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# PeopleSoft HCM 9.2: Human Resources Manage Profiles

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March 2013

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# Preface

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## 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.

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**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.

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### 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.

<i><b>Typographical Convention</b></i>	<i><b>Description</b></i>
<b>Bold</b>	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.
<i>Italics</i>	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 <i>O</i> .
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.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
{ } (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>.

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## 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 accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleSoft HCM Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft HCM 9.2: Application Fundamentals*.

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## 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](#)

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## Contact Us

[Send us your suggestions](#) Please include release numbers for the PeopleTools and applications that you are using.

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# Getting Started with Manage Profiles

## Manage Profiles Overview

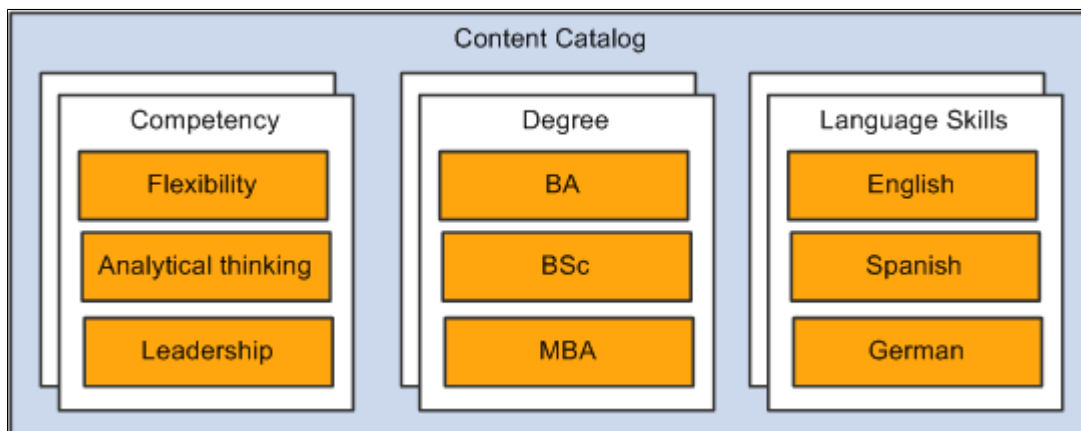
Profiles are widely used by organizations to describe the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person. Profiles are valuable for tracking employees' skills, competencies, and accomplishments, in career planning, for identifying training needs, for performance management, and in the recruitment process for identifying job requirements and suitable applicants. The Manage Profiles business process provides a framework for developing and managing profiles that meet your industry or organizational requirements. The Search and Compare profiles feature enables you to perform searches for profiles that match user-defined criteria and easily compare profiles.

### Content Catalog

The content catalog is the source of competencies, accomplishments, and other data that administrators, managers, and employees add to their profiles.

#### Image: Content catalog example with competencies, degrees, and language skills

The following diagram illustrates the content catalog that contains lists of competencies, such as flexibility, analytical thinking, and leadership; degrees, such as Bachelor's or Art, Bachelor's of Science, and Masters; and language skills, such as English, Spanish, and German:



Information in the content catalog is organized by content type. A set of content types is delivered for the common content types such as competencies, language skills, degrees, licenses and certificates. Profile administrators add items for the delivered content types.

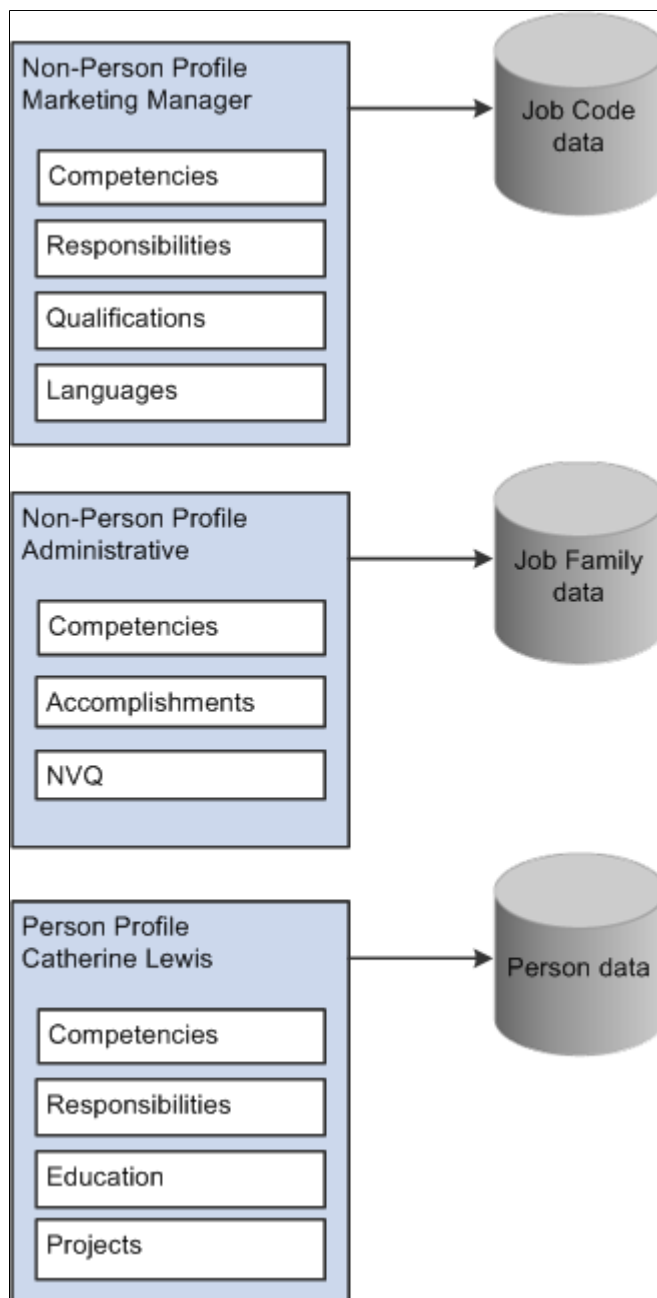
However, you are not limited to the delivered content types. You can extend the content catalog by defining additional content types and loading items for the new content types. This enables organizations to configure the content catalog to their specific needs and use this information in profiles.

## Person and Non-Person Profiles

In the same way that you set up the content catalog to include the attributes that you want to track, you define a set of profiles that match your organization's requirements.

### Image: Profile examples for a job code, a job family, and a person

The following diagram illustrates how Manage Profiles enables you to configure profile content and link profiles to any object in the system: a job code is linked to a profile that describes the competencies, responsibilities, qualifications, and languages of a Marketing Manager, a job family is linked to a profile that describes the competencies, accomplishments, and national vocational qualifications (NVQ) for administrative jobs, and a person's record is linked to a profile that describes that person's competencies, responsibilities, education, and projects:



You use the content types in the content catalog to create profile types that define the structure of your profiles. The profile type defines the content types and properties that appear in the profile, and the approvals processing associated with that content. The profile type also defines whether the profile is linked to a person ID to create person profiles, or linked to business entities, such as job code or positions, to create non-person profiles.

You can define as many profile types as you require for your business needs. Four profile types are delivered as system data. Use the CLUSTER, ROLE, and JOB profile types to create non-person profiles, and the PERSON profile type to create profiles that describe your employees.

Manage Profiles offers syndication and import features to reduce the administration of profile content. Profile administrators can set up common profile content once and then reuse that content in related profiles. Syndication has the added benefit that changes to the source profile trigger automatic updates to the target profiles that contain the syndicated content.

Approvals processing is an optional aspect of profile management. If required, set up approval processing using the standard HCM approvals framework and use it to control changes to particular sections of person and non-person profiles. PeopleSoft delivers approvals processing to handle these scenarios, but you can modify or create new definitions according to your needs:

- Employee changes to their person profiles (using PeopleSoft eDevelopment) are submitted to their manager for approval.
- Manager changes to non-person profiles (using eDevelopment) are submitted to the profile administrator for approval.

## Search and Compare Profiles

The Search and Compare Profiles feature in Manage Profiles provides the ability to build searches that work with your content catalog and profiles. Here are a few examples of the search types that are possible:

- Search for job profiles that match an employee's profile.
- Search for an employee who matches the profile for a job opening.
- Select a job profile and search for similar job profiles.

Searches are linked to roles which enables you to create a set of searches that are appropriate to employees, managers, and administrators.

Search and Compare Profiles uses Oracle's Secure Enterprise Search (SES) search engine to perform the search of profile data based on the search criteria. This returns a list of matching profiles ranked according to how well they match that criteria.

The Compare facility provides an online comparison of a given source profile against one or more target profiles. The contents of the source profile and the target profiles are displayed in adjacent columns, enabling the administrator to identify the differences between the profiles.

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**Note:** For more information on SES terminology and to learn how to create and implement the application-specific items, see the product documentation for *PeopleTools: PeopleSoft Search Technology*

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## Manage Profiles Business Processes

PeopleSoft HR Manage Profiles provides these business processes:

- Manage person and non-person profiles.

Administrators create profiles based on the profile types available and select items from the content catalog. They create and maintain employees' person profiles. They can also create and maintain non-person profiles for entities such as a job code, position, or job family.

- Manage interest lists.

An interest list is a collection of non-person profiles associated with an employee. It provides a way for employees to identify profiles that are of interest. Profile administrators can add to and remove profiles from employee interest lists.

- Manage profile approvals.

Using Manage Approvals, administrators can view profile changes routed to them by the approvals workflow engine and approve or reject the changes. They can also view approvals information for changes previously approved or rejected.

- Search and compare profiles.

Administrators have access to a set of searches that are configured for their role. Depending on the search type, administrators use the searches to identify target profiles that match a source profile or search criteria that they enter manually. The search results identify the best matches based on a profile score calculated by the search engine. Administrators can compare profiles listed in the search results or by using Compare Profiles to compare selected profiles.

- Match person competencies and other content types to the corresponding content in non-person profiles.

Profile administrators can compare a person's competencies and other content types with those required by a non-person profile, or compare the competencies and other content types of a team with those required by a non-person profile.

- (GBR) Manage National Vocation Qualifications (NVQs).

Manage Profiles provides content types and profile types for tracking and reporting employees who are enrolled in NVQs.

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

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## Manage Profiles Integrations

Manage Profiles integrates with other business processes within PeopleSoft HR, including:

- Plan Careers and Successions.
- Administer Training.

- Administer Workforce.

This includes the process for adding employment instances for U.S. Federal government employees and military rank processing.

- Manage French Public Sector.

It also integrates with other PeopleSoft HCM applications, including

- eDevelopment

eDevelopment provides the employee and manager self-service options that complement the administrator functionality in Manage Profiles.

- ePerformance
- Talent Acquisition Manager
- Candidate Gateway
- Campus Self Service

Manage Profiles also integrates with:

- PeopleSoft Enterprise Learning Management, Financials, CRM, and Enterprise Performance Management.

For example, Enterprise Learning Management and Enterprise Performance Management leverage profile content as configured by those products. Financials Resource Management and Staffing leverage competency and accomplishment data via the legacy EIPS (such as PERSON\_COMPETENCY\_SYNC, PERSON\_ACCOMP\_SYNC, and so on).

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**Note:** The Financials and CRM integration references the legacy content based on the legacy competencies and accomplishments structure only; new content that is added to Profile Management is not leveraged by Financials or CRM.

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- Third-party applications.

You can integrate Manage Profiles with third-party content providers to load competency content into the content catalog. Profile data can be integrated with Oracle Workforce Scheduling (*PeopleSoft HCM 9.2: Application Fundamentals*) and Clairvia (*PeopleSoft HCM 9.2: Application Fundamentals*).

We discuss integration considerations in the implementation topics in this documentation.

---

## Manage Profiles Implementation

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

Manage Profiles also provides component interfaces to help you load data from your existing system into Manage Profiles tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

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

<b>Component</b>	<b>Component Interface</b>	<b>Usage</b>
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_COMP	Add or update Competency content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_CRITERIA	Add or update Criteria content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_ELEMENT	Add or update Element content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_GOAL	Add or update Goal content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_HON	Add or update Honors and Awards content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_LIC	Add or update Licenses and Certifications content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_RESP	Add or update Responsibility content catalog items.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_SUBCOMP	Add or update Sub-competency content catalog items.
JPM_NON_PERS_PROFL	CI_JPM_NONPERS_PROFILE	Add or update non-person profiles. <ul style="list-style-type: none"> <li>• Use ExcelToCI action CREATE to add new profiles.</li> <li>• Use ExcelToCI action UPDATE to add new profile items or identifiers.</li> <li>• Use ExcelToCI action UPDATEDATA to update an existing profile item.</li> </ul>
JPM_PERSON_PROFILE	CI_JPM_PERSON_PROFILE	Add or update person profiles. <ul style="list-style-type: none"> <li>• Use ExcelToCI action CREATE to add new profiles.</li> <li>• Use ExcelToCI action UPDATE to add new profile items.</li> <li>• Use ExcelToCI action UPDATEDATA to update an existing profile item.</li> </ul>

See [Understanding the Content Catalog](#).

## Other Sources of Information

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

See the product documentation for

*PeopleTools: PeopleSoft Component Interfaces*

and

*PeopleTools: PeopleSoft Setup Manager*

## Related Links

*PeopleSoft HCM 9.2: Application Fundamentals*





## Chapter 2

# Setting Up the Content Catalog

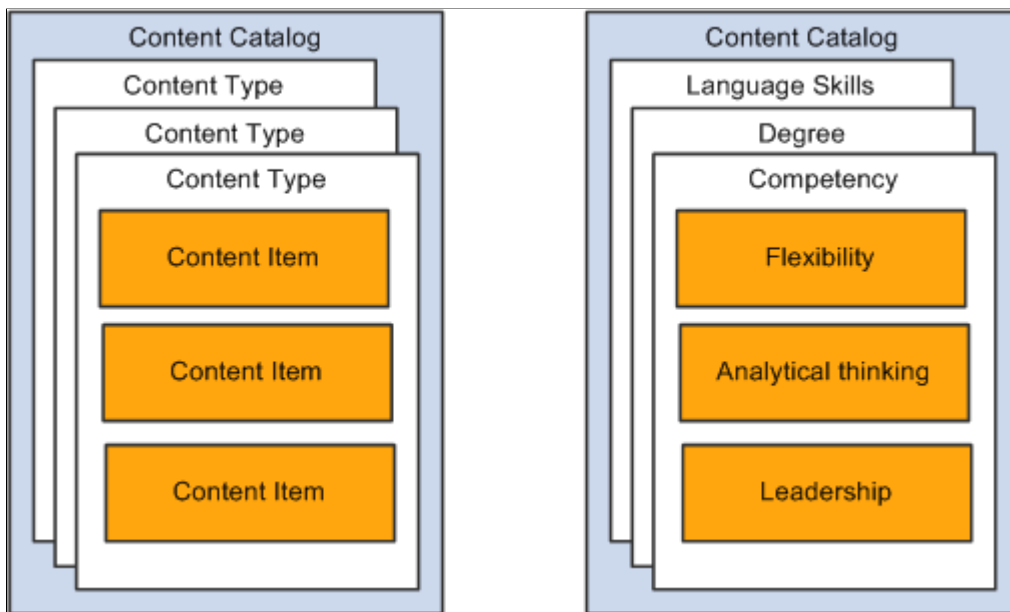
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## Understanding the Content Catalog

The content catalog is a repository of the data that can be associated with person and non-person profiles, and is used by other applications such as PeopleSoft ePerformance, Talent Acquisition Manager, Candidate Gateway, and Learning Management.

### Image: PeopleSoft HCM generic content catalog structure

In PeopleSoft HCM, the content catalog provides a generic structure for setting up different types of information. The following diagram illustrates the generic structure in which the content catalog contains multiple content types and the content types contain content items. It also illustrates a specific example of this where the content catalog contains content types for language skills, degrees, and competencies:



With the content catalog you define the different types of information (competency, degrees, languages, and so on) as *content types* and then set up the data for each content type as *content items*. For example, within the content type DEG (Degrees), a Bachelor of Arts degree (BA) is a content item.

The structure of the content catalog enables you to easily add new content types to your organization's profiles.

### Content Catalog System Data

The PeopleSoft application delivers the content catalog already populated with a set of content types. You can add content types and content items to the content catalog to suit your organizational requirements.

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**Note:** PeopleSoft delivers content items as sample data only.

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The following content types are delivered as system data:

<b>Content Type</b>	<b>Description</b>
AREA STUDY	Areas of Study
COMPETENCY	Competencies
CRITERIA	Element Criteria
DEG	Degrees
EDLVLACHV	Education Level
EG SPCL PROJ	(E&G) Educ and Govt Special Projects
ELEMENT	Competency Elements
GEOG_PREF	Geography Preferences
GOAL	Goals and objectives
HON	Honors and awards
INITIATIVE	Initiatives
INTL_PREF	International Preferences
LIC	Licenses and certifications
LNG	Language skills
LOCATION	Current Location
LOCATN_PREF	Location Preferences
MEM	Memberships
MISSION	Mission Statements
NVQ	NVQs
NVQ UNIT	NVQ Units
NVQ ELEMENT	NVQ Elements
RANK	Military Rank.
RESP	Responsibilities

<b>Content Type</b>	<b>Description</b>
SPECL PROJ	Special Projects
SUB COMP	Sub-Competencies
TRAVEL	Travel Preferences
TST	Tests/Examinations

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**Note:** The RANK content type is for military customers to record rank in profiles. You can integrate Manage Profiles with Job Data using the Event Manager, so that when a person's rank is updated in Job Data, the profile is automatically updated.

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See "Job Data - Salary Plan Page (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)".

See "Understanding Event Setup (*PeopleSoft 9.2: Events and Notifications Framework*)".

## Understanding Content Catalog Setup

To set up the content catalog you define the following:

- Content types.
- Content items.
- (Optional) Content group types and groups.

Content groups enable you to categorize content items within a content type.

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**Note:** If you want to use rating models with your content catalog, you must define these on the Rating Model page before you can associate content items with rating models.

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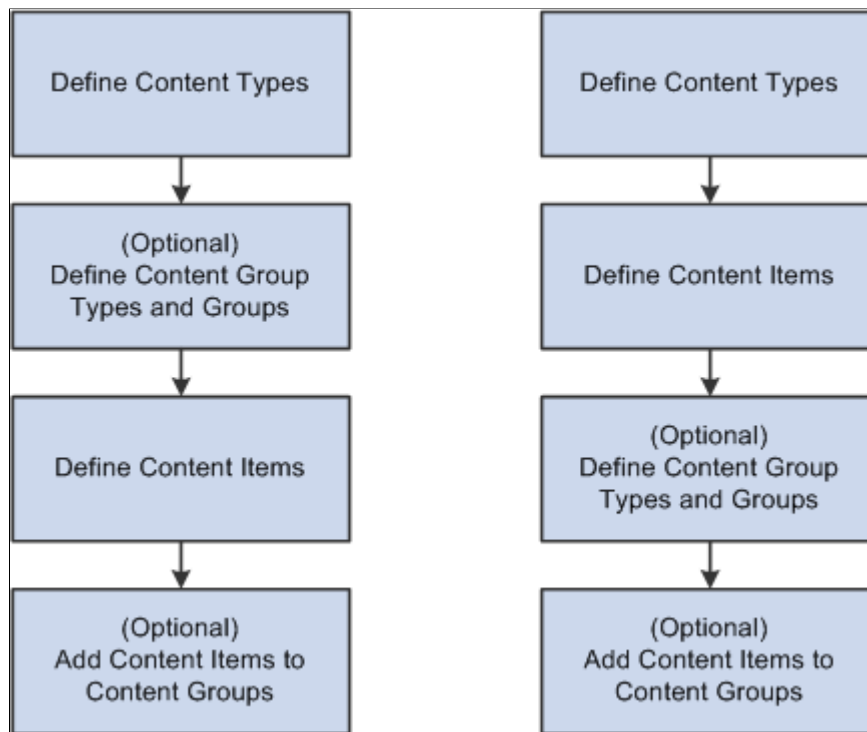
See [Defining Rating Models](#).

The first step in setting up the content catalog is to set up content types. After this, the order in which you set up content groups and content items does not matter. If you know how you want to group your content items, create the content groups first and then set up your content items. Conversely if you know which

content items you want to add but haven't decided how to group those items, you can set up the content items first, then create the groups and add the items to the groups.

**Image: Setting up the content groups before content items or setting up content items first**

This diagram illustrates the two ways in which you can set up your content catalog: setting up content groups before setting up items, or setting up the items before the content groups:



## Content Types and Content Items

The Content Type component (JPM\_CAT\_TYPES) has two pages:

- The Content Types page lists the properties (fields) for that content type.

For each property, you define the attributes of the field, which determines how it will appear on the Content Items - Item Details page.

- The Relationship Rule page defines how the content type is related to other content types in the catalog.

The component for setting up content items is the same for all content types, but the pages and the fields that appear are determined by the content type definition. The Content Items component (JPM\_CAT\_ITEMS) has three pages:

- The Content Items - Item Details page is where you set up the main details for the content item.
- The Relationships page defines relationships between content items.

The system hides this page if there are no relationship rules defined for the content type.

- The Group Memberships page defines the groups to which the content item belongs.

The system hides this page if there are no groups for the content type.

The fields on the Content Items - Item Details page are entirely dependent on the properties selected on the Content Types page.

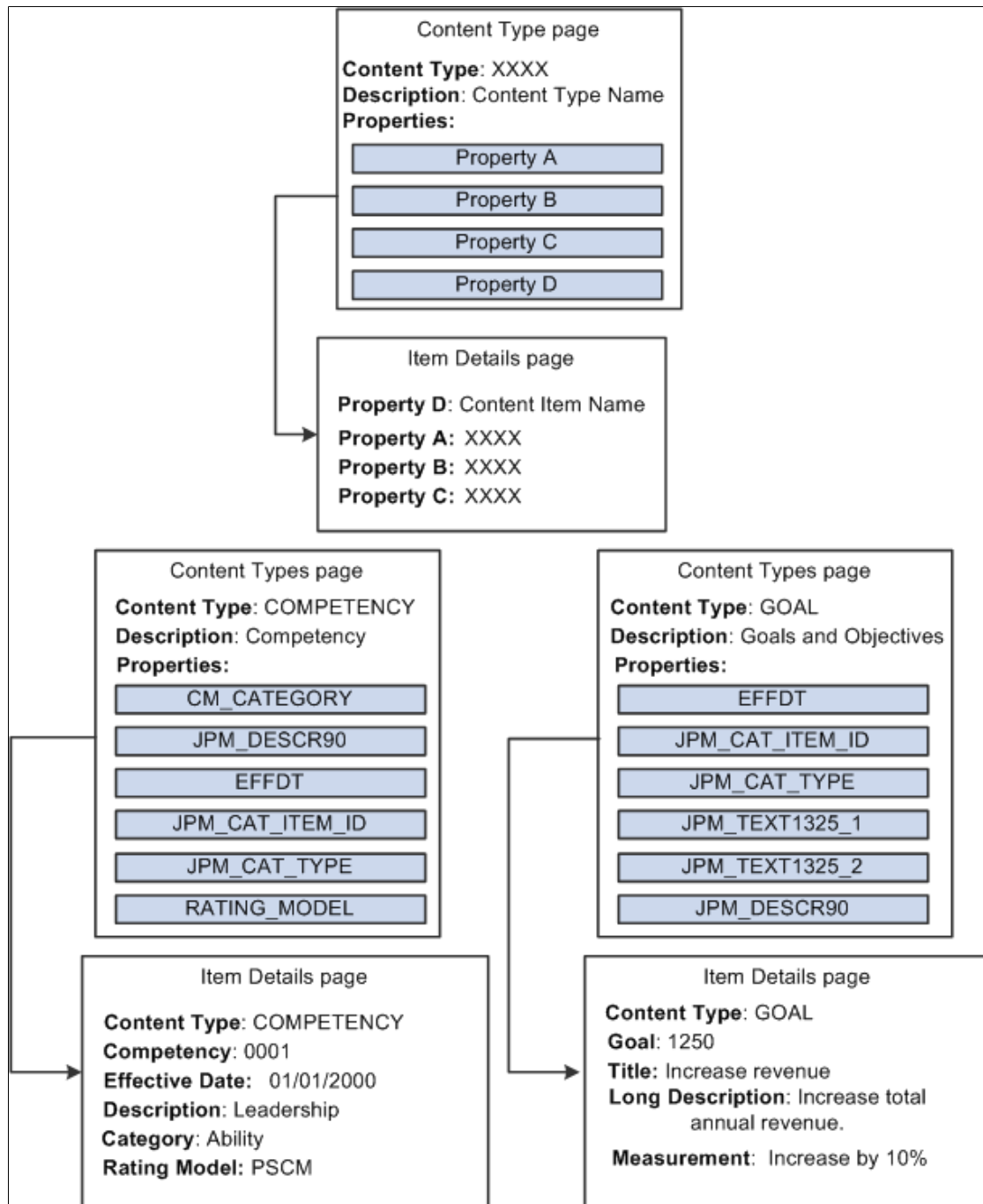
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**Note:** These fields have no impact on the configuration or display of an item in a profile.

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**Image: Properties of content types flow through to become fields for content item definitions**

The following diagram shows property selections on the Content Type page flowing through to become fields on the Content Items - Item Details page. The diagram includes a generic content type and two example content types (competencies and goals):




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**Note:** For a limited set of profile type properties, the search indexes that you use for the search and compare profile feature store only code-based data.

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## Setting Up Content Types and Properties

To set up content types and properties, use the Content Types (JPM\_CAT\_TYPES) component.

These topics provide an overview for content type properties, free form content types, and discuss how to:

- Define content type properties.
- Define content type relationship rules.

### Understanding Content Type Properties

A content type is a broad definition of a group of items that can be added to the content catalog. Within a content type, specify the properties that all items of this type can or must have. Many of the delivered content types define legacy content originating from the Competency Management application. Many of these content types contain additional attributes that control functionality in other products. When defining new content types, attributes other than the default values and RATING\_MODEL should not be added. The system displays the properties you define for a content type as fields on the Content Items - Item Details page. You can override the default label text, select default values, and indicate if the field should be available for entry, unavailable for entry, or hidden on the Content Items - Item Details page.

#### Related Links

[Content Type Properties](#)

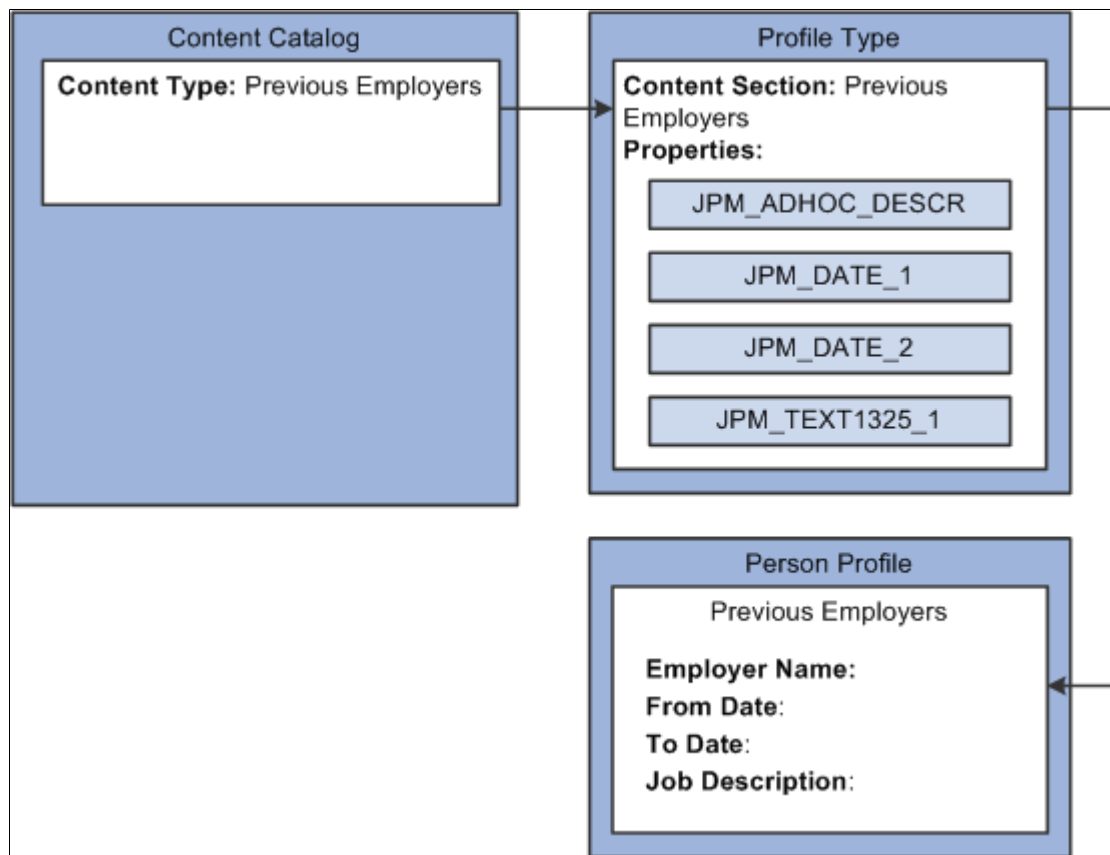
### Understanding Free Form Content Types

Depending on your organization's requirements, you may find that certain types of profile content are not suitable for storing in the content catalog due to the quantity or maintainability of the data. For example, you may want to include a section in person profiles for recording an employee's previous employers. However, employers are not stored in the database and the information is applicable to person

profiles only. For this type of information, you can define free form content types that are basically empty placeholders. Free form content types do not include fields and you cannot create content items for them.

**Image: Example free form content type for capturing previous employment information in a person profile**

When you add a free form content type to a profile type, you add the properties (fields) that define the information entered for that specific profile type. This diagram illustrates how you could use free form content types to record previous employers and associated information such as the employment dates and a job description:



In the example, the content type definition for previous employers has no fields or content items. When this content type is added to the profile type, fields are added for employer name, job start and end dates, and a descriptive field for the job description. On the Person Profiles page, employees add their previous employers information in these fields. There is no validation of the employers because it isn't defined as a record in the database.

To create a free form content type, select the Free Form Type Only check box on the Content Types page.

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**Note:** You cannot include free form content sections when you use the search and compare profiles feature.

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## Pages Used to Set Up Content Types and Properties

Page Name	Definition Name	Navigation	Usage
Content Types	JPM_CAT_TYPES	Set Up HCM, Product Related, Profile Management, Content Catalog, Content Types, Content Types	Define the properties of content types. The properties selected for a content type determine which fields appear on the <a href="#">Content Items - Item Details</a> page and the attributes of those fields.
Relationship Rule	JPM_CAT_TYPE_RLAT	Set Up HCM, Product Related, Profile Management, Content Catalog, Content Types, Relationship Rule	Set up and review relationships between content types.

### Content Types Page

Use the Content Types page (JPM\_CAT\_TYPES) to define the properties of content types.

The properties selected for a content type determine which fields appear on the Content Items - Item Details page and the attributes of those fields.

#### Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Content Types, Content Types

#### Image: Content Types page: Properties tab

This example illustrates the fields and controls on the Content Types page: Properties tab. You can find definitions for the fields and controls later on this page.

Content Type LOCATION

Description Location

☒ System Data

☐ Free Form Type Only

Properties ? Personalize | Find | [Grid Icon] | [Calendar Icon] First 1-5 of 5 Last

*Field Name	*Label Text	Sys Data	Key Field	Required		
EFFDT	Effective Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
EFF_STATUS	Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JPM_CAT_ITEM_ID	Content Item ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JPM_CAT_TYPE	Content Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JPM_DESCR90	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

#### System Data

Content types with this check box selected are delivered with the system.

**Free Form Entry Only**

Select this check box if you want to create a free form content type. You cannot define properties or content items for free form content types.

See [Understanding Free Form Content Types](#).

**Properties Tab**

The system displays the properties that you select in this scroll area as fields on the Content Items - Item Details page. Use the properties to define content items for this content type.

All content types that are not defined as free from types automatically have the following five properties:

- Content Type (JPM\_CAT\_TYPE)
- Content Item ID (JPM\_CAT\_ITEM\_ID)
- Effective Date (EFFDT)
- Status as of Effective Date (EFF\_STATUS)
- Description (JPM\_DESCR90)

When you create a new content type, the system automatically populates the grid with these properties and you can only edit the label text and the maximum length of the Content Item ID and the Description.

The RATING\_MODEL properties can be optionally added if the items define content whose rating will be tracked in a profile.

**Property**

Select the properties to add to this content type from the list of available options. For content types that are delivered as system data you cannot delete the properties delivered, but you can add other properties.

See [Content Type Properties](#).

**Label Text**

Displays the default label text for the selected property, but you can override it with a more meaningful label. The system displays the label text defined here on the Item Details page.

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**Note:** We strongly recommend that you choose a meaningful label for the property so that users clearly understand what kind of information to enter in the field on the Item Details page.

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**Sys Data (system data)**

This field is display-only. PeopleSoft delivers some content types as system data. The system selects this check box if the property is delivered as part of this system data.

**Key Field**

This field is display-only. The system selects it if the property is a key field for the record.

**Required**

Select to make a property required when defining an item on the Item Details page.

## Property Attributes Tab

Access the Property Attributes tab on the Content Types page.

### Image: Content Types page: Property Attributes tab

This example illustrates the fields and controls on the Content Types page: Property Attributes tab. You can find definitions for the fields and controls later on this page.

*Field Name	*Display	Max Len	Minimum	Maximum	List	Default
EFFDT	Editable					
EFF_STATUS	Editable	1				
JPM_CAT_ITEM_ID	Editable	12				
JPM_CAT_TYPE	Editable					
JPM_DESCR90	Editable	90				

### Display

Select whether the property should be available for entry (*Editable*), unavailable for entry (*Display Only*), or hidden (*Hidden*) on the Items Details page.

### Max Len (maximum length)

Enter the field length of this property.

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**Note:** Although the *JPM\_DESCR90* field value allows you to enter up to a 90 character maximum, a description length that is within a maximum of 30 characters is recommended for legacy content types but can be overridden.. A description length that is longer than the specified maximum may be truncated when referenced by certain applications.

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### Minimum and Maximum

For numeric properties, enter the minimum and maximum values.

### List

This option is available for the attribute *EP\_SUB\_LEVEL* only. This property is used for ePerformance processing.

Select a custom list defined in the Custom List Values table.

This field appears only when there is a custom list defined for the field (as delivered, *EP\_SUB\_LEVEL*). When a list value is selected, the Default field values are dynamically built from the list values associated with the custom list value assigned.

See [Custom Prompt Page](#).

### Default

Enter the default value for this property. On the Item Details page, the system populates the field with this value. You should select a default value if the property is display only or hidden. The Default field is available for properties that have predefined values or are associated with a prompt table only.

## Relationship Rule Page

Use the Relationship Rule page (JPM\_CAT\_TYPE\_RLAT) to set up and review relationships between content types.

### Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Content Types, Relationship Rule

### Image: Relationship Rule page

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

*Relationship	*Related Content Type	Description	System Data
Is a child of	COMPETENCY	Competencies	<input checked="" type="checkbox"/>

If a content type is related to other content types, define the relationship on this page. Leave the page blank if there are no relationship rules for the content type.

### Relationship

Select from one of the following relationships: *Is a parent of* or *Is a child of*. Child items are added to profiles under the parent items. These relationships create a hierarchy.

(GBR) *Supports* or *Is Supported By* apply to the NVQ and NVQ Units content types. These are not in a hierarchical relationship with one another (that is, the supports items do not have to go under the supported by items), but it enables you to apply the items of these types to a profile together and review them together.

### Related Content Type

Select the content type to which this content type is related.

### System Data

This field is display-only. The system selects this check box if the content type is system data delivered in the PeopleSoft application.

When you create a relationship here and save the content type, the system enters the opposite relationship for the related content type. For example, suppose you set up content type A and define the relationship:

Content type A *Is a parent of* content type B.

The system updates the content type B definition to define the relationship:

Content type B *Is a child of* content type A.

You cannot create two kinds of relationships between two types or create a relationship between a type and itself. The system displays a duplicate insert error when you attempt this. For example, the content type *COMPETENCY* cannot have both the relationship *Is a parent of* and the relationship *Is a child of* with the content type *SUB\_COMP*.

## Defining Content Items

To set up content items, use the Content Items (JPM\_CAT\_ITEMS) component.

These topics discuss how to:

- Define content item details.
- Define proficiency descriptions.
- Set up and review content item relationships.
- Add content items to groups.

## Pages Used to Define Content Items

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Item Details	JPM_CAT_ITEMS	Set Up HCM, Product Related, Profile Management, Content Catalog, Content Items, Item Details	Define content items details for the selected content type.
Item Rating Descriptions	JPM_CAT_ITMRD_SEC	Click the Proficiency Descriptions link on the Item Details page.	Define proficiency descriptions of the ratings for the content item.  The Proficiency Descriptions link appears only if the RATING_MODEL property is included in the content type definition and a rating model is selected.
Relationships	JPM_CAT_ITEM_RLAT	Set Up HCM, Product Related, Profile Management, Content Catalog, Content Items, Relationships	Set up and review the relationship between content items.
Group Memberships	JPM_CAT_ITEM_GMEMB	Set Up HCM, Product Related, Profile Management, Content Catalog, Content Items, Group Memberships	Add the content item to existing content groups. From this page you can also view all the members of the selected content groups.

## Content Items - Item Details Page

Use the Content Items - Item Details page (JPM\_CAT\_ITEMS) to define content items details for the selected content type.

**Note:** When creating new content item IDs for accomplishment-related content types (*DEG, HON, LIC, LNG, MEM, TST, and NVQ*) the ID must be unique across all accomplishment content types. For example, if you have a *DEG* content type that uses the content item ID *BA*, you cannot use the content item ID *BA* for a *LIC* or *TST* content type. However, you can use the content item ID *BA* for a *GOAL* item since this is not included in the accomplishment-related content type list. User defined content item IDs do not need to be unique across content types.

### Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Content Items, Item Details

### Image: Content Items - Item Details page

This example illustrates the fields and controls on the Content Items - Item Details page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Content Items - Item Details' page. At the top, there are three tabs: 'Item Details' (selected), 'Relationships', and 'Group Memberships'. Below the tabs, the 'Content Type' is 'COMPETENCY' and 'Competencies' are listed. The 'Competency' is '0211'. The main section is titled 'Content Items Details' and includes a search bar with 'Find | View All' and a pagination control showing '1 of 1'. The form contains several fields: '\*Effective Date' (01/01/1900), '\*Status' (Active), '\*Description' (Motivate & lead people), 'Long Description' (Motivates those who work around him/her. Provides excitement and), 'Short Description' (Motivates), '\*Category' (Ability), 'Content Supplier' (Customer Defined), '\*Rating Model' (PSCM), and 'ePerformance Description' (Motivates those who work around him/her. Provides excitement and purpose to accomplish stated goals.). There is a link for 'Proficiency Descriptions' next to the 'Rating Model'. At the bottom, it shows 'Updated on 01/24/06 1:15:52PM' and 'Last Update User ID SYSTEM'.

**Note:** The fields on the page vary depending on the properties of the content type. Each content type property is a field on the Item Details page and the system labels the fields using the label you entered in the Label Text field on the Content Types page.

### Proficiency Descriptions

This link appears only if the `RATING_MODEL` property is included in the content type definition and a rating model is selected. Click the link to access the Item Rating Descriptions page, which you use to enter descriptions of the ratings for the content item.

Proficiency descriptions are optional and are used by ePerformance only. They enable you to set up a rating

description for a specific item. However, employees and managers can evaluate content items without proficiency descriptions.

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**Note:** If you change the rating model for an item that has proficiency descriptions associated with it, the system issues a warning indicating that the existing proficiency descriptions have been removed.

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Rating models are defined on the Rating Model page.

See [Defining Rating Models](#).

## Related Links

[Content Type Properties](#)

[Understanding Content Catalog Setup](#)

## Item Rating Descriptions Page

Use the Item Rating Descriptions page (JPM\_CAT\_ITMRD\_SEC) to define proficiency descriptions of the ratings for the content item.

The Proficiency Descriptions link appears only if the RATING\_MODEL property is included in the content type definition and a rating model is selected.

### Navigation

Click the Proficiency Descriptions link on the Item Details page.

### Image: Item Rating Descriptions page

This example illustrates the fields and controls on the Item Rating Descriptions page. You can find definitions for the fields and controls later on this page.

**Item Rating Descriptions**

Content Type: COMPETENCY Competencies

Competency: 0502

Effective Date: 01/01/1900 Status: Active

Rating Model: PSCM Competency Management Scale

**Proficiency Descriptions** Find | View All First 4 of 5 Last

*Review Rating	Description
4-Very Good	Grows personal networks within the immediate and larger organization. Regularly contributes ideas to improve the department's functioning.

OK Cancel

### Review Rating

Select a review rating. The system prompts against the rating model that you assigned on the Content Items - Item

Details page. For example, you can define what it means to be an *Expert* in communication (a 5 rating), or *Very Good* in communication (a 4 rating). This helps ensure that everyone in the organization knows what each rating means.

Content Items - Relationships Page

Use the Content Items - Relationships page (JPM\_CAT\_ITEM\_RLAT) to set up and review the relationship between content items.

Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Content Items, Relationships

Image: Content Items - Relationships page

This example illustrates the fields and controls on the Content Items - Relationships page. You can find definitions for the fields and controls later on this page.

Item DetailsRelationshipsGroup Memberships

Content TypeCOMPETENCYCompetenciesCompetency0211

Related Items

PersonalizeFind1 of 1Last

Relationship	Related Content Type	*Content Item ID	Description	Status
Is a parent of	ELEMENT			Active

Related Items

PersonalizeFind1 of 1Last

Relationship	Related Content Type	*Content Item ID	Description	Status
Is a parent of	LIC			Active

Related Items

PersonalizeFind1 of 1Last

Relationship	Related Content Type	*Content Item ID	Description	Status
Is a parent of	SUB_COMP			Active

The Relationships page is displayed if there are relationship rules for the content type defined on the Content Types - Relationship Rule page. If there are no relationship rules for the content type, the system hides this page.

**Note:** It is not mandatory to define relationships at the content item level.

Related Items

Relationship

Displays the relationship rule defined for the content type.

