performance history. The pagelets available on the Personalize Content page are based on permission lists. If a user does not have access to a permission list, for example, if the *Manager Dashboards - JPM* (HCCPJP2200) permission list is removed from the *Manager Dashboard* role, the profile based pagelets may not be listed for selection from the Personalize content page. The Personalize Content: Talent Summary works like the Personalize Content: Manager Dashboard page.
Personalize Layout: Talent Summary	PORTAL_HPLAYOUT	• Click the Personalize Layout link at the top of the Talent Summary page. • Click the Personalize Layout link on the Personalize Content: Talent Summary page.	Define the Talent Summary pagelet layout by selecting either a 2- or 3-column layout style you wish to display on your Talent Summary page. Identify the pagelets that should appear in each column by moving pagelets from one column to the next. The columns list only those pagelets you have selected on your Personalize Content: Talent Summary page. The Talent Summary page is optimized using the 3-column layout. The Personalize Layout: Talent Summary works like the Personalize Layout: Manager Dashboard page.

Talent Summary - Employee Selection Criteria Page

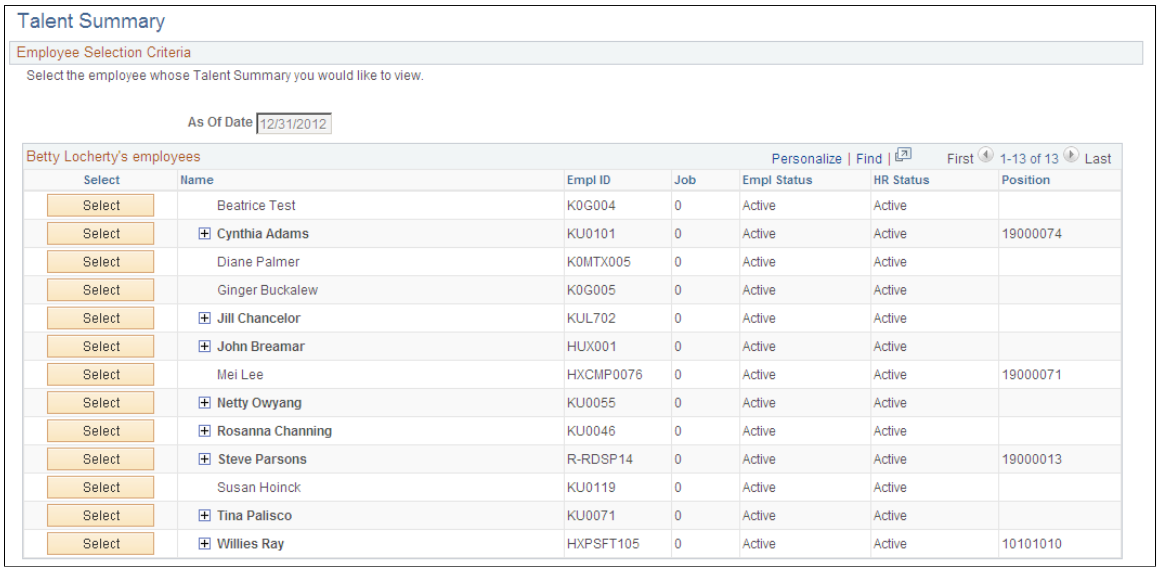
Use the Talent Summary - Employee Selection Criteria page (HR_DR_DIRECTREPORT) to select a direct or indirect report from this page to view the employee's talent summary data.

Navigation

- Talent Summary
- Manager Self Service, Talent Summary

Image: Talent Summary - Employee Selection Criteria page

This example illustrates the fields and controls on the Talent Summary - Employee Selection Criteria page . You can find definitions for the fields and controls later on this page.



View information about your direct and indirect reports. As a higher level manager, you will see your employees in a hierarchical list, or hierarchal grid (Hgrid) format. This enables you to expand or collapse the list to view or hide the indirect reports that report to your direct report managers.

Employee Reporting as of

Displays the current date, which dictates the reporting structure that appears in the employee list as of this date.

Refresh Employees

Click this button to refresh the employee list as of the Employee Reporting as of date specified.

(Expand) or (Collapse)

Click these buttons to expand or collapse the hierarchal grid to view or hide your indirect reports (the direct reports of your subordinates).

Select

Click this button to open the Talent Summary page for this person.

The Select button may display inactive for these reasons:

- You do not have access to an individual in the Direct Reports setup but you have access to their direct reports.

- The employee's status is inactive. Having the grid display the inactive person enables you to access employees under the inactive person who have not yet been reassigned to a new manager.
- The row reflects a position instead of an employee.

Talent Summary Page

Use the Talent Summary page (HC_TALENT_SUMMARY) to view the Talent Summary pagelet content by selecting or deselecting pagelets that should appear on your Talent Summary page.

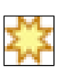
Navigation

- Click Select for an employee on the Talent Summary - Employee Selection Criteria page.
- Click the name link of an employee from the Direct Line Reports pagelet of the Manager Dashboard.
- Click the View in Talent Summary link from the Actions menu of an employee in the Direct Line Reports pagelet of the Manager Dashboard.
- Click the View in Talent Summary link from the Actions menu of an employee within the Org Chart Viewer pages.

Image: Talent Summary page header

This example illustrates the fields and controls on the Talent Summary page header. You can find definitions for the fields and controls later on this page.

The fields in the header are defined by the administrator and may vary from what is shown here.

 **(Additional Jobs icon)**	Displays the Additional Jobs icon next to the employee's name when an employee holds multiple jobs within the organization. Pause over the icon to see the name of the other job or jobs held by this person.
 **(Key Person icon)**	Displays the Key Person icon next to the employee's name to indicate that this employee has been identified as a vital, or key, employee within the organization for succession planning.
Actions	Click this menu drop down list to select manager self service actions to perform for your employees. The system will direct you to the appropriate manager self service page.

PeopleSoft delivers the various self service transactions to work in conjunction with the Talent Summary page that enables managers to view or manage employee information in the PeopleSoft database, as they would from the manager self service pages.

For a list of self service actions available from the Talent Summary page, see Understanding Related Actions and Self Service Transactions.