You can't define relationships between content items that differ from the relationship rules for the content types. For example, the COMPETENCY type has a parent relationship with the SUB\_COMP type. Therefore you can't set up a child relationship between a competency and a sub-competency when defining the competency content item.

Related Content Type

Displays the content type of the related item.

Content Item ID

Select the item to which this item is related. You can only select items of the type defined by the Related Content Type field.



## Content Items - Group Memberships Page

Use the Content Items - Group Memberships page (JPM\_CAT\_ITEM\_GMEMB) to add the content item to existing content groups.

From this page you can also view all the members of the selected content groups.

### Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Content Items, Group Memberships

### Image: Content Items - Group Memberships page

This example illustrates the fields and controls on the Content Items - Group Memberships page. You can find definitions for the fields and controls later on this page.

*Content Group Type	Description	*Group	Description	Content Group Members
COMP TYPE	Competency Types	LDRSHP	Leadership	View

The Group Memberships page is available if content groups have been set up for the content type. If there are no content groups, the system hides this page. Content groups are defined on the Content Group Types page.

#### Content Group Type

Select the content group type.

#### Group

Select a group from the list of groups.

#### Content Group Members and View

Click the View link to access the Content Group Members page that lists the content items in the selected group.

## Defining Content Groups

To set up content groups, use the Content Groups (JPM\_CAT\_GROUPS) and the Content Group Members (JPM\_CAT\_GMEMB) components.

These topics discuss how to:

- Define content group types.
- Define content group members.

## Pages Used to Define Content Groups and Members

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Content Group Types	JPM_CAT_GROUPS	Set Up HCM, Product Related, Profile Management, Content Catalog, Content Groups Types, Content Group Types	Define content group types and the groups within each content group type.
Content Group Members	JPM_CAT_GMEMB	<ul style="list-style-type: none"> <li>Set Up HCM, Product Related, Profile Management, Content Catalog, Content Group Members, Content Group Members</li> <li>Click the Add/View link on the Content Group Types page.</li> <li>Click the View link on the Content Item - Group Memberships page.</li> </ul>	Define content group members. Add content items to the content groups that you have created on the Content Group Types page or view existing item members for a content group.

### Content Group Types Page

Use the Content Group Types page (JPM\_CAT\_GROUPS) to define content group types and the groups within each content group type.

## Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Content Groups Types, Content Group Types

### Image: Content Group Types page

This example illustrates the fields and controls on the Content Group Types page. You can find definitions for the fields and controls later on this page.

**Content Group Types**
☒ System Data

Content Type COMPETENCY Competencies  
 Group Type COMP TYPE

Description Competency Types

**Content Group Types**
 Personalize | Find | View All | 
 First 1-10 of 39 Last

*Content Group	*Description	Short Description	Content Group Members		
ACCNT	Accountability	Accontability	Add/View	+	-
ADMIN	Administration	Admin	Add/View	+	-
BANK	Banking Experience	Banking	Add/View	+	-
BUSPLN	Business Planning	Bus Plannng	Add/View	+	-
COMM	Communication	Communictn	Add/View	+	-
COOP	Cooperative	Cooperativ	Add/View	+	-
CORP	Corporate	Corporate	Add/View	+	-
DRV	Drive and Ambition	Drive	Add/View	+	-
EDUC	Education	Education	Add/View	+	-
ENTRPR	Entrepreunerial	Entrepren	Add/View	+	-

## Content Group Types

This group box lists all the content groups defined for the selected content group type.

### Content Group

Enter the name of the content group.

### Content Group Members

Click the Add/View link to access the Content Group Members page that lists the content items belonging to the group.

## Content Group Members Page

Use the Content Group Members page (JPM\_CAT\_GMEMB) to define content group members.

Add content items to the content groups that you have created on the Content Group Types page or view existing item members for a content group.

## Navigation

- Set Up HCM, Product Related, Profile Management, Content Catalog, Content Group Members, Content Group Members
- Click the Add/View link on the Content Group Types page.
- Click the View link on the Content Item - Group Memberships page.

### Image: Content Group Members page

This example illustrates the fields and controls on the Content Group Members page. You can find definitions for the fields and controls later on this page.

Content Group Members			
Content Type		COMPETENCY	Competencies
Content Group Type		COMP TYPE	Competency Types
Content Group		ACCNT	Accountability
Content Group Members			
		Personalize	1-8 of 8
*Item ID	Description	View	
0156	Recognized as job expert	View	
0201	Accountability for decisions	View	
0202	Understands decision process	View	
0203	Displays confidence & maturity	View	
0241	Works well under pressure	View	
0802	Exhibits no racism or sexism	View	
FJC010	HR Policies & Procedures	View	
HXCMP1	Comp Mgmt Test	View	

Use this page to view, add, or delete items that are members of the content group.

### View

Click this link to view the item definition. When you click the link, the system displays the Content Items component.

## Defining Rating Models

To set up rating models, use the Rating Model (RATING\_MDL\_TBL) component.

These topics provide overviews of rating models, (USF) rating models, and discuss how to:

- Set up rating models.
- Add review rating explanations.

## Understanding Rating Models

Rating models define the values that can be used to rate an employee's performance or level of proficiency. The rating model defines the qualitative values, such as A, B, C, or D, that the system uses to rate or score an employee's performance. Each qualitative value can have a numeric rating, review points, and a review band (range of points).

Rating models are used by several applications within HCM, including:

- Manage Profiles business process.

In Manage Profiles, rating models are used to rate employees' proficiency level for items on their person profiles. In non-person profiles you can specify the proficiency levels expected for items in the profile. The RATING\_MODEL property is associated with the rating model table. Add this property to your organization's content types and profile types that are measured using rating models and specify the rating model used at the content item level. The COMPETENCY content type includes the RATING\_MODEL property.

- PeopleSoft ePerformance.

In ePerformance, rating models are used to define values for the rating sections of a performance document as well as rating overall performance. The calculation method that you select for the overall rating (the Overall Summary section of the document) determines which of these values you must define in rating models. When you design document templates, you select the rating model that applies to each section of the document and to each item that is rated. You can use the same rating model for the entire document or select a different rating model for each item and section.

- Manage Employee Reviews business process.
- Plan Careers and Successions business processes.
- Manage Base Compensation and Budgeting business process.

### Related Links

"Working with Manage Profiles (*PeopleSoft HCM 9.2: ePerformance*)"

*PeopleSoft HCM 9.2: Human Resources Manage Employee Reviews*

*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*

"Career Strength/Develop Areas Page (*PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions*)"

## (USF) Understanding Rating Models

The PeopleSoft HR product delivers two rating models that have specific uses:

- GUSF (goal status for USF).
- PIP (performance improvement plans).

These rating models define statuses, rather than ratings, that you can assign to goals and performance improvement plans in performance evaluations. GUSF values are *Not Met*, *Met*, and *Exceeded*. PIP values are *In Progress*, *Satisfactory*, and *Unsatisfactory*.

## Pages Used to Define Rating Models

Page Name	Definition Name	Navigation	Usage
Rating Model	RATING_MDL_TBL	Set Up HCM, Product Related, Profile Management, Content Catalog, Rating Model, Rating Model	Set up ratings models that contain values used to rate an employee's proficiency level.
Review Rating Explanation	RE VW _RATING _SEC	Click the Rating Explanation icon on the Rating Model page.	Add review rating explanations.

## Rating Model Page

Use the Rating Model page (RATING\_MDL\_TBL) to set up ratings models that contain values used to rate an employee's proficiency level.

### Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Rating Model, Rating Model

### Image: Rating Model page: General tab

This example illustrates the fields and controls on the Rating Model page: General tab. You can find definitions for the fields and controls later on this page.

**Rating Model**

Rating Model PSCM

Rating Model Description Find | View All First 1 of 1 Last

\*Effective Date 01/01/1980 Status Active

\*Description Competency Management Scale

Short Description Comp Mgmt ☐ Review Band OPM Pattern

**Ratings** Personalize | Find | 1-6 of 6

*Rating	*Description	Short Description	Numeric Rating	Career Strength/ Development	Rating Explanation
0	0-None	None	0.00	Development	
1	1-Little	Little	1.00	Development	
2	2-Fair	Fair	2.00	Development	
3	3-Good	Good	3.00	Strength	
4	4-Very Good	Very Good	4.00	Strength	
5	5-Expert	Expert	5.00	Strength	

## Rating Model Description

### Review Band

Select this check box if you want to define this rating model as a Review Band Rating model.

---

**Note:** To use the JPN Grade Advance Candidate List and the JPN Salary Increase processes, the performance reviews in ePerformance must use a Review Band Rating model for overall review ratings.

---

See "Understanding Updating Salaries for Japan (*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*)".

**OPM Pattern (Office of Personnel Management pattern)**

(USF) Select the pattern that applies to this rating model. This field appears for U.S. Federal users only.

## General Tab

Define all possible rating levels that can be used to evaluate an employee when this rating model is used. At least two rating levels are required. You can add as many rows as necessary.

**Rating**

Enter an alphabetic or numeric code for the rating. This is sometimes referred to as the qualitative rating.

**Numeric Rating**

This field is used by ePerformance only. Enter a numeric value for the rating, if applicable. The value you enter serves two purposes:

- For sections of a performance document that use the average calculation method, the system uses this value to calculate the section's average or weighted average. It also uses this value to calculate the average rating for each item in the section (when sub-items exist).
- If you select the Show Numeric Ratings/Points check box on the Rules/Roles page (EP\_TMPL\_DEFN3) of the Template Definition component, the value you enter here displays next to the rating on the performance document. This feature is useful when ratings are alphabetic.

**Career Strength/Development**

The system uses this value when defining competencies in the Plan Careers business processes using the Manage Profiles pages. Select:

*Development* (development) if the rating indicates an area that needs more skill development, education, or training.

*Strength* if the rating indicates an area of strength.

See "Career Strength/Develop Areas Page (*PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions*)".



Click to display the [Review Rating Explanation page](#).

## Review Points Tab

Access the Rating Model page: Review Points tab.

### Image: Rating Model page: Review Points tab

This example illustrates the fields and controls on the Rating Model page: Review Points tab. You can find definitions for the fields and controls later on this page.

*Rating	Review Points	From Points	To Points	Eligibility Points
0	0	0	1	0.0
1	1	2	4	0.0
2	2	5	7	0.0
3	3	8	10	0.0
4	4	11	13	0.0
5	5	14	15	0.0

Complete the fields on this tab if you want to associate a number of points, or a points range with each rating level defined on the General tab.

### Rating

The rating entered on the General tab displays here. If you change this value, the system automatically updates the Rating field on the General tab to match.

### Review Points

Enter a number from 0 to 999 for the rating. This field is used by both ePerformance and Manage Profiles.

- ePerformance uses this field for section calculation using the Summation method. The system uses the review points that you enter here in its calculations.

---

**Note:** To use the Automated Step Increase process, the Summation method is required.

---

- Manage Profiles uses the matching function to determine how well an employee profile matches the competencies for a non-person profile. The matching function uses the review points that you enter here. Review points are also used by the Search and Compare profiles scoring algorithm.

See [Understanding Profile Comparisons](#) and [Understanding Profile Matching](#).

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

### From Points and To Points

Define a range of points to associate with this rating. These points are used to convert summed-up points to either a Review Band or a qualitative rating.



A Review Band is really the same as a qualitative rating, instead of being directly assigned, it's calculated by summing points, then finding the entry in this table that contains a range of From/To points that encloses the summed points.

If Review Band is selected, you must enter a value in the To Points field. When the calculation method is Review Band, the system uses these fields to resolve the number of total points in a review to a qualitative rating. When the calculation method is Summation, the system uses these fields to resolve the number of total section points or total review points to a qualitative rating.

### Eligibility Points

If applicable, enter the number of points used by the Shohkaku (JPN), or Grade Advance, eligibility feature of the Plan Salaries business process. This is used only if the Appl for Grade Advance Prc check box is selected on the JPN Review Definition.

See "(JPN) Creating Review Identifiers (*PeopleSoft HCM 9.2: ePerformance*)".

See "Understanding Updating Salaries for Japan (*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*)".

### (USF) Federal Tab

Access the Rating Model page: Federal tab.

#### Image: Rating Model page: Federal tab

This example illustrates the fields and controls on the Rating Model page: Federal tab. You can find definitions for the fields and controls later on this page.

*Rating	OPM Rating	RIF Years
1	Level I	0
2	Level II	0
3	Level III	0
4	Level IV	0
5	Level V	0

This tab appears only when Federal is selected on the Products page of the Installation Table and the user is logged on as a U.S. Federal user.

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

#### OPM Rating (Office of Personnel Management rating)

Select the OPM rating that correlates with the rating level. This field is used for reporting to the Central Personnel Data File (CPDF)

**RIF Years (Reduction in Force years)** Enter the number of RIF Years associated with this rating level.

### Related Links

[Understanding Profile Matching](#)

[Understanding Profile Comparisons](#)

[Maintaining Profiles](#)

## Review Rating Explanation Page

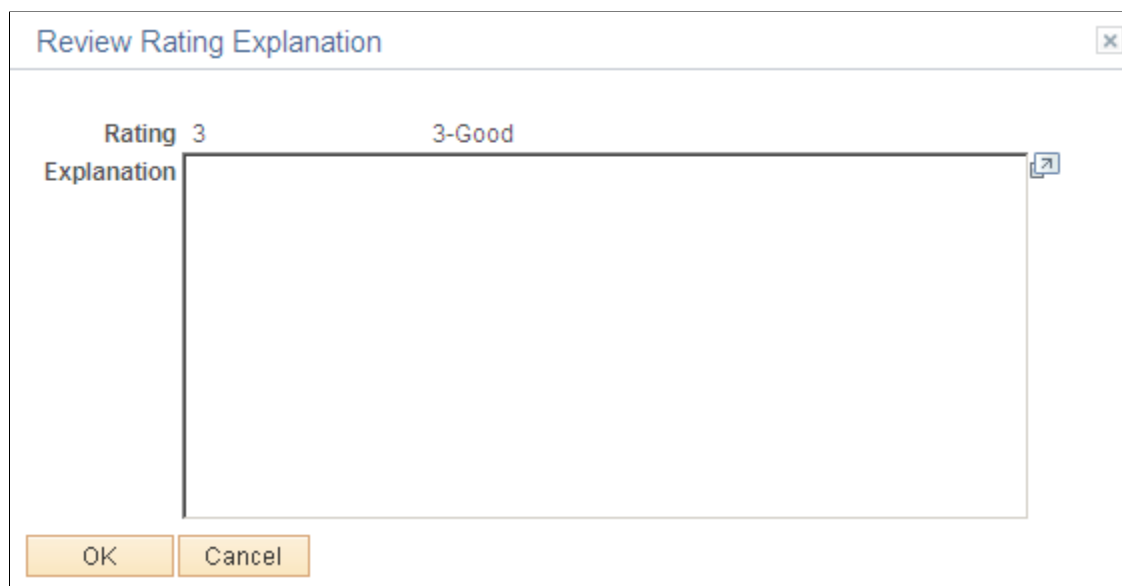
Use the Review Rating Explanation page (RE VW \_RATING \_SEC) to add review rating explanations.

### Navigation

Click the Rating Explanation icon on the Rating Model page.

### Image: Review Rating Explanation page

This example illustrates the fields and controls on the Review Rating Explanation page. You can find definitions for the fields and controls later on this page.

The image shows a dialog box titled "Review Rating Explanation" with a close button in the top right corner. Inside the dialog, there are two labels: "Rating 3" and "3-Good". Below these labels is a large text area labeled "Explanation" on the left. To the right of the text area is a small icon of a document with an arrow pointing out. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

### Explanation

Enter a description for the rating. You can enter up to 1325 characters. This description is used by ePerformance on the performance document.

# Setting Up Profile Management

## Understanding Profile Management

Organizations typically use two types of profile:

- Non-person profiles.

These describe the competencies, qualifications, and responsibilities of a certain job code, position, job family, or salary grade, or other entities in the system.

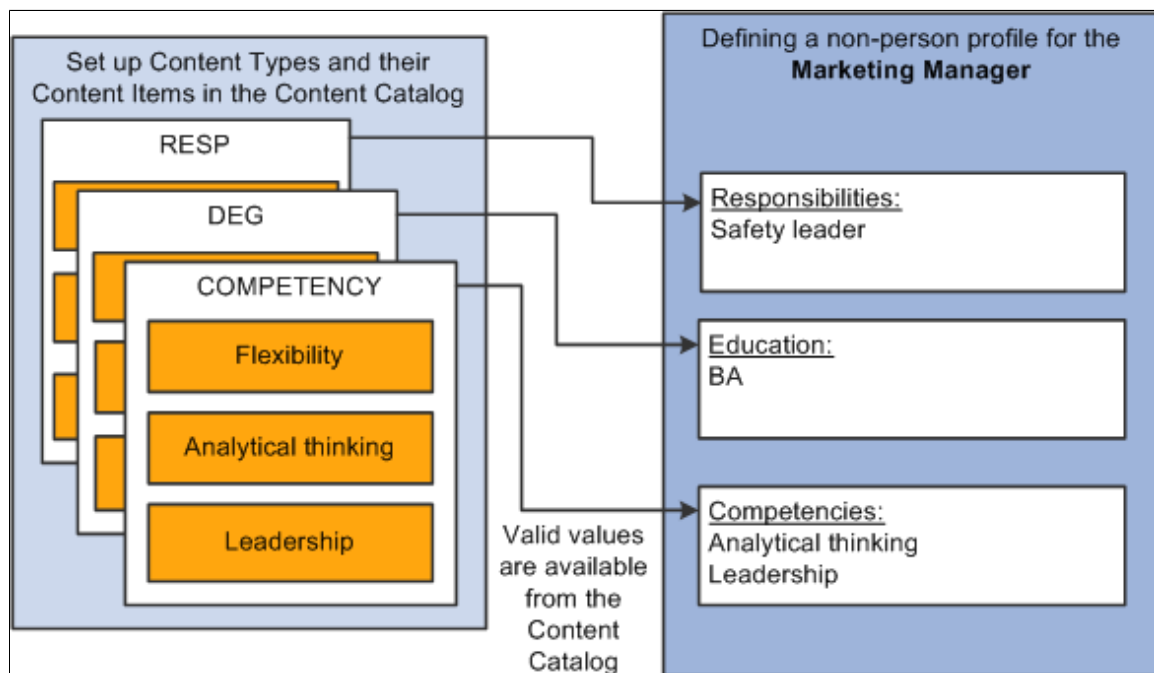
- Person profiles.

These describe people's skills, competencies, other content items such as accomplishments, and performance. Manage Profiles enables you to create profiles for employees and contingent workers. Persons of interest without a JOB record are not supported.

With the Manage Profiles business process, the content catalog provides the foundation for creating all profiles.

**Image: Profiles include content types and content items that are selected from the content catalog**

The following diagram provides an example of constructing a profile (a job profile for a marketing manager) by selecting from the content types and content items that are defined in the content catalog:



In the same way that you configure the content catalog to suit your organization, you define a set of profiles that are configured to your requirements. When employees, managers, and administrators create profiles they select the profile type that they want to use.

The profile type controls the following aspects of the new profile:

- The type of entities to which users can link the profile.
- The content of the profile.
- Profile security (who can update the profile).
- Whether approval is required for changes to the profile.

## Entity Types

Profiles fall into two categories:

- Non-person profiles (also known as job profiles).

These are profiles that are created for a business entity, such as a position or a job code.

- Person profiles.

A person profile is created for a specific person ID.

When you define a profile type, you specify the type of entities that the user can select when creating a profile. For example, suppose that you create a profile type and specify that it can be linked to job codes and salary grades. When users create a profile based on that profile type, they can only select job codes, salary grades, or both job codes and salary grades for the new profile. A profile type cannot be linked to both business entities and people. A person profile will automatically have an identifier added that is linked to the PERSON table. No other identifiers can be defined for a person profile.

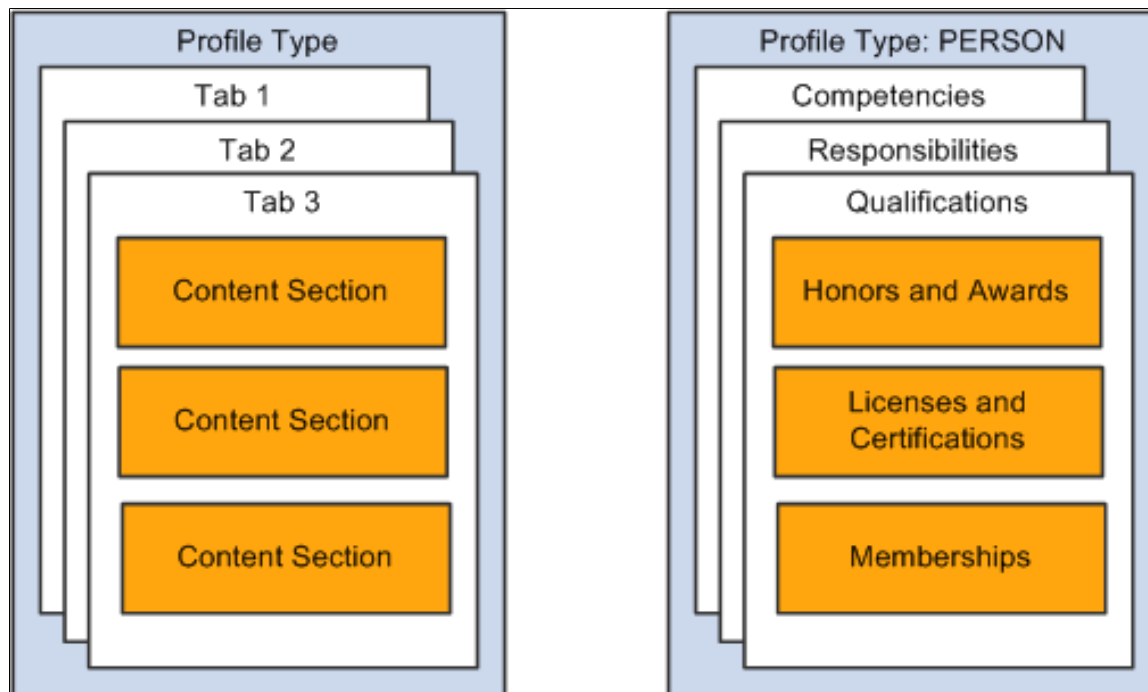
The entities to which you can link a profile type are known as *profile identity options*. Use the Profile Identity Options page to maintain the list of profile identity options available.

In addition to profile identities, you can also link a profile type to entities outside the Manage Profiles business process. These entities are known as *profile association options*. ePerformance templates are linked to profile types in this way. The Association Option is used to find the ePerformance Template during the document creation process. The ePerformance template is currently the only supported external entity.

## Profile Content

### Image: Content for profile types is divided into tabs and content sections

This diagram shows how the content of profile types (and profiles created from those profile types) is divided into tabs and content sections. The diagram shows both a generic architecture and an example where the tabs are responsibilities, competencies, and qualifications.



When you set up a profile type you define the name of each tab and the order in which they are displayed in the profile. You add one or more content types to each tab to create *content sections*. For example, the previous diagram shows a tab labelled Qualifications that has three content sections for three different content types or sections: Honors and Awards, Licenses and Certifications, and Memberships. When users create a profile using this profile type (PERSON), they can only add content items of the type LIC (Licenses and Certifications) to the Licenses and Certifications content section. You define the order in which the content sections are listed within the tab.

Each content section is made up of supporting properties, or fields. The content section enables you to identify fields such as the content item, such as the specific degree required or earned, and other associated data, such as the school name and dates. For example, you can enter that a person received a Bachelors of Science in June of 2007.

---

**Note:** The profile type definition does not include content items. The purpose of the profile type is to provide the structure for the new profile and not the detailed content. Users select content items from a prompt list when they create a profile.

---

Property categories are associated with each field property, which enables you to easily retrieve the fields you want to include in a content section. Profile properties are organized into the following property categories:

<b>Property Category</b>	<b>Usage</b>
Career Properties	Properties tied to the delivered Mobility content types: Location Preference, Geographic Preference, International Preference, and Travel Preference. (If properties are used in any custom content, then the defaulting behavior of some of these properties cannot be guaranteed.).
Common Properties	Properties used for multiple content sections. A specific set of translate values or a prompt table is tied to each property.
Country Properties	Properties tied to the delivered education content sections: School Education, Degrees, and Area of Study. These properties are organized in separate page country specific sections and most have specific translate values or prompt lists tied to them.
Education Properties	Non-country specific properties tied to the delivered education content sections: School Education, Degrees, and Area of Study.
Key Properties	Properties that are part of the record key structure and special process indicator properties.
User Defined Properties	<p>Properties can be used for extending delivered content sections or defining new content sections. The following types are provided:</p> <ul style="list-style-type: none"> <li>Integer</li> <li>Decimal</li> <li>Percent</li> <li>Check box</li> <li>Date</li> <li>Text (254)</li> <li>Text (1325)</li> <li>Custom prompt (12 characters)</li> </ul>

See also "Defining Education-Related Information (*PeopleSoft HCM 9.2: Application Fundamentals*)".

## Profile Security

When you set up a content section, you specify the Profile Management roles that can view that section of the profile. This enables you to display or hide sections to different types of users. There is an additional check box that enables you to control which roles can update the items in the section. There are three roles available:

- Administrator

The administrator is any user who has access to the Profile Management menu in Workforce Development.

- Manager

Managers are users that can access the self-service transactions for managing profiles, using the Manager Self Service menu.

- Employee

Employees use employee self service to access the profile management self-service transactions.

The manager and employee self service transactions are delivered in PeopleSoft eDevelopment.

See *PeopleSoft HCM 9.2: eDevelopment*.

## Profile Approvals

Approvals processing is an optional aspect of profile management. If you want to use approval workflow to control changes to profiles, you:

1. Set up approval processing using the standard Approvals Framework engine.
2. Associate the approvals definition with the profile type.

On the Profile Type - Attributes page, you define one approvals workflow transaction and one approvals definition for the profile type.

3. Specify whether identities require approval (non-person profile types only).

You can specify that approvals workflow is triggered when users add or change the profile identities associated with a non-person profile. To do this, select the Approval Req'd for Identities check box on the Profile Types - Identities page. This applies to non-person profile types only. The check box is not available when you are working with person profile types.

4. Specify which content section roles require approval.

Each content section within a profile type has an Approval Required check box per security role that controls whether changes to that content section require approval by the designated person or role. If you have set up approval processing for a content section when users add items to a profile, delete existing items, or modify existing items, this initiates the approvals process.

5. (Optional) Add properties to content sections to track workflow status.

You should add the workflow status property (JPM\_WF\_STATUS) to content sections that require approval to enable users to view the status of profile items as they are processed by the Approvals Framework. Other useful properties for tracking approval are the last updated date and time property (LASTUPDDTTM), and the last updated user ID property (LASTUPDOPRID).

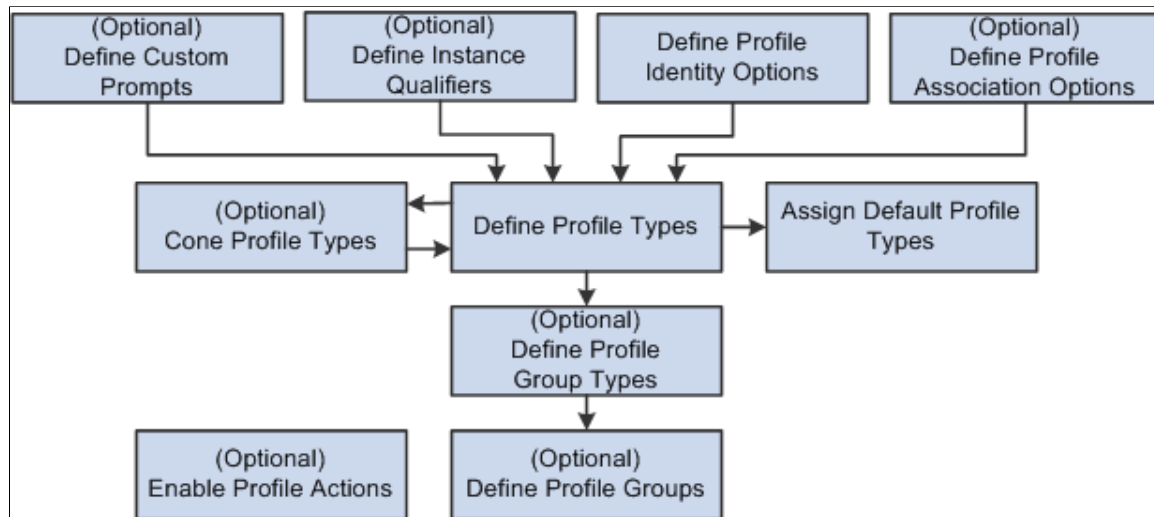
See "Understanding Approvals (*PeopleSoft HCM 9.2: Application Fundamentals*)".

See [Content Section Page](#).

## Manage Profiles Setup

### Image: Steps for setting up profile management

This diagram illustrates the optional and required steps for setting up profile management:



To set up profile management you define the following:

- (Optional) Custom Prompts.
- Custom prompts are used to define the prompt list for the JPM\_PROMPT properties which allows you to customize the list of values that is permitted to be entered.
- (Optional) Instance qualifiers.

Instance qualifiers are used as additional key fields for a profile item. They can prompt off of a table or the valid values can be defined within the instance qualifier. Instance qualifiers are used to identify who updated the profile or the type of evaluation. You can also use instance qualifiers to restrict the profile item rows that are visible to employees and managers using self-service transactions.

- Profile Identity Options.
- (Optional) Profile Association Options.

---

**Note:** You do not need to define profile association options for the Manage Profiles business process. However, if you have installed ePerformance and you want to use profile content to create performance or development documents, you must define profile association options for ePerformance.

---

- Profile Types and Clone Profile Types.

To facilitate profile type creation, the system enables you to copy an existing profile type through the Clone Profile Types Application Engine process. You can then modify the new profile type using the Profile Types component.



---

**Note:** Profile Type configurations are delivered for CLUSTER, ROLE, JOB, and PERSON. It is strongly recommended that if changes need to be made to these types, this should be done by adding a new effective dated entry for the profile type. Caution should be used when changing ROLE and PERSON content sections since there may be existing integration requirements. Refer to the topic [Manage Profile Integrations](#) to determine the business processes that leverage profile content. Caution must be taken in the removal of delivered properties since there may be processing tied to the property..

New properties should not be specified with an attribute of Required if profile data already exists. It is recommended that the Maximum Length value not be changed to avoid possible truncation during integration with other products.

---

See [Manage Profiles Integrations](#).

- Assign Default Profile Types.

The system uses the primary person and non-person profile types for products that need to interact with Profile Management.

- (Optional) Profile Group Types and Profile Groups.

Profile group types and profile groups enable you to categorize profile types. Profile group types are defined as either person or non-person. Profile groups are used as search criteria in the search and compare profiles feature to filter the search results.

- (Optional) Profile Actions

Profile actions enable administrators, managers, and employees to perform transactions directly from the non-person profile and person profile pages.

---

**Note:** Before you can use Manage Profiles, you must also set up the installation settings on the Profile Management Installation page. This is described in the next section.

---

## Related Links

[Searching and Comparing Profiles](#)

---

## Common Elements Used to Set Up Profiles

### Sys Data or System Data (system data)

This check box appears on setup pages for instance qualifiers, profile identities, profile associations, and profile types. It is system-maintained and indicates if the data is delivered as system data. When this check box is selected, the row of data is display-only.

---

## Configuring Manage Profiles

To configure Manage Profiles, use the Profile Mgmt Installation (JPM\_INSTALLATION) component.

This topic discusses how to configure Manage Profiles installation settings.

## Page Used to Configure Manage Profiles

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Profile Management Installation	JPM_INSTALLATION	Set Up HCM, Install, Product Specific, Profile Mgmt Installation, Profile Management Installation	Define installation settings for the Manage Profiles business process. This includes setting up the profile ID length and the last numbers used for profile ID and approval transaction. You complete this page once during implementation only.

## Profile Management Installation Page

Use the Profile Management Installation page (JPM\_INSTALLATION) to define installation settings for the Manage Profiles business process.

This includes setting up the profile ID length and the last numbers used for profile ID and approval transaction. You complete this page once during implementation only.

### Navigation

Set Up HCM, Install, Product Specific, Profile Mgmt Installation, Profile Management Installation

### Image: Profile Management Installation page

This example illustrates the fields and controls on the Profile Management Installation page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Profile Management Installation' page with the following fields and controls:

- Profile ID Length**: Input field with value 6
- Last Profile ID Used**: Input field with value 210553
- Last Item Key ID Used**: Input field with value 12291
- Last Approval Transaction Used**: Input field with value 1286
- \*Supervisor Navigation Method**: Dropdown menu with selected value '5 - Position / Supervisor ID'
- Days of Approval History**: Input field with value 185

### Profile ID Length

Enter the number of characters in the profile ID. The maximum profile ID length is defined in Application Designer and the system displays an error message if you enter a length that exceeds this maximum.

### Last Profile ID Used

To let the system assign numbers for profile IDs, enter the last number that you used. The system automatically increases the number in this field each time that it assigns a new profile ID.

You can manually assign profile IDs to non-person profiles when you create the profile.

---

**Note:** To avoid maintaining two different sets of numbers, either always assign profile IDs manually or always let the system do it.

---

### **Last Item Key ID Used**

Displays the last number used to identify items on profiles. The system automatically assigns an item key ID to each content item added to a profile. The field is set to 1 at installation and the system automatically increases the number in the field each time you add content items to a profile.

---

**Note:** The item key ID is not visible to users when setting up or using profiles.

---

### **Last Approval Transaction Used**

Displays the last approval transaction number. The system automatically increases the number in the field each time that an approval transaction for Manage Profiles is generated.

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

### **Supervisor Navigation Method**

Select the method that is used by the Schedule Search index process to determine supervisor relationships when building manager security for the Profile Management SES indexes. Select from these options: 2 - *Supervisor Id*, 3 - *Department Manager ID*, 4 - *Reports To Position*, 5 - *Position / Supervisor ID*, or 6 - *Position / Dept Manager*.

See [Understanding Search and Compare Profiles](#).

### **Days of Approval History**

Enter the number of days of approval history that is available from the Person or Non-person Profile pages. Links on the profile pages indicate how many profile items have been approved or denied approval over a period that is determined by the setting of Days of Approval History field. When users view a profile, the system checks the approval history for the period between the system date (current date) and the system date minus the number of days you specify in this field.

For example, if you enter 31 days in this field and the system date is August 2, the system checks for profile items that have been approved or denied in the period July 2 to August 2.

### **Related Links**

[Understanding Managing Profiles](#)

## Defining Custom Prompts

To set up custom prompts, use the Custom Prompt (JPM\_C\_LIST\_VALUES) component.

These topics provide an overview of custom prompts and discuss how to define custom list values.

### Understanding Custom Prompts

Prompt lists can be configured for certain properties. The Content Catalog contains a single property, EP\_SUB\_LEVEL (specific to ePerformance use), that permits a list of values to be configured. \Profile Type content section definitions can leverage the special properties JPM\_PROMPT\_1 through JPM\_PROMPT\_20. These properties give you the ability of adding fields to a content section within the profile that have a customized list of values. The PeopleSoft application enables administrators the ability to define a customer list of values for the following fields:

- EP\_SUB\_LEVEL - This is the only Content Item property that leverages a custom prompt.
- JPM\_PROMPT\_1 through JPM\_PROMPT\_20.

The prompt list is defined separately from the property. This means that the property could have a different set of prompt values within each of the content sections in which it is used. For example, in one profile item a person may have the choice of selecting a level of difficulty *Advanced*, *Basic*, or *Intermediate*, while in another profile item a person may have the choice of selecting from values such as *Minimum*, *Basic*, or *Stretch*. The Custom Prompt page enables organizations to change or add prompt values for these fields. On the Content Types page: Property Attributes tab you select which custom list to use for the EP\_SUB\_LEVEL content item property. On the Profile Type - Content Section page, a custom list can be assigned to the properties JPM\_PROMPT\_1 through JPM\_PROMPT\_20 to configure the list of values for a profile item field.

The ePerformance business process also uses the Content Catalog to obtain content items. Through this integration, administrators can create custom lists for the EP\_ITEM\_STATUS and the Level of Difficulty (EP\_SUB\_LEVEL) fields on the ePerformance template and document. The EP\_ITEM\_STATUS field is used only by ePerformance and is not leveraged by the Content Type or Profile Type configurations.

This tables shows the custom lists delivered as system data:

<b>Where you can add the custom prompt field</b>	<b>Field Name</b>	<b>Prompt List Name</b>	<b>Description</b>	<b>List Values</b>
Content Types component	EP_SUB_LEVEL	EP_SUB_LEVEL	Level of Difficulty	<ul style="list-style-type: none"> <li>• A - Advanced</li> <li>• B - Basic</li> <li>• I - Intermediate</li> </ul>
Profile Types component - Content Sections page	JPM_PROMPT_1 through JPM_PROMPT_20	Varies based on custom prompt lists you have created.	Varies based on customer prompt list descriptions you have entered.	Varies based on customer prompt list values or record you have entered on the Custom Prompt page for the custom prompt.

---

**Note:** The EP\_SUB\_LEVEL field is delivered in the Content Catalog in the *SUB\_COMP* (Sub-Competencies) content type only. You can create or update other content types to include this property, or field, if necessary.

---

### Related Links

"Defining Sections (*PeopleSoft HCM 9.2: ePerformance*)"

[Setting Up Profile Types](#)

[Setting Up Content Types and Properties](#)

[Content Section Page](#)

## Pages Used to Define Custom Prompts

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Custom Prompt	JPM_C_LIST_VALUES	Set Up HCM, Product Related, Profile Management, Profiles, Custom Prompt, Custom Prompt	Use the Content Prompt page (JPM_C_LIST_VALUES) to define customized prompt values that will be used to define valid values for custom lists, such as level of difficulty and ePerformance item statuses, or identify a prompt record from which to provide a list.

## Custom Prompt Page

Use the Custom Prompt page (JPM\_C\_LIST\_VALUES) to define customized prompt values that will be used to define valid values for custom lists, such as level of difficulty and ePerformance item statuses, or identify a prompt record from which to provide a list.

Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Custom Prompt, Custom Prompt

Image: Custom Prompt page

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

Custom Prompt

Prompt List Name VOLUNTEER GROUP

Custom Prompt ?

Find | View All

First 1 of 1 Last

\*Effective Date 01/01/1900

\*Status Active

\*Description Volunteer Group

\*Short Description Volunteer

\*Maximum Length 5

☐ System Data

Prompt Type

☒ Use Custom List Values

☐ Use Prompt Record

Prompt Values

Personalize | View All

First 1-4 of 5 Last

List Value	Description	
BCAMP	Blood Donation Camps	+ -
CPARK	Cleanup Local Parks	+ -
FSORT	Food Sorting	+ -
GTREE	Collection for The Giving Tree	+ -

- Prompt List Name

Enter the code that identifies this custom list.
- Description

Enter the description of the custom prompt list. The description will display in the List field under the Property Attributes tab on the Content Types page or the Content Section page of the Profile Type.

See [Content Types Page](#).
- System Data

Indicates if this is delivered data. Custom prompt values with this check box selected are delivered with the system.
- Maximum Length

Enter the length of the custom list value. Defaults to 12, which is consistent with other profile item values. However, the delivered *EP\_SUB\_LEVEL* custom prompt has a length of 1.
- Prompt Type

Custom prompt definitions support two types of list formats: a customized list defined on the custom prompt or an external prompt record.

Use Custom List Values

Select this type to identify an internal self-contained list maintained within the custom prompt definition.

When you select this option, the page displays the Prompt Values group box, where you will enter a list of valid prompt values from which the user can select.

**Use Prompt Record**

Select this type to use an external prompt table that the custom definition is associated with.

When you select this option, the page displays the Record Name field.

---

**Note:** Only tables with a single key, other than SET ID or EFFDT, are supported.

---

**Record Name**

Indicate the external table that should supply the prompt values.

---

**Note:** When using an external table as a prompt, consider the following:

- The key field must be defined with the CHAR data type.
  - The key data length cannot be greater than the property data length.
  - The record must contain a description field.
  - When you select a record that uses a SET ID as a high-level key, the system determines the SET ID based on the default values from the Org Defaults by Permission List (*PeopleSoft HCM 9.2: Application Fundamentals*) component.
- 

**Prompt Values**

Use this section to enter the valid values you want to include in your custom prompt list.

**List Value**

Enter a code, up to 12 characters, to identify the list value. Codes must be unique only within the same custom prompt definition.

**Description**

Enter the name of the value that the system will display. This text appears when the page displays the custom prompt field as a drop down list.

---

## Defining Instance Qualifiers

To define your instance qualifier sets, use the Instance Qualifiers (JPM\_JP\_INST\_QUAL) component.

These topics provide an overview of instance qualifiers, instance qualifier integration, and discuss how to set up instance qualifiers.

## Understanding Instance Qualifiers

Instance qualifiers, or instance qualifier sets, are an optional element of profile types, used to uniquely identify a profile item. They can be used to add an additional key to the profile item, where needed for a certain type of content. Normally, a profile item is uniquely identified by the content type and item identifier. In some cases, such as the Degree content, an additional key (Major) is required to uniquely describe the item.

Define instance qualifiers in one of two ways:

- By selecting a record in the database.

For example, if you specify the PERSON\_NAME record, the person ID is the instance qualifier.

- By entering the values of each instance qualifier.

When you define instance qualifiers in this way you can also specify those that employees and managers can view using self-service. This is useful if, for example, you don't want employees to view ratings given by peers, or you want to prevent employees and managers from viewing evaluations made by an executive committee.

Once you have set up instance qualifier sets you link them to content sections in the profile type. When users add a content item or update an item in a section that includes instance qualifiers, they select the instance qualifier that is inserted in that row. You can link a content section with up to two instance qualifier sets.

---

**Note:** The instance qualifier properties must be included in the content section definition in order for users to be able to select an instance qualifier when they add or update profile items.

---

These are the properties for instance qualifiers:

- JPM\_CAT\_ITEM\_QUAL (instance qualifier 1).

The instance qualifier 1 field can only be associated with instance qualifier sets where you define each value.

- JPM\_CAT\_ITEM\_QUAL2 (instance qualifier 2).

The instance qualifier 2 field can only be associated with instance qualifier sets defined by a record.

The delivered PERSON profile type includes three content sections, Competencies, Degrees, and NVQs, that are configured to use instance qualifiers.

This table lists the instance qualifier fields, the field name, and the instance qualifier sets for the Competencies section:

<b>Field</b>	<b>Field Label</b>	<b>Instance Qualifier Set</b>
JPM_CAT_ITEM_QUAL	Evaluation Type	EVAL_TYPE
JPM_CAT_ITEM_QUAL2	Reviewer ID	REVIEWER_ID

This table lists the instance qualifier field, the field name, and the instance qualifier set for the Degree section:

<b>Field</b>	<b>Field Label</b>	<b>Instance Qualifier Set</b>
JPM_CAT_ITEM_QUAL2	Major Code	MAJOR

This lists the instance qualifier fields, the field name, and the instance qualifier sets for the NVQ section:

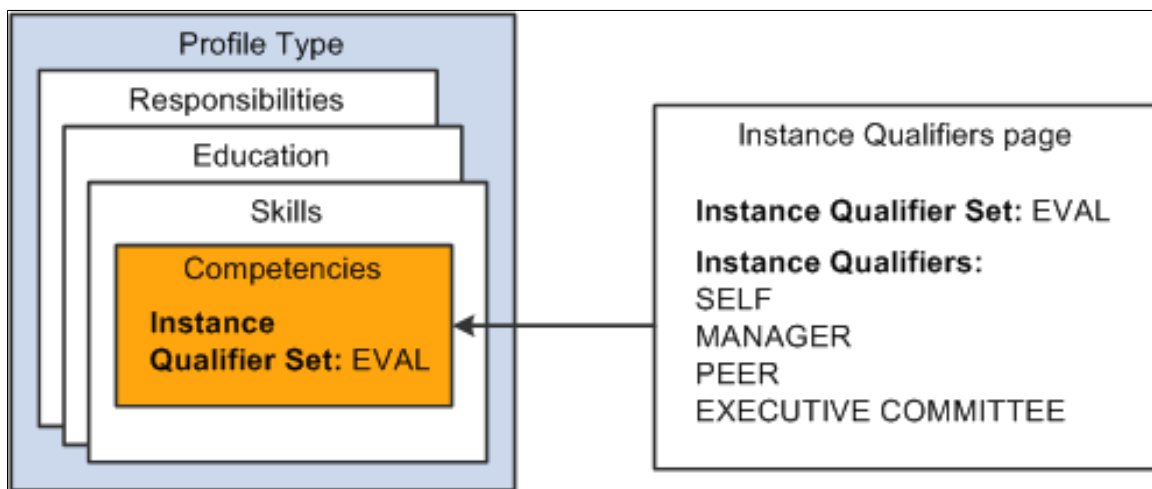


<i>Field</i>	<i>Field Label</i>	<i>Instance Qualifier Set</i>
JPM_CAT_ITEM_QUAL	Review Type	REVIEW_TYPE
JPM_CAT_ITEM_QUAL2	Reviewer ID	NVQ_REVIEWER

### Example: Using Instance Qualifiers

**Image: Example of instance qualifiers where an evaluation type qualifies a competency rating**

This diagram illustrates how a section within a profile can be linked to a set of instance qualifiers. In this example, the tab called Skills contains a content section for the COMPETENCY content type, and this section is linked to a set of instance qualifiers called EVAL with qualifiers that describe the source of the competency rating.



Suppose that an employee creates a profile, and he or she adds the competencies Abstract Thinking and Analytical Thinking to the profile, and enters a rating. The system creates two profile items with the following information:

<i>Profile Item</i>	<i>Effective Date</i>	<i>Rating</i>	<i>Instance Qualifier</i>
Abstract Thinking	April 16, 2009	3 (Good)	SELF
Analytical Thinking	April 16, 2009	5 (Expert)	SELF

If the manager reviews the employee's profile and adds a rating for the competencies, the profile now contains these rows for the profile items:

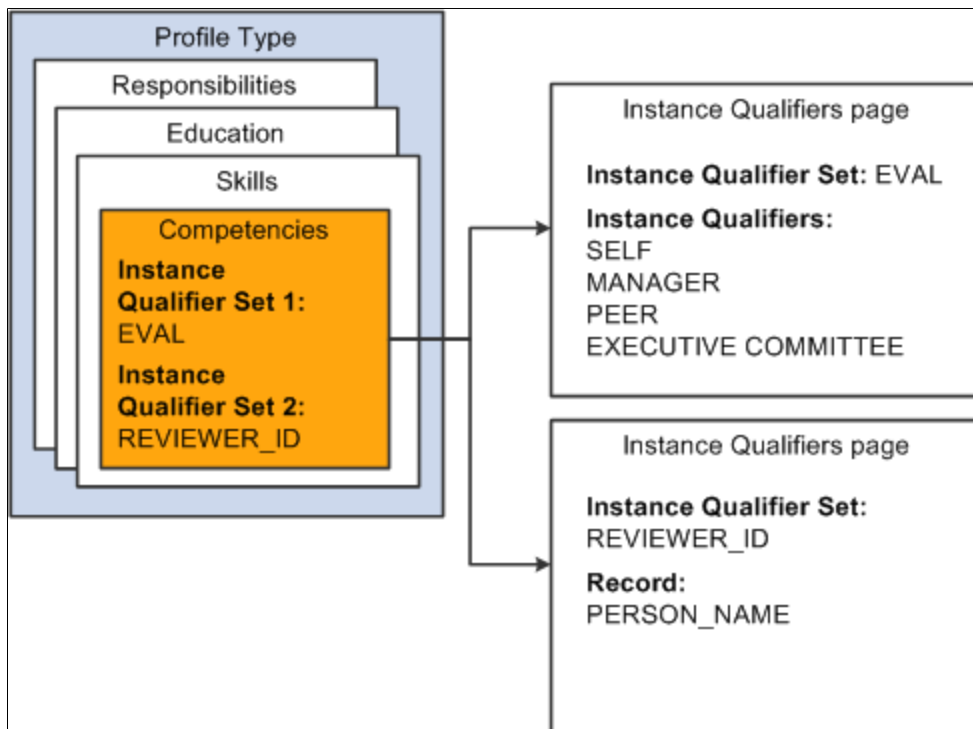
<i>Profile Item</i>	<i>Effective Date</i>	<i>Rating</i>	<i>Instance Qualifier</i>
Abstract Thinking	April 16, 2009	3 (Good)	SELF
Abstract Thinking	April 16, 2009	4 (Very Good)	MANAGER
Analytical Thinking	April 16, 2009	5 (Expert)	SELF

<b>Profile Item</b>	<b>Effective Date</b>	<b>Rating</b>	<b>Instance Qualifier</b>
Analytical Thinking	April 16, 2009	4 (Very Good)	MANAGER

### Example: Using Two Instance Qualifier Sets

#### Image: Example of two instance qualifier sets qualifying the same content section

You can link a content section with up to two instance qualifier sets. Using the previous example, suppose that the Competencies section is linked to the EVAL instance qualifier set and a second instance qualifier set (REVIEWER\_ID) that is linked to the PERSON\_NAME record, as illustrated in this diagram:



Using two qualifier sets you can uniquely identify rows that have the same instance qualifier 1. For example, if a person is evaluated by a committee you can use the instance qualifiers to record the ratings given by each member of the committee. This table shows the rows created for each committee member's evaluation of the same profile item:

<b>Profile Item</b>	<b>Effective Date</b>	<b>Rating</b>	<b>Instance Qualifier 1</b>	<b>Instance Qualifier 2</b>
Abstract Thinking	May 14, 2009	3 (Good)	EXECUTIVE COMMITTEE	KU0045
Abstract Thinking	May 14, 2009	5 (Expert)	EXECUTIVE COMMITTEE	KU0016
Abstract Thinking	May 14, 2009	4 (Very Good)	EXECUTIVE COMMITTEE	KU0119

---

**Note:** Since the Instance Qualifier defines key data, the profile type content section configuration should not be modified to remove an Instance Qualifier once profile items for that content type already exist. You cannot remove an Instance Qualifier value from the profile item retroactively.

---

## Understanding Instance Qualifier Integration

Applications that publish data to Manage Profiles can use instance qualifiers. In ePerformance, when you define a document template, you can specify the instance qualifier to use for each role that participates in a performance or development document. When users complete the document, the system updates the person profile data in Manage Profile using the instance qualifier specified.

In PeopleSoft Enterprise Learning Management, you can also specify the instance qualifier that the system uses when publishing profile data to PeopleSoft HCM. When learners complete learning objectives that came from HCM, the system marks the objective as *Met* and publishes profile data to HCM, using the specified instance qualifier value.

See product documentation for *PeopleSoft Enterprise Learning Management*.

### Related Links

"Section Definition Page (*PeopleSoft HCM 9.2: ePerformance*)"

## Page Used to Define Instance Qualifiers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Instance Qualifiers	JPM_JP_INST_QUAL	Set Up HCM, Product Related, Profile Management, Profiles, Instance Qualifiers, Instance Qualifiers	Define instance qualifiers for a content type, and define which instance qualifiers employees and managers can view.

## Instance Qualifiers Page

Use the Instance Qualifiers page (JPM\_JP\_INST\_QUAL) to define instance qualifiers for a content type, and define which instance qualifiers employees and managers can view.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Instance Qualifiers, Instance Qualifiers

### Image: Instance Qualifiers page

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

**Instance Qualifiers**

Content Type: COMPETENCY

Instance Qualifier Set: EVAL\_TYPE

\*Description: Evaluation Type

**Prompt Definition**

☒ Use Prompt Record      Record Name:

☐ Create Set of Qualifiers

*Priority	*Instance Qualifier	*Description	Empl View	Mgr View	Empl Default	Mgr Default	Searchable	Sys Data	
10	A	Approved/Official	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20	R	Supervisor/Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
30	S	Self	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
40	L	Learning	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
50	P	Peer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
60	B	Subordinate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
70	M	Mentor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
80	E	Executive Committee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
90	C	Customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

+ Add Instance Qualifier

### Use Prompt Record

Select to use a record in the database as the instance qualifiers.

For example, you might use the PERSON\_NAME record as the instance qualifier. The system makes the Record Name field available and hides the Instance Qualifiers grid area.

When you define a content section in a profile type, instance qualifiers that use a prompt record can be associated with the Instance Qualifier 2 field only. You can't specify instance qualifiers that use a prompt record in the Instance Qualifier 1 field.

### Record Name

Select the record that contains the instance qualifiers. This field is available only if you select Use Prompt Record.

### Create Set of Qualifiers

Select to create a new set of instance qualifiers in the Instance Qualifiers grid area. When you select this radio button, the Record Name field becomes unavailable and displays the Instance Qualifiers grid area.

Instance qualifiers of this type can be associated with the Instance Qualifier 1 field on the Content Section page; they can't be specified in the Instance Qualifier 2 field.

## Instance Qualifiers

### Priority

Enter a number that indicates the priority of the instance qualifier. The priority increases as the number decreases, so that the instance qualifier with the lowest number is considered the highest priority. The priority value determines the order in which the system displays instance qualifiers. The Schedule Search Index process that builds the SES indexes for the Search and Compare Profiles feature also uses this field. The process uses the priority value to determine which profile item row is included in the index. The process includes the row that has the instance qualifier with the highest priority.

See [Building the Search Indexes](#).

### Instance Qualifier

Enter the instance qualifier code and enter a description in the Description field.

### Empl View (employee view)

Select this check box to enable employees to view rows in a profile that are assigned the selected instance qualifier.

### Mgr View (manager view)

Select this check box to enable managers to view rows in a profile that are assigned the selected instance qualifier.

### Empl Default (employee default)

Select this check box to specify the instance qualifier that is automatically used in the employee self-service transactions. If you select a check box in this column, when employees add or update rows in self-service, the system inserts the selected instance qualifier and employees cannot change the instance qualifier.

### Mgr Default (manager default)

Select this check box to specify the instance qualifier that is automatically used in the manager self-service transactions. If you select a check box in this column, when managers add or update rows in self-service, the system inserts the selected instance qualifier and managers cannot change the instance qualifier.

### Searchable

Select this check box if you want profile items with the selected instance qualifier to be included in the SES indexes. The Schedule Search Index process uses this field to determine which profile item rows are included in the SES indexes that are used by the Search and Compare Profiles feature.

If the Searchable check box is not selected, any profile item rows that are assigned the selected instance qualifier are always excluded from the SES index.

## Setting Up Profile Identity and Association Options

To set up profile identity options and profile association options for your organization, use the Profile Identity Options (JPM\_RLAT\_SETUP) and the Profile Association Options (JPM\_RLAT\_ASC\_SETUP) components.

These topics discuss how to:

- Define profile identity options.
- Enable profile association options.

### Common Elements Used to Define Profile Identity and Association Options

<b>Identity Option</b>	<p>Enter the name of the entity to which you can link a profile. For the delivered identity and association options, this field is display-only.</p> <p>Identity options are entities within the Profile Management business process, such as job code or position, whereas association options are entities external to the Profile Management business process. One association option is delivered that enables you to associate a profile type to an ePerformance template to automatically resolves which template is selected during document creation process.</p>
<b>Enabled</b>	Select this check box to allow profile types to be linked to the entity specified in the Identity Option field.
<b>Record Name</b>	Select the record that defines the entity specified in the Identity Option field. This field is display-only for identity options that are delivered as system data (Sys Data check box is selected).
<b>Key 1 Field Name</b>	Displays the key field for the record selected in the Record Name field.
<b>Key 2 Field Name, Key 3 Field Name, Key 4 Field Name</b>	Displays the additional key fields for the record. These fields are hidden if the record has one key field only.
<b>SetID</b>	Indicates if SetID is a key field for the selected record. The system automatically selects this check box based on the record definition and makes the field display-only.
<b>Eff Date (effective date)</b>	Indicates if the effective date field is a key field for the selected record. The system automatically selects this check box based on the record definition and makes the field display-only.

## Pages Used to Define Profile Identity and Association Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Profile Identity Options	JPM_RLAT_SETUP	Set Up HCM, Product Related, Profile Management, Profiles, Profile Identity Options, Profile Identity Options	<p>Define profile identity options, which can be linked to profile types. Entities include job codes, job functions, job families, people, and salary grades. The entities enabled on this page determine which options are available on the Identities page of the Profile Type component that defines the structure of a non-person profile. For example, if you enable Job Codes you can set up a profile type that is linked to job code.</p> <p>A set of default profile identity options is delivered but you can add to the list according to your requirements.</p>
Profile Association Options	JPM_RLAT_SETUP	Set Up HCM, Product Related, Profile Management, Profiles, Profile Association Options, Profile Association Options	<p>Define the entities external to the Manage Profiles business process to which you can link profile types. One association option is delivered that enables you to link a profile type to ePerformance templates. The addition of other associations would require customizations to leverage it.</p>

### Profile Identity Options Page

Use the Profile Identity Options page (JPM\_RLAT\_SETUP) to define profile identity options, which can be linked to profile types.

Entities include job codes, job functions, job families, people, and salary grades. The entities enabled on this page determine which options are available on the Identities page of the Profile Type component that defines the structure of a non-person profile. For example, if you enable Job Codes you can set up a profile type that is linked to job code.

A set of default profile identity options is delivered but you can add to the list according to your requirements.

Only those records that are used for prompting on JOB and JOB\_JR non-key record fields can be selected. Person profile identifiers cannot be defined.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Identity Options, Profile Identity Options

### Image: Profile Identity Options page: Enable Options tab

This example illustrates the fields and controls on the Profile Identity Options page: Enable Options tab. You can find definitions for the fields and controls later on this page.

### Profile Identity Options

Profile Identity Options

Enable Options

Configuration

*Identity Option	*Description	Enabled	
BUSINESS_UNIT	Business Unit	<input checked="" type="checkbox"/>	
COMPANY	Company	<input checked="" type="checkbox"/>	
DEPARTMENT	Department	<input checked="" type="checkbox"/>	
GP_PAY_GROUP	<input type="text" value="GP Pay Group"/>	<input checked="" type="checkbox"/>	
JOB_CODE	Job Code	<input checked="" type="checkbox"/>	
JOB_FAMILY	Job Family	<input checked="" type="checkbox"/>	
JOB_FUNCTION	Job Function	<input checked="" type="checkbox"/>	
JOB_SUB_FUNCTION	<input type="text" value="Job Sub Function"/>	<input checked="" type="checkbox"/>	
JOB_TASK	Job Task	<input checked="" type="checkbox"/>	
LOCATION	Location	<input checked="" type="checkbox"/>	
PNA_PAY_GROUP	<input type="text" value="PNA Pay Group"/>	<input checked="" type="checkbox"/>	
POSITION	Position Data	<input checked="" type="checkbox"/>	
REG_REGION	Regulatory Region	<input checked="" type="checkbox"/>	
SALARY_GRADE	Salary Grade	<input checked="" type="checkbox"/>	

Add Profile Identity Option

### Add Profile Identity Option

Click this link to add a new profile identity option.

## Enable Options Tab

### Enabled

Select this check box to allow profile types to be linked to the entity specified in the Identity Option field.

If this check box is deselected, you cannot set up a profile type with this entity. For example, if you deselect the check box for the *Job\_Sub\_Function* option, you cannot define a profile type using the *Job\_Sub\_Function* profile identity option.



## Configuration Tab

Access the Configuration tab on the Profile Identity Options page.

### Image: Profile Identity Options page: Configuration tab

This example illustrates the fields and controls on the Profile Identity Options page: Configuration tab. You can find definitions for the fields and controls later on this page.

Profile Identity Options							
Enable Options		Configuration					
*Identity Option	*Record Name	*Key 1 Field Name	Key 2 Field Name	Set ID	Eff Date	Sequence	Sys Data
BUSINESS_UNIT	BUS_UNIT_TBL_HR	BUSINESS_UNIT		<input type="checkbox"/>	<input type="checkbox"/>	150	<input checked="" type="checkbox"/>
COMPANY	COMPANY_TBL	COMPANY		<input type="checkbox"/>	<input checked="" type="checkbox"/>	140	<input checked="" type="checkbox"/>
DEPARTMENT	DEPT_TBL	DEPTID		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>
GP_PAY_GROUP	GP_PYGRP	GP_PAYGROUP		<input type="checkbox"/>	<input type="checkbox"/>	120	<input type="checkbox"/>
JOB_CODE	JOB_CODE_TBL	JOB_CODE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>
JOB_FAMILY	JOB_FAMILY_TBL	JOB_FAMILY		<input type="checkbox"/>	<input checked="" type="checkbox"/>	40	<input checked="" type="checkbox"/>
JOB_FUNCTION	JOB_FUNCTION_TBL	JOB_FUNCTION		<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	<input checked="" type="checkbox"/>
JOB_SUB_FUNCTION	JOB_SUBFUNC_TBL	JOB_SUB_FUNC		<input type="checkbox"/>	<input checked="" type="checkbox"/>	60	<input type="checkbox"/>
JOB_TASK	JOB_TASK_TBL	JOB_TASK		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	70	<input checked="" type="checkbox"/>
LOCATION	LOCATION_TBL	LOCATION		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	110	<input checked="" type="checkbox"/>
PNA_PAY_GROUP	PAYGROUP_TBL	COMPANY	PAYGROUP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	130	<input type="checkbox"/>
POSITION	POSITION_DATA	POSITION_NBR		<input type="checkbox"/>	<input checked="" type="checkbox"/>	20	<input checked="" type="checkbox"/>
REG_REGION	REG_REGION_TBL	REG_REGION		<input type="checkbox"/>	<input type="checkbox"/>	160	<input checked="" type="checkbox"/>
SALARY_GRADE	SAL_GRADE_TBL	SAL_ADMIN_PLAN	GRADE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	90	<input checked="" type="checkbox"/>

### Sequence

Enter the number that determines the order in which non-person profiles related to a person's job are listed. The system uses the sequence value as follows:

- On the Person Profile page, when you select *View Related Job Profiles* in the Profile Actions field, the system uses the sequence values to define the order in which the related profiles are listed. Profiles with the lowest sequence number are displayed first.
- In eDevelopment, when employees select My Job Profiles, the system uses the sequence values to define the order in which the related profiles are listed. Profiles with the lowest sequence number are displayed first.
- In ePerformance, when you are creating a document for an employee, the system retrieves all matching job profiles for an employee and then copies content from the profile with the highest priority (lowest sequence value).

See [Common Elements Used to Define Profile Identity and Association Options](#).

## Profile Association Options Page

Use the Profile Association Options page (JPM\_RLAT\_SETUP) to define the entities external to the Manage Profiles business process to which you can link profile types.

One association option is delivered that enables you to link a profile type to ePerformance templates. The addition of other associations would require customizations to leverage it.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Association Options, Profile Association Options

### Image: Profile Association Options page: Enable Options tab

This example illustrates the fields and controls on the Profile Association Options page: Enable Options tab. You can find definitions for the fields and controls later on this page.

*Identity Option	*Description	Enabled
EPERF_TMPLT	ePerformance Template	<input checked="" type="checkbox"/>

### Image: Profile Association Options page: Configuration tab

This example illustrates the fields and controls on the Profile Association Options page: Configuration tab. You can find definitions for the fields and controls later on this page.

*Identity Option	*Record Name	*Key 1 Field Name	Key 2 Field Name	Set ID	Eff Date	Sys Data
EPERF_TMPLT	EP_TMPL_DEFN	EP_REVIEW_TYPE	EP_TEMPLATE_ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Use this page to define the entities external to the Manage Profiles business process to which you can link profile types. ePerformance Template is a delivered profile association option. The addition of other associations would require customizations to leverage. Enter the identity option on the Enable Options tab. Enter the record name and key field information on the Configuration tab.

**Add Profile Association Option** Click this link to add a new profile association option.

See [Common Elements Used to Define Profile Identity and Association Options](#).

## Setting Up Profile Types

To set up profile types, establish the person and non-person profile types for other business modules, and assign the default person and non-person profile types, use the Profile Types (JPM\_JP\_TYPES), Clone Profile Types (RUNCTL\_JPM\_CLONE), and Assign Default Profile Types (JPM\_DFLT\_JP\_TYPES) components.

These topics discuss how to:

- Set up profile type attributes.
- Define profile type identities.

- Define profile type content.
- Select content types.
- Define content sections.
- Set up profile type associations.
- Clone profile types.
- Assign profile type defaults.

## Pages Used to Set Up Profile Types

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Profile Types - Attributes	JPM_JP_TYPE_ATTRIB	Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Attributes	Set up profile type attributes. Define basic details of the profile type identifying the type of profile. If the profile type is associated with approvals workflow, specify the transaction and the approval definition on this page.
Profile Types - Identities	JPM_JP_TYPE_IDENT	Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Identities	Define profile type identities by selecting the identity options to which the profile type is linked. Identity options are entities such as a job code, position number, or person. When users create profiles based on a profile type, they can only create profiles for the entities that are defined on this page. Active profile types must have at least one identity option. Define the identity options enabled on the Profile Identity Options page. A <i>Person</i> identifier is automatically added for profile types with a Person usage. No other identifiers can be added for these.
Profile Types - Content	JPM_JP_TYPE_CONT	Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Content	Define profile type content. The content of a profile is divided into tabs and each tab comprises one or more sections. Use the Content page to set up the tabs in the profile, and add content types to each tab.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Add Content Section	JPM_JP_ADD_CNT_SEC	<ul style="list-style-type: none"> <li>Click the Add Content Section link on the Profile Types - Content page.</li> <li>Click the Add Sub-section link on the Profile Types - Content page.</li> </ul>	Select content types. This page lists the content types available to add to the profile type. Select the content type you want to add and the system displays the Content Section page.
Content Section	JPM_JP_CONTENT_SEC	<ul style="list-style-type: none"> <li>Select a content type on the Add Content Section page.</li> <li>Click the section name link on the Content page.</li> </ul>	Define content section properties (fields) and the attributes of those properties. You also use this page to define the Profile Management roles that can access the content section when creating or updating profiles.
Profile Content Visualization	JPM_VISUAL_DTL_SEC	Click the Visualize Profile Detail icon on the Content Section page.	View the configuration of how the content section will render on the Add <content type> or Update <content type> pages.
Copy Content from another Profile Type	JPM_JP_CPY_CNT_SEC	Click the Copy from another Profile Type icon on the Content Section page.	Copy content properties of the content type for the section in which you are working from an existing profile type into the current profile.
Profile Type - Associations	JPM_JP_TYPE_ASSOC	Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Associations	Set up profile type associations. Select the associations to which the profile type is linked. Associations are entities external to the Profile Management business process. Define the association options enabled on the Profile Association Options page. This is only available for profile types with a <i>Non-Person</i> usage.
Clone Profile Types	RUNCTL_JPM_CLONE	Set Up HCM, Product Related, Profile Management, Profiles, Clone Profile Types, Clone Profile Types	Clone profile types. Create a new profile type by copying an existing profile type by running the Clone Profile Type process.
Assign Profile Type Defaults	JPM_DFLT_JP_TYPES	Set Up HCM, Product Related, Profile Management, Profiles, Assign Default Profile Types, Assign Profile Type Defaults	Assign profile type default person and non-person profile types available to other product features and services.

## Profile Types - Attributes Page

Use the Profile Types - Attributes page (JPM\_JP\_TYPE\_ATTRIB) to set up profile type attributes.

Define basic details of the profile type. If the profile type is associated with approvals workflow, specify the transaction and the approval definition on this page.

### Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Attributes

### Image: Profile Types - Attributes page

This example illustrates the fields and controls on the Profile Types - Attributes page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Profile Types - Attributes' page for a profile type named 'JOB'. The page has tabs for 'Attributes', 'Identities', 'Content', and 'Associations'. The 'Attributes' tab is active. The page title is 'Profile Type JOB'. Below the title, there is a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The main form contains the following fields and controls:

- \*Effective Date:** A date field with the value '01/01/1900'.
- \*Status:** A dropdown menu with the value 'Active'.
- \*Description:** A text field with the value 'Job'.
- System Data:** A checkbox that is checked.
- Summary:** A text area containing the text: 'Profile Type for jobs. Used to upgrade job profiles from HRMS 8.9. Identity options = job code, position, salary grade, job family. No approvals are required.'
- \*Profile Type Usage:** A dropdown menu with the value 'Non-Person'.
- End Profile:** A checkbox that is checked.
- Transaction Name:** A text field with a magnifying glass icon.
- Definition ID:** A text field with a magnifying glass icon.

### Summary

Enter a brief description of the profile type.

### Profile Type Usage

Select the usage value: *Person* or *Non-Person*. The usage will determine the Profile Identity Options values that can be selected on the Profile Types - Identities page. If the Profile Type Usage field is *Person*, then a *Person* identifier is automatically added and no other identifiers can be added. If the usage is *Non-Person* then any enabled Identity Option can be added.

### End Profile

Select this check box if the profile type is an end profile. The system displays end profiles in employee and manager self service and uses the end profiles in search, match, and browse.

### Transaction Name

Select the approvals workflow transaction associated with the profile type. You must complete this field if any of roles in the content sections in the profile type have the Approval Required check box selected or if the Approval Req'd for Identities check box on the Profile Type - Identities page is selected.

See [Content Section Page](#).

**Definition ID**

Select the approvals definition for the profile type. If you leave this field blank, the system uses the default approval definition ID for the approval process ID specified in the Transaction Name field.

If multiple approval definition IDs exist, the approval framework will decide which approval definition ID to use, based on the criteria and priority configured on the Approval Process Definition component. For the definition IDs used for Manage Profiles approvals processing, the default definition has a priority of 1 and the non-default definitions have a priority of 9.

## Profile Types - Identities Page

Use the Profile Types - Identities page (JPM\_JP\_TYPE\_IDENT) to define profile type identities by selecting the identity options to which the profile type is linked.

Identity options are entities such as a job code, position number, or person. When users create profiles based on a profile type, they can only create profiles for the entities that are defined on this page. Active profile types must have at least one identity option. Define the identity options enabled on the Profile Identity Options page. Identifiers can only be added for profile types with the non-person usage.

A *Person* identifier is automatically added for profile types with a Person usage. No other identifiers can be added for these.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Identities

### Image: Profile Types - Identities page

This example illustrates the fields and controls on the Profile Types - Identities page. You can find definitions for the fields and controls later on this page.

Attributes | **Identities** | Content | Associations

Profile Type JOB

Identity Options ? Find | View All First 1 of 1 Last

\*Effective Date 01/01/1900 \*Status Active + -

\*Description Job ☒ System Data

☐ Approval Req'd for Identities

Profile Identity Options Personalize   Find   1-4 of 4	
*Profile Identity Option	Sys Data
Job Code	<input checked="" type="checkbox"/>
Job Family	<input checked="" type="checkbox"/>
Position Data	<input checked="" type="checkbox"/>
Salary Grade	<input checked="" type="checkbox"/>

+ Add Profile Identity

#### Approval Req'd for Identities (approval required for identities)

Select this check box if approval is required for changes to the profile identities associated with profiles of this profile type.

#### Profile Identity Option

Select one or more objects to which the profile type can be linked. The objects available are determined by the profile identity options enabled on the Profile Identity Options page.

Profile identity options can only be added for non-person profiles. A *Person* identifier is automatically added for person profiles and no further identifiers can be added. The system validates that there is only one active profile per profile identity key within a given profile type. For example, if the position Human Resources Administrator is listed as the identifier for a certain active JOB profile, then another JOB profile cannot be defined with the same position identifier.

See [Profile Identity Options Page](#).

#### Add Profile Identity

Click to add another profile identity option to the page.

## Profile Types - Content Page

Use the Profile Types - Content page (JPM\_JP\_TYPE\_CONT) to define profile type content.

The content of a profile is divided into tabs and each tab comprises one or more sections. Use the Content page to set up the tabs in the profile, and add content types to each tab.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Content

### Image: Profile Types - Content page

This example illustrates the fields and controls on the Profile Types - Content page. You can find definitions for the fields and controls later on this page.

Profile Type JOB

Content ? Find | View All First 1 of 1 Last

\*Effective Date 01/01/1900 \*Status Active + -

\*Description Job ☒ System Data

View All Sections

Competencies Responsibilities Qualifications NVQ Worn Rank

\*Tab Name Competencies Add Tab Delete Tab

\*Tab Order 10

Content Sections Personalize | Find | First 1-2 of 2 Last

Section Name	Parent Section Name	Required	*Move To Tab	Order
Competencies		<input type="checkbox"/>	Competencies	10
> Sub-Competencies	Competencies	<input type="checkbox"/>	Competencies	20

+ Add Content Section + Add Sub-section Reorder Content

Competencies Responsibilities Qualifications NVQ Worn Rank

Use this page to define the content of a profile type.

### Image: Example of how tab links appear on the Profile Types - Content page

The content is divided into tabs that appear as links on the page as shown in this example:

Competencies Responsibilities Qualifications NVQ Worn Rank

In this example, there are five tabs and the Competencies tab is the one currently selected. Click the tab name link to move to that tab.

The order in which the tabs are displayed is determined by the Tab Order field. Within each tab, you specify the content types in the Content Sections grid area. These links will appear as actual tabs to the user on the profile pages.

## View All Sections

Click this link to display the sections for all the tabs in the profile type. The system updates the Content Sections group box to list the sections from all tabs, and hides the Tab Name and Tab Order fields. To return to viewing a specific tab, click that tab link.



<b>Add Tab</b>	Click this button to add a new tab to the profile type.
<b>Delete Tab</b>	Click this button to delete the selected tab.
<b>Tab Name</b>	Enter a name for the tab. When users create a profile using this profile type, the tab name appears as a link in the profile. Therefore, it is important to use meaningful names and not leave the default name of <i>Tab 1</i> , <i>Tab 2</i> , and so on.
<b>Tab Order</b>	Enter a value to specify the order in which the system should display the tab links.

## Content Sections

This grid area lists the sections in the selected tab. If you click the View All Sections link, this grid area lists the content sections for all the tabs in the profile type.

<b>Section Name</b>	Click the section name to access the Content Section page and view and update details of the section or sub-section.
<hr/> <p><b>Note:</b> A "&gt;" symbol preceding a section name indicates that the section is a child of the section above it.</p> <hr/> <p><b>Note:</b> Profile Type configurations are delivered for CLUSTER, ROLE, JOB, and PERSON. This can be changed by adding a new effective dated entry for the profile type. Caution should be used when changing ROLE and PERSON content sections since there may be existing integration requirements. Refer to the topic “Getting Started with Manage Profiles,” Manage Profile Integrations to determine the business processes that leverage profile content.</p> <p>Caution should be exercised when removing delivered properties. If profile content already exists for the property, then it should not be removed.</p> <hr/> <p>See <a href="#">Manage Profiles Integrations</a>.</p>	
<b>Parent Section Name</b>	Displays the name of the parent section for child sections.
<b>Required</b>	Select this check box if the section is a required section of the profile. When users create a profile, the system uses this check box to validate that required sections have at least one profile item.
<b>Move To Tab</b>	Displays the current tab name where this content section is located.
	Select the tab from the list and click the Reorder Content link to move a section to a different tab.
<b>Order</b>	Enter a value to specify the order in which the content sections are displayed within the tab in the profile.

**Add Content Section**

Click this link to add a new section to the Content Sections grid area. The system displays the Add Content Section page that lists all the content types available. Content types are defined using the Content Types component.

See [Setting Up Content Types and Properties](#).

**Add Sub-section**

Add sub-sections to include content types that are related to the content type of an existing section.

Select the radio button for the content section for which you want to create a sub-section, and click this link.

Relationships between content types are defined on the Relationship Rules page in the Content Types component

For example, if you add a Competencies section to a tab, you can add the Element or Sub-Competencies content type as sub-sections because these content types are related to the competencies type.

When you click this link the system displays the Add Content Section page, which lists the content types that are defined as a child of the content type of the parent section.

See [Relationship Rule Page](#).

**Reorder Content**

Click this link if you have changed the Tab Order or the section Order field values. The system refreshes the page to show the new ordering of tabs or content sections.

**Add Content Section Page**

Use the Add Content Section page (JPM\_JP\_ADD\_CNT\_SEC) to select content types.

This page lists the content types available to add to the profile type. Select the content type you want to add and the system displays the Content Section page.

## Navigation

- Click the Add Content Section link on the Profile Types - Content page.
- Click the Add Sub-section link on the Profile Types - Content page.

### Image: Add Content Section page

This example illustrates the fields and controls on the Add Content Section page. You can find definitions for the fields and controls later on this page.

Select Content Type	
ADA	ADA Essential Functions
AREA STUDY	Areas of Study
CADRE_CLASS	Cadre Job
COMPETENCY	Competencies
DEG	Degrees
EDLVLACHV	School Education
EG SPCL PROJ	Educ and Govt Special Projects
ENT_OBJ	Enterprise Objective
GEOG_PREF	Geographic Preferences
GOAL	Goals and Objectives
H001	H001 Content Type
H0RESP	ePerf Responsibilities

[Return to Previous Page](#)

This page lists the content types that you can add to the profile type. Those content types that are already included in the profile type are shown in normal text and do not have a link.

If you are adding a sub-section, the system displays the content types that have a subordinate relationship with the content type of the parent section.

See [Profile Types - Content Page](#).

Click the link for the content type that you want to add, or click the Return to Previous Page link to cancel the addition.

## Content Section Page

Use the Content Section page (JPM\_JP\_CONTENT\_SEC) to define content section properties (fields) and the attributes of those properties.

You also use this page to define the users that can access the content section when creating or updating profiles.

## Navigation

- Select a content type on the Add Content Section page.
- Click the section name link on the Content page.

### Image: Content Section page showing the Properties tab

This example illustrates the fields and controls on the Content Section page showing the Properties tab. You can find definitions for the fields and controls later on this page.

**Content Section**

Content Type: **COMPETENCY** Competencies ☒ System Data

Instance Qualifier Set 1:

Instance Qualifier Set 2:

**Content Property Definition**

Properties | Property Attributes

*Field Name	*Label Text	
EFFDT	Effective Date	
JPM_CAT_ITEM_ID	Competency	
EFF_STATUS	Status	
RATING_MODEL	Rating Model	
JPM_RATING1	Target Proficiency	
JPM_PCT_1	Weight	
JPM_MANDATORY	Mandatory	
JPM_PCT_2	Minimum Weight	

[Add Property](#)

**Role Security**

*Role	Allow Update	Approval Required	
Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Employee	<input type="checkbox"/>	<input type="checkbox"/>	
Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

[Add Role](#)

**Note:** Profile Type configurations are delivered for CLUSTER, ROLE, JOB, and PERSON. This can be changed by adding a new effective dated entry for the profile type. Caution should be used when changing ROLE and PERSON content sections since there may be existing integration requirements. It is not recommended that delivered properties be removed.

### Instance Qualifier Set 1

(Optional) Select the instance qualifier set that you want to use with this section. You can only select instance qualifiers that are associated with the content type of the section and are defined as sets of values. You cannot select instance qualifier sets that are based on prompt records for this field. Define instance qualifiers using the Instance Qualifiers page.

You will be required to add the property JPM\_CAT\_ITEM\_QUAL.

See [Defining Instance Qualifiers](#).

### Instance Qualifier Set 2

(Optional) If you want to define an instance qualifier that is based on a prompt record, then select an Instance Qualifier Set that has a prompt definition.

You will be required to add the property JPM\_CAT\_ITEM\_QUAL2.

### Allow Copy From Job

This check box is available for *Person* profile types.

Select to enable the functionality to select a non-person profile from a list of related profiles when maintaining a person's profile. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. For example, the system checks for active profiles that match the employee's job codes, positions, and salary grades. If this check box is not selected, these content types related to the person will not be copied from the non-person profile.

### Visualize Profile Detail



Click this icon to access the Profile Content Visualization page to view how the content section configuration will render on the Add <content type> or Update <content type> pages.

### Copy from another Profile Type



Click this icon to identify an existing profile type from which you want to copy content properties for the content type section you have selected. When you click this icon, the system displays the Copy Content from another Profile Type page. Enter the profile type to copy and click OK to have the system insert the properties into the content section definition.

## Content Property Definition Group Box: Properties Tab

If you are setting up a content section, the Content Property Definition group box lists the key properties defined for the content type in the content catalog. You can add other properties as required.

---

**Note:** If the content type is a free form content type, a description field, JPM\_ADHOC\_DESCR, is included. You can add any other properties as required.

---

See [Understanding Content Type Properties](#).

See [Profile Type Properties](#).

### Field Name

Displays the name of the field for the property that is part of the content type definition.

If you are adding a new property, click the Add Property link to select a field name from the available options.

Enter one or more of the twenty custom field values *JPM\_PROMPT\_1* through *JPM\_PROMPT\_20* to present the user with a list of values defined in a custom prompt.

### Label Text

Displays the label specified for the field if the property is part of the content type definition. If you are adding a new property, enter the text that you want to appear for this field on the profile pages.

---

**Note:** You should choose a meaningful label for the property so that users clearly understand what kind of information to enter in the field when they create profiles.

---

### Add Property

Click this link to add a property to the section. Use the Property Category field to narrow your property search by category. You can also copy profile properties from another profile type using the Copy from another Profile Type icon.

See profile content information under Understanding Profile Management.

See Profile Type Properties.

## Content Properties Group Box: Property Attributes Tab

Access the Property Attributes tab on the Content Section page.

### Image: Content Section page: Property Attributes tab

This example illustrates the fields and controls on the Content Section page: Property Attributes tab. You can find definitions for the fields and controls later on this page.

Content Property Definition (?)											
Properties		Property Attributes		[F11]							
*Field Name	Required	*Display	Max Len	Minimum	Maximum	Prompt List Name	Default	Detail	Summary	Search/Compare	Sys Data
EFFDT	<input checked="" type="checkbox"/>	Editable						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
JPM_CAT_ITEM_ID	<input checked="" type="checkbox"/>	Editable	8					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EFF_STATUS	<input checked="" type="checkbox"/>	Editable						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RATING_MODEL	<input checked="" type="checkbox"/>	Editable	4				PSCM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
JPM_RATING1	<input type="checkbox"/>	Editable						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
JPM_PCT_1	<input type="checkbox"/>	Editable						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
JPM_MANDATORY	<input type="checkbox"/>	Editable						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
JPM_PCT_2	<input type="checkbox"/>	Editable						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

---

**Note:** New properties should not be specified with an attribute of *Required* if profiles already exist with that content. Caution should be used when changing the Maximum Length value. If integrations exist with other products that leverage the legacy COMPETENCIES and ACCOMPLISHMENTS data model, then truncation of data should be avoided.

---

See Manage Profiles Integrations.

### Required

Select to make a property required when creating a profile using this profile type. If the check box is selected, users must complete the field when they set up a profile.




<b>Display</b>	Select whether the property should be available for entry ( <i>Editable</i> ), unavailable for entry ( <i>Display</i> ), or hidden ( <i>Hidden</i> ) on the profile pages. The system populates the property with the value you enter in the Default Value field. If you select <i>Editable</i> , the system populates the default value at the profile, but users can override that value.
<b>Max Len (maximum length)</b>	This field applies to character properties only. If you added the property to the profile type, enter a value that is less than or equal to the field length of this property.
<b>Minimum and Maximum</b>	These fields apply to numeric properties only. If you added the property to the profile type, enter the minimum and maximum values allowed when a user adds a profile item.
<b>Prompt List Value</b>	Select a custom list for this field property. This field is available when you have selected from the user define properties <i>JPM_PROMPT_1</i> through <i>JPM_PROMPT_20</i> for a field property.
<b>Default</b>	<p>If you added the property to the profile type, enter the default value that will be assigned to this property when a user adds a profile item.</p> <p>When creating a profile item that contains the <i>RATING_MODEL</i> property, the system attempts to populate the <i>RATING_MODEL</i> property default first from the content catalog. If that does not exist, the default is assigned from this value entered for the Content Section.</p>
<b>Detail</b>	Select this check box if you want the field to appear on the details page for the content section.
<b>Summary</b>	<p>Select this check box to display the field on the summary page when creating or viewing a profile. Fields that are marked as summary automatically appear on the details page.</p> <p>See <a href="#">Understanding Managing Profiles</a>.</p>
<b>Search/Compare</b>	Select this check box if you want to include the property in the search index that is used by the search and compare profiles feature. The check box is display-only if the property is not supported by this feature.
	<hr/> <p><b>Note:</b> The item ID (<i>JPM_CAT_ITEM_ID</i>) is automatically set to searchable if you make other properties in the content section searchable.</p> <hr/>
<b>Sys Data (system data)</b>	Displays as selected if a PeopleSoft delivered and maintained value for this profile type. System data cannot be deleted. When you manually enter another property this check box is not selected.