 **(IM icon)**

Displays the IM icon, if enabled. Pause over the icon to see the employee's chat ID. Click the ID to open the chat window. The page uses the following conditions to determine if it should display the IM icon:

1. The employee has defined an instant messaging ID in HR.
2. The Instant Message Presence Icon is selected for direct line reports in the Org Chart Viewer.
3. The employee's IM protocol and IM domain matches the protocol and domain for the direct line reports in the Org Chart Viewer.

Select Another Employee, Return To Manager Dashboard, or Return to Org Chart Viewer

Click this link to return to the page from which you accessed the Talent Summary page.

Personalize Content

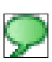
Click this link above the header to open the Personalize Content: Talent Summary page and select or deselect pagelets you want to view on your Talent Summary page.

Personalize Layout

Click this link above the header to open the Personalize Layout: Talent Summary page to define the column layout of your Talent Summary page.

Viewing IM Icons in the Header

Different IM icons will be displayed based on the following:



Indicates the employee is available on the IM Protocol specified.

Indicates the employee is either not available on the IM Protocol specified or the employee does not have an account on that IM Protocol.

Indicates there is an error connecting to the IM Protocol.

Related Links

Understanding the Talent Summary Dashboard Pagelets and Setup

Header Rate Boxes Page

Viewing the HR Job and Plan Careers Pagelets

These topics discuss the:

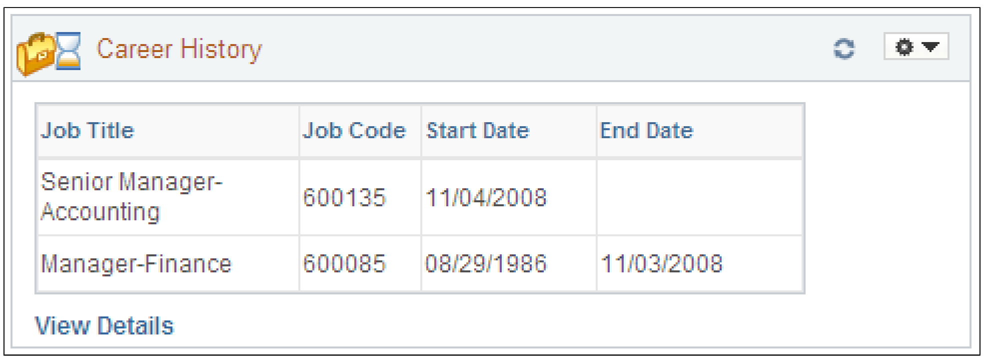
- Career History pagelet.
- Career Planning pagelet.

Career History Pagelet

The Career History pagelet displays job summary information for the employee.

Image: Career History pagelet

This example illustrates the fields and controls on the Career History pagelet. You can find definitions for the fields and controls later on this page.



This pagelet displays a grid with a list of jobs that the employee holds and has held in the past, most recent jobs first.

View Details or View All	Click this link to open the Career History model window to view all of the employee's job history. The Career History model window also displays the employment record number for the person. The View Details link appears when there are five or fewer rows of job history. The View All link appears when there are more than five rows of history.

Related Links

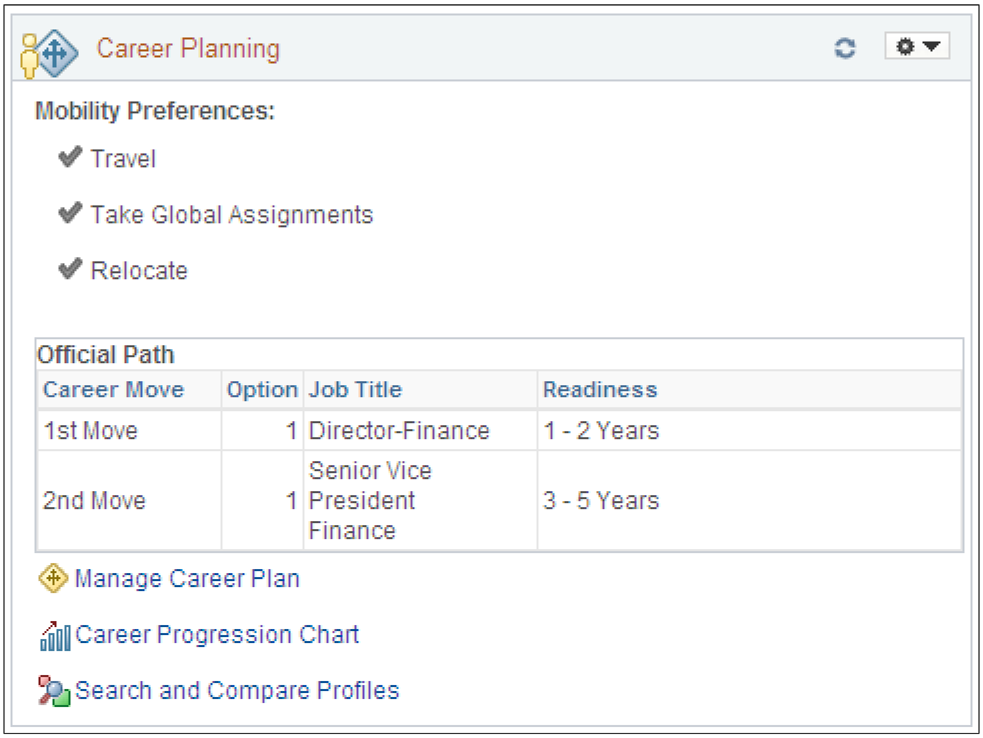
"Viewing Worker Job History *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*"

Career Planning Pagelet

The Career Planning pagelet displays career paths for the employee.

Image: Career Planning pagelet

This example illustrates the fields and controls on the Career Planning pagelet. You can find definitions for the fields and controls later on this page.



Use this pagelet to view the mobility preferences for an employee. The pagelet may also display up to 3 grids to view the employee's different types of career paths: the Official Path, the Manager Approved Path, and the Personal Path, if applicable. The grids will appear only when there is data to display. The Personal Path grid will appear only if it has data to display and if the employee has not marked the personal career path as private.

Willing To	Display the mobility preferences for this employee. Mobility preferences are maintained in the person's profile. The check mark indicates an employee is willing to relocate, travel, or take an international assignment for his or her job.
Career Move	Identifies the order of career steps. For example, *1st Move* is the first step in the suggested career path.
Option	Displays the preference order of jobs when more than one job is associated with a career move.
Job Title	Identifies the suggested job for an employee's career progression.

Readiness

Displays when this employee is or will be ready for this career move. Values are: *1-2 Yrs, 3-5 Yrs, Emergency, Ready Now,* and *Retirement.*

Manage Career Plan

Click this link to open the Manage Careen Plan component and manage career information for this employee.

Career Progression Chart

Click this link to open the Career Progression Chart page and see a graphical representation of an employee's career path.

Search and Compare Profiles

Click this link to open the Search for Profiles page to perform profile comparisons between this employee and other employees or jobs within the organization.

View All <number>

Click this link when more than five rows of data appear in a grid to view additional career move options for this person.

Related Links

"Person Profile Page *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*"
"Understanding Plan Careers *(PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)*"

Viewing the HR Manage Profiles Pagelets

These topics discuss the:

- Education pagelet.
- Honors and Awards pagelet.
- Interest List.
- Job Related Competencies pagelet.
- Personal Competencies pagelet.
- Licenses and Certifications pagelet.
- Responsibilities pagelet.
- Special Projects pagelet.
- E&G Special Projects pagelet.

Related Links

PeopleSoft HCM 9.2: Human Resources Manage Profiles
PeopleSoft HCM 9.2: eDevelopment

Pages Used to View Additional Manage Profiles Pagelet Content

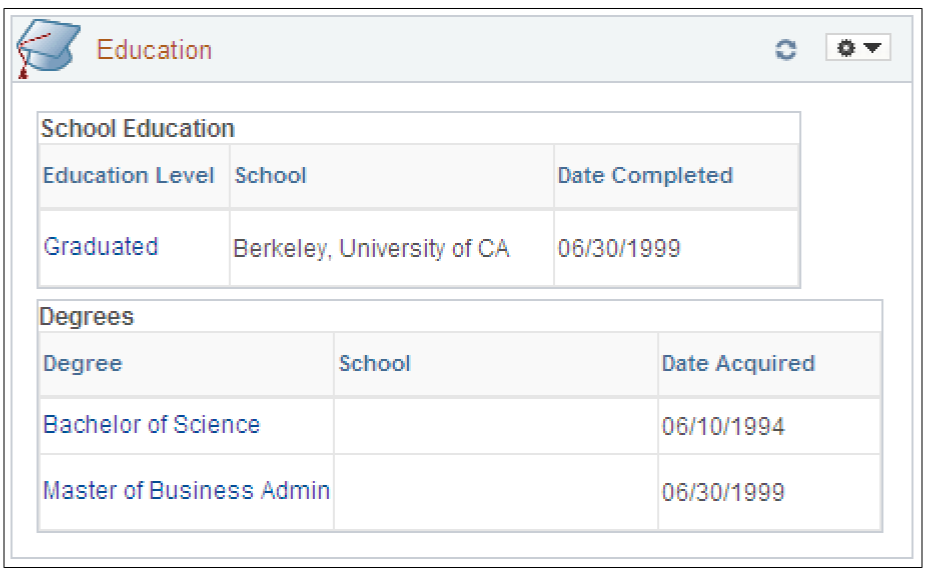
Page Name	***Definition Name***	***Navigation***	***Usage***
Job Related Competencies	HCTS_JOB_COMP_SEC	Click the View All <number> link at the bottom of the Job Related Competencies pagelet on the Talent Summary page.	View all job related competencies when there are more competencies associated with an employee's job than the 10 the pagelet can display.
Personal Competencies	HCTS_PERS_COMP_SEC	Click the View All <number> link at the bottom of the Personal Competencies pagelet on the Talent Summary page.	View all the employee competencies not associated with the employee's job. This link is available when the employee has more than five non-job related competencies.

Education Pagelet

The Education pagelet displays the schools attended and degrees completed by this employee.

Image: Education pagelet

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



Up to two grids can display on this pagelet: the School Education grid and the Degrees grid. If there is not data to populate one of the grids, only one grid will appear.

View an employee's schooling and degrees acquired. You can click the names of the education level and degree name links to open the Profile Details page and view additional details about this employee's education.

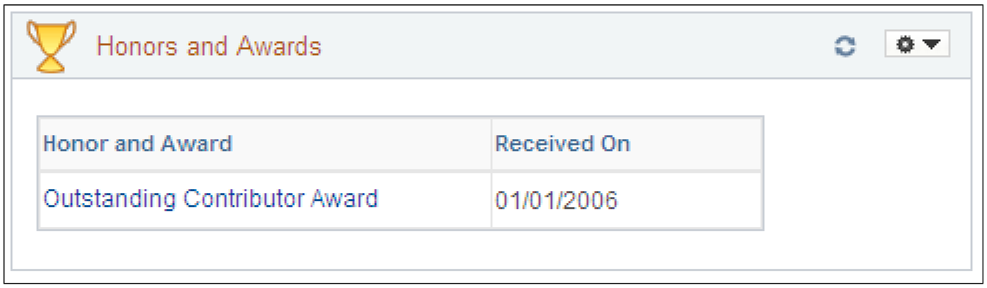
View All <number>	Click this link when more than five rows of data appear in either educational grid to view additional education of degrees for this person.

Honors and Awards Pagelet

The Honors and Awards pagelet displays the honors and awards this employee has received.

Image: Honors and Awards pagelet

This example illustrates the fields and controls on the Honors and Awards pagelet. You can find definitions for the fields and controls later on this page.



Managers use this pagelet to view a list of honors and awards obtained by an employee and the date it was received. The grid sorts the information by received date, more recent first.

Honor and Award

Click the honor and award name link to open the View Profile page and view more details about the honor or award for this person.

View All <number>

Click this link when more than five honors or awards are associated with the employee's person profile.

Interest List Pagelet

The Interest List pagelet displays the job profiles in which an employee may have an interest.

Image: Interest List pagelet

This example illustrates the fields and controls on the Interest List pagelet. You can find definitions for the fields and controls later on this page.

Profile

Displays a list of job profiles (in this case typically jobs or positions) that are of interest to the employee. Click the profile name link to open the Manager Self-Service Job Profile page and view more information about the job's profile, such as competencies, responsibilities, or qualifications.