## Role Security

Access the Content Section page, Role Security section (select a content type on the Add Content Section page or click the section name link on the Profile Types - Content page).

### Image: Role Security section of the Content Section page

This example illustrates the fields and controls on the Role Security section of the Content Section page. You can find definitions for the fields and controls later on this page.

Role Security			
*Role	Allow Update	Approval Required	
Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

[+ Add Role](#)

The Role Security group box lists the Profile Management roles that can access the content section when creating a profile.

**Note:** If you don't select a role for any content section, then users can't create profiles using this profile type.

### Role

Select the role that you want to access the content section. There are three Profile Management roles available:

*Administrator:* Administrators create profiles using the options in Workforce Development, Profile Management menu.

*Employee:* Employees create their own profiles using the options available in Self Service, Learning and Development.

*Manager:* Managers use the manager self-service transactions available in Manager Self Service, Learning and Development.

**Note:** These Profile Management roles should not be confused with Tools roles.

### Allow Update

Select this check box to enable users with the specified role to update the content section within a profile. If this check box is left deselected, users cannot add items to the content section in the profile.

**Note:** This check box is not available for the NVQ, NVQ Units, or NVQ Elements content sections because it is not possible to update them within a profile.

### Approval Required

Select this check box if approval is required for a specific role to add, remove, or update profile items.

### Add Role

Click this link to add another role to the list of roles that have access to the profile type.



## Profile Type - Associations Page

Use the Profile Type - Associations page (JPM\_JP\_TYPE\_ASSOC) to set up profile type associations.

Select the associations to which the profile type is linked. Associations are entities external to the Profile Management business process. Define the association options available on the Profile Association Options page. This is only available for profile types with a *Non-Person* usage.

### Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Types, Associations

### Image: Profile Types - Associations page

This example illustrates the fields and controls on the Profile Types - Associations page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Profile Type JOB' page with the 'Associations' tab selected. It contains two main sections: 'Association Options' and 'Profile Association Options'.

**Association Options:**

- \*Effective Date: 01/01/1900
- \*Status: Active
- \*Description: Job
- ☒ System Data

**Profile Association Options:**

*Profile Association Option	Sys Data
ePerformance Template	<input checked="" type="checkbox"/>

At the bottom, there is a '+ Add Profile Association' button.

### Profile Association Option

Select the object you want to link to the profile type. The objects available are determined by the profile association options enabled on the Profile Association Options page. The system allows multiple active profiles per association within a given profile type.

See [Profile Association Options Page](#).

### Add Profile Association

Click this link to add another association to the profile type.

## Clone Profile Types Page

Use the Clone Profile Types page (RUNCTL\_JPM\_CLONE) to clone profile types.

Create a new profile type by copying an existing profile type by running the Clone Profile Type process.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Clone Profile Types, Clone Profile Types

### Image: Clone Profile Types page

This example illustrates the fields and controls on the Clone Profile Types page. You can find definitions for the fields and controls later on this page.

**Source Profile Type** Enter the profile ID that you want to copy.

**Target Profile Type** Enter the new profile ID that you want to create.

**Copy Validations** Select this check box to copy the validations associated with the source profile type. Only the PERSON profile type has system delivered validations.

## Assign Profile Type Defaults Page

Use the Assign Profile Type Defaults page (JPM\_DFLT\_JP\_TYPES) to assign profile type default person and non-person profile types available to other product features and services.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Assign Default Profile Types, Assign Profile Type Defaults

### Image: Assign Profile Type Defaults page

This example illustrates the fields and controls on the Assign Profile Type Defaults page. You can find definitions for the fields and controls later on this page.

The purpose of the Assign Profile Type Defaults page is to provide a primary person and non-person profile type for business processes within Profile Management and also the products that interface with Profile Management, such as Federal Hire, Military, NVQ, Talent Acquisition Management, Oracle Workforce Scheduling, and so forth. If you change these profile types from the delivered profile types, be sure that the new profile types will support the interface of those workflows that you use. For instance, if you use Military Rank, make sure you have a content section that matches the Worn Rank content section in the PERSON profile type.

---

**Important!** Before making changes to this page, you must consider all integration points related to this data.

Additional setup may be required within the specific business processes to specify further interfacing options with Profile Management.

---

<b>Primary Person Profile Type</b>	Specify the profile type that will serve as the default person profile for other business processes in the system interfacing with Profile Management. This default value can be overwritten at the individual business process level.
<b>Primary Non-Person Profile Type</b>	Specify the profile type that will serve as the default non-person profile for other business processes in the system interfacing with Profile Management. This default value can be overwritten at the individual business process level.

---

## Creating Profile Group Types and Profile Groups

To set up profile groups, use the Profile Group Types (JPM\_JP\_GTYPE\_GRP) and Profile Groups (JPM\_JP\_GROUPS) components.

These topics provide an overview of profile groups and group types, list prerequisites, and discuss how to:

- Create profile group types.
- Create profile group definitions.
- Define profile group members.
- Build profile groups.

## Understanding Profile Groups and Group Types

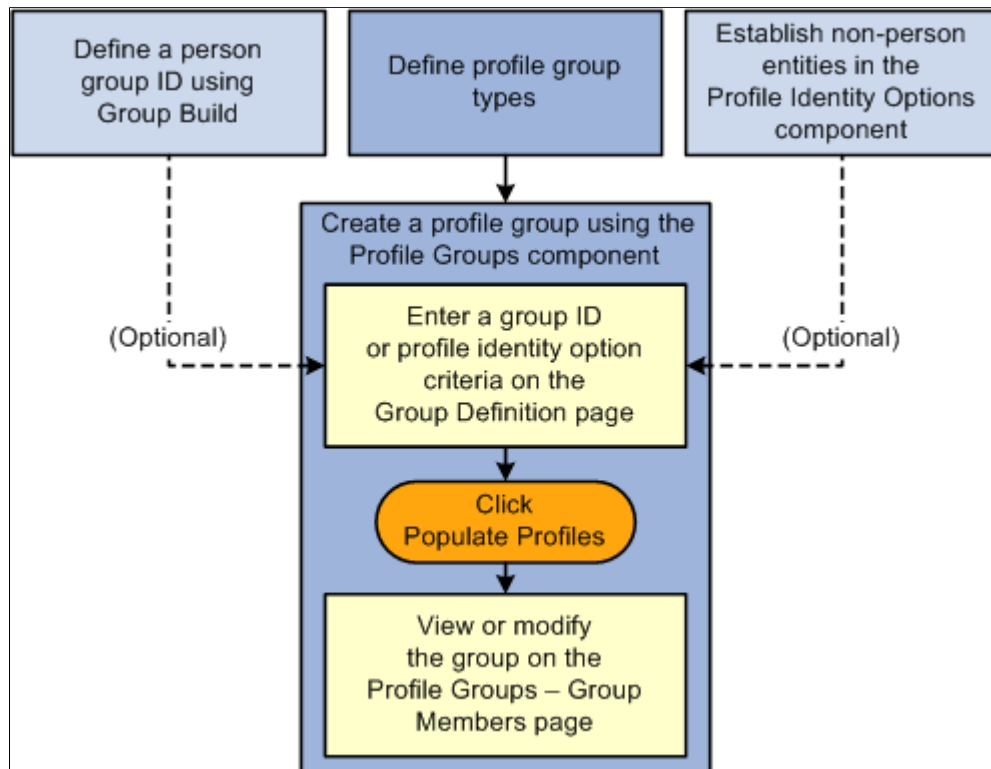
The PeopleSoft application provides the means of creating profile groups, either manually or by using group criteria, to provide filtering in the Search and Compare process. The Profile Group Types page enables you to identify a group and valid profile types for that group. It also specifies which profile types this profile group can be applied as a search filter in Search and Compare and self service. The profile group is an instance of the group type and specifies which profile IDs are members of this group.

The system uses profile group types of either *Person* or *Non-person* to drive the behavior of the criteria that is entered for each of the groups tied to the group type. It also controls the profile types that can be selected for the group type. The Profile Groups component enables you to include criteria to build a list

of profile members for a person profile group, through the use of the Group Build feature, or for a non-person profile group, which uses criteria from the Profile Identity Options page.

### Image: Steps for creating a profile group

To create the profile group, the administrator uses the Profile Groups component. The administrator can choose to select the group build identifier that he defined in the Group Build feature for person group type, or use field criteria from a profile identity. Upon clicking the Populate Profiles button on the Profile Groups - Group Definition page, the system uses the Build Profile Groups process to populate the Profile Groups - Group Members page. The administrator can also manually defines a profile group without entering any group criteria:



The system uses the Build Profile Groups process to create profile groups. This Application Engine program executes both online via the Populate Profiles button PeopleCode and in batch mode via Process Scheduler. It is possible to rebuild multiple groups of the same profile group type when you run the Application Engine program in batch mode. When this process is executed via the Populate Profiles button, the system will only build or rebuild a single group.

Since person and job attributes are frequently changing, person profile groups are a lot more volatile. You can schedule person profile group builds to run on a regular basis. As the profile group member list changes, the Last Update datetime stamp is updated for those profiles that are added or removed from the list. This will result in the profile automatically being selected by the next incremental Schedule Search Index process run. Only those profiles with group changes are rebuilt.

## Prerequisites

To build profile groups, you must establish profile types. Optionally you can set up profile identity options and create groups using the Group Build functionality.

See [Setting Up Profile Identity and Association Options](#).

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

## Pages Used to Create Profile Group Types and Groups

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Profile Group Types	JPM_JP_GTYPE_GRP	Set Up HCM, Product Related, Profile Management, Profiles, Profile Group Types, Profile Group Types	Set up profile group types.
Profile Groups - Group Definition	JPM_JP_GROUPS	Set Up HCM, Product Related, Profile Management, Profiles, Profile Groups, Group Definition	Define criteria to create a profile group.
Profile Groups - Group Members	JPM_JP_GMEMB	Set Up HCM, Product Related, Profile Management, Profiles, Profile Groups, Group Members	View or add profiles to define members for a profile group.
Build Profile Groups	RUNCTL_JPM_GROUP	Set Up HCM, Product Related, Profile Management, Profiles, Build Profile Group, Build Profile Groups	Run the Build Profile Groups process to create a profile group.

## Profile Group Types Page

Use the Profile Group Types page (JPM\_JP\_GTYPE\_GRP) to set up profile group types.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Group Types, Profile Group Types

### Image: Profile Group Types page

This example illustrates the fields and controls on the Profile Group Types page. You can find definitions for the fields and controls later on this page.

**Profile Group Types**

Profile Group Type K0GLOBAL

\*Description Global

Profile Type Usage Non-person Profile

☒ Include in Search

*Profile Type	Description
CLUSTER	Cluster
JOB	Job
ROLE	Role

+ Add Profile Type

### Profile Type Usage

Indicate the subordinate group that will contain profiles that are *Person Profiles* or a *Non-person Profiles*. Once this value is selected, the field becomes display only. This value controls which profile types you can select on this page.

### Include in Search

Select this check box to include all profile groups within this profile group type in the search index.

### Profile Type

Select the profile type to add to the profile group type. The profiles of the profile types defined for this group type are the only ones that can be assigned to the groups of this group type. Set up profile types using the Profile Types component. A profile can be tied to zero or many profile group IDs.

See [Setting Up Profile Types](#).

### Add Profile Type

Click this link to add another profile type to the profile group type.

## Profile Groups - Group Definition Page

Use the Profile Groups - Group Definition page (JPM\_JP\_GROUPS) to define criteria to create a profile group.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Groups, Group Definition

### Image: Profile Groups - Group Definition page

This example illustrates the fields and controls on the Profile Groups - Group Definition page. You can find definitions for the fields and controls later on this page.

Group Definition | Group Members

Profile Group Type: KOREGION Regional

Profile Type Usage: Non-person Profile

Profile Group ID: K0WEST

\*Description: Western Region

Profile Identity Option:

*Sequence	*Search Condition	*Field Name	*Operator	Value	Remove
	AND				

+ Add Criteria for Group

Save Populate Profiles

The page displays differently depending on if the profile type usage is *Person* or *Non-Person*.

For non-person groups, the Profile Identity Options field and Group Criteria grid display and criteria can be added to construct the group based upon the profile identity.

A person profile group displays the Group ID field that is part of the Group Build functionality, which lists the criteria for extracting an employee ID list.

### Profile Type Usage

Displays the group as a *Person* or a *Non-Person* profile, as defined for the profile group type on the Profile Group Types page. This value determines how you will select criteria that is entered for each of the groups tied to the group type.

### Group ID

This field displays when the Profile Type Usage field is *Person*.

The system uses the Group Build functionality to extract the group of people used to identify person profiles. The group build groups must be created prior to defining a profile groups. The Group ID field lists the IDs defined through the Group Build business process.

See "Setting Up Group Definitions (*PeopleSoft HCM 9.2: Application Fundamentals*)".

**Note:** Group definitions for this process should only include employees, contingent workers, and persons of interest having a JOB record. Profiles for persons of interest without a Job record are not supported.

A group ID is not required. You may manually enter person profile IDs on the Profile Groups - Group Members page to create a group.

### Profile Identity Option

This field displays when the Profile Type Usage field is *Non-Person*.

Enter the non-person profile identity option. The Profile Identity Option field lists the non-person IDs defined in the Profile Identity Option component. Once you enter the profile identity option ID, the group criteria fields become available for entry.

This criteria is not required. You may manually define a group on the Profile Groups - Group Members page.

### Group Criteria

Use this section to identify group identifier criteria for a non-person group. The non-person profile group criteria uses fields from the Profile Identity Options record along with corresponding values and relational operators entered on this page to create a profile group. This grid becomes available when you enter a value in the Profile Identity Option field.

#### Sequence

Specify the sequence order of the criteria.

#### Search Condition

Select either the connector value *AND* or *WHERE*. *AND* connectors are connected to the row with the sequence prior to it. *WHERE* connectors are independent of any rows with a sequence prior to it.

#### Field Name

Select the field that should be used to construct a filter for a non-person profile. Valid fields are defined in the Profile Identity Options component.

#### Operator

Define the field values to include in or exclude from the group. Valid operators include *equal to*, *greater than*, *greater than or equal to*, *is blank*, *is not blank*, *less than*, *less than or equal to*, *like*, and *not like*.

#### Value

Enter the value that should be used in filtering data for the non-person profile.

#### Add Criteria for Group

Click this link to add another criteria row.

#### Populate Profiles

Click this button to run the Build Profile Groups (JPM\_BLD\_GROUP) Application Engine process to build or rebuild the member list based on the group criteria defined. This process populates the group members on the Group Members page.

This Application Engine program executes both online via the Populate Profiles button PeopleCode and in batch mode via Process Scheduler.



## Profile Groups - Group Members Page

Use the Profile Groups - Group Members page (JPM\_JP\_GMEMB) to view or add profiles to define members for a profile group.

### Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Groups, Group Members

### Image: Profile Groups - Group Members page

This example illustrates the fields and controls on the Profile Groups - Group Members page. You can find definitions for the fields and controls later on this page.

Group Definition | **Group Members**

Profile Group Type: K0REGION      Regional  
 Profile Group ID: K0WEST      Usage: Non-person Profile  
 Description: Western Region

**Search Criteria**

Descr:       Profile ID:            **Search**

Navigation:

**Group Members**      Personalize      First 1-4 of 4 Last

Profile ID	Description	Profile Type	Remove
100885	Admin Assistant	JOB	
100886	Analyst - Financial	JOB	
100887	Accountant	JOB	
100888	General Clerk	JOB	

**Add Profile to Group**

**Save**

The system automatically populates the Group Members grid when you click the Populate Profiles button on the Profile Group Definition page. You can also enter profiles manually on this page. When you have the system automatically rebuild profile group members according to the group criteria, any manual changes you have made to the group will be lost.

When the Profile Group component is saved, each profile that has been added or removed from the group will have its Last Update datetime stamp updated. This will cause the profile to automatically be selected by the next incremental Schedule Search Index process run so that the index profile document can be rebuilt.

Use the search fields to locate a specific profile id or profile description.

**Search On: Descr and Search On: Profile ID**

Enter the description or profile ID of the profile you wish to locate.

**Search**

Click this button to search for the profile ID based upon the description or ID you entered in the search fields.

**Profile ID**

Select the profile that you want to add to the profile group. The system displays the profile description and type, as well as the employee name and ID, if applicable.

**Add Profile to Group**

Click this link to add another profile to the group.

## Build Profile Groups Page

Use the Build Profile Groups page (RUNCTL\_JPM\_GROUP) to run the Build Profile Groups process to create a profile group.

**Navigation**

Set Up HCM, Product Related, Profile Management, Profiles, Build Profile Group, Build Profile Groups

**Image: Build Profile Group page**

This example illustrates the fields and controls on the Build Profile Group page. You can find definitions for the fields and controls later on this page.

Use this page to run the Build Profile Groups process. The RUNCTL\_JPM\_GRP record stores the requested profile groups to be built or rebuilt.

**Profile Group Type**

Enter a profile group type you wish to build or rebuild. Only those profile groups that have criteria are available for selection. This field is required.

**Profile Group ID**

Enter the profile group ID for the group type you wish to build or rebuild. This field is optional. When no profile group is specified, all groups for that profile group type are rebuilt.

---

## Enabling Profile Actions

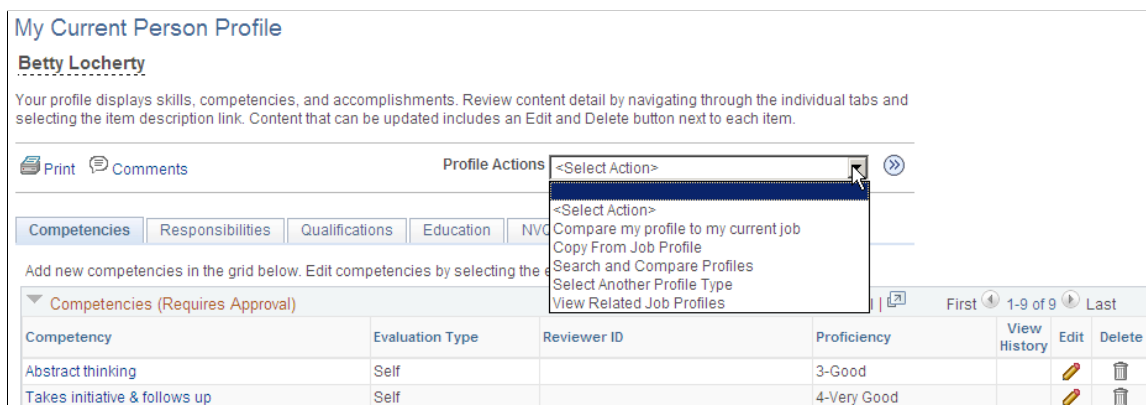
To enable profile actions, use the Profile Actions (JPM\_PROFILE\_ACTION) component.

These topics provide an overview of profile actions, and discusses how to enable profile actions.

## Understanding Profile Actions

### Image: Example of the Profile Actions drop-down menu for a user

The Profile Actions field appears on the non-person profile and person profile pages. It enables administrators, managers, and employees to perform transactions directly from the profile pages, as shown in this example:



Use the Profile Actions component to modify action descriptions and to control which Profile Management roles within the organization (Administrator, Manager, or Employee) have access to specific actions. This functionality enables you to hide or display profile actions according to your organizational policies. For example, if your organization does not use the Search and Compare Profiles transaction, you can hide this option for each profile role.

### Pages That Display the Profile Actions Field

The Profile Actions field is available on the person and non-person profile pages throughout the system. The following pages display the Profile Actions field.

The administrator uses these pages to access profile data by navigating to Workforce Development, Profile Management, Profiles:

- Person Profiles
- Non-person Profiles

See [Maintaining Profiles](#).

Employees use these self-service pages to access profile data by navigating to Self Service, Learning and Development:

- My Current Profile
- My Historical Profile
- My Job Profiles
- View Job Profiles

Managers use these manager self-service pages to access profile data by navigating to Manager Self Service, Learning and Development:

- Current Team Profiles

- Historical Team Profiles
- Maintain Job Profile

See "Maintaining Person Profiles (*PeopleSoft HCM 9.2: eDevelopment*)" and "Viewing and Updating Job Profiles (*PeopleSoft HCM 9.2: eDevelopment*)".

## Delivered Profile Actions

The following tables list the Profile Actions that are delivered with the Manage Profiles business process, although some of the actions are not available for all profile roles or pages.

This table lists the profile actions available for the Person profile transaction pages and the Profile Management roles that can perform these transactions:

<b>Profile Action</b>	<b>Usage</b>	<b>Administrator Pages</b>	<b>Employee Self Service Pages</b>	<b>Manager Self Service Pages</b>
Copy From Job Profile	Copy items from a non-person profile to the employee's profile using the Copy Items from Job Profile page, which lists the profiles related to the employee's active jobs.	Yes	Yes	Yes
Select Another Profile Type	Select a different profile type for a person on the Select Profile Type page.	No	Yes	Yes
Update Profile Groups	Categorize your profiles by profile groups using the Update Profile Groups page, which you use to list the profile group types and profile groups to which you want to add the profile.	Yes	No	No
Compare my profile to current job	Compare your own profile to your job profile. If more than one job profile applies to your job, select from a list of all applicable job profiles to compare.	No	Yes	No

<b>Profile Action</b>	<b>Usage</b>	<b>Administrator Pages</b>	<b>Employee Self Service Pages</b>	<b>Manager Self Service Pages</b>
Compare employee profile to current job	Compare an employee's profile items to his or her job profile items. If more than one job profile applies to the employee, select from a list of all applicable job profiles to compare.	Yes	No	Yes
View Related Job Profiles	View a list of non-person profiles that are related to the employee's job data. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles.	Yes	Yes	Yes
Search and Compare Profiles	Select and perform a search on the Search for Profiles page	Yes	Yes	Yes

This table lists the profile actions available for the Non-Person profile transaction types:

<b>Profile Action</b>	<b>Usage</b>	<b>Administrator Pages</b>	<b>Employee Self Service Pages</b>	<b>Manager Self Service Pages</b>
Update Profile Groups	Categorize your profiles by profile groups on the Update Profile Groups page, which you use to list the profile group types and profile groups to which you want to add the profile.	Yes	No	No

<b>Profile Action</b>	<b>Usage</b>	<b>Administrator Pages</b>	<b>Employee Self Service Pages</b>	<b>Manager Self Service Pages</b>
Express Interest for Employee	Add a non-person profile to a person's interest list using the Person Search - Simple page, which you use to search for an employee whose interest list you want to update.	Yes	No	Yes
Express Interest	Add a job profile to your interest list using the Add to Interest List - Confirmation page.	No	Yes	No
Search and Compare Profiles	Select and perform a search on the Search for Profiles page	Yes	Yes	Yes

This table lists the profile actions available for the Historical profile transaction types:

<b>Profile Action</b>	<b>Usage</b>	<b>Administrator Pages</b>	<b>Employee Self Service Pages</b>	<b>Manager Self Service Pages</b>
View As Of Another Date	Indicate a new as of date on the Select New As Of Date page to view profile information as of a certain time.	No	Yes	Yes
Select Another Profile Type	Select another person profile type for a person on the Select Profile Type page. This page is only available if there are two or more active person profile types. If there is only one active person profile type, this page is not available.	No	Yes	Yes

## Pages Used to Enable Profile Actions

Page Name	Definition Name	Navigation	Usage
Profile Actions	JPM_JP_ACTION	Set Up HCM, Product Related, Profile Management, Profiles, Profile Actions, Profile Actions	Enable profile actions by person or non-person profile component for each role.

## Profile Actions Page

Use the Profile Actions page (JPM\_JP\_ACTION) to enable profile actions by person or non-person profile component for each role.

### Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Profile Actions, Profile Actions

### Image: Profile Actions page

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

Profile Actions				
Profile Action Security				
Profile Transaction Type		Description		
		Admin Access	Employee Access	Manager Access
Historical	View As Of Another Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Historical	Select Another Profile Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Non-Person	Update Profile Groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-Person	Express Interest for Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Non-Person	Express Interest	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Non-Person	Search and Compare Profiles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Non-Person	Syndicate Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-Person	Import Profile Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person	Copy From Job Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Person	Select Another Profile Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Person	Update Profile Groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person	Compare my profile to my current job	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Person	Compare employee profile to current job	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Person	View Related Job Profiles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Person	Search and Compare Profiles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Note:** This Profile Action list is maintained by PeopleSoft development. Changes to this list require code line modifications. For a list of all profile actions delivered with the system, see [Delivered Profile Actions](#) in the [Understanding Profile Actions](#) topic.

See [Understanding Profile Actions](#).

Profile transaction types are not available for all roles. When the system does not allow a profile transaction for a specific role, the access check box for that role is not available for selection.

**Profile Transaction Type**

Identifies the types of profile pages where this transaction can be used. This is also the high level key value for this table. Transaction types for Manage Profiles are:

- *Person*
- *Non-Person*
- *Historical*

**Description**

View or modify the text that will appear in the Actions Type drop-down list.

**Admin Access (administrator access)**

Select to add this action type to the Actions Type drop-down list on the administrator profile pages in the system.

**Employee Access**

Select to add this action type to the Actions Type drop-down list on employee self-service profile pages in the system.

**Manager Access**

Select to add this action type to the Actions Type drop-down list on manager self-service profile pages in the system.

---

**Note:** Deselecting a <role> Access check box will remove the profile action option from the Profile Actions drop-down menu list. If all options that could appear for a role in the Profile Actions drop-down menu list are deselected, the Profile Actions field will be hidden on the page.

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## Setting Up to Use BI Publisher Reports and Profiles

These topics provide an overview of BI Publisher reports and templates, list prerequisites, and discuss how to:

- View delivered report templates.
- Modify an existing template.

## Understanding BI Publisher Reports and Templates

Manage Profiles uses the PeopleTools BI Publisher to generate the Content Catalog Listing report as well as the online profiles and profile reports for person and non-person profiles.

### Delivered Report Definitions

This table lists the delivered report definitions and data sources for the related RTF templates:

<i><b>Report Name</b></i>	<i><b>Description</b></i>	<i><b>Data Source Type</b></i>	<i><b>Data Source ID</b></i>
JPM_CATI_RPT	Content Items Reports	PS Query	JPM_CONTENT_ITEMS
JPM_JPNP_RPT	Non Person Profile Batch	XMLDoc	JPM_PROFILE



<b>Report Name</b>	<b>Description</b>	<b>Data Source Type</b>	<b>Data Source ID</b>
JPM_JPPP_RPT	Person Profile Batch	XMLDoc	JPM_PROFILE
JPM_NP_PROF	Non Person Profile Online	XMLDoc	JPM_PROFILE
JPM_PP_PROF	Person Profile Online	XMLDoc	JPM_PROFILE

## Delivered Data Sources

This table describes each of the delivered data sources:

<b>Data Source ID</b>	<b>Description</b>
JPM_CONTENT_ITEMS	PS Query that is used only for content items reports.
JPM_PROFILE	BI document structured by row sets. All profile reports use the same data structure. All data elements are included in the data structure and are available for both person and non-person profile report templates.

## Delivered Templates

To format the reports, we deliver three template files that specify the content and layout:

- One template file for the Content Items reports.
- One template file for both the online and batch Person Profile reports.
- One template file for both the online and batch Non-Person Profile reports.

You can modify the delivered template files to address your specific reporting requirements. After modifying each template, you must upload it to the corresponding report definition. You can modify one instance of each of the profile reports and attach that same updated template file to both of the corresponding report definitions.

See [Template Page](#).

See [Modifying an Existing Template](#).

## Profile Report Nodes

This table describes the report nodes for profile reports:

<b>Node</b>	<b>Data Elements Summary</b>
JPM_PROFILE	High level data elements related to the profile.
JPM_IDENTITY_WK	Profile identities and associations.
JPM_JP_SECTION	Sections defined in the profile type.

<b>Node</b>	<b>Data Elements Summary</b>
JPM_JP_CRITM_VW	Profile content items in the sections in the profile. All properties are included whether the content type uses them or not.
JPM_CATITMAXD_VW	Definitions of the content items in the content catalog. All properties are included whether the content type uses them or not.
RUN_PARAMETERS	Criteria used to generate the report.

For more information, see the product documentation for *PeopleTools: BI Publisher for PeopleSoft*.

## Related Links

[Running Profile Reports](#)

[Understanding Managing Profiles](#)

[Understanding the Content Catalog](#)

## Prerequisites

To use BI Publisher reports, you must configure PeopleSoft Integration Broker and PeopleSoft Process Scheduler to implement PeopleSoft Report Manager.

For more information, see the product documentation for *PeopleTools: PeopleSoft Integration Broker*, *PeopleTools: PeopleSoft Process Scheduler*, and *PeopleTools: BI Publisher for PeopleSoft*.

## Pages Used to View and Modify BI Publisher Reports and Templates

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Definition	PSXPRPTDEFN	Reporting Tools, BI Publisher, Report Definition, Definition	View the report properties and download or view the data schema and data source.
Template	PSXPRPTTMPL	Reporting Tools, BI Publisher, Report Definition, Template	View or update the existing template.
Design Helper	PSXPSETUPDWNL	Reporting Tools, BI Publisher, Setup, Design Helper, Design Helper	Download plug-ins to facilitate template design and modification.

## Template Page

Use the Template page (PSXPRPTTMPL) to view or update the existing template.

## Navigation

Reporting Tools, BI Publisher, Report Definition, Template

### Image: Report Definition - Template page

This example illustrates the fields and controls on the Report Definition - Template page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Template' tab of the 'Report Definition' page. At the top, there are navigation tabs: 'Definition', 'Template' (selected), 'Output', 'Properties', 'Security', and 'Bursting'. Below the tabs, the 'Report Name' is 'JPM\_JPNP\_RPT'. The 'Template' section includes a 'Template ID' of 'JPM\_JPNP\_RPT\_1', a 'Description' of 'Non Person Profile ENG', a '\*Language Code' dropdown set to 'English', and a 'Channel' dropdown. A 'Default Template' checkbox is checked. Below this is the 'Template Files' section, which shows an 'Effective Date' of '01/01/1900', a '\*Status' dropdown set to 'Active', and a 'Template File' link labeled 'Non-Person\_Profile.rtf'. There are also checkboxes for 'Use Data Transform' and 'Use Alt. XML'. At the bottom, there are 'Upload' and 'Preview' buttons.

## Viewing the Existing Template

### Template File

Click this link to open or save the RTF template in a new window or save it to a location of your choice.

### Preview

Click to view an example of the report using sample data registered with the data source.

---

**Note:** The person profile online and batch reports share the same person profile template file. Similarly, the non-person batch and online reports share the non-person profile template file.

---

For more information, see the product documentation for *PeopleTools: BI Publisher for PeopleSoft*.

## Modifying an Existing Template

The existing templates contain two sections at the end to print out the ID and description of any additional items for content types that you added after the template was created. If you want to display more specific information about your new items, you must create an additional section in the template and define the data that you want to display.

The reports group and display content items in order of profile tab number and profile section sequence number based on the profile type definition that you set up for online display. Regardless of where you place a new section in the template, the report sorting order governs the order of display in the report. To change the report display order, you must edit the sorting. To sort new sections properly, you must also add within the correct loops in the report's driving logic.

---

**Note:** Become familiar with BI Publisher before modifying either of the delivered templates.

---

## Setting Up to Modify a Template

To prepare to modify an existing template:

1. Access the Design Helper page (Reporting Tools, BI Publisher, Setup, Design Helper, Design Helper) and save the plug-in design helper for Microsoft Word to facilitate template modifications.
2. Access the Definition page (Reporting Tools, BI Publisher, Report Definition, Definition) for the appropriate report definition and click the links to download the data schema and sample data files.
3. Click Template File link on the Template page (Reporting Tools, BI Publisher, Report Definition, Template) and row for the existing RTF template that you want to edit.

## Creating a New Section in a Template

To create a new section:

1. Copy an entire section defined by `<?when: JPM_JP_SECTION.JPM_CAT_TYPE=.....end when?>` and paste it into the template.
2. Modify the conditional statement to identify the item that you want to add.
3. Insert fields into the table to identify the data that you want to display on the report.
4. Save the revised template any file name and the .rtf file extension (\*.rtf).

## Uploading the Revised Template

To upload the revised template:

1. Add a new effective dated row in the Template Files scroll area on the Template page (Reporting Tools, BI Publisher, Report Definition, Template).

Update these options:

**Effective Date**

Enter the date that the system should begin to print and display reports and profiles with this template.

**Status**

Select the *Active* status for the new template.

2. Click Upload and select the revised template file.
3. Repeat the last two steps to provide the new template to both the online and the batch report definitions.

For more information, see the product documentation for *PeopleTools: BI Publisher for PeopleSoft*.

# Setting Up Search and Compare Profiles

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## Understanding Search and Compare Profiles

The Search and Compare Profiles feature uses the SES search engine that is provided as part of PeopleTools to search and compare profiles. Search and Compare Profiles enables employees, managers, and administrators to search for profiles that match selected search criteria. You configure searches for your profile types and your users. Here are examples of the types of searches that are possible:

- Employees can search for jobs that match their own personal profile.
- Managers can select an employee who reports to them and search for other direct or indirect reports with similar skills.
- Managers can search for direct or indirect reports who match the profile for a job opening that they want to fill.
- Administrators can select a job profile and search for similar job profiles.

Define search types for your organization on the Define Search Configuration page. The high level keys for a search configuration are the object owner identifier, the sub application id, and the search ID. The object owner identifier enables other products to easily interface with the PeopleSoft Manage Profiles search engine. For Manage Profiles searches, select the *HCM Profile Management* (JPM) in the Object owner identifier field. The Sub Application Id field indicate other products using the Search and Compare processes, such as Succession Planning.

For each search, you define:

- Who can run the search.

You can set up searches for one or more of the roles: employee, manager, and administrator. Users can only run the searches that are defined for their role. In addition, the search results list only those profiles to which the user has the appropriate security. For example, if a manager searches for employees that match a job opening, the search results include those employees that are direct or indirect reports of the manager.

- Source and target profile types.

The source and the target profile types are the two profile types that are being compared in the search. The source is the profile type that forms the basis for the search criteria and the target is the profile type being searched for matching profiles. These profile types must share a common set of content types, otherwise no search criteria items can be entered. For example, if an employee searches for jobs that match his or her personal profile, the source is the employee's person profile type and the target is the job profile type and all content types shared by both the person profile type and the job profile type are exposed as search criteria content sections.

- Criteria rule.

The Criteria Rule field defines two aspects of the search:

- Whether the system populates the search criteria based on the profile that the user selects for the search.

If you select the criteria rule *Default and Display* or *Default, No Display*, the system populates the search criteria using the source profile that the user selects for the search.

- Whether users can view and adjust the search criteria.

If you select the criteria rule *Default, No Display*, the system populates the search criteria and runs the search without displaying the search criteria page. If you select any other criteria rule, the system displays the search criteria page and users can adjust the criteria before running the search.

- The maximum number of profiles returned by the search query.

---

**Note:** The use of special characters in searchable property data can lead to incorrect search results. Special processing has been added to handle special characters for the content type and content item codes.

---

This table lists the search configurations delivered for the administrator with the system:

<b>Object Owner Identifier</b>	<b>Sub Application ID</b>	<b>Search ID</b>
HCM Profile Management (JPM)	NA	PERSON1 - Find people having certain qualifications
HCM Profile Management (JPM)	NA	PERSON2 - Find people that fit this job
HCM Profile Management (JPM)	NA	ADHOC3 - Adhoc search
HCM Profile Management (JPM)	NA	JOB4 - Find jobs that fit my qualifications
HCM Profile Management (JPM)	NA	JOB5 - Find jobs for a team member
HCM Profile Management (JPM)	NA	PERSON6- Find similar people on team
HCM Profile Management (JPM)	NA	PERSON7- Find team member for a specific job profile
HCM Profile Management (JPM)	NA	JOB8 - Find jobs
HCM Profile Management (JPM)	NA	JOB16 - Find jobs like my job
HCM Profile Management (JPM)	NA	JOB17 - Find jobs for this person
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANINC – For people with profile matches to plan incumbent
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANJOB – For people with profile matches to plan/pool job code

<b>Object Owner Identifier</b>	<b>Sub Application ID</b>	<b>Search ID</b>
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANPOS – For people with profile matches to plan/pool position

**Note:** NA means it is not applicable.

The profile type definitions are the basis for Search and Compare Profiles so it's important to understand how they affect the search results. When users select a search, to build the search criteria the system:

1. Identifies the content sections to include in the search criteria.

The system compares the source and target profile types to identify which content sections appear in both source and target. Only the content sections that are common to the source and target profile types are included in the search criteria.

2. Identifies the properties to include in the search criteria for each of the content sections identified in the previous step.

The properties included are those defined as searchable in the target profile type.

See [Setting Up Profile Types](#).

## Example Search Criteria

To illustrate how Search and Compare Profiles works, consider the example of an administrator searching for employees who match a given job profile. In this example:

- Source profile type is *JOB*.
- Target profile type is *PERSON*.

Suppose that the *JOB* profile type has the following content sections and properties that are defined as searchable:

<b>Content Section</b>	<b>Searchable Properties</b>
Competencies	JPM_CAT_ITEM_ID (Competency) JPM_RATING1 (Target Proficiency)
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country)
Test/Examinations	JPM_CAT_ITEM_ID (Test)
Responsibilities	JPM_CAT_ITEM_ID (Responsibility) JPM_YN_2 (Critical)

Suppose that the *PERSON* profile type has the following content sections and properties that are defined as searchable:

<b>Content Section</b>	<b>Searchable Properties</b>
Competencies	JPM_CAT_ITEM_ID (Competency ID)  JPM_RATING1 (Proficiency)  JPM_INTEREST_LEVEL (Interest Level)
Degrees	JPM_CAT_ITEM_ID (Degree)  COUNTRY (Country)  MAJOR_CODE (Major Code)
School Education	JPM_CAT_ITEM_ID (Education Level)  SCHOOL_CODE (School Code)  COUNTRY (Country)  AVERAGE_GRADE (Average Grade)
Test/Examinations	JPM_CAT_ITEM (Test)

In this example, the search criteria are:

<b>Content Section</b>	<b>Properties</b>
Competencies	JPM_CAT_ITEM_ID (Competency)  JPM_RATING1 (Target Proficiency)  JPM_INTEREST_LEVEL (Interest Level)
Degrees	JPM_CAT_ITEM_ID (Degree)  COUNTRY (Country)  MAJOR_CODE (Major Code)
Test/Examinations	JPM_CAT_ITEM_ID (Test)

Notice that:

- Responsibilities and School Education are missing because these content sections do not appear in both the source and the target profile types.
- The properties included in the search criteria are those defined as searchable in the target profile type.
- The labels displayed on the Search Criteria page are those defined in the source profile type for those properties that are defined in both the source and the target profile type.



In the example, the label for the property JPM\_RATING1 is Target Proficiency in the source profile type and Proficiency in the target profile type. When users run the search, the JPM\_RATING1 field is labelled Target Proficiency on the Search Criteria page.

## Importance and Mandatory Properties

The Importance (JPM\_IMPORTANCE) and Mandatory (JPM\_MANDATORY) properties appear on the Search Criteria page for each of the content sections included in the search criteria. The system automatically adds these fields to enable users to adjust the search as follows:

- The Mandatory check box enables users to specify profile items that must appear in the matching profiles.

If the Mandatory check box is selected for any profile item, the search results include only those profiles containing that profile item and having the same property values as those in the search criteria. For example, if the search criteria includes an item *0100 - Abstract Thinking* and a proficiency of *Good* for the item, if you specify that the item is mandatory, the search results include only profiles that contain both the *0100 - Abstract Thinking* item and a proficiency equal to *Good*. Any profiles that have the item but with a lower or higher proficiency value are not included in the search results.

If the Mandatory property is included in a content section definition, the system uses the setting of the check box in the profile as the default value in the search criteria, but users can override the default.

- The Importance field is a way to define the profile items that are most or least important.

When the search runs, the SES engine uses the Importance field to determine the ranking of matching profiles. The default value is 3 - *Average*, but users can override this value.

For searches with a criteria rule of *Default, No Display* that do not allow users to modify the search criteria, the system automatically assigns the default importance value (3 - *Average*).

See [Searching and Comparing Profiles](#).

## Search Filters

The Search Criteria page includes search filter links if you have set up searchable profile group types for the target profile type. Search filters enable users to narrow the search to specific profile groups, locations, or travel preferences.

To illustrate how this works, consider the following example:

- The profile group type GLOBAL includes the profile type JOB.
- The profile groups for GLOBAL are REGION1, REGION2, and REGION3.

When users select a search where the target profile type is JOB, the search filter link enables users to select one or more of the profile groups REGION1, REGION2, and REGION3. The search results are limited to profiles that belong to the selected profile groups. The Search Filter feature is particularly useful if your organization has large numbers of profiles.

Current Location and Travel Preferences filters will only be available if the target profile is configured to include those content sections.

See [Searching and Comparing Profiles](#).

See [Creating Profile Group Types and Profile Groups](#).

---

## Setting Up Searches

Use the Define Search Configuration component (JPM\_SRCH\_CFG) to define the search types for your users.

This topic discusses how to set up profile search types.

### Page Used to Set Up Search Types

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Define Search Configuration	JPM_SRCH_CFG	Set Up HCM, Product Related, Profile Management, Profiles, Define Search Configuration, Define Search Configuration	Set up profile search types or employees, managers, and administrators.

### Define Search Configuration Page

Use the Define Search Configuration page (JPM\_SRCH\_CFG) to set up profile search types or employees, managers, and administrators.

## Navigation

Set Up HCM, Product Related, Profile Management, Profiles, Define Search Configuration, Define Search Configuration

### Image: Define Search Configuration page

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

**Define Search Configuration**

Object Owner ID HCM Profile Management

Sub Application Id

Search Id PERSON1

**Search Properties** ?

Source Profile PERSON Person

Target Profile PERSON Person

Search Name Find people having certain qualifications

Status Active

\*Criteria Rule No Default, Display (Adhoc)

Display Max 10

**Job Profile Management Roles** ? Personalize | Find | 1-3 of 3 First Last

Role		
Administrator		+ -
Employee		+ -
Manager		+ -

#### Object Owner ID

Select *HCM Profile Management* to view and define searches for profile management.