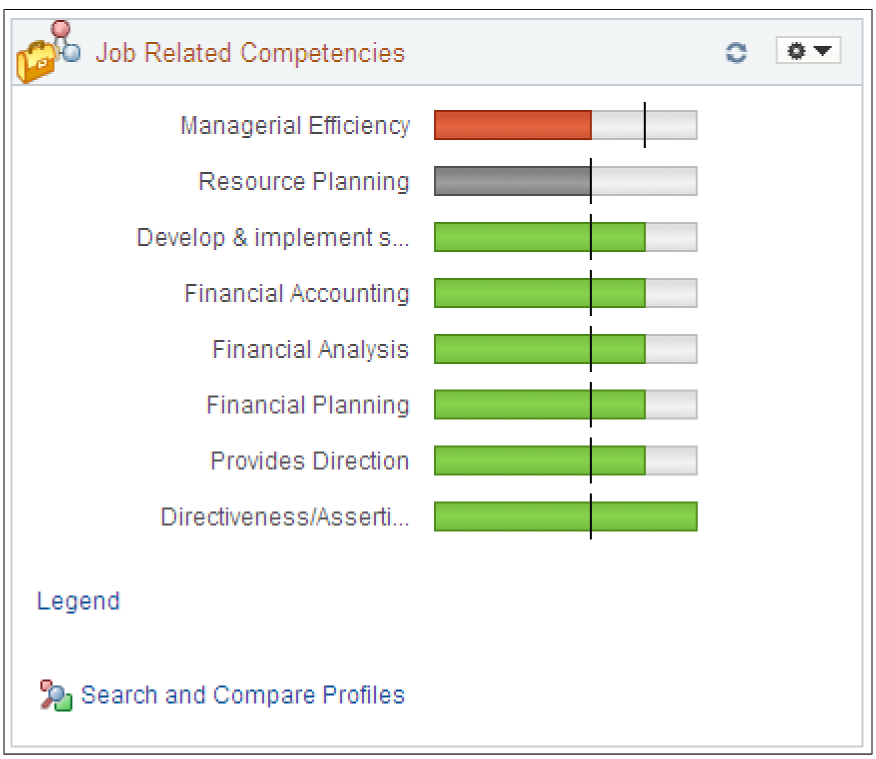
Assigned By	Identifies the person that added this job profile to the employee's interest list.
Compare Profiles	Click the Compare icon button to open the Compare Profiles - Match Result page to compare this job's skills and competencies with that of the employee's current skills and competencies.
View All <number>	Click this link when the employee is associated with more than five profiles and view all profiles on the interest employee's list.
Interest List	Click this link to open the Team Interest List page in Manager Self Service. There you can review, update, or delete job interests for this person.

Job Related Competencies Pagelet

The Job Related Competencies pagelet displays the list of competencies associated with this employee's job (non-person) profile compared to the employee's (person) profile.

Image: Job Related Competencies pagelet

This example illustrates the fields and controls on the Job Related Competencies pagelet. You can find definitions for the fields and controls later on this page.



This pagelets displays the primary nonperson profile type as the target profile. Define Primary profile types by navigating to Set Up HCM, Product Related, Profile Management, Profiles, Assign Default Profile Types. For example, if the Primary NonPerson Profile Type field is *JOB,* only the profile competency types of *JOB* will show.

This pagelet displays a bar graph of the target versus actual proficiencies for competencies found on the job (non-person) profile related to the employee. The vertical line on the graphic represents the minimum target level an employee should have in this job. The colored horizontal bars represent the employee's proficiency level.

The color of the bar changes based on these employee proficiency levels:

- *Red bar that appears below the target line:* Employee's proficiency is less than the target level of the job.
- *Dark gray bar that appears even with the target line:* The employee is on target and matches the target level for a competency.
- *Green bar that appears beyond the target line:* The employee exceeds that of the target level for the job.
- *Only the light gray competency bar appears:* The employee has not been rated for this job competency.

Pause over a competency bar to view the full name of the competency, the target level rating, and the employee's rating. Click the bar to open the View Profiles page to see additional details about the rating for this employee.

The types of evaluations to display and the number of year to display them are defined on the Talent Summary Setup - Other Pagelets page.

See Other Pagelets Page.

View All <number>	Click this link when more than 10 competencies are associated with the job (non-person) profile.
Legend	Click this link to open the Legend page and view the bar descriptions.
Exceptions	Click this link to open the Exceptions page and view chart exceptions where the competency actual rating model of the employee does not match the target rating model of the job.
Search and Compare Profiles	Click to open the Search for Profiles page and perform a profile comparison between profiles.

Note: Competencies that the employee has been rated on but not associated with the employee's non-person job profile are visible on the Personal Competencies pagelet.

Personal Competencies Pagelet

The Personal Competencies pagelet displays the list of competencies associated with this employee's person profile, but not the employee's job (non-person) profile.

Image: Personal Competencies pagelet

This example illustrates the fields and controls on the Personal Competencies pagelet. You can find definitions for the fields and controls later on this page.

Competency

Click the competency name link to open the View Profile page and view more details about the competency rating for this person.

For competencies that have multiple reviewers for the same evaluation type, data for the most recent effective date displays on the pagelet. The types of evaluations to display and the number of years to display them are defined on the Talent Summary Setup - Other Pagelets page.

See Other Pagelets Page.

View All <number>

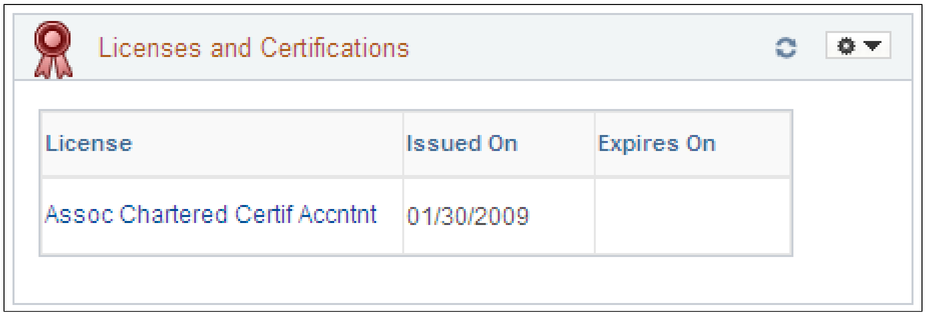
Click this link when more than five non-job related competencies are associated with the employee's person profile.

Licenses and Certifications Pagelet

The Licenses and Certifications pagelet displays the licenses and certificate held by this employee and their expiration date.

Image: Licenses and Certifications pagelet

This example illustrates the fields and controls on the Licenses and Certifications pagelet. You can find definitions for the fields and controls later on this page.



The grid sorts the rows by expiration date, then by issued date.

<warning icon>

This column displays a warning icon, if applicable. The grid can display the Critical or Warning icons based on the alert level definitions set up by the administrator on the Alerts Pagelet Setup page: The grid will also display this icon when a certificate or licenses is past due.

See Alerts Pagelet Setup Page.

License

Click the license name link to open the View Profile page and view more details about the license or certificate for this person.

View All <number>

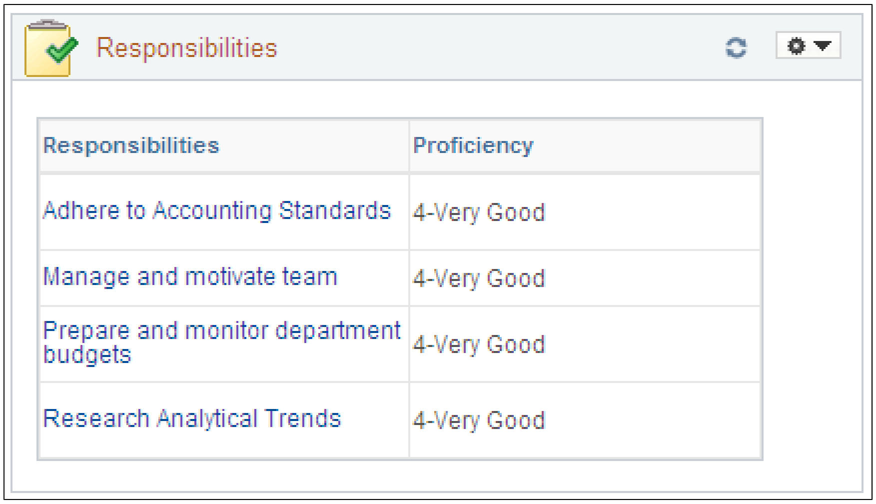
Click this link when more than five licenses or certificate are associated with the employee's person profile.

Responsibilities Pagelet

The Responsibilities pagelet displays the list of responsibilities associated with an employee's person profile.

Image: Responsibilities pagelet

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



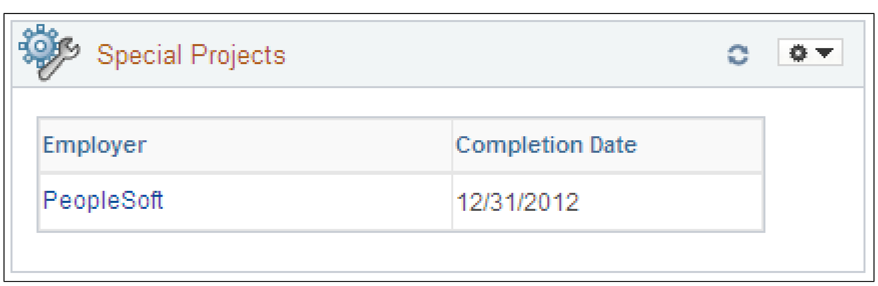
Responsibilities	Lists the responsibilities held by this employee as defined on the person profile. Click the responsibilities name link to open the Profile Details page and view additional information about the responsibilities.
View All <number>	Click this link when more than five responsibilities are listed on the employee's person profile.

Special Projects Pagelet

The Special Projects pagelet displays projects assigned to this employee.

Image: Special Projects pagelet

This example illustrates the fields and controls on the Special Projects pagelet. You can find definitions for the fields and controls later on this page.



Employer	Lists the projects assigned to this employee. Projects are sorted by completion date. Click the employer name link to open the

Profile Details page. The number or years to display a project is defined on the Talent Summary Setup - Other Pagelets page.

See Other Pagelets Page.

View All <number>

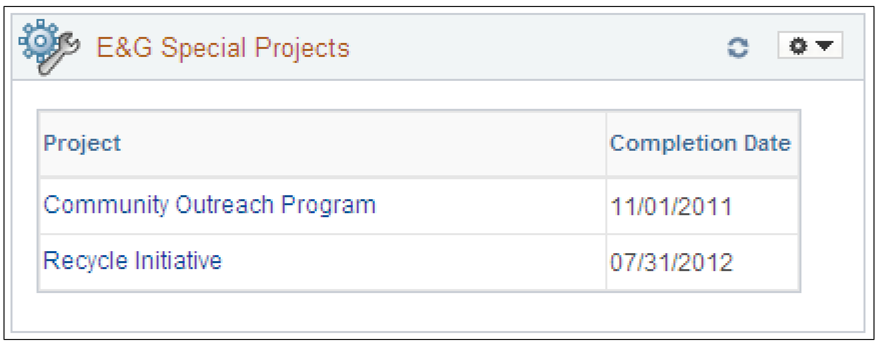
Click this link when more than five projects are listed for the employee.

(E&G) E&G Special Projects Pagelet

The E&G Special Projects pagelet displays Education and Government projects assigned to this employee.

Image: E&G Special Projects pagelet

This example illustrates the fields and controls on the E&G Special Projects pagelet . You can find definitions for the fields and controls later on this page.



Project

Lists the E&G projects assigned to this employee. Projects are sorted by completion date. Click the project name link to open the Profile Details page. The number or years to display a project is defined on the Talent Summary Setup - Other Pagelets page.

See Other Pagelets Page.

View All <number>

Click this link when more than five projects are listed for the employee.