#### Sub Application Id

Leave this field blank for all profile searches. It is not used by profile management.

#### Search Id

Enter a search key unique to the object owner ID and sub application ID.

#### Source Profile

Select the profile type to use as the basis for the search criteria.

#### Target Profile

Select the profile type that you want to search for matching profiles.

#### Search Name

Enter a descriptive name for the search. Employees, managers, and administrators see the search name when they select the Search and Compare Profiles option. Therefore, it's important that the name accurately describes the search.

#### Criteria Rule

Select one of these options:

*Default and Display:* The system populates the search criteria using data from the profile that the user selects and displays the Search Criteria page. This option enables users to adjust the search criteria before running the search.

*Default, No Display:* The system generates the search criteria using data from the profile that the user selects and immediately runs the search. Use this option if you don't want users to adjust the search criteria.

*No Default, Display (Adhoc):* The system displays the Search Criteria page without populating the search criteria. The user has to set up the search criteria from scratch for this type of search, which requires knowledge of the profile types. Typically, you use this option to enable administrators to run adhoc searches.

**Display Max (display maximum)**

Enter the maximum number of profiles to be returned by the search query. For example, if you specify a maximum of ten ( 10), the search query will return only 10 results even though the document match count may be greater. Users click the Next and Previous links to navigate through the profiles in the search results. For example, the Next link will return the next 10 search results (result documents 11 through 20) if they exist.

**Job Profile Management Roles**

Add the Profile Management roles that have access to the search. The options are: *Administrator*, *Manager*, and *Employee*.

---

**Note:** Caution should be used when identifying a property in the profile type configuration as searchable. Consideration needs to be given to the types searches this property will be included in to ensure that the property in both the source and target profile of the search have been defined with the same meaning.

---

## Building the Search Indexes

These topics provide an overview of the search indexes and index maintenance, list prerequisites, and discuss how to:

- Run the Direct Reports Tables Build process.
- Schedule a search index build.

## Understanding the Search Indexes

Search and Compare Profiles uses the Oracle SES (Secure Enterprise Search) engine by way of Integration Broker to generate search results and perform comparisons between matching profiles. In order to complete searches, the SES search engine uses a set of indexes that contain data about the profiles in your system; it does not search the database tables directly.

The PeopleTools Search Framework (PTSF) creates the SES search objects. SES maintains its own definition of an index in the form of the SES source object to which the PTSF Search Definition maps.

Two SES source objects are supported for Profile Management. One source object contains person profile documents and the other contains non-person profile documents.

Creating the SES source objects involves the following sequence of steps:

1. Deploy the Search Definition.
  - Person Profile search definition
  - Non-person Profile search definition
2. Create Search Index Schedule .
  - For the person profile search definitions.
  - For the non-person profile search definition.
3. Deploy the profile Search Category that combines the non-person and person profile documents into a single searchable object.

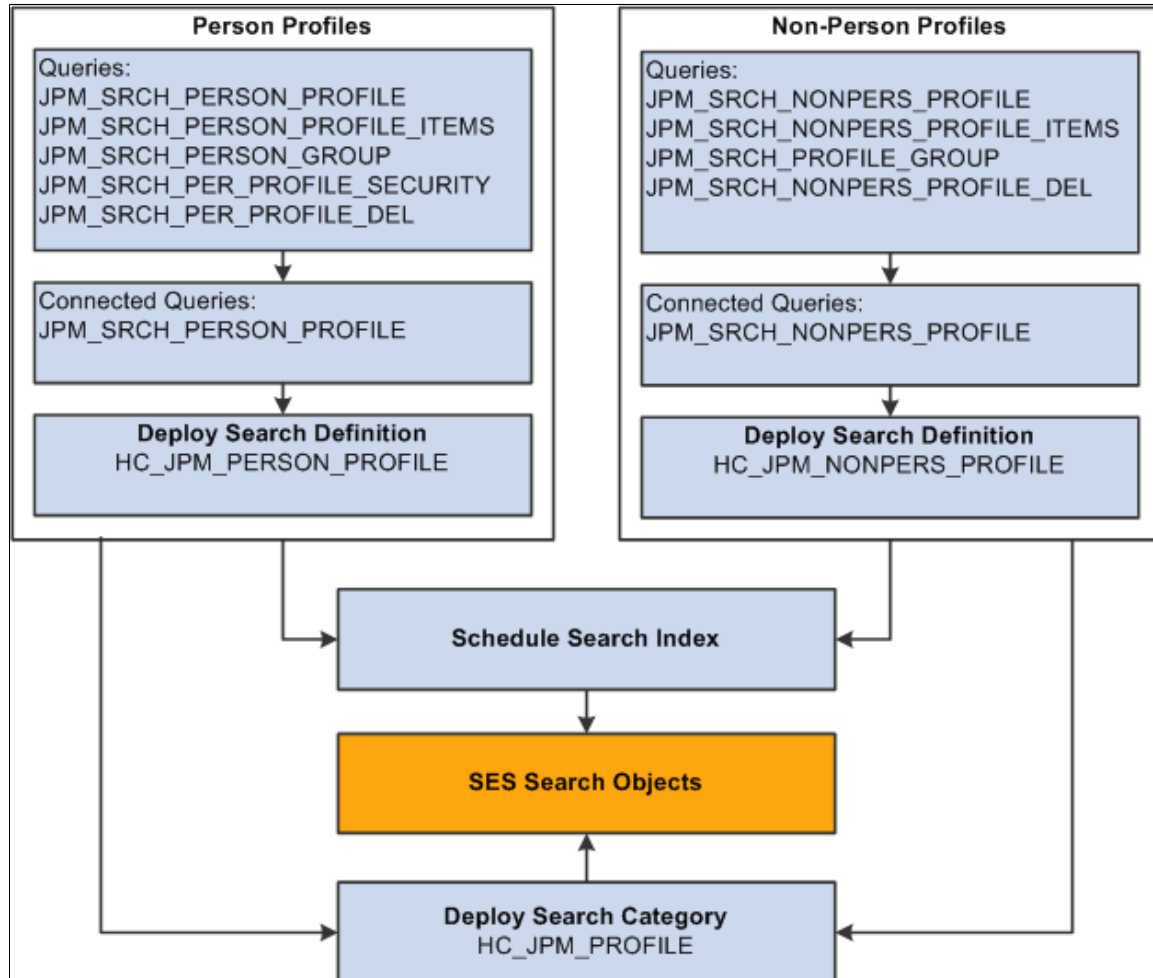
---

**Note:** This is required for the Search and Compare Profiles transaction.

---

### Image: Processes for maintaining indexes for search and compare profiles

The diagram illustrates how the queries, search definitions, search category, and search index schedule relate to each other:




---

**Note:** It is recommended that the incremental Schedule Search Indexes process be scheduled to run following the completion of the Direct Reports Table Build Process.

---

### Direct Reports Tables Build

The Build Direct Reports Tables process maintains the direct reports tables by updating the direct reports for managers with current information used in the in Profile Search and Compare process.

---

**Note:** The Direct Reports Tables Build process is required to build the manager security for the Search and Compare Profiles transaction. If you are not using the Manager Self Service Search and Compare Profiles transaction, then this process is not needed. The incremental updating of the SES Profile indexes leverages the manager hierarchy that is built based on the Access Type value specified on the Profile Management Installation page. It is required that the Direct Reports Tables Build process be scheduled to run on an interval to capture the latest organization changes.

---

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

As shown in this table, running the Direct Reports Tables Build process in incremental mode updates only the manager list information for the relevant job record.

<b>Person ID</b>	<b>Employee Record Number</b>	<b>Manager Data Updated</b>
12000	1	Manager data for the reporting structure for record 1.
12000	2	Manager data for the reporting structure for record 2.

## Deploying the Search Definitions and Search Category

Before end users can run the Profile Search and Compare process against the search indexes, the Profile Management search definitions (HC\_JPM\_PERSON\_PROFILE and HC\_JPM\_NONPERSON\_PROFILE) need to be deployed to the SES search engine. Once the search definitions are deployed to SES, you use categories to group search definitions within logical, manageable groups.

You do this by navigating to the PeopleTools, Search Framework, Administration, Deploy/Delete Object component, and then:

1. Select one or several of the following search definitions from the Deploy Search Definition page and select Deploy:
  - HC\_JPM\_NONPERSON\_PROFILE
  - HC\_JPM\_PERSON\_PROFILE
  - HC\_JPM\_PROFILES
2. Access the Deploy Search Category page to select and deploy search categories.

Before end users can submit search requests against the Search Framework deployed objects, the search indexes must first be built. Prior to the index being built, a deployed search definition contains no searchable data. Therefore, a search index needs to be built for each individual search definition.

Invoke a search index build for one or several search definitions from the Build Search Index page.

## Schedule Search Process

The Schedule Search Index Application Engine process (PTSF\_GENFEED) builds an index for person or non-person profile types. Select the search definition HC\_JPM\_PERSON\_PROFILE if building the index for person profile types. Select the search definition HC\_JPM\_NONPERSON\_PROFILE for non-person profile types. You cannot create an index for a profile type if it:

- Is inactive.
- Is a not an end profile type.

When you set up a profile type, you can specify if the profile type is an end profile on the Profile Types - Attributes page. The delivered CLUSTER profile type is an example of a profile type that is not an end profile.

- Does not have searchable properties.

When you set up content sections for a profile type, you select the Searchable check box for the properties that you want to include in the index. If none of the content sections contain searchable properties, you can't create an index.

The process uses the profile type definition to determine what profile information is included in the index. Only those properties defined as searchable in the profile type are selected for indexing. The process retrieves active profiles, the active profile items in those profiles, and the searchable properties to include in the index. For profile types with a profile type of *Person*, the Schedule Search Index process retrieves manager hierarchy data and row level security for the person ID associated with the profile. If a profile type belongs to a profile group type that is defined as searchable, the profile group is also included in the index.

The index created by this process is separate from the database. It is a snapshot of the database at one point in time and does not remain synchronized with the profile data in the database unless you routinely update the index.

When the Schedule Search Index is run, the application engine process PTSF\_GENFEED generates an XML feed and creates a schedule in the search engine, which in turn crawls the XML feed and builds the search index.

Searching is language-independent since only the codes and not the associated descriptions are indexed. For example, if a user searches for the competency *Forecasting* whose content item ID is *1000*, then the search query will look for item ID *1000* and not for the word *Forecasting*.

## Understanding Index Maintenance

The indexes represent a snapshot of the profile data and security as of the date that you last ran the Direct Reports Tables Build, Build Profile Groups, and Schedule Search Index processes. To ensure that your Search and Compare Profiles results are accurate, run these processes periodically to update the indexes and its security.

You can run the Schedule Search Index process in two modes:

- *Full Index*: creates or recreates the index for the selected search definition.
- *Incremental Index*: updates profile documents for an existing index based on the profile update datetime stamp (LASTUPDDTM). If the profile has been updated since the last incremental run, then this profile will be selected for re-indexing.

Run the process according to a frequency that balances frequency of profile updates with the need to search on the most up-to-date information. You can select this process to run immediately or schedule it to run at intervals using Process Scheduler when the system usage is low.

Run the Schedule Search Index process using the *Full Index* mode when any of the following changes are made:

- A new profile type is defined that has searchable properties.



- The Searchable check box for a property is selected.

When you select the Searchable check box for a property that previously was not searchable, the index must be recreated to include the property in the index for profiles of that type.

- The Priority field for an Instance Qualifier is changed.

The Maintain Profile Indexes process uses the priority field to determine which profile item row is included in the index when instance qualifiers are associated with a content section of a profile type. The row with the highest priority and highest effective date for that priority is selected for indexing only.

- A large reorganization has occurred that impacts the manager reports or administrator row level security.

To illustrate how the Schedule Search Index process selects rows in the profile for indexing, suppose that you have defined an Instance Qualifier Set to identify the evaluation type. This table lists the instance qualifier values and their assigned priorities:

<i><b>Instance Qualifier</b></i>	<i><b>Description</b></i>	<i><b>Priority</b></i>	<i><b>Searchable</b></i>
A	Approved	10	Y
R	Supervisor/Manager	20	Y
S	Self	30	Y

---

**Note:** The priority decreases as the value in the Priority field increases. In this example, the instance qualifier with the highest priority is *A* and the instance qualifier with the lowest priority is *S*.

---

In this example, the employee's profile has three profile items for competencies 0010, 0200, and 0120. This table lists the profile item rows:

<i><b>Competency</b></i>	<i><b>Date</b></i>	<i><b>Proficiency</b></i>	<i><b>Evaluation Type</b></i>
0010	May 1, 2009	3 - Good	A
0010	June 21, 2009	4 - Very Good	S
0200	June 21, 2009	4 - Very Good	S
0200	June 21, 2009	5 - Expert	R
0120	January 30, 2009	2 - Fair	A
0120	May 1, 2009	2 - Fair	A

This table lists the rows that are included in the index for this profile:

<i><b>Competency</b></i>	<i><b>Date</b></i>	<i><b>Proficiency</b></i>	<i><b>Evaluation Type</b></i>
0010	May 1, 2009	3 - Good	A

<b>Competency</b>	<b>Date</b>	<b>Proficiency</b>	<b>Evaluation Type</b>
0200	June 21, 2009	5 - Expert	R
0120	May 1, 2009	2 - Fair	A

Notice that:

- For competency 0010, the row with the highest priority (lowest sequence number) instance qualifier (*A*) is selected even though the effective date for this row is earlier than the row dated June 21, 2009.
- For competency 0200, the two rows have the same effective date. In this case the system selects the row that is assigned the instance qualifier with the highest priority (*R*-Supervisor/Manager).
- For competency 0120, the system selects the row with the highest effective date.

---

**Note:** Instance qualifiers that are defined by a prompt record are not searchable and not included in indexes.

---

See [Defining Instance Qualifiers](#).

## Understanding SES Profile Document Security for Person Profiles

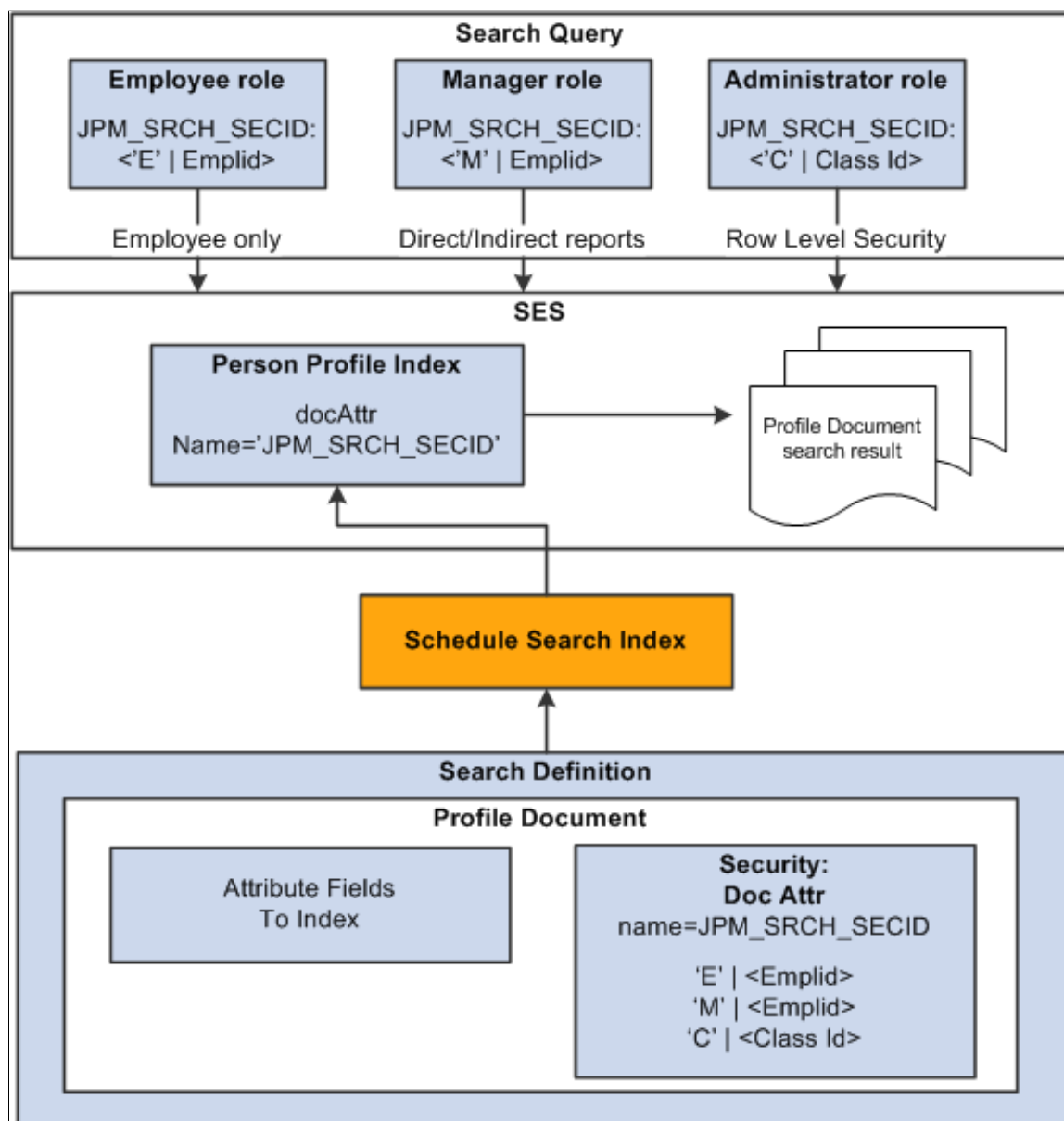
Document level security exists for Person Profiles. The administrator can only view profiles for employees in their range of HCM row-level security. Managers can only view profiles for direct and indirect reports. Employees can only view their own profile.

The list of “manager access” Emplids and “administrator access” Class Ids is merged into a single Document Security Attribute called JPM\_SRCH\_SECID. When a search is executed against the Person

Profile Index, this security attribute is automatically filtered based on the Profile Management role that issues the query.

### Image: SES Security for Person Profiles

This diagram illustrates how document level security will add security attributes to the profile document and SES will automatically apply a list of values to be matched against the security attributes of those documents returned by the search query.



## Prerequisites

Before you run the Schedule Search Index process, you must define the Supervisor Navigation Method field on the Profile Management Installation page and run the Direct Reports Tables Build process for at least that access type specified. The Supervisor Navigation Method field value specifies the reporting structure (access type) for your organization.

Before you run the Schedule Search Index process, you must set up the content catalog, define your profile types, and set up the Integration Broker.

For more information on the Search Framework, see the product documentation for *PeopleTools*: *PeopleSoft Search Technology*.

## Related Links

[Understanding the Content Catalog](#)

[Understanding Profile Management](#)

## Pages Used to Build the Search Indexes

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Direct Reports Tables Build	RUNCTL_HR_DR	Set Up HCM, Common Definitions, Direct Reports for Managers, Direct Reports Tables Build, Direct Reports Tables Build	Run the Direct Reports Tables Build process to build the reporting relationships for a single access type or all access types. This will fully or incrementally load all or a selected access type.  "Configuring Direct Reports Functionality ( <i>PeopleSoft HCM 9.2: Application Fundamentals</i> )", "Understanding the Direct Reports Performance Tables ( <i>PeopleSoft HCM 9.2: Application Fundamentals</i> )", and "Direct Reports Tables Build Page ( <i>PeopleSoft HCM 9.2: Application Fundamentals</i> )".
Build Profile Groups	RUNCTL_JPM_GROUP	Set Up HCM, Product Related, Profile Management, Profiles, Build Profile Group, Build Profile Groups	Run the Build Profile Groups process to create a profile group.  See <a href="#">Understanding Profile Groups and Group Types and Build Profile Groups Page</a>
Deploy Search Definition	PTSF_DEPLOY_SBO	PeopleTools, Search Framework, Administration, Deploy/Delete Object, Deploy Search Definition	Deploy the person and non-person profile search definitions.
Deploy Search Category	PTSF_DEPLOY_CAT	PeopleTools, Search Framework, Administration, Deploy/Delete Object, Deploy Search Category	Deploy the person and non-person profile search categories.
Build Search Index	PTSF_SCHEDULE_SI	PeopleTools, Search Framework, Administration, Schedule Search Index, Build Search Index	Run the process that builds the SES index for a person or non-person profile search definition.

For more information on deploying search definitions and categories, as well as building the search index, see the product documentation for *PeopleTools: PeopleSoft Search Technology*, PeopleSoft Search Framework content.

## Direct Reports Tables Build Page

Use the Direct Reports Tables Build page (RUNCTL\_HR\_DR) to run the Direct Reports Tables Build process to build the reporting relationships for a single access type or all access types. This will fully or incrementally load all or a selected access type.

### Navigation

Set Up HCM, Common Definitions, Direct Reports for Managers, Direct Reports Tables Build, Direct Reports Tables Build

### Image: Direct Reports Tables Build page

This example illustrates the fields and controls on the Direct Reports Tables Build page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Direct Reports Tables Build' page. At the top, the title 'Direct Reports Tables Build' is displayed. Below the title, there are several fields and controls: 'Run Control ID' with the value '1', 'Report Manager' and 'Process Monitor' links, a 'Run' button, 'Build Mode' with a dropdown menu showing 'Full - Complete Rebuild', and 'Access Method' with the value 'All Access Methods'.

### Build Mode

Select one of these modes:

*Full - Complete Rebuild:* Created the full organizational hierarchy. Any existing data is overwritten by this process.

*Incremental - Current Date Upd:* Detects where the organization hierarchy has changed and updates those changes in the tables.:

### Access Method

Select the access method that was defined on your [Profile Management Installation](#) page.

### Related Links

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

## Build Search Index Page

Use the Build Search Index page (PTSF\_SCHEDULE\_SI) to run the process that builds the SES index for a person or non-person profile.

## Navigation

PeopleTools, Search Framework, Administration, Schedule Search Index, Build Search Index

### Image: Build Search Index page

This example illustrates the fields and controls on the Build Search Index page. You can find definitions for the fields and controls later on this page.

**Build Search Index**

Run Control ID 1   Report Manager   Process Monitor   **Run**

\* Search Definition HC\_JPM\_PERSON\_PROFILE

Indexing type	Language Option
<input type="radio"/> Full index	<input checked="" type="radio"/> Base Language
<input checked="" type="radio"/> Incremental Index	<input type="radio"/> All Languages

#### Search Definition

Select *HC\_JPM\_NONPERSON\_PROFILE* for non-person profiles, or *HC\_JPM\_PERSON\_PROFILE* for person profiles.

---

**Note:** These search definitions must be deployed prior to running this process.

---

#### Indexing type

Select one of these values:

Full index: Builds a new index for the selected search definition.

Incremental Index: Updates the existing index for the selected search definition.

#### Language Option

Always select the Base Language option since related language data is not indexed.

# Managing Profiles

---

## Understanding Managing Profiles

These topics discuss the profile management options available to profile administrators that enable them to:

- Create and maintain person and non-person profiles.

Person profiles are those profiles that are linked to a person ID, while non-person profiles describe business entities such as job codes, positions, and salary grades. These changes can be performed by accessing the profile pages directly or by using the Smart HR Transactions component to add or update a person's profile.

- Review and approve changes to profiles.

Depending on the configuration of your profile types, approvals workflow is triggered when employees update their personal profiles and managers make changes to non-person profiles. Typically, managers approve changes to their employees' person profiles and administrators approve non-person profile changes.

- Complete searches for profiles that match certain criteria.

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

- Compare profiles.

Administrators can compare the content of a source profile with one or more target profiles. The Compare Profiles option provides a summary of the common content sections in a simple readable format along with a score for each content item indicating the degree of fit.

- Manage interest lists.

An interest list is a collection of non-person profiles that is associated with an employee. Any profile can be added to an interest list, but it is typically used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile. Employees maintain their own interest list using a self-service transaction. However, an employee's manager and administrators can also add profiles to an interest list or remove profiles from them.

- Track training.

Manage Profiles provides profile administrators access to employees' training history for training that is managed by the Administer Training business process. In addition, Manage Profiles enables you to track external training that is not managed using Administer Training.

For information about the employee and manager self-service transactions, see *PeopleSoft HCM 9.2: eDevelopment*.

## Related Links

"Using Smart HR Templates and Transactions (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)"

"Maintaining Person Profiles (*PeopleSoft HCM 9.2: eDevelopment*)"

"Viewing and Updating Job Profiles (*PeopleSoft HCM 9.2: eDevelopment*)"

---

## Prerequisites

Before administrators can create profiles, approve changes to profiles, or run searches for profiles you must:

- Define the content catalog.
- Define your profile types.
- (Optional) Set up Smart HR templates using profiles.
- (Optional). Define and configure approvals for profiles.

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

- Configure search queries and run the Direct Reports Tables Build and Schedule Search Index processes required by the Search and Compare Profiles feature.

## Related Links

[Understanding the Content Catalog](#)

[Setting Up Profile Types](#)

"Setting Up Smart HR Templates (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)"

[Searching and Comparing Profiles](#)

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

---

## Maintaining Profiles

These topics provide an overview of profiles and profile types, profile copy, import, and syndication, list prerequisites and common elements, and discuss how to:

- Create and update person profiles.
- Create and update non-person profiles.
- Add and update profile groups for a profile.
- Enter additional profile information.
- Add, update, and view profile item details.
- Add related profile items.

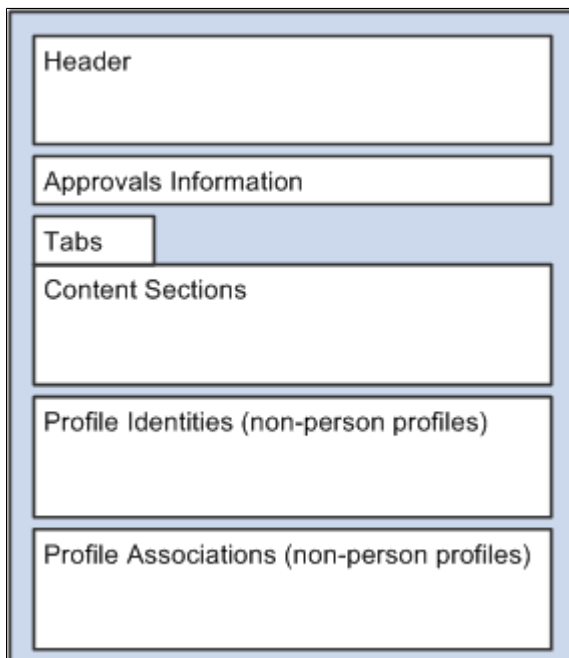


- View profile item rows.
- View syndication sources and targets.
- Select profiles for import or syndication.
- Add and update profile identities.
- Add and update profile associations.
- Submit changes to person profiles.
- Submit changes to non-person profiles.
- Review syndication exceptions.
- Review syndication exception details.

## Understanding Profiles and Profile Types

### Image: Format of a profile page

Administrators use the Person Profile page and the Non-person Profile page to create and maintain profiles. Both pages have a similar format. This diagram and the following text identify the elements in these pages:



Here is a description of the parts of a profile:

- Header.

The header includes general information such as the profile ID, profile type, profile status, and effective date. For a person profile, the header includes the person ID.

- Approvals Information.

This section includes links that indicate how many profile items are saved (but not submitted for approval), pending approval, approved, or were denied approval.

---

**Note:** The content section on the profile pages displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear in the content sections. Use the links in this area of the profile to view the changes that are unapproved.

---

- Tabs.

Profile are grouped together by tabs. When you select a tab, the system displays the content sections defined for that tab. The naming and order of the tabs in a profile are determined by the profile type.

- Content sections.

Tabs consist of one or more content sections. The content sections are defined by the profile type. Users add profile items to the content sections.

- Profile identities (non-person profiles only).

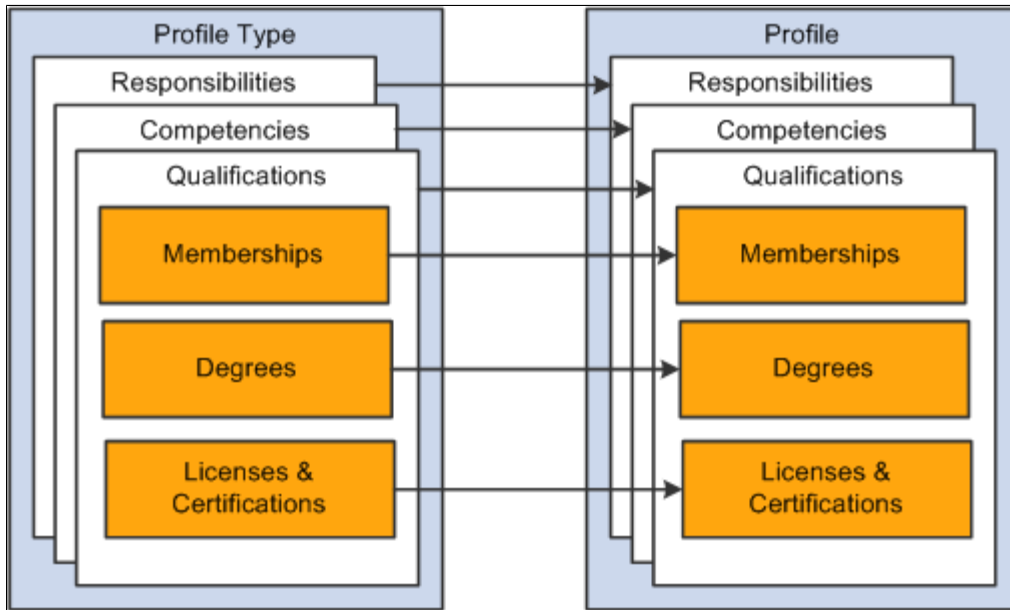
On the Non-person Profile page, the Profile Identities grid lists the entities to which the profile is linked. The type of profile identities available are controlled by the profile type selected. For example, if the profile type allows job codes to be linked to the profile, users can insert a row for a job code for the profile, but they cannot link the profile to a position number. An active profile must be linked to at least one profile identity.

- Profile Associations (non-person profiles only).

On the Non-person Profile page, the Profile Associations grid lists any entities to which the profile is associated. Profile associations are entities, such as ePerformance templates, that are outside of the Manage Profiles business process. The profile type defines the profile associations available.

**Image: The profile type serves as a template for the tabs and content sections in a profile**

This diagram shows how the tabs and content sections of a profile are determined by the tabs and content sections of the profile type; in this example, the three tabs in the profile type automatically exist in the related profile, as do the content sections within the tabs:



The profile type provides the structure for a profile, it does not provide the actual content. To complete the profile, users add profile items, such as competencies or education information, by selecting from the content items available in the content catalog.

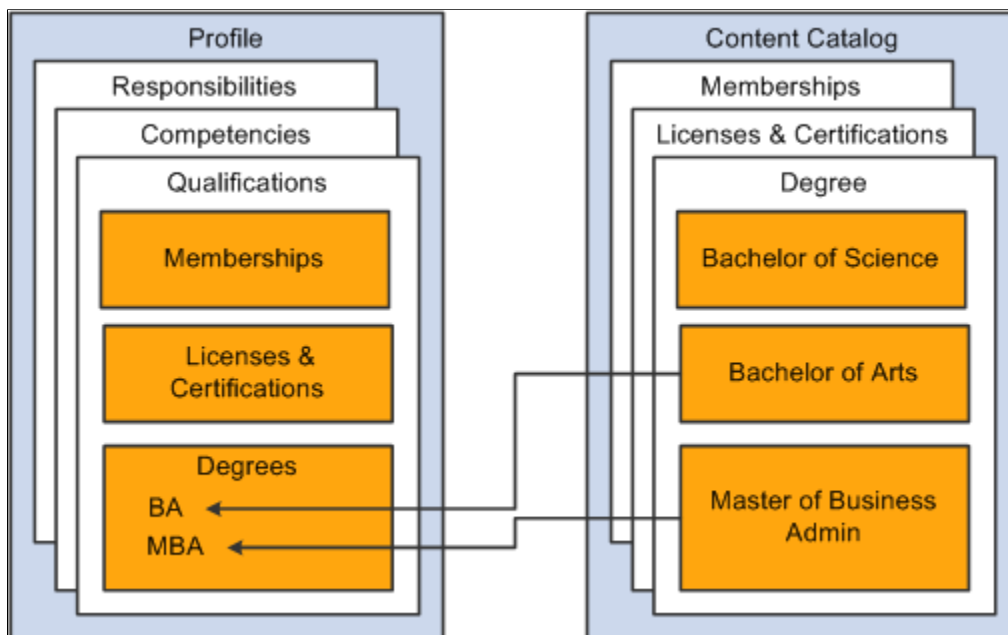
---

**Note:** The structure of the content items and their data (other than the content item ID) do not have any impact on the profile item structure.

---

**Image: Adding items to profiles by selecting from the content catalog**

This diagram illustrates how you complete the Degrees content section by selecting from degrees such as Bachelor of Science, Bachelor of Arts, and Master of Business Administration, all of which are defined in the content catalog:




---

**Note:** The profile type controls whether approvals workflow is triggered when the profile is updated, and the Profile Management roles that can view and update each section of the profile.

---

See [Setting Up Profile Types](#).

## Understanding Profile Copy, Import, and Syndication

Often the same profile items appear in related profiles. For example, employees' profiles may contain profile items that also appear in the profiles for their job code or position. Non-person profiles for similar or related jobs may have common profile items. To streamline the process of creating and maintaining profiles, Manage Profiles provides three ways to copy profile items. You can:

- Load profile items into a person profile from a related non-person profile.

The Profile Actions field on the Person Profile page has an option, *Copy from Job Profile*, that enables you to select a non-person profile from a list of related profiles. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. For example, the system checks for active profiles that match the employee's job codes, positions, and salary grades.

- Import content into a non-person profile from another profile or from the content catalog.

When you import content, the system copies the profile items from the source profile into the target profile. Any changes made to the source profile or content items after the import do not affect the target profile. Use the Import Content link on the Non-person Profile page to import content.

- Syndicate content into a non-person profile from another profile.

When you syndicate content, the system copies profile items from the source profile into the target profile. However, it also sets up a relationship between the source profile and the target profile that contains the syndicated content. Whenever syndicated content is updated, the changes are incorporated into the target profiles automatically. Use the *Syndicate Profile* profile action on the Non-person Profile page to syndicate content.

---

**Note:** The copy from job profile, import, and syndicate actions copy profile content that is not defined as free form content. Import and syndicate copy the properties that are defined in the target profile type definition only. Additional properties in the non-person (source) profile type are not copied. If the target profile has additional properties that are not used in the source profile, the system uses the default values defined for these properties. The default values can be defined for that property in the content section of the profile type.

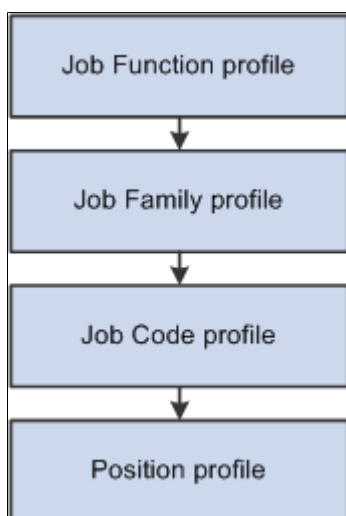
---

## Setting Up Syndication

Syndication reduces maintenance by enabling administrators to set up common content once in a source profile and copy it to multiple target profiles. You can also syndicate content through a series of related profiles.

**Image: Syndication propagates a job function profile through the job family, job code, and position number profiles**

This diagram shows how you could set up a job function profile and syndicate the content through the hierarchy to job family, job code, and position number profiles:



If you set up cascading syndication, we recommend that you use it in a similar hierarchical method.

When setting up syndication, you should consider what happens when the target profile already includes an item that is in the syndicate source profile. For example, if you syndicate content from more than one source profile into a target profile, it is possible for the same item to occur in the source profiles but with

different values. These are known as syndication exceptions. In this situation, the system updates the target profile with the values from the source profile, effectively overriding the existing values.

View syndication exceptions using the Syndication Exceptions page.

## Prerequisites

Before you can syndicate content:

- Configure the application server for publish/subscribe.
- Configure the integration broker and make it active.

Ensure that the:

- The EOEN\_MSG\_CHNL queue is running.
  - The service operation EOEN\_MSG is active.
  - The associated routing definitions are active.
- Set up the Event Manager.

Make the event JPMPProfileItemsUpdated and the associated event handlers active. We also recommend that you enable logging for the event and handler.

See *PeopleTools: PeopleSoft Integration Broker* and *PeopleTools: System and Server Administration*.

## Related Links

*PeopleSoft 9.2: Events and Notifications Framework*

## Common Elements Used in Managing Profiles

### Status

Select one of these values:

*Active:* If the profile type does not require approval, update the status to *Active* to make the profile available to other users.

*Inactive:* Profiles that are inactive are not available to employees and managers in self-service. When you update the status to *Inactive*, the system removes the profile from the profile groups to which it belongs.

When you create a non-person profile, the default status is *Inactive*. You can only update the status to *Active* when the profile is linked to one or more profile identities and approved. Employees can view active non-person profiles only. Managers can view both active and inactive non-person profiles.

### Profile Type

Select the profile type for the new profile. When you update an existing profile, the Profile Type field is display-only. The profile type determines the tabs that appear in the profile.

See [Setting Up Profile Types](#).

## Profile Actions

This field appears on the Non-person Profile and Person Profile pages. Select an action and click the Go icon if you want to do one of the following, if the action has been enabled on the [Profile Actions Page](#):

- *Compare employee profile to current job:* To compare an employee's profile items to his or her job profile items. This profile action is available from the Person Profile page only. If more than one job profile applies to the employee, select from a list of all applicable job profiles to compare.
- *Copy From Job Profile:* To copy items from a non-person profile to the employee's profile. This profile action is available from the Person Profile page only. The system displays the Copy Items from Job Profile page, which lists the profiles related to the employee's active jobs.
- *Express Interest for Employee:* To add the profile to a person's interest list. This profile action is available from the Non-person Profile page only. The system displays the Person Search - Simple page, which you use to search for the employee whose interest list you want to update.
- *Import Profile Items:* To import content from another profile or the content catalog. This profile action is available from the Non-person Profile page only. The system displays the Import Profile Items page, which you use to search for and add the types of item you wish to import into a profile.
- *Search and Compare Profiles:* To run a search. This profile action is available from the Non-person Profile page and the Person Profile page. The system displays the Search for Profiles page.
- *Syndicate Profile:* To syndicate content from another profile or the content catalog. This profile action is available from the Non-person Profile page only. The system displays the Profile Syndication page, where you can add or view the source profiles that provide syndicated content for the profile and view the target profiles that contain content syndicated from the profile.
- *Update Profile Groups:* To categorize your profiles by profile groups. This profile action is available from the Non-person Profile page and the Person Profile page when the profile is active and the page is not display only. The system displays the Update Profile Groups page, which you use to list the profile group types and profile groups to which you want to add the profile. This action is not available if the profile status is inactive

See [Update Profile Groups Page](#).

- *View Related Job Profiles:* To display a list of non-person profiles that are related to the employee's job data. This profile action is available from the Person Profile page only. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles.

See [Profile Actions Page](#).

## Pages Used to Maintain Profiles

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Person Profile	JPM_PROFILE_PERS	<ul style="list-style-type: none"> <li>• Workforce Development, Profile Management, Profiles, Person Profiles, Person Profile</li> <li>• Workforce Administration, Global Assignments, Assignee Qualifications, Person Profiles, Person Profile</li> </ul>	Create and update person profiles.
Smart HR Transactions	HR_TBH_EULIST	<ul style="list-style-type: none"> <li>• Workforce Administration, Smart HR Templates, Smart HR Transactions, Smart HR Transactions</li> <li>• Manager Self Service, Job and Personal Information, Smart HR Template, Smart HR Transactions, Smart HR Transactions</li> </ul>	<p>Select a template or person that is associated with a profile-related template to add or update a person's profile using the Smart HR pages.</p> <p>For more information on using Smart HR templates and transactions, see "Using Smart HR Templates and Transactions (<i>PeopleSoft HCM 9.2: Human Resources Administer Workforce</i>)".</p>
Non-person Profile	JPM_PROFILE1	Workforce Development, Profile Management, Profiles, Non-person Profiles, Non-person Profile	Create and update non-person profiles.
Search for Profiles	JPM_SRCH_TRANSFER	Select <i>Search and Compare Profiles</i> from the Profile Actions field on the Person Profile page or the Non-person Profile page and click Go.	Lists the profile search queries that are defined for administrators. Select the search query that you want to run.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Update Profile Groups	JPM_UPD_GROUP_SEC	Select the <i>Update Profile Groups</i> from the Profile Actions field on the Person Profile page or the Non-person Profile page and click Go.	Add and update profile groups for a profile.
Profile Comments	JPM_PROF_INFO_SEC	Select the Comments link on the Person Profile page or the Non-person Profile page.	Enter additional profile information such as comments or the owner ID for non-person profiles.
Add New <content type> Update <content type> View <content type>	JPM_PROF_DTL_SEC	Click the Add New <content type> link for a profile content item ID on the Person Profile page or the Non-person Profile page.  (When you click the profile content item ID link for an item that is from another source profile, the View or Update <content type> page appears.)	Add, update, and view profile item details.
Content Item Details	JPM_CAT_ITEMS_DSP	<ul style="list-style-type: none"> <li>Click the content item name link on the Update &lt;content type&gt; page.</li> <li>Click the content item name link on the View &lt;content type&gt; page.</li> <li>Click the content item name link on the Add New &lt;content type&gt; page.</li> </ul>	View details about a specific content item.
Rating Model	HCR_RATEMDL_POPUP	<ul style="list-style-type: none"> <li>Click the Rating Detail icon on the Update &lt;content type&gt; page.</li> <li>Click the Rating Detail icon on the View &lt;content type&gt; page.</li> <li>Click the Rating Detail icon on the Add New &lt;content type&gt; page.</li> </ul>	Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, the you can modify the rating as well.
Update <Related Content Item>	JPM_PROF_DETAIL	Click the related content link on the Add New <content type> or Update <content type> page.	Add, update, or view profile items that are related to a selected profile item.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
View Profile Item History	JPM_PROF_HIST_SEC	Click the icon in the View History column on the Person Profile page or Non-person Profile page.	View profile item rows for different effective-dates.
Items Awaiting Submission Pending Items Denied Items	JPM_JP_PRF_VW_CHGS	<ul style="list-style-type: none"> <li>Click the &lt;number&gt; item(s) awaiting submission for approval link on the Person Profile page or the Non-person Profile page.</li> <li>Click the &lt;number&gt; item(s) pending approval link on the Person Profile page or the Non-person Profile page.</li> <li>Click the &lt;number&gt; item(s) denied (since &lt;date&gt;) link on the Person Profile page or the Non-person Profile page.</li> </ul>	Lists the profile items that are awaiting submission for approval, pending approval, or have been denied approval. Items that have been submitted for approval can't be changed until they have been approved. Items awaiting submission can be deleted but not updated.
View <content type>	JPM_APR_DTL_SEC	Click a content item ID on the Items Awaiting Submission page, Pending Items page, or Denied Items page to view the item details.	View details of a profile item.
Copy Items from Job Profile	JPM_COPY_PROFL_SEC	Select <i>Copy From Job Profile</i> in the Profile Action field on the Person Profile page and click the Go icon.	View a list of job profiles from which you can copy profile items. Select the profile from which you want to copy profile items and click the Select button. The system adds the profile items to the employee's profile. If only one job profile exists, the system automatically copies the items to the profile and displays a message saying how many items were copied.
Select Profile	JPM_JP_REL_PRF_EMP	Select <i>View Related Job Profiles</i> in the Profile Action field on the Person Profile page and click the Go icon.	View a list of the job profiles that are related to an employee's job data. Select the profile that you want to view and click the Continue button. The Non-person Profile page appears.
Person Search - Simple	HR_PSS_SEARCH	Select <i>Express Interest for Employee</i> in the Profile Actions field on the Non-person Profile page and click the Go icon.	Search for and select a person.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Profile Syndication	JPM_PROF_SYND_SEC	Select the Profile Action <i>Syndicate Profile</i> and click the Go icon.	View the syndication source and target profiles. You can also add and remove syndicated content on this page.
Syndicate Profiles Import Profile Items	JPM_PROF_SRCH_SEC	<ul style="list-style-type: none"> <li>Click Add New Syndication on the Non-person Profile - Profile Syndication page.</li> <li>Select the Profile Action <i>Import Profile Items</i> from the Non-person Profile page and click the Go icon.</li> </ul>	Select the profiles from which content will be imported or syndicated.
Profile Identity	JPM_JP_PID_SEC	Click the Add Profile Identity link or the Edit Identity icon in the Profile Identities grid area on the Non-person Profile page.	Add or edit profile identities associated with the profile.
Profile Association	JPM_JP_ASSC_SEC	Click the Add Profile Association link or the Profile Association Option name link in the Profile Associations grid area on the Non-person Profile page.	Add or update profile associations for the profile.
Person Profile - Summary of Changes	JPM_JP_PERSUMM_SEC	Click the Save button or the Submit button on the Person Profile page when there are items that need to be submitted for approval.	View a list of changes that have been made to the person profile that require approval. You can also enter comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Person Profile page and not submit the items for approval. These items will not be available to other processes until they have been submitted for approval and approved.
Non-person Profile - Summary of Changes	JPM_JP_NPSUMM_SEC	Click the Save button or the Submit button on the Non-person Profile page when there are items that need to be submitted for approval.	View a list of changes that have been made to the non-person profile that require approval. You can also enter comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Non-person Profile page not submit the items for approval.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Submit Confirmation	JPM_JP_PROFL_APPR	Click the Submit button on the Person Profile - Summary of Changes page or the Non-person Profile - Summary of Changes page.	View confirmation messages of changes have been submitted. The Approval Routing group box provides a summary of the approval path. It shows the number of approvers and the sequence of approvals.
Syndication Exceptions	JPM_JP_SYND_EXC1	Workforce Development, Profile Management, Profiles, Syndication Exceptions, Syndication Exceptions	Display the syndication exceptions for a profile. Syndication exceptions occur when an content item is syndicated from multiple source profiles but has different property values from each source profile.
Exception Details	JPM_JP_SYND_EX_SEC	Click the View Details link on the Syndication Exceptions page.	Display details of profile items with exceptions.

## Person Profile Page

Use the Person Profile page (JPM\_PROFILE\_PERS) to create and update person profiles.

## Navigation

- Workforce Development, Profile Management, Profiles, Person Profiles, Person Profile
- Workforce Administration, Global Assignments, Assignee Qualifications, Person Profiles, Person Profile

### Image: Person Profile page

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

**Person Profile**

Empl ID KU0119      Susan Hoinck  
 Profile Type PERSON      Person  
 \*Profile Status **Active**  
 \*Description Susan Hoinck

Print    Comments      Profile Actions <Select Action>

☒ You have successfully saved those profile changes that do not require approval.

**Approvals**  
 2 item(s) pending approval

Competencies   Responsibilities   Qualifications   Education   NVQ   Projects   Worn Rank   Mobility

**Competencies**      Personalize | Find | View All |      First 1-5 of 7 Last

ID	Competency	Evaluation Type	Reviewer ID	Proficiency	
0205	Teamwork and cooperation	Supervisor/Manager	Betty Locherty	2-Fair	
0209	Team leadership	Supervisor/Manager	Betty Locherty	2-Fair	
0400	Persuasive	Self		3-Good	
0401	Strategically influences	Self		3-Good	
0402	Influences	Self		3-Good	

Add New Competencies

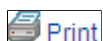
**Note:** A Job Data row is required to create a Person profile for an individual. Therefore, when creating a profile for a person of interest (POI), he or she must also have a Job Data record.

### Profile Status

Select the status of the profile. Options are *Active* or *Inactive*.

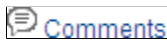
When a worker's job is terminated, the Event Manager event `InactivatePersonProfile` event is raised to determine if all the worker's job assignments are inactive. If all job assignments are inactive, then all person profiles for that employee ID are also changed to *Inactive*.

See *PeopleSoft 9.2: Events and Notifications Framework*, "Setting Up Events".



Click the Print link to display the profile in a PDF file that you can print from Adobe Acrobat. BI Publisher technology generates the printable file using the same template and layout as the Person Profile batch report.

See [Setting Up to Use BI Publisher Reports and Profiles](#).



Click the Comments link to display the Profile Comments page and enter additional comments about the profile.

## Profile Actions

Select an action you want to perform and click the Go icon.

Values on the Person Profile page include those profile actions that are enabled on the [Profile Actions](#) setup page for the administrator. Each of these actions opens a corresponding page where you can view or update information related to the action.

---

**Note:** When during setup there are no action types enabled for a profile user role, the Profile Actions field is hidden on the page.

---

See [Common Elements Used in Managing Profiles](#).

See [Update Profile Groups Page](#).

---

**Note:** The Person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear on the profile content sections. Instead links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or denied approval. Use these links to view the changes.

---

**<number> item(s) awaiting submission for approval**

Click this link to access the Items Awaiting Submission page and view the profile items that have been saved but not submitted for approval. This includes profile items that have been added, amended, or deleted.

When a profile item has been saved but not submitted, the Submit button appears after the <number> item(s) awaiting submission for approval link. When you click the Submit button, the system displays the [Summary of Changes](#) page, where newly added items can be submitted for approval. The system will also display the Summary of Changes page upon saving the profile page when there are items awaiting submission. If approval is not required, the system automatically changes the status of the items approved.

## Submit

Click this button if there are any items awaiting to be submitted for approval. The Person Profile - Summary of Changes page appears and lists the new, deleted, and changed items requiring approval. This button appears only when there are items awaiting submission for approval.

**<number> item(s) pending approval**

Click this link to access the Pending Items page and view the profile items that have been submitted for approval but are pending approval.

**<number> item(s) approved (since <date>)**

Displays the number of items that have been approved.

The date displayed is determined by the value in the Days of Approval History field on the [Profile Management Installation Page](#).

**<number> items denied (since  
<date>)**

Click this link to access the Denied Items page and view the profile items that have been submitted for approval but the approver denied.

The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

The system enables the administrator to group profile content sections into separate tabs. When you select a tab, the page displays content sections associated with that tab.

---

**Note:** The tabs that appear on the profile and content sections within each tab are determined by the profile type selected. Define the tabs and content sections for profile types using the Profile Type - Content page.

---

See [Setting Up Profile Types](#).

**Add New <content type> and  
<content item>**

Click these links to add or update profile items. The Add <content type> page or Update <content type> page appears. The fields on this page are determined by the profile type associated with the profile.

See [, Update <content type>, or View <content type> Page" ?>](#).



Click the View History icon to display the View Profile Item History page. This icon appears only when a profile item has more than one effective-dated row.

**Save**

Click this button to save the changes you have made. The system updates the Person Profile page to display approved items or items not requiring approval within the profile content sections. Pending items and items awaiting to be submitted do not appear in the profile content sections. If you are creating a new profile that requires approval of all its items, no profile items will appear in the content sections upon saving. However, the system displays the item(s) awaiting submission for approval or item(s) pending approval links to enable you to view the changes you have saved but not submitted or that are pending approval. Once these items have been approved, then they will appear in the content sections.

Upon saving, the system does the following:

- For items that do not require approval, the system saves them to the page and a message appears saying you have successfully saved those profile changes that do not require approval. These items will appear in the profile tab item list.
- For items that require approval, the system displays the Person Profile - Summary of Changes page, which provides a list of the items requiring approval.
  - Click Submit to route items to an approver. The system will then display the <number> item(s) pending

approval link on the Person Profile page, which you can click to view pending items.

- Click Cancel to save your items without submitting them for approval. The system will then display the <number> item(s) awaiting submission for approval link and the Submit button on the Person Profile page, where you can view the items awaiting submission or submit items for approval at a later time.

---

**Note:** The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks Submit, the system display a message that no approvals are required, and changes will be immediately reflected in the profile.

---

## Non-person Profile Page

Use the Non-person Profile page (JPM\_PROFILE1) to create and update non-person profiles.



## Navigation

Workforce Development, Profile Management, Profiles, Non-person Profiles, Non-person Profile

### Image: Non-person Profile page (1 of 2)

This example illustrates the fields and controls on the Non-person Profile page (1 of 2). You can find definitions for the fields and controls later on this page.

### Non-person Profile

Profile ID 150008

Profile Type JOB Job

\*Profile Status Active

\*Description Finance

Short Description KFIN

Print
 Comments
 Profile Actions <Select Action>

**Approvals**  
★ 1 item(s) awaiting submission for approval Submit  
🕒 1 item(s) pending approval

Competencies
Responsibilities
Qualifications
NVQ
Worn Rank

**Competencies (Requires Approval)**
Personalize | Find | View All | 
First 1-2 of 2 Last

ID	Competency	View History	
0700	Customer Service Orientation		
3004	Financial Experience		

Add New Competencies

### Image: Non-person Profile page (2 of 2)

This example illustrates the fields and controls on the Non-person Profile page (2 of 2). You can find definitions for the fields and controls later on this page.

**Profile Identities**
Personalize | Find | View All | 
First 1-3 of 3 Last

Profile Identity Option	Set ID	Key 1 Value	Description	Edit Identity	Delete
POSITION		19000024	General Auditor		
JOB_CODE	SHARE	110000	Accountant		
JOB_CODE	SHARE	200005	Auditor-General		

Add Profile Identity

**Profile Associations**
Personalize | Find | View All | 
First 1-2 of 2 Last

Profile Association Option	Key 1 Value	Key 2 Value	Description	
EPERF_TMPLT	K0ANNUAL	KU000004	Avg -Uses Job Profile	
EPERF_TMPLT	K0PROMO	KU000010	Job Promotion Document	

Add Profile Association

Save



Select the Print icon to display the profile in a PDF file that you can print from Adobe Acrobat. BI Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report.

See [Setting Up to Use BI Publisher Reports and Profiles](#).



Select the Comments link to display the Profile Comments page and enter the employee owner ID as well as additional comments about the profile.

## Profile Actions

Select an action you want to perform and click Go. Values on the Non-person Profile page include those profile actions that are enabled on the [Profile Actions](#) setup page for the administrator. Each of these actions opens a corresponding page where you can view or update information related to the action.

---

**Note:** When during setup there are no action types enabled for a profile user role, the Profile Actions field is hidden on the page.

---

See [Common Elements Used in Managing Profiles](#).

See [Profile Actions Page](#).

See [Update Profile Groups Page](#).

See [Profile Syndication Page](#).

See [Syndicate Profiles Page](#) or [Import Profile Items Page](#).

---

**Note:** The Non-person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear within the profile content sections. Instead, links appear on the page that indicate how many items are awaiting submission, are pending approval, or have been denied approval. Use these links to view the changes.

---

**<number> item(s) awaiting submission for approval**

Click this link to access the Items Awaiting Submission page and view the profile items that have been saved but not submitted for approval. This includes profile items that have been added, amended, or deleted.

When a profile item has been saved but not submitted, the Submit button appears after the <number> item(s) awaiting submission for approval link. When you click the Submit button, the system displays the Non-person Profile - Summary of Changes page, where changes to items requiring approval can be submitted. The system will also display the Non-person Profile - Summary of Changes page upon saving the profile page when there are items awaiting submission for approval.

## Submit

Click this button if there are any items awaiting to be submitted for approval. The Non-person Profile - Summary of Changes page appears and lists the new, deleted, and changed items



**<number> item(s) pending approval**

requiring approval. This button appears only when there are saved items awaiting submission for approval.

Click this link to access the Pending Items page and view the profile items that have been submitted for approval but are pending approval.

**<number> item(s) approved (since <date>)**

Displays the number of items that have been approved.

The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

See [Profile Management Installation Page](#).

**<number> items denied (since <date>)**

Click this link to access the Denied Items page and view the profile items that have been submitted for approval but the approver denied.

The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

The system enables the administrator to group profile content sections into separate tabs. When you select a tab, the page displays content sections associated with that tab.

---

**Note:** The tabs that appear on the profile and content sections within each tab are determined by the profile type selected. Define the tabs and content sections for profile types using the Profile Type - Content page.

---

See [Profile Types - Content Page](#).

**Add New <content type> and <content item>**

Click these links to add or update profile items. The Add <content type> page or Update <content type> page appears.

If the origin of the content item is from another source profile or another product such as ePerformance, the system displays the View <content type> page. The fields on this page are determined by the profile type associated with the profile.

See [, Update <content type>, or View <content type> Page" ?>](#).

**Source Profile**

Click the source profile link to view details about the source profile from which this item was syndicated. The system displays this field only when items have been syndicated into the profile.



Click the View All Rows icon to display the View All Rows page. The system displays this icon when a profile item has more than one effective-dated row only.

**Save**

Click this button to save the changes you have made. The system updates the Non-person Profile page to display approved items or items not requiring approval within the profile content sections. Pending items and items awaiting to be submitted do

not appear in the profile content sections. If you are creating a new profile that requires approval of all its items, no profile items will appear in the content sections upon saving until they have been approved.

Upon saving, the system does the following:

- For items that do not require approval, the system saves them to the page and a message appears saying you have successfully saved those profile changes that do not require approval. These items will appear in the profile content section.
- For items that require approval, the system displays the Non-person Profile - Summary of Changes page, which provides a list of the items requiring approval.
  - Click Submit to route to the approver. The system will then display the <number> item(s) pending approval link on the non-person Profile page, which you can click to view pending items.
  - Click Cancel to save your items without submitting them for approval. The system will then display the <number> item(s) awaiting submission for approval link and the Submit button on the Non-person Profile page, where you can view the items awaiting submission or submit items for approval at a later time.

---

**Note:** The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks Submit, the system displays a message that no approvals are required, and changes will be immediately reflected in the profile.

---

## Profile Identities

Expand this section to view a lists of the profile identities information to which the profile is linked.



Click the Edit Identity icon to open the Profile Identity page and update an existing identity.

### Add Profile Identity

Click this link to add a profile identity to this profile. The system displays the Profile Identity page.

See [Profile Identity Page](#).

## Profile Associations

Expand this group box to view a list of the associations for the profile. Profile associations are entities outside the Manage Profiles business process. PeopleSoft ePerformance templates are linked to profiles in this way.

**Note:** If a non-person profile type does not have an association specified in its configuration then the page will not display the Profile Associations grid.

### Profile Association Option

Select the profile association ID link to view association details or update the effective date or status. The options available are determined by the profile type definition.

See [Profile Type - Associations Page](#).

### Add Profile Association

Click to add a new profile association to this profile. The system displays the Profile Association page.

See [Profile Association Page](#).

## Update Profile Groups Page

Use the Update Profile Groups page (JPM\_UPD\_GROUP\_SEC) to add and update profile groups for a profile.

### Navigation

Select the *Update Profile Groups* value in the Profile Actions field on the Person Profile page or the Non-person Profile page and click Go.

### Image: Update Profile Groups page

This example illustrates the fields and controls on the Update Profile Groups page. You can find definitions for the fields and controls later on this page.

Non-person Profile

**Update Profile Groups**

Profile ID 150008      Finance  
Profile Type JOB      Job

Profile Groups		Personalize   Find   View All   [Print] [Refresh]		First 1-2 of 2 Last
*Profile Group Type	Description	*Profile Group ID	Description	
HXNPG_BATCH	Non Person profile group batch	HXPM_NP_BAT1	Non Person profile group -bat1	[Delete]
K0GLOBAL	Global	K0NAME	North America	[Delete]

+ Add Profile to Group

OK Cancel

This page lists the profile groups to which the profile belongs.

### Profile Group Type

Select the profile group type.

### Profile Group ID

Select the profile group you want to add to the profile.

### Add Profile to Group

Click this link to add another profile group to this profile.

See [Creating Profile Group Types and Profile Groups](#).

**Note:** Manually entered profiles may be deleted when this group is repopulated. This group is populated using preset group criteria. When the group is rebuilt the manually entered profiles will be deleted if they do not fit the criteria.

## Profile Comments Page

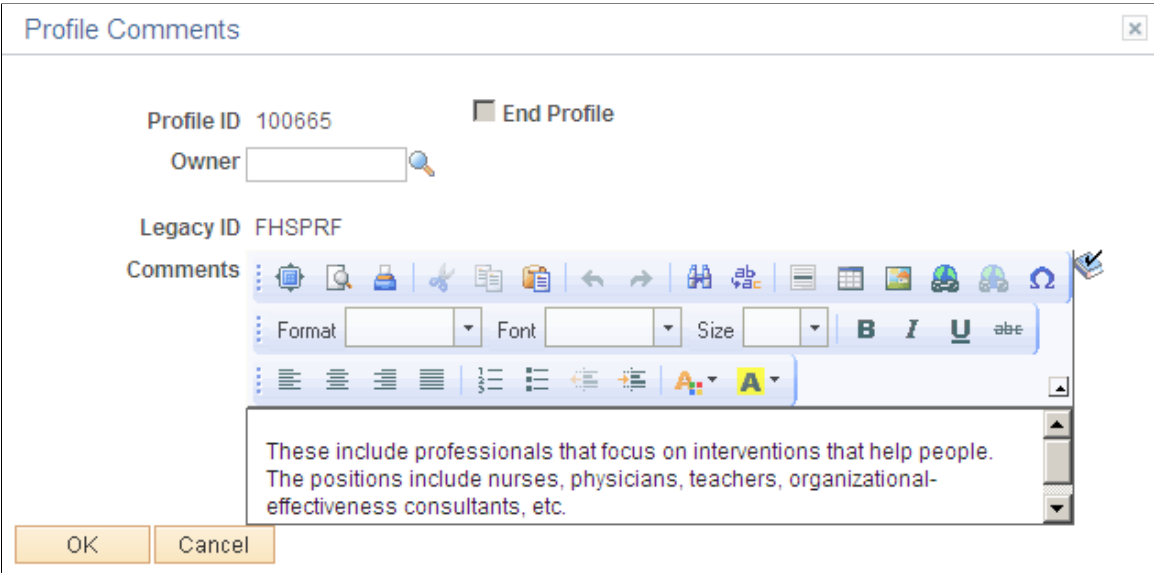
Use the Profile Comments page (JPM\_PROF\_INFO\_SEC) to enter additional profile information such as comments or the owner ID for non-person profiles.

### Navigation

Select the Comments link on the Person Profile page or the Non-person Profile page.

### Image: Example of the Non-person Profile - Profile Comments page

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



**Note:** The fields on the Profile Comments page for a Person Profile and a Non-person Profile vary only slightly.

### End Profile

This field is available on the Non-Person Profile - Profile Comments page.

Displays whether the profile type is used for end profiles or not. End profiles can be viewed from self service and must have a profile identity before they can be set to a status of active.

### Legacy Profile ID

This field is available on the Non-Person Profile - Profile Comments page.

Displays the legacy profile ID assigned to the profile during upgrade. This field is displayed for some types of profiles that existed in earlier versions of PeopleSoft HR.

### Owner

This field is available on the Non-Person Profile - Profile Comments page.

Select the employee ID of the profile owner. Use this field if you want to assign owners to profiles for reporting or other purposes.

### Comments

Enter additional comments about the profile.

## Add New <content type>, Update <content type>, or View <content type> Page

Use the Add New, Update, or View <content type> pages (JPM\_PROF\_DTL\_SEC) to add, update, and view profile item details.

### Navigation

Click a content item or the Add New <content type> link for a profile content item ID on the Person Profile page or the Non-person Profile page.

(When you click the profile content item ID link for an item that is from another source profile, the View or Update <content type> page appears.)

### Image: Add New <content type> page

This example illustrates the fields and controls on the Add New <content type> page. You can find definitions for the fields and controls later on this page.

Non-person Profile

### Add New Competencies

Profile ID 100887      Accountant  
Profile Type JOB      Job

Add item details. Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details Find | View All First 1 of 1 Last

\*Effective Date 02/05/2013

\*Competency H0P602 602 Job Profile Competency

\*Status Active

\*Rating Model H06 Job Profile Test

Target Proficiency Excellent

Weight 35

☐ Mandatory

Minimum Weight

☐ Critical

Long Description

Related Content [Sub-Competencies](#)

OK Cancel Apply and Add Another

---

**Note:** The fields and field labels that appear on this page vary according to the item's content type and the content section definition in the profile type. Define content sections using the [Profile Types - Content Page](#).

---

See [Setting Up Profile Types](#).

In the administer profile pages, when you look up a content item ID, the system enables you to use these items as part of the search criteria:

- Content item ID
- Content group type
- Content group
- Description

The content item name, such as the *601 Job Profile Competency* shown in the previous screen shot example, appears as a link. Select this link to open the Content Item Details page to view more information about this item.



**(Rating Detail icon)**

Select this icon button to open the Rating Model page and view rating model details of the selected item. When accessing the page from the update or add new pages, the you can modify the rating as well.

### Related Content

Click the link associated with this field to access the [Update <Related Content Item>](#) page where you can add, update, and view items that are related to the selected profile item. This link appears only for items with a child relationship in the Content Catalog where the child content section is included in the profile type definition.

---

**Note:** If you are adding a parent item, the system does not automatically add related items for it unless you click the Related Content link.

---

### OK

Click to keep any updates that you make on the profile detail or on the related items pages. If you deleted a parent item row, the system deletes all of its related items.

### Related Links

[Relationship Rule Page](#)

[Content Items - Relationships Page](#)

[Profile Types - Content Page](#)

## Update <Related Content Item> Page

Use the Update <Related Content Item> page (JPM\_PROF\_DETAIL) to add, update, or view profile items that are related to a selected profile item.



## Navigation

Click the related content link on the Add New <content type> or Update <content type> page.

### Image: Update <Related Content Item> page

This example illustrates the fields and controls on the Update <Related Content Item> page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web application window titled "Non-person Profile". Inside, the main heading is "Update Sub-Competencies". Below this, there are two labels: "Competency H0P602" and "602 Job Profile Competency". A button labeled "Populate Related Items" is present. A "Details" section contains several fields: "Effective Date" with the value "02/01/2013", "Sub Competency" with the value "35", "\*Status" with a dropdown menu showing "Active", "Rating Model" with an empty text box and a magnifying glass icon, and "Long Description" with a large empty text area and a magnifying glass icon. Below the "Long Description" field, it says "by PS". At the top right of the "Details" section, there are links for "Find | View All" and a pagination indicator "First 1 of 1 Last". At the bottom of the window are "OK" and "Cancel" buttons.

Use this page to add profile items to a profile that are related to an existing profile item. The related items that you can add to a profile are determined by the content section definitions in the profile type and the relationships defined in the content catalog.

**Note:** The fields and field labels that appear on this page vary according to the related item's content type and the content section definition in the profile type.

### Populate Related Items

Clicked to have the system automatically insert all related items defined in the content catalog. It is also possible to manually select individual items from those defined in the content catalog.

### OK

Click to save the updates made on this page. The system does not merge the updates with the profile items until you click the OK button on the parent item page (Update <content type> or Add New <content type>).

## Related Links

[Relationship Rule Page](#)

[Content Items - Relationships Page](#)

[Content Section Page](#)

## View Profile Item History Page

Use the View Profile Item History page (JPM\_PROF\_HIST\_SEC) to view profile item rows for different effective-dates.

## Navigation

Click the icon in the View History column on the Person Profile page or Non-person Profile page.

**Note:** Click the content type item to update historical information on the Update <content type> page by using the scroll arrows.

### Image: View Profile Item History page

This example illustrates the fields and controls on the View Profile Item History page. You can find definitions for the fields and controls later on this page.

Effective Date	Competency	ID	*Evaluation Type	Reviewer ID	*Proficiency
02/01/2012	Java	5013	Self	Samish Patel	4-Very Good
03/06/2004	Java	5013	Self	Samish Patel	3-Good
01/01/2000	Java	5013	Self	Samish Patel	2-Fair

**Note:** The fields that appear on this page are configured in the Profile Type definition and are indicated as Summary.

This page lists the current, future, and historical rows for an item in a person or non-person profile, enabling you to track the history of a profile item. For example, you can use this page to review the changes to an employee's rating for a profile item, or the desired rating of an item in a job profile. Click the profile item link to view details of the profile item for the selected effective date.

Click Return to Profile to return to the Person Profile page or the Non-person Profile page, depending on the profile type.

## Profile Syndication Page

Use the Profile Syndication page (JPM\_PROF\_SYND\_SEC) to view the syndication source and target profiles.

You can also add and remove syndicated content on this page.

## Navigation

Select the Profile Action *Syndicate Profile* from the Non-person Profile page and click the Go icon.

### Image: Profile Syndication page

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

The screenshot shows the 'Profile Syndication' window. At the top, it displays 'Profile ID 100887' and 'Description Accountant'. Below this, there are two main sections: 'Syndication Sources' and 'Syndication Targets'. Each section has a header bar with 'Personalize | Find | View All' and navigation controls like 'First', '1 of 1', and 'Last'. The 'Syndication Sources' table has one row with 'Profile ID 100693' and 'Description Accountant', and a trash can icon in the last column. Below the table is a '+ Add New Syndication' link. The 'Syndication Targets' table is currently empty. At the bottom of the window is a 'Return to Profile' link.

#### Syndication Sources

Lists the profiles that provide content for the selected profile. If you want to remove syndicated content, select the trash can icon.

#### Add New Syndication

Click this link to open the Syndicate Profiles page to select the profiles from which content will be syndicated.

#### Syndication Targets

Displays the profiles that are targets for syndication. These profiles contain content from the selected profile. If you make changes to the selected profile, the syndicated profiles are automatically updated.

## Syndicate Profiles Page or Import Profile Items Page

Use the Syndicate Profiles or Import Profile Items pages (JPM\_PROF\_SRCH\_SEC) to select the profiles from which content will be syndicated or imported.

## Navigation

- Select Add New Syndication on the Non-person Profile - Profile Syndication page.
- Select the Profile Action *Import Profile Items* from the Non-person Profile page and click the Go icon.

### Image: Syndicate Profiles page

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

Non-person Profile

### Syndicate Profiles

Select the type of search that the criteria is based on: Profile Data, Profile Groups, Content Groups.

\*Search Type By Profile Data

Enter Search Criteria

Enter your search criteria in the box below, then select Search.

Profile ID

Profile Type

Description

Profile Status

Search

Select Profiles

Select from the result list, and then select Add Items to retrieve profiles items. Select OK to apply the profile items that have been retrieved. Select Cancel to exit without applying retrieved items.

Results

[Personalize](#) | [Find](#) | [View All](#) | |

First 1-3 of 3 Last

	Profile ID	Description	Profile Type
<input type="checkbox"/>	150008	Finance	Job
<input type="checkbox"/>	HXJOBC	Finance Director	Job
<input type="checkbox"/>	HXJOBC_SP	Finance Director	SP-Non-Person profile type

[Select All](#)
[Deselect All](#)

Add Items

OK

Cancel

## Image: Import Profile Items page

This example illustrates the fields and controls on the Import Profile Items page. You can find definitions for the fields and controls later on this page.

Non-person Profile

### Import Profile Items

Select the type of search that the criteria is based on: Profile Data, Profile Groups, Content Groups.

\*Search Type By Profile Data

Enter Search Criteria

Enter your search criteria in the box below, then select Search.

Profile ID

Profile Type

Description

Profile Status

Search

Select Profiles

Select from the result list, and then select Add Items to retrieve profiles items. Select OK to apply the profile items that have been retrieved. Select Cancel to exit without applying retrieved items.

Profile ID	Description	Profile Type
<input type="checkbox"/> 150008	Finance	Job
<input type="checkbox"/> HXJOBC	Finance Director	Job
<input type="checkbox"/> HXJOBC_SP	Finance Director	SP-Non-Person profile type

Select All Deselect All Add Items

OK Cancel

**Note:** The Syndicate Profiles page works the same as the Import Profile Items page where you select a search type and enter your search criteria.

The search types for the Syndicate Profiles page are *By Profile Data* and *By Profile Groups*.

The search types for the Import Profile Items page are *By Content Groups*, *By Profile Data*, and *By Profile Groups*.

When you syndicate content, you establish a relationship between the source profile and the target profile, such that changes to the source profile result in the same changes in the target profiles. View syndication relationships on the Profile Syndication page.

When you import profile items, the system does not establish a link between the source profile or content item and the target profile. This means that changes to the content of the source profile or item made after the import action do not affect the target profile.

## Selecting a Search Type

When you first enter the page, it lists the search types available:

### *By Profile Data*

Select to search for a non-person profile by profile ID, profile type, description, and status.

This option is available on the Import Profile Items page and the Syndicate Profiles page.

### ***By Profile Groups***

Select to search for a profile by limiting the search to a profile group type or profile group.

This option is available on the Import Profile Items page and the Syndicate Profiles page.

### ***By Content Groups***

Select to search for content items within a content group. This enables you to import multiple items within a content group in one step.

This option is available on the Import Profile Items page.

When you select the search type the Enter Search Criteria group box appears. When you enter search criteria and click Search, the Select Profiles and Results group boxes appear.

## **Enter Search Criteria**

Select the search criteria and click the Search button to search for profiles that you want to use for the import or syndication. The fields in this group box vary depending on the search type you select.

## **Select Profiles**

The Results group box lists the profiles or items that meet your search criteria. Select the profiles from which you want to import or syndicate content by selecting the check box next to the profile ID, profile group type, or catalog item.

### **Profile ID or Content Item ID**

Click the profile ID or content item ID to view the profile or item.

### **Add Items**

Click to import or syndicate content from the profiles or content items you selected. A message will appear indicating how many profile items will be imported. Click OK to merge imported items in content sections of profile. The Cancel button returns to the profile without merging items.

## **Profile Identity Page**

Use the Profile Identity page (JPM\_JP\_PID\_SEC) to add or edit profile identities associated with the profile.

## Navigation

Click the Add Profile Identity link or the Edit Identity icon in the Profile Identities grid area on the Non-person Profile page.

### Image: Profile Identity page

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

#### Profile Identity

Select the profile identity. The options available are determined by the profile type definition.

See [Profile Types - Identities Page](#).

#### Set ID

Select the set ID for the profile identity you want to link to this profile. This field appears if the profile identity selected has set ID as a key field. Set ID is a key field for job codes and salary grades.

#### Job Data, Job Family, Position Number, Salary Administration Plan, and Salary Grade

Select the profile identity you want to link to the profile. The number of fields that appear depends upon whether the profile identity has one or up to four key fields. For example, if you select *Salary Grade* in the Profile Identity field, you can enter a salary administration plan and grade. The system displays the Key 1 Value and Key 2 Value fields for the salary administration plan and salary grade on the Non-person Profile page.

## Profile Association Page

Use the Profile Association pages (JPM\_JP\_ASSC\_SEC) to add or update profile associations for the profile.

## Navigation

Click the Add Profile Association link or the Profile Association Option name link in the Profile Associations grid area on the Non-person Profile page.

### Image: Profile Association page

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

Profile associations are entities outside the Manage Profiles business process. PeopleSoft ePerformance templates are linked to profiles in this way.

#### Profile Association

Select the profile association that you want to link to the profile.

#### Document Type and Document Template ID

Enter the document type and template ID that you want to link to the profile. The system displays these fields as the Key <number> Value fields on the Non-person Profile page.

You can have up to four key fields. For example, if you select ePerformance in the field, the Key 1 Value field is for the Document Type and the Key 2 Value field is for document template ID.

## Person Profile - Summary of Changes Page

Use the Person Profile - Summary of Changes page (JPM\_JP\_PERSUMM\_SEC) to view a list of changes that have been made to the person profile that require approval.

You can also enter comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Person Profile page and not submit the items for approval. These items will not be available to other processes until they have been submitted for approval and approved.



## Navigation

Click the Save button or the Submit button on the Person Profile page when there are items that need to be submitted for approval.

### Image: Person Profile - Summary of Changes page

This example illustrates the fields and controls on the Person Profile - Summary of Changes page. You can find definitions for the fields and controls later on this page.

**Person Profile**

**Summary Of Changes**

Susan Hoinck

This page shows a summary of all the changes that you made that require approval. Any Changes not requiring approval have been successfully saved. Select the Submit button to request approval of these changes.

Changed Competencies (Requires Approval)					
Disposition	Competency	ID	Evaluation Type	Reviewer ID	Proficiency
Add	Auditing	8010	Approved/Official		3-Good

Comments

This page lists the changes that have been made to the person profile that require approval. The title of the scroll areas indicate that content sections that require approval. The fields displayed on this page are determined by the definition of the content section in the profile type. The properties in the content section with the Approval Required check box selected are displayed on this page only.

See [Content Section Page](#).

### Profile Type

Displays the profile type for the profile.

### Disposition

Displays the type of change made:

*Add:* If it is a new profile item

*Change:* If you have made any changes to the item properties.

*Delete:* If you have deleted a profile item.

### Comments

Enter comments for the approver, if applicable.

### Submit

Click this button to submit the changes for approval. The system then displays the Submit Confirmation page.

The Submit Confirmation page displays the approval routing.

When the system needs to route items to an approver, the item's status is changed to pending. If the items do not require approval, the approval routing specifies that no approvals are required.

---

**Note:** The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks Submit, the system display a message that no approvals are required, and changes will be immediately reflected in the profile.

---

### Cancel

Click this button to return to the Person Profile page without submitting the items for approval.

## Non-person Profile - Summary of Changes Page

Use the Non-person Profile - Summary of Changes page (JPM\_JP\_NPSUMM\_SEC) to view a list of changes that have been made to the non-person profile that require approval.

You can also enter comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Non-person Profile page not submit the items for approval.

### Navigation

Click the Save button or the Submit button on the Non-person Profile page when there are items that need to be submitted for approval.

### Image: Non-person Profile - Summary of Changes page

This example illustrates the fields and controls on the Non-person Profile - Summary of Changes page. You can find definitions for the fields and controls later on this page.

**Non-person Profile**

**Summary Of Changes**

Profile ID 100887      Accountant

Profile Type JOB      Job

This page shows a summary of all the changes that you made that require approval. Any Changes not requiring approval have been successfully saved. Select the Submit button to request approval of these changes.

Changed Competencies (Requires Approval)		
Disposition	Competency	ID
Add	Auditing	8010

Comments

Submit      Cancel

This page lists the changes to the non-person profile shown in the Profile ID field. The fields on this page are similar to the Person Profile - Summary of Changes Page.

## Syndication Exceptions Page

Use the Syndication Exceptions page (JPM\_JP\_SYJPM\_JP\_SYND\_EXC1ND\_EXC1) to display the syndication exceptions for a profile.

Syndication exceptions occur when an content item is syndicated from multiple source profiles but has different property values from each source profile.

### Navigation

Workforce Development, Profile Management, Profiles, Syndication Exceptions, Syndication Exceptions

### Image: Syndication Exceptions page

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

### Syndication Exceptions

Target Profile 100695

Managing Director

Profile Type ROLE

This profile has multiple syndication sources with the same content items. The content items in question are listed below. To see the details of the differences select view details.

Select Content Type		Personalize	Find	First	1-2 of 2	Last
Content Type	Descr		Content Item ID	View Details		
COMPETENCY	Competencies		0110	View Details		
COMPETENCY	Competencies		0157	View Details		

This page lists the content types that include syndication exceptions. Click the View Details link to access the Exception Details page that lists the profile items with syndication exceptions.

## Exception Details Page

Use the Exception Details page (JPM\_JP\_SYND\_EX\_SEC) to display details of profile items with exceptions.

## Navigation

Click the View Details link on the Syndication Exceptions page.

### Image: Exception Details page

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

Exception Details

Target Profile ID 100695

Managing Director

Content Type COMPETENCY

Competencies

Content Item ID 0110

Ability to manage own time

Current Profile Item from Syndicated Source

Source Profile Items

Properties

Source Profile	Effective Date	Competency	Status
100682	01/01/1980	0110	Active

Ignored Profile Items from Syndicated Source

Ignored Profile Items

Properties

Profile ID	Effective Date	Competency	Status
100680	01/01/1900	0110	Active

Return

### Current Profile Item from Syndicated Source

This tab displays the details of the source profile and profile items that have been syndicated into the target profile.

### Ignored Profile Items from Syndicated Source

This tab displays the details of the source profile that conflicts with the syndicated profile items specified in the Source Profile Items tab.

## Properties

Access the Properties tab.

### Image: Exception Details: Properties tabs

This example illustrates the fields and controls on the Exception Details: Properties tabs. You can find definitions for the fields and controls later on this page.

Current Profile Item from Syndicated Source

Source Profile Items

Properties

Description	Rating Model	Proficiency	Importance	FP Hiring Requirements	FP Promotion Requirements	FP Tenure Requirements
Competency Management Scale	3-Good	3 - Average				

Ignored Profile Items from Syndicated Source

Ignored Profile Items

Properties

Description	Rating Model	Proficiency	Importance	FP Hiring Requirements	FP Promotion Requirements	FP Tenure Requirements
Competency Management Scale	3-Good	3 - Average				

The Properties tabs display the field values in the syndicate source profiles. In the example shown, the Target Proficiency field has different values in the two source profiles. The values shown for the Source Profile Items are those inserted into the target profile.

---

## Approving Profile Changes

These topics provide an overview of profile approval processing and discuss how to:

- View profile approval transactions.
- View, approve, and deny profile changes.

## Understanding Profile Approval Processing

You can use approval processing to control:

- Updates to profile items on person profiles.

If approval processing is configured for a content section, when profiles items are added, deleted, or updated, it triggers approval processing.

- Updates to profile items and profile identities associated with non-person profiles.

If approval is required for profile identities, any changes to the list of profile identities associated with the profile triggers approval processing.

Configure profile approvals at the profile type level. You associate an approval definition with the profile type and then specify which content sections in the profile type require approval. For non-person profiles, you can also specify whether profile identities require approval.

Profile approvals uses the Approval Framework for managing approval of person and non-person profiles. The delivered approvals definitions provide the following profile approval processing:

- When employees make changes to their person profiles, the changes are routed to their manager for approval.

When managers or administrators update person profiles, these changes do not require approval.

- When managers create or update non-person profiles, the changes are routed to the profile administrator for approval.

When administrators update non-person profiles, the changes do not require approval.

You can use the delivered definitions or set up new approval definitions for managing profiles, according to your business needs.

---

**Note:** Profile Management does not support delegation and push back of approval transactions. All profile changes submitted together as a group for approval cannot be approved or denied at the line item level. The entire group must either be approved or denied.

---

### Related Links

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

## Pages Used to Approve Profiles

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Select Approval Transaction	JPM_JP_MNG_APPRVL	Workforce Development, Profile Management, Profiles, Approve Profiles, Select Approval Transaction	View a list of profiles waiting approval, with approved changes, or with changes that have been denied.
Approve Profiles	JPM_JP_PERS_APPR	Click a person profile ID on the Select Approval Transaction page.	View a list of the changes to a selected person profile. If the profile changes are pending approval, you can either approve or reject the changes.
Non-person Profile - Approval	JPM_JP_NONPER_APPR	Click a non-person profile ID on the Select Approval Transaction page.	View a list of the changes to a selected non-person profile. If the profile changes are pending approval, you can either approve or reject the changes.
View <content type>	JPM_APR_DTL_SEC	Click a profile item link on the Approval Profiles page or the Non-person Profile - Approval page.	View details of a profile item that has changed.
Approval Confirmation Deny Confirmation	JPM_JP_PER_APR_CNF	Click the Approve button or Deny button on the Approve Profiles page.	Displays a confirmation message. When you click OK, you return to the Select Approval Transaction page.

## Select Approval Transaction Page

Use the Select Approval Transaction page (JPM\_JP\_MNG\_APPRVL) to view a list of profiles waiting approval, with approved changes, or with changes that have been denied.

## Navigation

Workforce Development, Profile Management, Profiles, Approve Profiles, Select Approval Transaction

### Image: Select Approval Transaction page

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

**Select Approval Transaction**

Enter your search criteria and select the "Search" push button.

Submitted By

From Date

To Date

Profile Type

Workflow Status

Approval Transactions						Personalize   Find	First   1-3 of 3   Last
Originator	Submitted	Profile Type	Profile ID	Profile	Workflow Status		
Betty Locherty	02/05/2013 2:31PM	Person	100850	Cynthia Adams	Pending		
Rosanna Channing	02/05/2013 2:25PM	Person	100814	Rosanna Channing	Pending		
Susan Hoinck	02/05/2013 2:13PM	Person	100856	Susan Hoinck	Pending		

### Originator

Select an employee ID to search for profile changes submitted by that employee.

### From Date, To Date

Enter period begin and end dates to search for approvals that were submitted between the selected dates.

### Profile Type

Select a profile type to search for approvals for a specific profile type.

### Workflow Status

Select the status of the approvals you want to view:

*Pending:* To view profile changes that have been routed to you for approval.

*Approved:* To view profile changes that you have previously approved.

*Denied:* To view profile changes that you rejected.

### Search

Click to populate the Approval Transaction scroll area with profiles that match your search criteria.

## Approval Transactions

### Submitted

Displays the date that the profile changes were submitted for approval.

## Profile

Click the profile link to view the changes to the profile that require approval. The system displays the Approve Profiles page.

## Approve Profiles Page

Use the Approve Profiles page (JPM\_JP\_PERS\_APPR) to view a list of the changes to a selected person profile.

If the profile changes are pending approval, you can either approve or reject the changes.

## Navigation

Click a person profile ID on the Select Approval Transaction page.

## Image: Approve Profiles page

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

**Approve Profiles**

Empl ID KU0101  
 Name **Cynthia Adams**  
 Profile Type PERSON Person

Select the Approve button to approve the changes or the Deny button to reject the changes. You can view the item details by selecting the content description. Select the Approval Routing links to review approval information and comments specific to this transaction.

Changed Competencies (Requires Approval)			Personalize	Find	View All	First	1 of 1	Last
Disposition	ID	Competency	Evaluation Type	Reviewer ID	Proficiency			
Add	5010	PS Query	Supervisor/Manager		3-Good			

**Approval Routing**

**Approval by Manager**

Person Profile: Pending

Approval by Manager

Pending

ESGBPI (KU0007)

JPM by Posn Mgmt or Supervisor

**Comments**

Approve Deny

**Note:** Profile Management does not support delegation and push back of approval transactions. All profile changes submitted together as a group for approval cannot be approved or denied at the line item level. The entire group must either be approved or denied.

## Disposition

Displays one of these values to indicate the type of change:

*Add:* Indicates a new profile item.

*Change:* Indicates that the originator changed one or more properties for the profile item.

*Delete:* The originator has deleted the profile item.



**<content item>**

Click a content item link to view details of the changes to the profile item. The item properties are determined by the profile type definition.

**Comments**

Enter any comments for the originator relating to this approval transaction. The comments field is available only if the profile changes require approval. For profile items that have been denied or approved, an expandable Comments section appears in the Approval Routing group box where you can view comments that may have been entered by the originator.

**Approve**

Click this button to approve the profile changes. This button appears only for profile changes with a *Pending* workflow status.

**Deny**

Click this button to reject the profile changes. This button appears only for profile changes with a *Pending* workflow status.

**(View Profile as Printable Page icon)**

Click the View Profile as Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. BI Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report. The printable file displays approved items only.

See [Setting Up to Use BI Publisher Reports and Profiles](#).

**Approval Routing**

This group box displays the routing information from the Approval Framework.

**View/Hide Comments**

Click to view or hide the comments entered by the originator when he or she submitted the profile changes for approval.

---

## Searching and Comparing Profiles

These topics provide an overview of search and compare profiles and scores, and discuss how to:

- Select a source profile.
- Set up search criteria.
- View search results.
- Select profiles to compare.
- View comparison results.

## Understanding Search and Compare Profiles

The search and compare profiles feature enables employees, managers, and administrators to search for profiles that match selected search criteria and compare profiles. Before users can run any searches, you must build the indexes and define the search queries available on the Search Configuration page.

---

**Note:** For a limited set of profile type properties, the indexes store only code-based data. These indexes support search word matching only on the property data.

---

For each search type you define:

- Source and target profile types.

The source and the target profile types are the two profile types that are compared in the search. The source is the profile type that forms the basis for the search criteria and the target is the profile type being searched for matching profiles.

---

**Note:** The source and target profile types should have at least one searchable content section in common.

---

- Criteria rule.

The Criteria Rule field controls how the search works. There are three types of criteria rules:

- *Default, No Display:* The search has default search criteria based on a source profile and the search criteria are not displayed.
- *Default and Display:* The search has default search criteria based on a source profile and users can view and adjust the search criteria before running the search.
- *No Default, Display (Adhoc):* The search does not have default search criteria and users define the search criteria manually. For this type of search, the source and target profile types are not mandatory in the configuration. However, if these fields are blank, users must select source and target profile types before they define the search criteria.

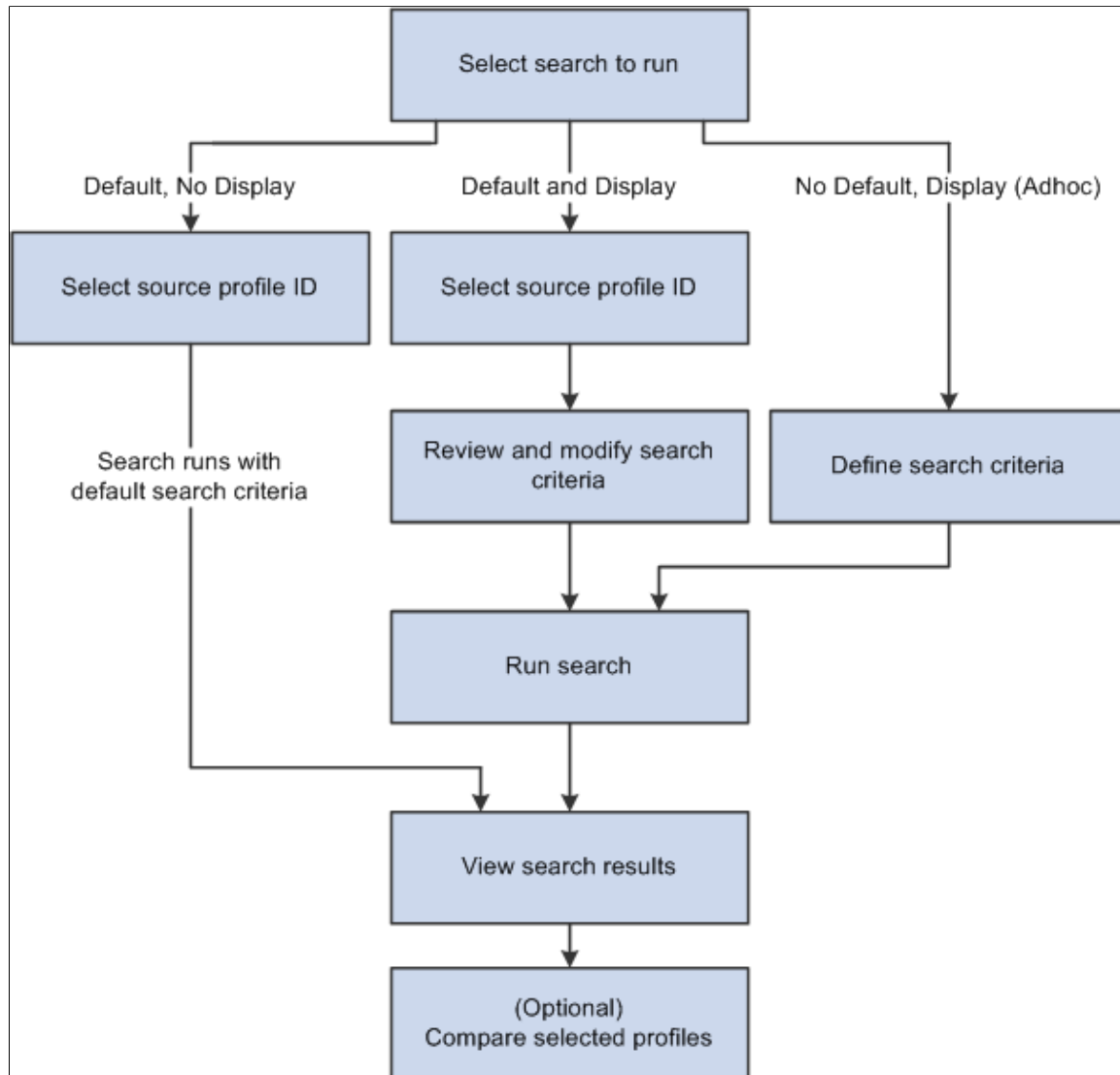
- Roles associated with the search.

Users can only run the searches that are defined for their role.

See [Understanding Search and Compare Profiles](#).

**Image: Search criteria selection during the search and compare profiles process**

This diagram illustrates the steps for Search and Compare Profiles for each type of search. The steps are discussed in detail in the topics that follow:



## Selecting a Search

Administrators can run search and compare profiles in two ways:

- By selecting the Search and Compare Profiles component from the Profiles menu.
- By selecting *Search and Compare Profiles* in the Profile Actions field on the Person Profile or Non-person Profile page.

Whichever navigation you use, the system displays only those searches that are configured for the administrator role. Roles are associated with searches on the Search Configuration page. In addition, if you run search and compare profiles from the Person Profile or Non-person Profile page, the list of searches is restricted to those that have a source profile type that matches the profile you are viewing.

The *PeopleSoft HCM 9.2: eDevelopment* documentation discusses the employee and manager self-service options for search and compare profiles.

## Selecting a Source Profile ID

If you select a search with a criteria rule of *Default, No Display* or *Default and Display*, you must select a source profile ID that provides the default search criteria for the search and compare. The Source Profile field on the Define Search Configuration page defines the profile type that you can select for the search.

---

**Note:** If you run the search from the profile pages, the system automatically uses the profile that you were viewing as the source profile ID and therefore you are not prompted for a source profile ID.

---

If the search has the criteria rule of *Default, No Display*, the system automatically runs the search after you select the source profile ID. For this type of search, the search criteria is based on the profile items that default from the source profile and you can't adjust the criteria before running the search.

## Defining Search Criteria

When you run a search with a criteria rule of *Default and Display* or *No Default, Display (Adhoc)*, you define or modify the search criteria using the Search Criteria page.

If you are running a search with a criteria rule of *Default and Display*, the page has default criteria based on the source profile type defined in the configuration. You can modify the default search criteria and add other criteria before you run the search.

If the search has a criteria rule of *No Default, Display (Adhoc)*, there are no default criteria; use the Search Criteria page to define the items you want to search for in the target profiles. You are prompted for the source and target profile types if these are not defined for the search. The system then refreshes the Search Criteria page with the content sections and search filters that you can use for the search.

The Search Criteria page includes a Search Filters group box section. Search filters enable you to narrow the search to specific profile groups, people in a current location, or those with travel preferences. If Current Location and Travel Preferences are defined as content sections in the target profile type, then these sections automatically appear as additional filters.

When you have defined the search criteria, click the Search button to run the search.

## Viewing Search Results

The Search Results page lists the profiles that match the search criteria. Matching profiles are ranked according to the profile scores calculated by the system. Profile scores are in the range 0 to 100, where a score of 100 means that the profile meets all the search criteria. Profile scores are discussed later in this topic. The travel and current location filters are used to filter the target profile candidates but do not contribute to the overall search score.

---

**Note:** Only profiles that you are authorized to access are listed among the search results.

---

See [Understanding Search and Compare Profile Scores](#).

If you want to adjust the search criteria and rerun the search, click the Modify Search Criteria link to return to the Search Criteria page. You can also run a new search by clicking the Search for Profiles link.

## Comparing Profiles

The profile scores shown on the Search Results page give an overall indication of how closely each profile matches the search criteria. However, you can also view a breakdown of the score at the item level. From the Search Results page you can:

- Compare the item scores for one profile in the search results with the search criteria by clicking the score.
- Compare up to ten profiles listed in the search results with the search criteria. Select profiles for comparison (between 1 and 10 profiles) and then click the Compare Profiles button.

---

**Note:** The Compare Profiles component is also available from the Profiles menu.

---

## Interfacing with Profile Management Search and Compare

PeopleSoft Profile Management delivers these interfaces to perform Search and Compare for other business processes:

- Employee Self Service Career Progression Chart  
compare the person's profile to their job profile.
- Administer Succession Planning - Succession 360 Degree  
Compares the person's profile to their job profile.

## Understanding Search and Compare Profile Scores

These topics discuss:

- The scoring calculation.
- Calculating property and item scores.
- Calculating item weighting based on the Importance field.
- Calculating the rating property score.
- Calculating the interest level property score.
- Calculating item scores for mandatory items.

## Overview of the Scoring Calculation

This topic discusses how the system calculates scores for target profiles to determine the profiles that best match the search criteria. Search and compare profiles uses the SES search engine to determine which profiles most closely meet the specified criteria. The SES search query is constructed of search elements generated from each profile item property in the search criteria. A full text search is performed to return matching profiles with a score which represents the match percentage. The scores are displayed in descending order with the profile having the best fit listed first.

To calculate the score for a target profile, the system calculates:

- Property scores for each property associated with an item.

The search criteria comprises a set of profile items that you want to search for in the target profile. However, items in the search criteria can have multiple properties. For example, if you add a competency to the search criteria you can also specify the desired rating for the competency, or if you add a language skill you can specify the desired writing proficiency for that language. The competency rating and the writing proficiency are properties of the competency and language skill profile items. The system calculates a property score for each property that you specify in the search criteria and these contribute to the item scores.

- Item scores for each item in the search criteria.

The item score is an average of the property scores for the properties associated with an item.

- Weighted item scores based on the Importance field.

The Importance field is used to denote the relative importance of each item in the search criteria. The system applies a weighting to item scores that reflect the Importance values assigned to the items. The default for the Importance field is 3 - *Average*, but this can be changed.

- The sum of the weighted item scores.

The overall profile score is the sum of the weighted item scores. This is the value that you see on the Search Results page.

Profile scores are also determined by the setting of the Mandatory check box. This is discussed later in this topic under the Calculating Item Scores for Mandatory Items section.

## Calculating Property and Item Scores

The property score varies according to the property. For most properties, profiles with matching properties score 100 and those that don't score 0. However, properties with a rating scale such as the rating property and the interest level property have scores that are in the range 0–100 according to how closely the source and the target match. This is discussed later in this topic in the Calculating the Rating Property section.

To calculate the item score the system calculates the average of the property scores as follows:

Total Property Score/ Property Count

In this example, the source profile contains three profile items for these content types:

<b>Content Type</b>	<b>Item ID</b>	<b>Other Properties</b>
Degree	BA (Bachelor of Arts)	Country: USA
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

For the degree item BA (Bachelor of Arts), the system searches for two properties, the item ID and the country. Therefore, the score for the degree item is calculated as follows:

(Property score item ID + Property score Country) / 2

This means that only profiles with the degree *BA* and country *USA* have an item score of *100*.

To show how the system calculates the property scores, this example compares the source profile with three person profiles, for Nicola Edwards, Rachel Norris, and Helen Scott.

This table lists the items in the person profile for Nicola Edwards:

<b>Content Type</b>	<b>Item ID</b>	<b>Other Properties</b>
Degree	BA (Bachelor of Arts)	Country: USA
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Rachel Norris:

<b>Content Type</b>	<b>Item ID</b>	<b>Other Properties</b>
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Helen Scott:

<b>Content Type</b>	<b>Item ID</b>	<b>Other Properties</b>
Degree	BA (Bachelor of Arts)	Country: GBR
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the item scores for each person profile:

<b>Item ID</b>	<b>Country Property</b>	<b>Person Profile</b>		
		Nicola Edwards	Rachel Norris	Helen Scott
BA	USA	$100 = (100+100)/2$	0	$50 = (100+0)/2$
DU (Dutch)		0	100	0
1006		100	100	100

## Calculating Item Weighting Based on the Importance Field

The system automatically includes the Importance field for each item in the search criteria and assigns the default value of *3-Average*, which means that each item is of equal importance. Depending on the search type, you can override the default importance to specify the relative importance of each profile item. When you run the search, the system applies a weighting to each item score according to the importance that you assigned to that item. The result is that profiles that include the most important items are assigned a higher score than profiles that only include the least important items.

The system calculates the weighting for each item as follows:

$$\text{Importance \%} = (\text{Item Importance} / \text{Total Importance}) \times 100$$

To show how this works, suppose you specify the following Importance values to items in the search criteria:

<b>Content Type</b>	<b>Item ID</b>	<b>Importance</b>
Degree	BA (Bachelor of Arts)	4-Above Average
Language	DU (Dutch)	3-Average
Tests/Examinations	1006 (Accounting Aptitude Test)	1-Low

In this example, the total importance points is  $8 = 4 + 3 + 1$

This table shows how the weighting is calculated for each item in the search criteria:

<b>Item ID</b>	<b>Importance</b>	<b>Weighting</b>
BA (Bachelor of Arts)	4-Above Average	$4/8 \times 100 = 50\%$
DU (Dutch)	3-Average	$3/8 \times 100 = 37.5\% = 38 \text{ rounded}$
1006 (Accounting Aptitude Test)	1-Low	$1/8 \times 100 = 12.5\% = 13 \text{ rounded}$

The system uses the item weighting value to calculate the weighted item score using this formula:

$$\text{Item Score (weighted)} = \text{Item score} \times \text{Importance \%}$$

Using the person profiles from the earlier examples you can see how the weighting affects the overall score. This table lists the item scores and the weighted scores for Nicola Edwards:

<b>Item</b>	<b>Item Score</b>	<b>Item Score (weighted)</b>
BA (Bachelor of Arts) /USA	100	$50 = 100 \times 50\%$
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	$12.5 = 100 \times 12.5\% = 13 \text{ rounded}$

Nicola's overall score is the sum of the weighted item scores:

$$\text{Total score} = 50 + 12.5 = 62.5 \text{ (63 rounded)}$$

---

**Note:** The system rounds the score to the nearest integer value.

---

This table lists the item scores and the weighted scores for Rachel Norris:



<i>Item</i>	<i>Item Score</i>	<i>Item Score (weighted)</i>
BA (Bachelor of Arts) / USA	0	0
DU (Dutch)	100	$37.5 = 100 \times 37.5\% = 38$ rounded
1006 (Accounting Aptitude Test)	100	$12.5 = 100 \times 12.5\% = 13$ rounded

Total score =  $37.5 + 12.5 = 50$

This table lists the item scores and the weighted scores for Helen Scott:

<i>Item</i>	<i>Item Score</i>	<i>Item Score (weighted)</i>
BA (Bachelor of Arts) / USA	50	$25 = 50 \times 50\%$
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	$12.5 = 100 \times 12.5\% = 13$ rounded

Total score =  $25 + 12.5 = 37.5 = 38$  rounded

## Calculating the Rating Property Score

If the search criteria includes items with the rating or interest level property (JPM\_RATING1, JPM\_RATING2, JPM\_RATING3, or JPM\_INTEREST\_LEVEL), the system calculates this property score differently than other properties. Instead of scoring 100 or 0, the system assigns a score that depends on how closely the rating or interest level in the target profile matches the rating or interest level specified in the search criteria.

The following use cases illustrate the scoring methodology which is tied to the profile usage (*PERSON* and *JOB*) of the search source and target profile types:

1. Person looking for a job match:
  - If target (job) profile has a matching item with a higher rating, then score < 100%.
  - If target (job) profile has a matching item with the same or lower rating, then score 100%.
  - If the target (job) profile has a matching item with a lower rating, then the “person overqualified” symbol will be displayed on the Compare page for that target profile item.
2. Job needs to be filled with the best person match:
  - If target (person) profile has a matching item with the same or higher rating, then score 100%.
  - If target (person) profile has a matching item with a lower rating, then score < 100%.
  - If the target (person) profile has a matching item with a higher rating, then the “person overqualified” symbol will be displayed on the Compare page for that target profile item.
3. Look for people with certain qualifications: (uses fit-gap scoring method)

- If target (person) profile has a matching item with the same rating, then score 100%.
  - If target (person) profile has a matching item with a lower or higher rating, then score < 100%.
  - The Compare page will not display the “person overqualified” symbol in the legend since this does not apply.
4. Look for jobs with certain criteria: (uses fit-gap scoring method)
- If target (job) profile has a matching item with the same rating, then score 100%.
  - If target (job) has a matching item with a lower or higher rating, then score < 100%.
  - The Compare page will not display the “person overqualified” symbol in the legend since this does not apply.

The interest level property is discussed in the Calculating the Interest Level Property Score section later in this topic.

The system calculates the rating property score based on the number of levels in the rating model defined for that item.

---

**Important!** When running a search and compare, the rating models used for the profile items in the source and target profiles must have the same number of rating levels. If the rating models are not consistent, the scores will not be accurate.

---

This table shows an example of a rating model and the rating levels that are assigned by the system for the search and compare:

<i><b>Rating</b></i>	<i><b>Description</b></i>	<i><b>Rating Level</b></i>
A	Excellent	5
B	Very Good	4
C	Good	3
D	Fair	2
E	Poor	1

When you assign a rating to a profile item, the system compares the level of the requested rating to the target rating level in the search and compare. For this example, the source profile has the following item and associated rating:

<i><b>Item ID</b></i>	<i><b>Rating</b></i>	<i><b>Rating Level</b></i>
0102 (Conceptual thinking)	B (Very Good)	4

This table lists target profiles that include the same item and the ratings for that item:

<b>Profile</b>	<b>Item ID</b>	<b>Rating</b>	<b>Rating Level</b>
01000	0102 (Conceptual thinking)	B (Very Good)	4
02000	0102 (Conceptual thinking)	A (Excellent)	5
03000	0102 (Conceptual thinking)	C (Good)	3

The system calculates the difference between the desired rating level (in the source) and the actual rating level in the target profiles as follows:

ABS (Desired Rating Level – Actual Rating Level)

ABS (absolute value) means that the system ignores the sign of the number that results from the calculation of Desired Rating Level – Actual Rating Level. By calculating the difference in this way, if the actual rating has a higher value than the desired rating the system doesn't use a negative number in the calculation of the rating score.

---

**Note:** This ABS calculation applies only to Use Cases 3 and 4 mentioned below. Use Cases 1 and 2 use a separate calculation algorithm.

---

This example demonstrates a search query using the Rating property. The Rating Model contains the following entries in its rating scale:

1–Little

2–Fair

3–Good

4–Excellent

Incremental weighting = 4 scale entries / 100 = .25

Search criteria is looking for profiles having a matching item whose rating is *3-Good*.

#### 1. *Use Case 1: Person looking for a Job match*

This use case measures how closely the job requirements match a person's qualifications indicating overqualification for those items where the person's skill level exceeds the job requirement.

The default logic for assigning the weights is as follows:

- Find entry number in scale (i.e. 3 is the 3<sup>rd</sup> scale entry).
- Calculate incremental weighting for each scale entry: total scale entries / 100 = n% (i.e. 4/100 = .25).
- If the target rating is greater than (>) the desired rating, the score calculation is:  

$$1 - [(\text{Target rating} - \text{desired rating}) * \text{incremental weight}]$$
- If Target rating less than or equal to (<=) the desired rating, a score of 100% is assigned.

The scores generated based on the search criteria rating value *3-Good* are:

Target rating of 1-Little = 100%

Target rating of 2-Fair = 100%

Target rating of 3-Good = 100%

Target rating of 4-Excellent =  $1 - [(4 - 3) * .25] = 75\%$

## 2. *Use Case 2: Job looking for a Person match*

This use case measures how closely the person's qualifications match the job's requirements indicating an overqualification for those items where the person's skill level exceeds the job requirement.

The scores generated based on the search criteria rating value 3-Good are:

target rating of 1-Little =  $1 - [(3 - 1) * .25] = 50\%$

target rating of 2-Fair =  $1 - [(3 - 2) * .25] = 75\%$

target rating of 3-Good = 100%

target rating of 4-Excellent = 100%

- Calculate incremental weighting: total scale entries / 100 = n% (i.e. 4/100 = .25).
- If target rating  $\geq$  desired rating, a score of 100% is assigned.
- If target rating < desired rating, the score calculation is:  
 $1 - [(\text{desired rating} - \text{target rating}) * \text{incremental weight}]$

## 3. *Use Case 3 and 4: Person compared to other people or Job compared to other jobs.*

This use case measures how closely the qualifications of several people match or the requirements of several jobs match (i.e. "fit-gap" scoring).

The scoring algorithm can be calculated as follows:

- Calculate incremental weight = total scale entries / 100 = n% (i.e. 4/100 = .25).
- Score =  $1 - (\text{ABS}(\text{target rating level} - \text{desired rating level}) * \text{incremental weight})$

The scores generated based on the search criteria rating value 3-Good are:

target has rating = 1-Little:  $1 - (\text{ABS}(1 - 3) * .25) = 50\%$

target has rating = 2-Fair:  $1 - (\text{ABS}(2 - 3) * .25) = 75\%$

target has rating = 3-Good:  $1 - (\text{ABS}(3 - 3) * .25) = 100\%$

target has rating = 4-Excellent:  $1 - (\text{ABS}(4 - 3) * .25) = 75\%$

This table lists the difference between the desired rating and the actual rating in the example profiles:

<b>Profile</b>	<b>Item ID</b>	<b>Desired Rating Level</b>	<b>Actual Rating Level</b>	<b>ABS (Desired – Actual Rating)</b>
01000	0102	4	4	0
02000	0102	4	5	1
03000	0102	4	3	1

This difference value is used in the calculation of the rating score, which the system calculates using the following formula:

Rating Score =  $100 - \text{ABS (Desired Rating Level - Actual Rating Level)} \times \text{Rating Weight}$

The Rating Weight is calculated as follows:

Rating Weight =  $100 / (\text{total number of rating levels in rating model})$

In the example rating model, the total number of rating levels is 5 and the rating weight is therefore  $20 = 100/5$ .

This table lists the rating score for the example profiles:

<b>Profile</b>	<b>Item ID</b>	<b>ABS (Desired – Actual Rating Level)</b>	<b>Rating Score</b>
01000	0102	0	100
02000	0102	1	80
03000	0102	1	80

The highest rating score is 100 and this is assigned only if the item has the same rating in both the source and the target. If the actual rating in the target is lower or higher than the desired rating, the rating score is less than 100. In the example, you can see that profile 02000 and 03000 have the same rating score even though the ratings are different. This is because the difference between the desired and actual rating is the same for these profiles.

The system applies weightings to items with the rating model property in the same way that it applies weightings to items without the rating model property.

To illustrate how this works, the next example shows how the system calculates scores for items with the rating model property. In this example, the job search criteria includes three competency items and desired rating, with importance values as listed in this table:

<b>Item ID</b>	<b>Rating</b>	<b>Rating Level</b>	<b>Importance</b>
0102 (Conceptual thinking)	C (Good)	3	2-Below Average
0110 (Time management)	A (Excellent)	5	4-Above Average

<b>Item ID</b>	<b>Rating</b>	<b>Rating Level</b>	<b>Importance</b>
0203 (Confidence & maturity)	B (Very Good)	4	3-Average

The target profiles for the search and compare are person profiles. This table summarizes the competency ratings for Nicola Richardson:

<b>Item ID</b>	<b>Rating</b>	<b>Rating Level</b>
0102 (Conceptual thinking)	B (Very Good)	4
0110 (Time management)	A (Excellent)	5
0203 (Confidence & maturity)	D (Fair)	2

In this search and compare, the system calculates two property scores for each item:

- Item ID.

The profiles that have the same competency item score 100. If the competency is missing, the item score is 0.

- Rating score for the Rating property.

The first step in the search and compare is to calculate the property scores for each competency item. This table lists the property scores for Nicola Richardson:

<b>Item ID</b>	<b>Rating Level</b>	<b>Item ID Score</b>	<b>Rating Score</b>
0102	4	100	$80 = 100 - [ABS(3-4) \times 20]$
0110	5	100	$100 = 100 - [ABS(5-5) \times 20]$
0203	2	100	$60 = 100 - [ABS(4-2) \times 20]$

Next the system calculates these values:

- Total property scores.

The total property score for each item is the sum of the property scores for item ID and rating.

- Average item score.

This is calculated as follows:

Total property score/Property Count

In this example, the property count is 2 (item ID and rating).

This table lists the item scores for Nicola:

	<b>Property Scores</b>			
<b>Item ID</b>	<b>Item ID Score</b>	<b>Rating Score</b>	<b>Total Property Score</b>	<b>Average Item Score</b>
0102	100	80	$180 = 100 + 80$	$90 = 180/2$
0110	100	100	$200 = 100 + 100$	$100 = 200/2$
0203	100	60	$160 = 100 + 60$	$80 = 160/2$

Next the system applies the weighting to the average item scores. To do this, the system calculates the weighting for each item based on the Importance assigned to the item using this formula:

$$\text{Importance \%} = (\text{Item Importance} / \text{Total Importance}) \times 100$$

In this example, the total importance is  $9 = 2 + 4 + 3$ .

This table lists the weightings for the competency items:

<b>Item ID</b>	<b>Importance</b>	<b>Importance %</b>
0102	2	$22.22\% = 2/9 \times 100$
0110	4	$44.44\% = 4/9 \times 100$
0203	3	$33.33\% = 3/9 \times 100$

The system calculates the weighted item score as follows:

$$\text{Item Score (weighted)} = \text{Item score} \times \text{Importance \%}$$

This table lists the weighted item scores for Nicola:

<b>Item ID</b>	<b>Average Item Score</b>	<b>Item score (weighted)</b>
0102	90	$20 = 90 \times 22.22\%$
0110	100	$44 = 100 \times 44.44\%$
0203	80	$27 = 80 \times 33.33\%$

Finally, the system calculates the overall profile score by summing all the weighted item scores:

$$\text{Total Profile Score} = 91 = 20 + 44 + 27$$

### Calculating the Interest Level Property Score

If the search criteria include items with the interest level property (JPM\_INTEREST\_LEVEL), the system calculates the property score in the same way as the rating property. The interest level property score

depends on how closely the interest level in the target profile matches the interest level specified in the search criteria:

$$\text{Interest Level Score} = 100 - \text{ABS}(\text{Desired Interest Level} - \text{Actual Interest Level}) \times \text{Rating Weight}$$

The Rating Weight is calculated as follows:

$$\text{Rating Weight} = 100 / (\text{total number of rating levels in rating model})$$

The delivered interest level model (which is delivered as a rating model) has 5 levels and the rating weight is therefore 20 (100/5).

## Calculating Item Scores for Mandatory Items

The system automatically includes the Mandatory check box for each item in the search criteria. If you select this check box for an item, the system searches for profiles that include the item and all the properties specified for that item. Profiles must include the item and an exact match for the requested item properties for the profile to be included in the search results. Profiles that have different item properties are not included.

For this example, the search criteria includes two competency items and a degree as shown in the table:

<i>Item ID</i>	<i>Rating</i>	<i>Country</i>	<i>Mandatory</i>
0110 (Time management)	3		Y
0203 (Confidence & maturity)	4		N
BA (Bachelor of Arts)		CAN	N

This table lists the items in the target profile and the item scores:

<i>Item ID</i>	<i>Rating</i>	<i>Country</i>	<i>Item Score (unweighted)</i>
0110 (Time management)	2		0
0203 (Confidence & maturity)	4		100
BA (Bachelor of Arts)		USA	50

**Note:** The target profile scores 0 for item 0110 because the rating does not match the search criteria and the item is specified as mandatory. If the mandatory item receives a score of 0, then the profile will not be returned as a search result.



## Pages Used to Search and Compare Profiles

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Search for Profiles	JPM_SRCH_TRANSFER	<ul style="list-style-type: none"> <li>Workforce Development, Profile Management, Profiles, Search and Compare Profiles, Search for Profiles</li> <li>Select <i>Search and Compare Profiles</i> in the Profile Actions field on the Non-person Profile page or the Person Profile page.</li> </ul>	Select from the list of search queries that are defined for administrators. Use the Search Configuration page to set up searches for administrators, employees, and managers.
Select a Profile	JPM_COM_PROF_SRCH	Select a search link on the Search for Profiles page.	Select the profile that you want to use as the source of criteria for the search. The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of <i>Default</i> , <i>No Display</i> or <i>Default and Display</i> and the source profile type is a non-person profile type. If the criteria rule is <i>No Default</i> , <i>Display</i> , you enter the search criteria manually on the Search Criteria page.
Person Search - Simple	HR_PSS_SEARCH	<ul style="list-style-type: none"> <li>Select a search that uses a person profile as the source on the Search for Profiles page.</li> <li>Select <i>Express Interest for Employee</i> in the Profile Actions field on the Non-person Profile page and click the Go icon.</li> </ul>	<p>Select the person profile that you want to use as the source for the search criteria.</p> <p>This page is displayed only if the search selected has a criteria rule of <i>Default</i>, <i>No Display</i> or <i>Default</i>, <i>Display</i> and the source profile type is for a person profile.</p>
Search Criteria	JPM_SRCH_CRITERIA	<ul style="list-style-type: none"> <li>Select a search link on the Search for Profiles page.</li> <li>Click the Modify Search Criteria link on the Search Results page.</li> </ul>	<p>View and modify the search criteria for the search and compare.</p> <p>If the search selected on the Search for Profiles page has a criteria rule of <i>Default and Display</i> or <i>No Default</i>, <i>Display (Adhoc)</i>, this page is displayed before you run the search. If the criteria rule is <i>Default</i>, <i>No Display</i>, the system runs the search without first displaying the Search Criteria page.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Related Items Criteria	JPM_SRCH_RELITMS	Select the Related Items icon on the Search Criteria page.	Enter the related items to be included as search criteria. These are from a parent item that has been defined with related items in the Content Catalog.
Search Results	JPM_SRCH_RESULT	<ul style="list-style-type: none"> <li>Click the Search button on the Search Criteria page.</li> <li>Select a profile on the Select a Profile page.</li> </ul>	Displays the results of the search.
Add to Interest List - Confirmation	JPM_INT_CONFIRM	<ul style="list-style-type: none"> <li>Select profiles on the Search Results page and click the Add to Interest List button.</li> <li>Enter search criteria on the Person Search - Simple page, select a person, and click the OK button.</li> </ul>	<p>Confirm that the non-person profiles that you selected on the Search Results page have been added to the person's interest list.</p> <p>The Add to Interest List button is available only if the search that you ran has a target profile type that is a non-person profile type.</p>
Select Profiles to Compare	JPM_COMPARE_MAIN	Workforce Development, Profile Management, Profiles, Compare Profiles	Select the source and the target profile types that you want to compare.
Compare Results Match Results	JPM_COMPARE_RESULT	<ul style="list-style-type: none"> <li>Select source and target profiles on the Compare Profiles - Select Profiles to Compare page and click the Compare Profiles button.</li> <li>Select profiles on the Search Results page, select profiles for comparison then select the Compare Profiles button.</li> <li>Click the score link on the Search Results page.</li> <li>Click the Compare button on the Interest List page.</li> <li>Select the <i>Compare employee profile to current job</i> profile action on the Person Profile page and select the Go icon.</li> </ul>	View a summary of the comparison of the profiles you selected.

## Select a Profile Page

Use the Select a Profile page (JPM\_COM\_PROF\_SRCH) to select the profile that you want to use as the source of criteria for the search.

The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display*, you enter the search criteria manually on the Search Criteria page.

### Navigation

Select a search link on the Search for Profiles page.

### Image: Select a Profile page

This example illustrates the fields and controls on the Select a Profile page. You can find definitions for the fields and controls later on this page.

Job Profile Search

Select a Profile

To view a Profile, enter your search criteria and select the "Search" push button.

Basic Search Criteria

Profile ID

Type Job

Profile Name

Status

Legacy Profile ID

Search

Clear

Advanced Search

✓ Your search has returned 4 results.

Profile Search Results

Personalize | Find | View All | | First 1-4 of 4 Last

Profile ID	Profile Type	Profile Name	Legacy Profile ID
FEJ001	Job	HR Representative	Active
FEJ010	Job	HR Manager	Active
HXCS10_CP	Job	HR Admin	Active
HXCSP10_CP	Job	HR Administrator	Active

Select All

Deselect All

Return to Previous Page

### Basic Search Criteria

#### Profile ID

Select the profile, or enter part of the profile ID.

#### Type

Displays the profile type defined as the source for the search.  
The source and target profile types are configured on the Search Configuration page.

#### Profile Name

Enter the profile name, or part of the profile name, to search for profiles with matching names.

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<b>Status</b>	Select a status to list profiles of one status only, such as <i>Active</i> .
<b>Legacy Profile ID</b>	Enter the legacy profile ID if you want to search for a profile that existed in earlier versions of HR. The legacy profile ID is assigned to the profile during upgrade.
<b>Search</b>	Click this button to list profiles that match the search criteria.
<b>Clear</b>	Click this button to clear all search criteria or search results from the page.

## Profile Search Results

This scroll area lists the profiles that match the search criteria you selected. Click the profile name that you want to use as the source for the search and compare. Depending on the search type, the system either displays the Search Criteria page or runs the search using the selected profile. If the criteria rule for the search is *Default, Display* the system displays the Search Criteria page and you can modify the search criteria before running the search. If the criteria rule for the search is *Default, No Display* the system runs the search and displays the results on the Search Results page.

## Search Criteria Page

Use the Search Criteria page (JPM\_SRCH\_CRITERIA) to view and modify the search criteria for the search and compare.

If the search selected on the Search for Profiles page has a criteria rule of Default and Display or No Default, Display (Adhoc), this page is displayed before you run the search. If the criteria rule is Default, No Display, the system runs the search without first displaying the Search Criteria page.

## Navigation

- Select a search link on the Search for Profiles page.
- Click the Modify Search Criteria link on the Search Results page.

### Image: Search Criteria page (1 of 2): Search Filters section of the page

This example illustrates the fields and controls on the Search Criteria page: Search Filters section of the page. You can find definitions for the fields and controls later on this page.

Search and Compare Profiles

Search Criteria - Find people having certain qualifications

Search for profile results that have an exact match on one or more of the profile item criteria entered.

Search
Clear

Search Filters

The search filter will limit the search to specific profile groups. You can add search filters by selecting the Add Search Filter icon. Select the filtering method and enter the profile group.

\*Find Profile Group Results
with at least one group

Profile Groups

*Profile Group Type	Profile Group ID	Profile Group Name

Add Group Filter

Find Location Results
with at least one filter

Location

Current Country	Current Business Unit	Current Location
USA		

Add Location Filter

Travel Preferences

Willing to Relocate	Take International Assignment	Willing to Travel
Yes	No	Yes

## Image: Search Criteria page (2 of 2): Search Criteria section of the page

This example illustrates the fields and controls on the Search Criteria page (2 of 2): Search Criteria section of the page. You can find definitions for the fields and controls later on this page.

**Search Criteria**

Select items in one or more content sections, entering any properties relevant to the search. Specify the item importance and indicate if it is mandatory. Select the Search button to run the search.

Item	*Importance	Mandatory	Related Items	Target Proficiency
Communication Skills	3 - Average	<input type="checkbox"/>		

+ Competencies Remove All

Item	*Importance	Mandatory	Country
Bachelor of Arts	3 - Average	<input type="checkbox"/>	
Bachelor of Science	3 - Average	<input type="checkbox"/>	

+ Degrees Remove All

+ Honors and Awards

+ Language Skills

+ Licenses and Certifications

+ Memberships

+ Military Rank

Use this page to define the search criteria. If the search that you selected has the criteria rule of *Default, Display*, the system automatically displays the default search criteria based on the source profile you selected on the Select a Profile page or the Person Search page. Review and modify the search criteria as required.

However, if the search you selected doesn't have the profile types defined, you must first specify the source and target profile types to use, and then define the search criteria manually.

---

**Note:** The content types listed on this page and the fields for each content type are determined by the search type selected, the profile type definitions, and the content types definitions.

---

See [Understanding Search and Compare Profiles](#).

See [Setting Up Profile Types](#).

See [Setting Up Content Types and Properties](#).

### Source Profile Type and Target Profile Type

Select the profile types that you want to use in the search. The source profile type is used as the basis for the search criteria. The target is the profile type from which the system searches for matching profiles.

These fields appear for adhoc searches that don't have the source and target profile types defined on the Search Configuration page.

When you complete these fields, the system displays the content sections and search filters that you can use in the search.

<b>Search</b>	Click to initiate the search based on the criteria you have specified on this page. The system performs the search and displays the matching profiles on the Search Results page.
<b>Clear</b>	Click this button to clear the search criteria.

## Search Filters

Filters may include profile groups, current location, and travel preferences, depending upon how the profile was set up. Use the Profile Groups group box to limit the search to selected profiles. The Profile Groups group box appears only if the target profile type belongs to searchable profile groups. Filter group boxes for current location and travel preferences may also appear if the target profile type includes this content section in the Profile Type configuration.

Filter data is used to filter the target profile candidates, but does not contribute to the overall search score. For example, you may want to find those person profiles that best match the requirements of the job Manager-Information Systems and are currently located in the Paris office. The Current Location fields filter out those candidates that are not in the Paris office and the score of the candidates is based on how well their profiles match the Manager-Information Systems job profile. If no candidates are found, then the Travel Preferences properties, such as Willing to Relocate and Take International Assignment can be used as filters to find those candidates outside the Paris office. The PERSON profile type is delivered with the Mobility content section where you can enter these preferences for a person.

See [Profile Group Types Page](#).

## Search Criteria

Fields in this section depend upon how the profile type is set up.

<b>Importance</b>	Select a value that indicates the importance of the profile item. The default value is 3 - <i>Average</i> . The system uses the Importance value to determine how well profiles match the search criteria. If you select a high importance value, those profiles that include the profile item are considered a better match than the profiles without the profile item.
<b>Mandatory</b>	If you want matching profiles to include certain profile items, select this check box for those items. When you run the search, the system searches for target profiles with matches on the mandatory items and the same item properties that are specified in the search criteria. For example, if the search criteria includes a mandatory competency item and you specify a proficiency rating for the competency, the search results include only those profiles with the competency item and the same proficiency rating.
<b>Related Items</b>	<p>Select this icon to access the Related Items page and enter related items that should be part of the search.</p> <p>This icon is available when the content item has been set up with related items.</p>

## Related Items Criteria Page

Use the Related Items Criteria page (JPM\_SRCH\_RELITMS) to enter the related items to be included as search criteria.

### Navigation

Select the Related Items icon for an item on the Search Criteria page.

### Image: Related Items Criteria page

This example illustrates the fields and controls on the Related Items Criteria page. You can find definitions for the fields and controls later on this page.

Search and Compare Profiles

Related Items Criteria - Find jobs

Competency J005      Communication Skills

Sub-Competencies		
Item	Importance	Mandatory
Written communication	3 - Average	<input type="checkbox"/>

+ Add Related Item

OK      Cancel

Select the Add Related Item link to include specific related items in you search. Indicate whether this item should be a mandatory item included in the search. When the search criteria includes a mandatory related item, the search results include only those target profiles with that related item.

## Search Results Page

Use the Search Results page (JPM\_SRCH\_RESULT) to displays the results of the search.



## Navigation

- Click the Search button on the Search Criteria page.
- Select a profile on the Select a Profile page.

### Image: Search Results page (1 of 2)

This example illustrates the fields and controls on the Search Results page (1 of 2). You can find definitions for the fields and controls later on this page.

[Search and Compare Profiles](#)

### Search Results - Find jobs

The following profiles match one or more of the items entered as search criteria.

To view the details for a profile, select the hyperlink on the Profile Name below. Up to ten profiles can be compared or added to an interest list by selecting the profile result checkbox. Then select the Compare Profiles button to display the profile item comparison details or select the Add to Interest List button to add to an employee interest list.

☒ Your search returned result 1 - 10 out of 44. Next

Select	Score	Profile Name
<input checked="" type="checkbox"/>	50	<a href="#">N900001 - Position N90001</a>
<input checked="" type="checkbox"/>	50	<a href="#">JPN Technical Staff Grade 3</a>
<input type="checkbox"/>	50	<a href="#">Mgr-Finance</a>
<input type="checkbox"/>	50	<a href="#">Mgr-Finance</a>
<input type="checkbox"/>	25	<a href="#">Another Job Profile HXESS008</a>
<input type="checkbox"/>	25	<a href="#">Finance Director</a>
<input type="checkbox"/>	25	<a href="#">HXMP02 CP sr. Clerk</a>
<input type="checkbox"/>	25	<a href="#">Director for CP</a>
<input type="checkbox"/>	25	<a href="#">HXSS04 Sr Mgr</a>
<input type="checkbox"/>	25	<a href="#">HXSS02 CP Sr Officer</a>

## Image: Search Results page (2 of 2)

This example illustrates the fields and controls on the Search Results page (2 of 2). You can find definitions for the fields and controls later on this page.

**Selected Profiles**

Select the Compare Profiles button to compare selected profiles against the search criteria. Select the Add to Interest List button to add profiles to the interest list of a selected person.

Job Profiles	
Score	Profile Name
50	JPN Technical Staff Grade 3
50	N900001 - Position N90001

[Compare Profiles](#)
[Add to Interest List](#)

[Modify Search Criteria](#)  
[Return to Search For Profiles](#)

**Important!** When running Search and Compare, if the Indexes cannot be located, the system will issue a message stating that the search index could not be found. This means that the process Schedule Search Indexes (SES) has not been run to create the indexes or the SES environment is not accessible. When the index has been located, but the search criteria does not find any profile matches, the system will issue a message stating that your search did not return any results.

## Search Results

### Select

Select this check box to select the profile. This will add the profile to the Selected Profiles section and will be used in the compare process. You can select up to ten (10) profiles to compare.

### Score

Click the score link to view the Match Results page. This page lists the items in the search criteria and the corresponding item score for the profile that you selected.

### Profile Name

Click the profile name link to view the profile. The system displays the Person Profile page or the Non-person Profile page depending on the profile type.

## Selected Profiles

### Compare Profiles

Click this button to run the comparison. You can include 1 and 10 profiles for comparison. The system displays the Compare Results page, which lists the items in the search criteria and the corresponding item scores for the profiles that you selected.

### Add to Interest List

Click this button to add the profiles you have selected to a person's interest list.

This button is displayed when the target profile type for the search is a non-person profile type.

### Modify Search Criteria

Click this link to view and modify the search criteria if you want to rerun the search with different search criteria. The system displays the Search Criteria page.

### Return to Search for Profiles

Click this link to run a new search. The system returns you to the Search for Profiles page that lists all the searches available.

## Compare Profiles Page

Use the Compare Profiles page (JPM\_COMPARE\_MAIN) to select the source and the target profile types that you want to compare.

### Navigation

Workforce Development, Profile Management, Profiles, Compare Profiles

### Image: Compare Profiles page

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

**Compare Profiles**

Enter the source Profile Type and the Source Profile ID you want to use as the basis for the comparison. Then enter the Target Profile Type and add the Target Profiles that will be used in the comparison against the Source Profile. Select Compare to view the report.

Source Profile Type:  Job

Source Profile ID:  HR Administrator

Target Profile Type:  Person

Add Target Profiles		
Empl ID	Description	
<input type="text" value="HXCPADM01"/>	Andy Garcia	
<input type="text" value="HXCPADM02"/>	Doris Green	

Add Profile

### Source Profile Type

Select the profile type that you want to use for the source of the compare.

### Source Profile ID

Select the profile that you want to compare the target profiles against.

<b>Target Profile Type</b>	Select the profile type from which the target profiles are selected.
<b>Target Profile ID or Empl ID (employee identification)</b>	Select the profile ID. The system compares the target profiles with the profile selected in the Source Profile ID field.
<b>Add Profile</b>	Click to add another target profile.

## Compare Results Page

Use the Compare Results page (JPM\_COMPARE\_RESULT) to view a summary of the comparison of the profiles you selected.

## Navigation

- Select source and target profiles on the Compare Profiles page and click the Compare Profiles button.
- Select profiles on the Search Results page, select the check box next to 1 to 10 profiles and then select the Compare Profiles button.
- Click the score link on the Search Results page.
- Click the Compare button on the Interest List page.
- Select the *Compare employee profile to current job* profile action and select the Go icon.

### Image: Compare Results page

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

Compare Profiles		
Compare Results		
*View Content Section <View All Sections>		
<span>■ No Match</span> <span>▼ Partial Match</span> <span>● Complete Match</span> <span>◆ Person Overqualified</span>		
Compare Results		
Search Criteria - HR Administrator	Andy Garcia: 100%	Doris Green: 22%
<b>Competencies</b> <i>Developing others :</i> Proficiency: 4-Very Good	<b>Competencies</b> ● 100% 4-Very Good	<b>Competencies</b> ◆ 100% 5-Expert
<i>Develop goals for organization :</i> Proficiency: 5-Expert	● 100% 5-Expert	● 100% 5-Expert
<i>Negotiation/mediation :</i> Proficiency: 4-Very Good	◆ 100% 5-Expert	■ 0% --
<i>Human Relations :</i> Proficiency: 4-Very Good	◆ 100% 5-Expert	■ 0% --
<b>Degrees</b> <i>Bachelor of Science :</i>	<b>Degrees</b> ● 100%	<b>Degrees</b> ■ 0%
<i>Master of Business Admin :</i>	● 100%	● 100%
<b>Language Skills</b> <i>English :</i> Reading Proficiency: 3 - High Native Language: No Able To Translate: No Able To Teach: No	<b>Language Skills</b> ● 100% 3 - High No No No	<b>Language Skills</b> ● 100% 3 - High No No No
<b>Licenses and Certifications</b> <i>Procurement Management :</i> Renewal In Progress: No License Verified: No	<b>Licenses and Certifications</b> ● 100% No No	<b>Licenses and Certifications</b> ■ 0% -- --
<b>Responsibilities</b> <i>Research and Resolve customer issues :</i>	<b>Responsibilities</b> ● 100%	<b>Responsibilities</b> ■ 0%

This page displays the results of the compare. You access this page from the Search Results page, Compare Profiles page, or by clicking the Compare button on the Interest List page. In the left hand

column the system displays the content sections and content items in the source profile or search criteria. Related items appear as an indented item beneath the item to which it is related. The remaining columns show the corresponding data in the target profiles. The system shows the item scores for each target profile. Select the score links to view more details about the profile item.

#### **View Content Section**

Select *<View All Sections>* to list all the sections in the profiles or select a section to view the information for one content section. The default is *<View All Sections>*.

---

## **Managing Interest Lists**

These topics provide an overview of interest lists, list common elements, and discuss how to:

- Manage employees' interest lists.
- View interest lists by profile.

## **Understanding Interest Lists**

Interest lists enable employees to maintain a list of the non-person profiles that are of interest. They can also compare the added profile to their own profile to determine degree of a fit. The interest list can include any profile. For example, employees could add profiles for jobs that they want to include in their career planning, or job profiles that are similar to their own profile. Each employee has one interest list that can be modified by the employee, the employee's manager, and the profile administrator:

- Employees maintain their own interest list using the self-service options provided in eDevelopment.

The interest list shows who added each profile to the interest list, and employees can remove any profiles that they added. Employees cannot remove profiles added by their manager or the profile administrator.

- Managers can view and modify interest lists for their direct reports using the manager self-service options in eDevelopment.

Managers can remove profiles that they added to an interest list only. They cannot remove profiles that are added by the employee or the profile administrator.

- Administrators have access to interest lists based on the row-level security permissions associated with their role.

Administrator can remove any profile from an interest list, including those added by the employee and manager.

### **Related Links**

"Maintaining Interest Lists (*PeopleSoft HCM 9.2: eDevelopment*)"

## **Common Elements Used to Manage Interest Lists**

### **Profile**

Click the profile link to view the profile. From the Interest List page, the link takes you to the Non-person Profile page and

from the Interest List - View by Profile page, the link takes you to the Person Profile page.

### Assigned By

Displays the name of the person who added the profile to the interest list. This can be the employee, the employee's manager, or an administrator.

## Pages Used to Manage Interest Lists

Page Name	Definition Name	Navigation	Usage
Interest List by Person	JPM_INTEREST_PERS	Workforce Development, Profile Management, Profiles, Interest List by Person, Interest List by Person	View an employee's interest list and add profiles to the list.
Interest List by Profile	JPM_INTEREST_PROF	Workforce Development, Profile Management, Profiles, Interest List by Profile, Interest List by Profile	View a list of employees who have a selected profile on their interest list. You can also add the selected profile to an employee's interest list.

## Interest List by Person Page

Use the Interest List by Person page (JPM\_INTEREST\_PERS) to view an employee's interest list and add profiles to the list.

### Navigation

Workforce Development, Profile Management, Profiles, Interest List by Person, Interest List by Person













### Image: Interest List by Person page


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

### Interest List By Person

Use this page to manage interest lists.

Empl ID KU0010 Antonio Santos

Interest List		Personalize   Find   View All    	First  1-4 of 4  Last
Profile	Assigned By	Compare Profiles	Delete
Accountant	Betty Locherty		
Admin Assistant	Betty Locherty		
Analyst - Financial	Betty Locherty		
General Clerk	Betty Locherty		

 Add Profile

**Add Profile**

Click this link to add another profile to the employee's interest list.

**Compare Profiles**

Click this icon to access the Compare Results page. In order to use the compare process, you must first build the appropriate SES indexes. See. [Building the Search Indexes](#).

## Interest List by Profile Page

Use the Interest List by Profile page (JPM\_INTEREST\_PROF) to view a list of employees who have a selected profile on their interest list.

You can also add the selected profile to an employee's interest list.

**Navigation**

Workforce Development, Profile Management, Profiles, Interest List by Profile, Interest List by Profile

**Image: Interest List by Profile page**

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

**Interest List By Profile**

This page displays the employees that have expressed interest in a profile.

Profile ID 100685 Human Service Professionals

✓ You have successfully added the person/s - Susan Hoinck - to this interest list. The addition will occur when the transaction is saved.

Interest List			
Personalize   Find   View All   [Print]   [Calendar]			
First 1-2 of 2 Last			
Person	Assigned By	Compare Profiles	Delete
Antonio Santos	Betty Locherty	»	🗑️
Susan Hoinck	Betty Locherty	»	🗑️

+ Add Person

**Add Person**

Click this link to add the profile to another employee's interest list.

**Compare Profiles**

Click this icon to access the Compare Results page. In order to use the compare process, you must first build the appropriate SES indexes. See. [Building the Search Indexes](#).

## Tracking Training

These topics provide an overview of how to track employee training and discuss how to track employee training.



## Understanding How to Track Employee Training

The Administer Training business process enables you to set up training courses and manage course sessions. If you use Administer Training to manage your training courses, the Training page (COURSE\_STUDNT\_ENRL) gives you a summary of employees' training history.

Use the Professional Training page (EDUCAT\_TRAIN\_GBL) to track other training that is not managed using Administer Training. You can use this page to track training that an employee is enrolled in, or has completed.

This topic discusses how to record employee training.

### Related Links

"Course Student Enrollment Page (*PeopleSoft HCM 9.2: Human Resources Administer Training*)"

## Pages Used to Track Employee Training

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Training	COURSE_STUDNT_ENRL	Workforce Development, Profile Management, Profiles, Training, Training	View details of training courses that the employee has completed, enrolled in, or on the waiting list. This page displays course sessions that you manage using the Administer Training business process.
Professional Training	EDUCAT_TRAIN_GBL	<ul style="list-style-type: none"> <li>Workforce Development, Profile Management, Profiles, Professional Training, Professional Training</li> <li>, Result Tracking, Manage Person Profiles, Professional Training, Professional Training</li> </ul> Workforce Administration, Global Assignments, Assignee Qualifications, Professional Training, Professional Training	Record employee training that is not maintained using the Administer Training business process.

## Professional Training Page

Use the Professional Training page (EDUCAT\_TRAIN\_GBL) to record employee training that is not maintained using the Administer Training business process.

## Navigation

- Workforce Development, Profile Management, Profiles, Professional Training, Professional Training
  - , Result Tracking, Manage Person Profiles, Professional Training, Professional Training
- Workforce Administration, Global Assignments, Assignee Qualifications, Professional Training, Professional Training

## Image: Professional Training page

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

**Professional Training**

Antonio Santos Person ID KU0010

Training Personalize | Find | View All | First 1-2 of 2 Last

Course Title	School Name	Course Start Date	Course End Date	Enrollment/Attendance
Organizational Behavior	Sargam Prof School	05/04/2008	06/16/2008	Completed
Time Management		03/16/2008	03/20/2008	Completed

### Course Title

Enter the name of the training course.

### School Name

Enter the name of educational establishment or training company that runs the course.

### Course Start Date and Course End Date

Enter the date on which the course was started and completed.

# Matching Profiles

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## Understanding Profile Comparisons

The PeopleSoft Manage Profiles business process provides three ways to compare profiles:

- Search and compare profiles.
- Compare profiles.
- Role matching.

### Search and Compare Profiles

Using the Search and Compare Profiles option you can configure searches to suit your content catalog, profile types, and users. Users select the search that they want to run and the search returns the profiles that best match the search criteria. Each profile in the search results is assigned a score that indicates how well the profile matches all the item properties specified in the search criteria. You can also compare profiles in the search results with the search criteria. Depending on the search type, users can also modify the search criteria, which makes the Search and Compare Profiles more flexible than role matching.

Use the Search and Compare Profiles option if you have a specific profile or profile item criteria and you want to search for matching profiles within a profile type.

See [Searching and Comparing Profiles](#).

### Compare Profiles

The Compare Profiles option provides an online comparison of the profile items in a source profile with one or more target profiles.

See [Compare Results Page](#).

### Profile Matching

Use the profile matching options if you want to compare a specific employee profile with a specific non-person profile and you want fit-gap information on each competency based on proficiency and importance only.

The options on the Workforce Development, Profile Management, Profiles, Profile Matching menu enable you to compare the competencies and other profile content of an employee's profile against those required by a non-person profile, or a group of employee profiles against a non-person profile for a job task. The degree of fit is based on importance (field JPM\_IMPORTANCE) and in the case of competencies, item proficiency (field JPM\_RATING1). The comparison is not configurable and will use these fields only. The points assigned as a match score are based on the importance points of the matching items. If the non-person profile uses a profile type that does not have JPM\_IMPORTANCE defined as a field on the content types, each item is given an importance of 1 and the points scored will match the number of items matched.

The matching can be done using any profile type, but the delivered PERSON and ROLE profile types are set up to work best with the scoring of points in the matching process.

Use Search and Compare Profiles if you want to:

- Search person or non-person profiles for best matches.

With profile matching you select one person profile and one non-person profile and then match on proficiency and importance only. With Search and Compare Profiles, you have greater flexibility to set up search criteria and the searches return the profiles that best match those criteria.

See [Searching and Comparing Profiles](#).

- Make searches available to employees and managers.

If you have eDevelopment installed you can set up searches for self-service users.

See "Searching and Comparing Profiles (*PeopleSoft HCM 9.2: eDevelopment*)".

## Understanding Profile Matching

These topics discuss:

- Point awards and importance levels.
- Multiple evaluations.

### Point Awards and Importance Levels

You run different inquiries to match:

- Employee to non-person profiles.
- Teams to job tasks.

However, all inquiries are performed the same way. The system awards points to employees or teams based on their assigned competencies using competency proficiency ratings, and importance given to the competency in the non-person-profile. Other content items are awarded points only based on the importance assigned in the non-person profile. If the Importance field is left blank, the system assigns an importance of 1 to all items. This happens when the profile type for the profile does not have the Importance field defined to the content sections.

The system assigns the following point values to importance levels:

<b>Importance Level</b>	<b>Points</b>
High	5
Above Average	4
Average	3
Below Average	2

<b>Importance Level</b>	<b>Points</b>
Low	1
None	0

This table shows the competency requirements for a human resources (HR) specialist position and the points awarded for each competency:

<b>Competency</b>	<b>Importance Level</b>	<b>Points Assigned</b>
Communication	High	5
Leadership	Average	3
Interpersonal Effectiveness	Above Average	4
Planning	Low	1
Decision Making	Above Average	4
Adaptability to Change	Below Average	2

The *total match* value for a position represents the maximum number of points available if the employee meets all the requirements. In the preceding example, the total match equals 19 (the sum of the points in the Points Assigned column). Points are assigned differently for content items other than competencies.

## Employee Points for Content Items Other than Competencies

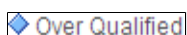
Other content points are calculated by the system. If the item exists in an employee's profile, the system awards points to the employee based on the importance value that you assign to the item. Some of the content types that are calculated in this manner are: degrees, school education, honors and awards, licences & certifications, language skills, memberships, and tests/examinations, and NVQs.

## Employee Points for Competencies

Competencies have proficiency ratings associated with them. These ratings indicate a level of expertise. If you are using a profile type with this matching process, you should set it up in such a way that when you assign competencies to the non-person profile, you also define the rating required for each competency. Similarly, you should set up the employee profiles in such a way that you give a rating for each competency that you add to the profile.

The system assigns points to an employee only if the individual has the required proficiency level for the competency. The points assigned are calculated as the average of the points for the most current row for each of the user specified evaluation types. These user evaluation types are assigned in the Match Evaluation Types component.

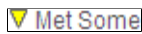
Here are the match indicator icons:



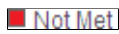
If the employee's rating is more than one level higher than the rating required for the role, the system displays a blue diamond and the text indicating that the employee is over qualified.



A green filled circle indicates that the employee possesses the required competency and has the required proficiency rating.



A yellow triangle indicates that the employee has a rating that is one level lower than that required for the role.



A red square indicates that the employee's rating in this competency is multiple levels below that required for the role.

Because proficiency ratings vary according to the rating model, the system uses the review points value associated with the rating to perform the match analysis. In some cases, the value in Review Points field on the Rating Model page is the same as the rating. For example, the PSCM rating model uses ratings from 0 (none) to 5 (expert), and these ratings have the associated review points of 0 to 5.

The following table shows an example of the ratings required for an HR specialist position, and it shows a hypothetical employee profile. The competencies in the profile are assigned the PSCM rating model. The Match Indicator column shown describes the icon that appears for the particular scenario.

<b>Competency</b>	<b>Required Rating</b>	<b>Employee Rating</b>	<b>Match Indicator</b>
Communication	5	5	Met (green circle icon)
Leadership	4	3	Met Some (yellow triangle icon)
Interpersonal Effectiveness	3	5	Over Qualified (blue diamond icon)
Planning	3	1	Not Met (red square icon)
Decision Making	2	3	Over Qualified (blue diamond icon)
Adaptability to Change	3	None	None

## Related Links

[Setting Up Profile Types](#)

[Defining Rating Models](#)

[Maintaining Profiles](#)

## Multiple Evaluations

If multiple people evaluate an employee or group of employees, each evaluation might include different competencies and competency ratings.

To control which evaluations are used in match and gap analyses, you define match evaluation types. For example, you might include only evaluations with the status of Approved/Official.

To understand how the system performs a match analysis with multiple evaluations, consider the following example:

<b>Competency</b>	<b>Manager Evaluation</b>	<b>Peer 1 Evaluation</b>	<b>Peer 2 Evaluation</b>	<b>Average Rating</b>
Communication	5	4	5	4.67
Leadership	4	3	3	3.33
Interpersonal Effectiveness	5	5	5	5
Planning	NA	NA	NA	NA
Decision Making	3	2	3	2.67
Adaptability to Change	2	1	2	1.67

If you use manager and peer evaluations for match analysis, the system calculates the average rating based on the three evaluations: manager, peer 1, and peer 2.

The following table shows the results if this employee is compared with the HR specialist position. The Employee Match column describes the icon that appears for the particular scenario.

<b>Competency</b>	<b>Importance</b>	<b>Points Assigned</b>	<b>Rating Required</b>	<b>Employee Rating</b>	<b>Employee Match</b>	<b>Employee Points</b>
Communication	High	5	5	4.67	Green half-filled circle	0
Leadership	Average	3	4	3.33	Green half-filled circle	0
Interpersonal Effectiveness	Above Average	4	3	5	+ Blue filled circle	4
Planning	Low	1	3	None	None	0
Decision Making	Above Average	4	2	2.67	Blue filled circle	4
Adaptability to Change	Below Average	2	3	1.67	Red circle outline	0

The total points value for the HR Specialist position is 19 (the sum of the values in the points assigned column). The employee earns the points for a competency when their rating meets or exceeds the required rating for the position being evaluated. In this case, the employee met or exceeded the required rating for two competencies. The combined point value for those two competencies is 8. Therefore, the employee's total points for evaluation against the HR Specialist position is 8.

## Setting Up Match Evaluation Types

To set up match evaluation types, use the Match Evaluation Types (MATCH\_TYPES) component.

This topic discusses how to define match evaluation types.

You must set up match evaluation types that correspond to the users for whom you want to run match analyses. Evaluation types determine which evaluations are included in each analysis.

## Page Used to Set Up Match Evaluation Types

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Match Evaluation Types	CM_MATCH_INSTR	Workforce Development, Profile Management, Profiles, Profile Matching, Match Evaluation Types, Match Evaluation Types	Define match evaluation types specifying the types of inquiries a user can run and the evaluation types a user can access. To run the match analyses, you must first set up evaluation types and user access.

## Match Evaluation Types Page

Use the Match Evaluation Types page (CM\_MATCH\_INSTR) to define match evaluation types specifying the types of inquiries a user can run and the evaluation types a user can access.

To run the match analyses, you must first set up evaluation types and user access.

### Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Match Evaluation Types, Match Evaluation Types

### Image: Match Evaluation Types page

This example illustrates the fields and controls on the Match Evaluation Types page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Match Evaluation Types' page. At the top, the title 'Match Evaluation Types' is displayed. Below it, the 'User ID' is set to 'PS'. A navigation bar includes 'Inquiry - Search Types' and 'Find | View All' buttons. A status bar shows '1 of 1' records. The main content area is titled 'Search Type Role/Person'. Within this area, there is a section for 'Match Evaluation Types' which contains a table. The table has a column for '\*Evaluation Type' and two columns for adding or removing types. The first row shows 'Approved/Official' and the second row shows 'Self'.

### Search Type

Displays *Role/Person*. This enables the selected user ID to match non-person profiles to employees, employees to non-person profiles, and teams to projects.

### Evaluation Type

Select evaluation types for this user.



These control which competency ratings the system includes when performing the analysis. For example, when performing a gap analysis for an individual (as opposed to a project team), you might include manager and peer evaluations and exclude customer evaluations.

If *Self* is selected as the evaluation type, only self-evaluations that have been approved by the employee's manager are included in the role matching process.

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## Matching Employee Profiles

These topics list prerequisites and discuss how to:

- Specify a role and analyze cluster matches.
- Analyze competency matches.
- View competency match details.
- Analyze other profile item matches.
- View a gap analysis of the employee.

## Prerequisites

Before you use the employee to profile match, set up:

- A profile for the employee using a person usage profile type. This profile type should have competencies set up with *JPM\_RATING1* as the Proficiency field. The delivered profile type *PERSON* is set up in this manner.
- A profile for the role using a non-person usage profile type. This profile type should have competencies set up with *JPM\_RATING1* as the Proficiency field and *JPM\_IMPORTANCE* set up as the Importance field. The delivered profile type *ROLE* is set up in this manner.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the role match.

## Related Links

[Setting Up Profile Types](#)

[Understanding Managing Profiles](#)

[Setting Up Match Evaluation Types](#)

## Pages Used to Match Employees to Profiles

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Employee Profile Matching - Summary	CM_PROFILE_SUMM	Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Summary	Specify the employee, employee profile type and non-person profile with which you want to compare and view an analysis of the employee matches.
Employee Profile Matching - Competency Match	CM_PROFILE_MATCH	Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Competency Match	View competency matches that display an analysis of how the employee matches the individual competencies required for a given non-person profile.
Competency Match Detail	CM_PROF_MATCH_SEC	Click the Competency Match Detail link on the Competency Match page.	View competency match details of the employee's ratings in each competency assigned to the non-person profile.
Competency Training	CM_COMP_TRAIN_SEC	Click the Competency Training link on the Competency Match page.	View training courses that address a selected competency.
Employee Profile Matching - Other Items Match	CM_PROFILE_MATCH2	Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Other Items Match	Analyze other profile item matches for an employee. Review how well an employee matches individual content for a given non-person profile.
Employee Profile Matching - Gap-Fit Measurement	CM_PROFILE_MATCH3	Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Gap-Fit Measurement	Compare an employee's ratings in each required competency with the rating expected for the non-profile, and view the percentage difference. The sum of these percentages provides an overall indication of how well the employee matches the requirements.

### Employee Profile Matching - Summary Page

Use the Employee Profile Matching - Summary page (CM\_PROFILE\_SUMM) to specify the employee, employee profile type and non-person profile with which you want to compare and view an analysis of the employee matches.

## Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Summary

### Image: Employee Profile Matching - Summary page

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

Employee Profile		Non-Person Profile	
Employee Profile ID	100425	Profile ID	100694
Name	Antonio Santos	Description	Administrator-Human Resources
Profile Type	PERSON	Profile Type	ROLE
<input type="button" value="Calculate Matches"/>			
Match Analysis			
Total Match Points	6	Total Possible Points	30
Competency Match Points	6	Possible Competency Points	30
Other Item Match Points	0	Possible Other Item Points	6

#### Employee Profile ID

Select the employee profile you wish to analyze. If you do not know the profile ID of the employee, select the look up button to access a search page where you can enter additional information to locate an employee profile.

The page will display the person's name and the profile type associated with the employee's profile after you have entered the employee profile ID.

#### Profile ID and Find Profiles

Enter the non-person profile ID you wish to compare to and rate the employee against. Select the Find Profiles button to access the search page to search for the profile by profile identity, profile group, or by description.

The page will display the description and profile type after entering the ID.

#### Calculate Matches

Select this button, after you have selected an employee profile and non-person profile, to calculate the matches. The system compares the employee's profile content to that of the non-person profile and displays the results of the analysis.

## Match Analysis

#### Total Match Points and Total Possible Points

Indicates the employee's points out of the total points possible compared to the non-person profile. This calculation includes points for all content items, both competencies and the non-competency items..

This total is weighted for the importance of each content item assigned to the non-person profile.

### Competency Match Points and Possible Competency Points

Indicates how many of the points are from the employee's competencies and how many competency points are available. These numbers add to the total match and total possible point values.

### Other Item Match Points and Possible Other Item Points

Indicates how many of the employee points are from non-competency content items and how many non-competency content item points are available. These numbers add to the total match and total possible point values.

## Employee Profile Matching - Competency Match Page

Use the Employee Profile Matching - Competency Match page (CM\_PROFILE\_MATCH) to view competency matches that display an analysis of how the employee matches the individual competencies required for a given non-person profile..

### Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Competency Match

### Image: Employee Profile Matching - Competency Match page

This example illustrates the fields and controls on the Employee Profile Matching - Competency Match page. You can find definitions for the fields and controls later on this page.

Employee Profile				Non-Person Profile	
Profile ID 100425				Profile ID 100694	
Name Antonio Santos				Description Administrator-Human Resources	
Profile Type PERSON				Profile Type ROLE	

Match Analysis			
Employee Match Points	6	Competency Points	30
Employee Competency Match	2	Total Competencies	10
Competencies Not Ranked	6	<a href="#">Competency Match Detail</a>	

Competencies					
Competency	Description	Competency Importance	Met Requirement	Training Scheduled	Competency Training
0110	Ability to manage own time	3-Average	Over Qualified	<input checked="" type="checkbox"/>	<a href="#">Competency Training</a>
0157	Set & achieve goals	3-Average		<input type="checkbox"/>	<a href="#">Competency Training</a>
0160	Ability to prioritize tasks	3-Average	Met Some	<input type="checkbox"/>	<a href="#">Competency Training</a>
0200	Takes initiative & follows up	3-Average	Met	<input type="checkbox"/>	<a href="#">Competency Training</a>
2001	Computer Literacy	3-Average	Not Met	<input type="checkbox"/>	<a href="#">Competency Training</a>

### Match Analysis

#### Employee Match Points and Competency Points

Indicates the number of competency points that an employee has out of a total possible number of competency points required by the non-person profile.

#### Employee Competency Match and Total Competencies

Displays the number of employee competencies that match the competencies required for the non-person profile. For example,

	an employee may only have 7 of the 15 competencies defined for the role.
<b>Competencies not ranked</b>	Displays the number of competencies required by the role that are not included in the employee's evaluations.
<b>Competency Match Detail</b>	Click to open the Competency Match Detail page and view the breakdown of each competency and its match within the profiles.
<b>Competencies</b>	
<b>Competency</b>	Lists competencies assigned to the non-person profile, from highest to lowest importance.
<b>Importance</b>	Displays the importance levels that are assigned to the competencies in the non-person profile.
<b>Met Requirement</b>	Displays the appropriate text and icon in the field for how the person matches the competency. Values include <i>Over Qualified</i> , <i>Met</i> , <i>Met Some</i> , and <i>Not Met</i> . When a person's profile does not have an item specified in the non-profile, no image will display for the item.
<b>Training Scheduled</b>	Indicates whether the employee is already scheduled for training in the competency.
<b>Competency Training</b>	Select this link to open the Competency Training page to see if any available training courses target the competency.

## Competency Match Detail Page

Use the Competency Match Detail page (CM\_PROF\_MATCH\_SEC) to view competency match details of the employee's ratings in each competency assigned to the non-person profile.

## Navigation

Click the Competency Match Detail link on the Competency Match page.

### Image: Competency Match Detail page

This example illustrates the fields and controls on the Competency Match Detail page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Competency Match Detail' page for employee Courtney Osborn (Employee ID: KU0100, Profile ID: 100714, Role: Analyst-Financial). The page includes a table with columns for Competency, Required Points, Employee Points, and Importance Match. The table shows a single row with values 0, 0, and 0 respectively. Navigation controls like 'Personalize', 'Find', 'View All', and 'First 1 of 1 Last' are visible. A 'Return' button is at the bottom left, and 'Competency Match Points 19' is at the bottom right.

Competency	Required Points	Employee Points	Importance Match
	0	0	0

#### Required Points

Each rating in a rating model has points associated with it.

Required points are derived from the rating (or rather a point translation of the rating) this is assigned to the competency for the specified role. You specify the number of points for each rating by using the Review Points field on the Rating Model page.

#### Employee Points

Displays the employee's point rating for the competency.

Employee review points are the point translation of the rating that the employee receives for the competency, and these points are specified for each rating using the Review Points field on the Rating Model page.

#### Importance Match

If the employee possesses the required competency and has the required rating, the employee is awarded points based on the importance of the competency.

## Employee Profile Matching - Other Items Match Page

Use the Employee Profile Matching - Other Items Match page (CM\_PROFILE\_MATCH2) to analyze other profile item matches for an employee. Review how well an employee matches individual content for a given non-person profile.

## Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Other Items Match

### Image: Employee Profile Matching - Other Items Match page

This example illustrates the fields and controls on the Employee Profile Matching - Other Items Match page. You can find definitions for the fields and controls later on this page.

<a href="#">Summary</a>   <a href="#">Competency Match</a>   <a href="#">Other Items Match</a>   <a href="#">Gap-Fit Measurement</a>											
<b>Employee Profile</b> Profile ID 100425 Name <b>Antonio Santos</b> Profile Type PERSON		<b>Non-Person Profile</b> Profile ID 100694 Description Administrator-Human Resources Profile Type ROLE									
<b>Match Analysis</b> <table> <tr> <td>Employee Match Points</td> <td>0</td> <td>Possible Other Item Points</td> <td>6</td> </tr> <tr> <td>Employee Other Item Match</td> <td>0</td> <td>Total Other Content Items</td> <td>2</td> </tr> </table>				Employee Match Points	0	Possible Other Item Points	6	Employee Other Item Match	0	Total Other Content Items	2
Employee Match Points	0	Possible Other Item Points	6								
Employee Other Item Match	0	Total Other Content Items	2								
<b>Other Content Items</b> <a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">Print</a>   <a href="#">Help</a> First 1-2 of 2 Last											
<b>Content Type</b>	<b>Description</b>	<b>Importance</b>	<b>Employee Complete</b>								
Licenses and Certifications	Personnel Management Associatn	3-Average	<input type="checkbox"/>								
Licenses and Certifications	Integrated Resource Management	3-Average	<input type="checkbox"/>								

## Match Analysis

### Employee Match Points

Indicates the number of employee importance points for those profile item matches between the employee and the non-person profile.

### Possible Other Item Points

Indicates the total number of profile item importance points available.

### Employee Other Item Match

Displays the number of employee profile items other than competencies that match the profile items required for the non-person profile.

### Total Other Content Items

Displays the number of total profile items that are required for the non-person profile.

## Other Items

### Content Type

Lists each content type for the content item assigned to the non-person profile, from highest to lowest importance.

### Description

Lists descriptions of each profile item in the non-person profile from, highest to lowest importance.

### Importance

Displays importance levels assigned to the profile item in the non-person profile.

### Employee Complete

Indicates whether the employee has accomplished the content item.

## Employee Profile Matching - Gap-Fit Measurement Page

Use the Employee Profile Matching - Gap-Fit Measurement page (CM\_PROFILE\_MATCH3) to compare an employee's ratings in each required competency with the rating expected for the role, and view the percentage difference.

The sum of these percentages provides an overall indication of how well the employee matches the requirements.

### Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Employee Profile Matching, Gap-Fit Measurement

### Image: Employee Profile Matching - Gap-Fit Measurement page

This example illustrates the fields and controls on the Employee Profile Matching - Gap-Fit Measurement page. You can find definitions for the fields and controls later on this page.

Summary	Competency Match	Other Items Match	Gap-Fit Measurement																														
<b>Employee Profile</b> Profile ID 100425 Name <b>Antonio Santos</b> Profile Type PERSON		<b>Non-Person Profile</b> Profile ID 100694 Description Administrator-Human Resources Profile Type ROLE																															
<b>Match Analysis</b> Employee Proficiency Points 12      Total Required Points 35 Total Competencies 10      Proficiency % Fit 37.50																																	
<b>Gap-Fit Analysis</b> <div>Personalize   Find   View All      First 1-5 of 10 Last</div> <table border="1"> <thead> <tr> <th>Competency</th> <th>Competency Importance</th> <th>Empl Review Points</th> <th>Required Points</th> <th>% Proficiency</th> </tr> </thead> <tbody> <tr> <td>Ability to manage own time</td> <td>3-Average</td> <td>5</td> <td>3</td> <td>166.67</td> </tr> <tr> <td>Set &amp; achieve goals</td> <td>3-Average</td> <td>0</td> <td>3</td> <td>0.00</td> </tr> <tr> <td>Ability to prioritize tasks</td> <td>3-Average</td> <td>3</td> <td>4</td> <td>75.00</td> </tr> <tr> <td>Takes initiative &amp; follows up</td> <td>3-Average</td> <td>3</td> <td>3</td> <td>100.00</td> </tr> <tr> <td>Computer Literacy</td> <td>3-Average</td> <td>1</td> <td>3</td> <td>33.33</td> </tr> </tbody> </table>				Competency	Competency Importance	Empl Review Points	Required Points	% Proficiency	Ability to manage own time	3-Average	5	3	166.67	Set & achieve goals	3-Average	0	3	0.00	Ability to prioritize tasks	3-Average	3	4	75.00	Takes initiative & follows up	3-Average	3	3	100.00	Computer Literacy	3-Average	1	3	33.33
Competency	Competency Importance	Empl Review Points	Required Points	% Proficiency																													
Ability to manage own time	3-Average	5	3	166.67																													
Set & achieve goals	3-Average	0	3	0.00																													
Ability to prioritize tasks	3-Average	3	4	75.00																													
Takes initiative & follows up	3-Average	3	3	100.00																													
Computer Literacy	3-Average	1	3	33.33																													

### Match Analysis

#### Employee Proficiency Points

Indicates how many importance points the employee has been awarded for competencies.

#### Total Required Points

Indicates how many competency importance points are possible for the non-person profile.

#### Total Competencies

Displays the number of competencies that are assigned to the non-person profile.

#### Proficiency % Fit (proficiency percentage fit)

Displays the employee's points as a percentage of the total possible. The system only includes points associated with competencies in this calculation.



For example, if the employee has 5 points and the total possible for the non-person profile is 20 points, then the percentage fit is 25%.

## Gap-Fit Analysis

### Empl Review Points (employee review points)

Displays the employee's proficiency point rating for the competency. For example, if you use the PSCM rating model, a rating of 5 has an associated review point value of 5.

### Required Points

Each rating in a rating model has points associated with it. Points are derived from the rating (or rather a point translation of the rating) that is assigned to the competency for the specified role. You specify the number of points for each rating by using the Review Points field on the Rating Model page.

### % Proficiency (percentage proficiency)

Displays the employee's rating percentage compared to the rating required for the role. The system divides the employee review points by the required points and converts the result into a percentage. For example, if the value of the employee review points is 3 but the role requires a point value of 4, then the percentage proficiency is 75%.

If an employee's rating exactly matches the required rating, then the percentage proficiency deficiency is 100%. A percentage less than 100% indicates that the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

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## Matching Teams to Projects

These topics list prerequisites and discuss how to:

- Set up employee teams.
- Analyze team competency matches.
- Analyze team matches for other content items.

## Prerequisites

Before you can use the Compare Team to Job Task option, set up:

- A profile for the job task using a non-person usage profile type. This profile type should have competencies set up with *JPM\_RATING1* as the Proficiency field and *JPM\_IMPORTANCE* set up as the Importance field. The delivered profile type *ROLE* is set up in this manner..

- Profiles for the employees in the team using a person usage profile type. This profile type should have competencies set up with *JPM\_RATING1* as the Proficiency field. The delivered profile type *PERSON* is set up in this manner.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the comparison.

## Related Links

[Understanding Managing Profiles](#)

[Setting Up Match Evaluation Types](#)

## Pages Used to Match Teams to Projects

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Teams	EE_TEAMS	Workforce Development, Profile Management, Profiles, Profile Matching, Create Teams, Create Teams	Set up employee teams.
Compare Team to Job Task - Competency Match	CM_TEAM_ROLE	Workforce Development, Profile Management, Profiles, Profile Matching, Compare Team to Job Task, Competency Match	Analyze team competency matches. Compare the competencies assigned to a job task with the competency profiles of team members.
Competency Match Detail	CM_TEAM_ROLE_SEC	Click the Team Competency Detail link on the Compare Team to Job Task - Competency Match page.	View the team members with the competency at the required proficiency.
Compare Team to Job Task - Other Items Match	CM_TEAM_ROLE2	Workforce Development, Profile Management, Profiles, Profile Matching, Compare Team to Job Task, Other Items Match	Compare the content items other than competencies required by a job task with the team members' profile items.
Team Details	CM_TEAM_ROLE2_SEC	Click Team Details link on the Compare Team to Job Task - Other Items Match page.	View a list of the team members with the required profile item.

## Create Teams Page

Use the Create Teams page (EE\_TEAMS) to set up employee teams.

## Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Create Teams, Create Teams

### Image: Create Teams page





























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

## Create Teams

Team Code

\*Description

Short Name

Team Members			Personalize   Find   View All    		First  1-8 of 8  Last
*Empl ID	Name				
<input type="text" value="KU0012"/> 	Allan Martin				
<input type="text" value="KU0023"/> 	Richie Finnes				
<input type="text" value="KU0043"/> 	Evelyn Sims				
<input type="text" value="KU0057"/> 	Jennifer Luis				
<input type="text" value="KU0083"/> 	Karena Matheson				
<input type="text" value="KU0090"/> 	Jeff Ryzhikov				
<input type="text" value="KU0102"/> 	Edmund Donahue				
<input type="text" value="KU0103"/> 	Colin Davidson				

### Team Members

Add members by selecting from the list of employee IDs. Insert new rows to add more employees.

## Compare Team to Job Task - Competency Match Page

Use the Compare Team to Job Task - Competency Match page (CM\_TEAM\_ROLE) to analyze team competency matches.

Compare the competencies assigned to a job task with the competencies in the profiles of team members.

## Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Compare Team to Job Task, Competency Match

### Image: Compare Team to Job Task - Competency Match page

This example illustrates the fields and controls on the Compare Team to Job Task - Competency Match page. You can find definitions for the fields and controls later on this page.

Team		Job Task	
Team	KU02 Project Managers	Business Unit	GBIBU
Profile Type	PERSON Person	Job Task	K10001 Project Management
		Profile ID	100710 Project Management
<b>Calculate Matches</b>			
Total Match	4	Total Possible Points	27
Competency Match Points	4	Possible Competency Points	24

Competency Detail						
Content Item ID	Description	Review Points	Competency Importance	Team Competency	Number of Employees	Team Competency Detail
0201	Accountability for decisions		5-High		0	<a href="#">Team Competency Detail</a>
0209	Team leadership		4-Above Average		0	<a href="#">Team Competency Detail</a>
4003	Project Management		4-Above Average		8	<a href="#">Team Competency Detail</a>
0155	Identify resources to assist		3-Average		0	<a href="#">Team Competency