Viewing the Compensation Pagelets

These topics discuss the:

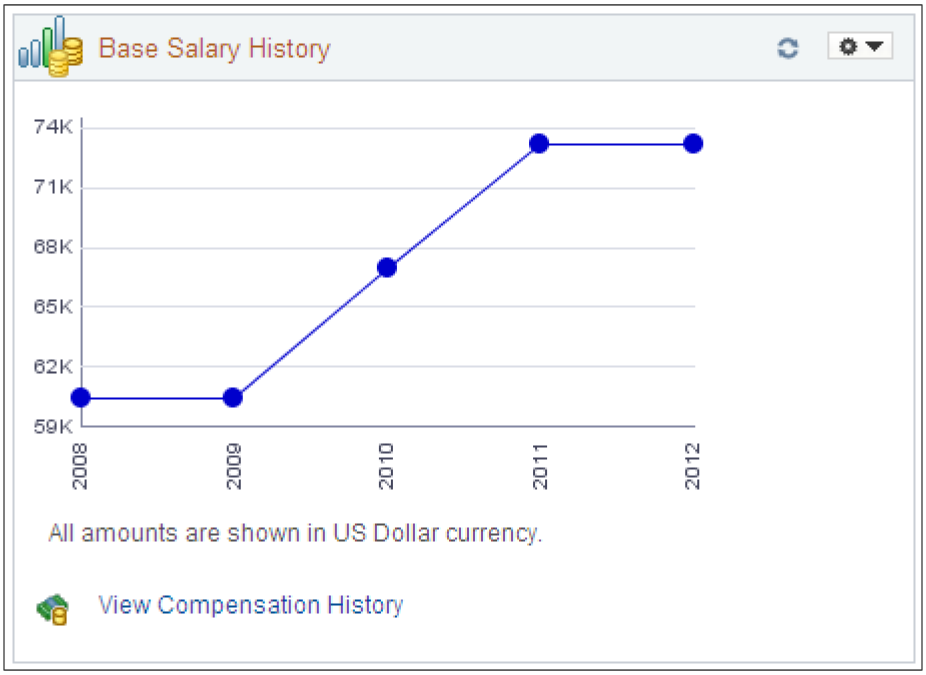
- Base Salary History pagelet.
- Current Salary pagelet.
- Total Rewards pagelet.

Base Salary History Pagelet

The Base Salary History pagelet displays the compensation history for an employee.

Image: Base Salary History pagelet

This example illustrates the fields and controls on the Base Salary History pagelet. You can find definitions for the fields and controls later on this page.



Use this pagelet to view salary change history. The pagelet displays the last five years of compensation. Pause over the graph line points to view the exact employee's salary for a specific year.

Note: In order for the pagelet to display data, it may be necessary to modify the access type for the View Compensation History (HR_SS_MG_COMP_HIST) component on the Direct Reports Configuration page by navigating to Set Up HCM, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI.

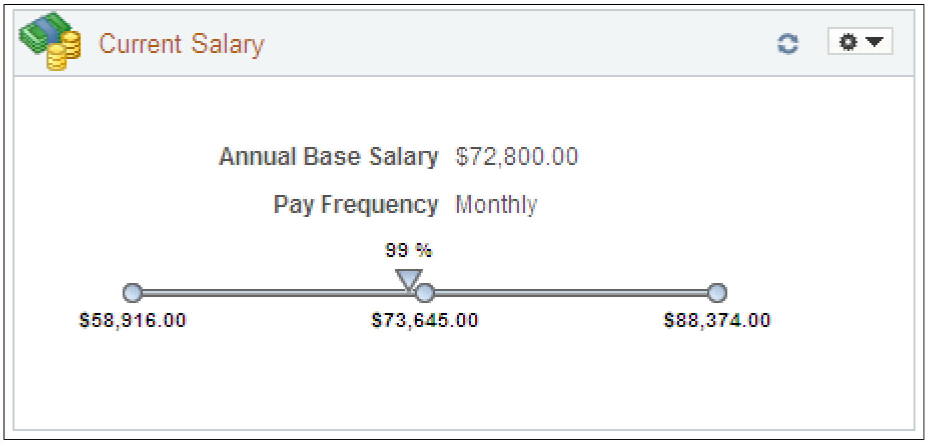
 **View Compensation History**	Click this link to open the Compensation History page in self service and view the employee's salary, variable cash, and variable noncash information.

Current Salary Pagelet

The Current Salary pagelets displays the salary range for an employee’s job and where the employee falls within that range.

Image: Current Salary pagelets

This example illustrates the fields and controls on the Current Salary pagelets. You can find definitions for the fields and controls later on this page.



The pagelet displays the minimum, midpoint, and maximum of the salary grade for this employee’s job. The arrow icon that runs across the salary range bar indicates the employee’s compa-ratio. The percentage that appears is in comparison to the midpoint of the range. You can pause over the arrow icon to view the employee’s actual salary.

Related Links

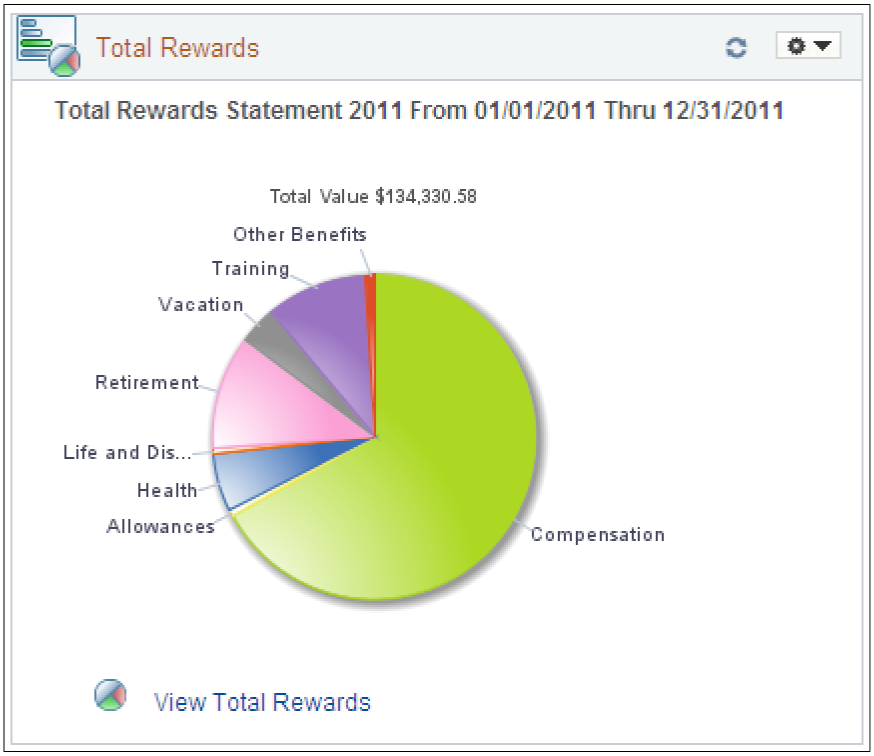
"Understanding Salary Grades and Steps *(PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)*"

Total Rewards Pagelet

The Total Rewards pagelets displays the composition of an employee's compensation and rewards package.

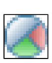
Image: Total Rewards pagelets

This example illustrates the fields and controls on the Total Rewards pagelets. You can find definitions for the fields and controls later on this page.



Use this pagelet to view a summary chart depicting a graphical representation of compensation and benefit summary information. The pagelet displays the most recent total rewards information for the employee.

The top of the pagelet displays the employee's total rewards value amount. Pause over various pie slices in the graphic to see the amount associated with each rewards component and its percentage of the reward. Click each individual pie slice to view more details about that reward. For example, a health benefit may represent 10 percent of your total reward, and by clicking the Health pie slice, you can see that the benefit is comprised of health and dental insurance.

 **View Total Rewards**	Click this link to open the View Total Rewards page. Review compensation and benefit summary information for a particular reward period.

Note: The Total Rewards pagelet will display data only when the Total Rewards feature has been implemented.

Related Links

"Understanding the Administer Compensation Total Rewards Statement *(PeopleSoft HCM 9.2: Human Resources Administer Compensation)*"

"Understanding Reward Data Sources *(PeopleSoft HCM 9.2: Human Resources Administer Compensation)*"

Viewing the ePerformance Pagelets

The Talent Summary page delivers two performance history pagelets and the user can choose to display either of them.

Data for the graph and grid is derived from the completed performance documents for an employee. The manager listed on the performance document can access both current and historical documents. When managers have access to the View Only Documents transaction, they can view any document for direct or indirect reports based upon the Direct Reports setup. This includes past documents for which the employee was not their direct or indirect report. If the manager does not have access to the View Only Documents transaction, then access is limited to the Historical Documents transaction where the user is listed as a manager on the document.

Note: It is best to use the graphical view of performance history when the rating model has not changed over performance periods. However, if the rating model has changed one or more times, it may be better to use the table grid view. The graphical view does not represent a change in rating model.

These topics discuss the :

- Performance History pagelet as a graph.
- Performance History pagelet in a table grid.

Performance History Pagelet as a Graph

This Performance History pagelet displays the overall rating (y-axis) for an employee from past performance periods (x-axis) using a bar graph.

Image: Performance History pagelet in graphical format

This example illustrates the fields and controls on the Performance History pagelet in graphical format. You can find definitions for the fields and controls later on this page.

We recommend that you use the graphical view when the rating model has not changed over performance periods.

This pagelet displays a bar graph. The colored vertical bars represent the employee's overall performance rating for the period specified. Each distinct job title is represented by a different colored bar. A legend for each job title appears below the graph. The administrator determines the document type and how many periods worth of data to show on the Talent Summary Setup - Other Pagelets page.

See Other Pagelets Page.

Pause over a period rating bar to view the performance dates and employee rating. Click the bar to open the Document Details page to see additional details about the rating for this employee and access the performance evaluation.

View Details	Click this link to view the performance history in a grid format.
Current Document - <status>	Click this link to view or manage the most current performance evaluation that is in progress in WorkCenter.

Related Links

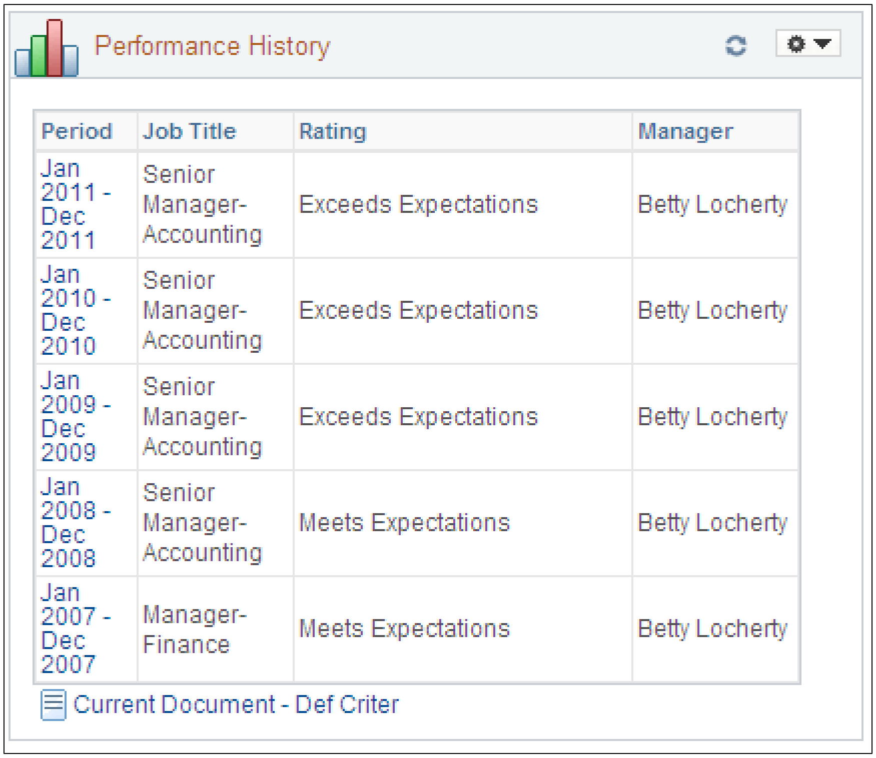
"Viewing Evaluation Ratings *(PeopleSoft HCM 9.2: ePerformance)*"

Performance History Pagelet in a Table Grid

This Performance History pagelet displays the overall rating for an employee from past performance periods using a table grid.

Image: Performance History pagelet in a table grid format

This example illustrates the fields and controls on the Performance History pagelet in a table grid format. You can find definitions for the fields and controls later on this page.


Performance History

Period	Job Title	Rating	Manager
Jan 2011 - Dec 2011	Senior Manager-Accounting	Exceeds Expectations	Betty Locherty
Jan 2010 - Dec 2010	Senior Manager-Accounting	Exceeds Expectations	Betty Locherty
Jan 2009 - Dec 2009	Senior Manager-Accounting	Exceeds Expectations	Betty Locherty
Jan 2008 - Dec 2008	Senior Manager-Accounting	Meets Expectations	Betty Locherty
Jan 2007 - Dec 2007	Manager-Finance	Meets Expectations	Betty Locherty

Current Document - Def Criter

If a rating model has changed one or more times over performance periods, it is recommended you use the grid view. The graphical view does not represent a change in rating model. This format also supports ADA (Americans with Disability Act of 1990) accessibility.

The administrator determines the document type and how many periods worth of data to show on the Talent Summary Setup - Other Pagelets page.

See Other Pagelets Page.

The grid sorts the rows by period end date, most recent first.

Period	Display the performance review period. Click this link to open the Document Details page and view additional information about this performance review.
Current Document - <status>	Click this link to view or manage the most current performance evaluation that is in progress in WorkCenter.

Related Links

"Viewing Evaluation Ratings *(PeopleSoft HCM 9.2: ePerformance)*"

Viewing the Plan Succession Pagelet

This topic discusses the Succession Options pagelet.

Succession Options Pagelet

The Succession Options pagelet displays all positions, jobs, and persons for which the employee is slated as a successor.

Image: Succession Options pagelet

This example illustrates the fields and controls on the Succession Options pagelet. You can find definitions for the fields and controls later on this page.

This pagelet displays succession plan data for which a manager has access to. The rows in the grid are sorted by status then readiness.

Successor For
Displays the person, job, or position from a succession plan for which an employee is a successor. Click this link to open the Succession 360 page and view or update the succession plan details.

Type
Indicates the type of succession plan with which this person is associated. Succession plan types are *Person, Position,* or *Job.*

Order
Displays this employee’s candidate ranking order for this succession plan.

<readiness status>
This column displays the readiness status of this person for this job or position. The icons that appear in this grid are defined in the Readiness ledger at the bottom of this pagelet, or pause over an icon to view text defining this icon.

Plan Status
Displays the status of this succession plan. Values are *Official* or *Draft.*

View All <number>
Click this link when the employee is associated with more than five succession plans to view all succession plans linked to this employee.

Viewing the Enterprise Learning Management Pagelet

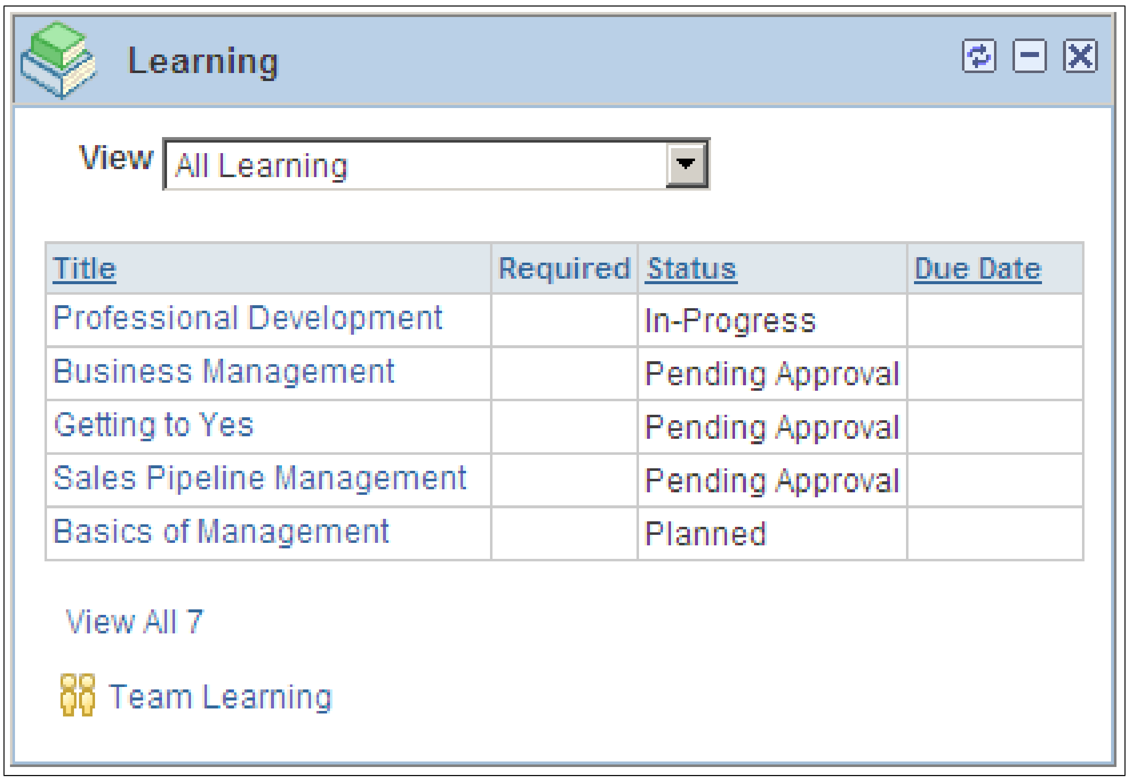
This topic discusses the Learning pagelet.

Learning Pagelet

The Learning pagelet displays an overview of learning events for a particular employee. This information comes from the Enterprise Learning Management (ELM) system.

Image: Learning pagelet

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



Use this pagelet to see an overview of learning activities of an employee. This pagelet highlights required learning and certifications which are expired or in warning status, with the Past Due and Due Soon warnings appearing first. The pagelets presents the classes, programs, and courses in *Planned* status.

The View drop-down field enables you to filter the data that you see in the grid.

View

Select which view of data you wish to display in the grid. Choices are:

- *All Learning* – does not filter out information but shows all learning scheduled for your employee
- *Required Learning* – filters the grid to show training that is only marked as required, in warning status, or expired.

Title

Click the title link to open an application page that corresponds to the type of learning item it is, for example, a class, course, or program.

Note: The data for ELM Learning is pulled from ELM database via IB Integration setup.

Required— (Due Soon) and (Past Due)

Displays the Due Soon or Past Due icon if the learning item has reached the date that defines an item as due soon or past due. If the item is not past due or due soon, the field is left blank.

View All <number>

The pagelet displays five rows of information in the grid. Click this link to open a modal Learning grid page to view all rows of employee learning. The number of employees that appear in the page grid will appear in the link name.

Team Learning

Click this link to open the Team Learning page in manager self service.

See the documentation for *PeopleSoft Enterprise Learning Management,* “Defining Defaults”.

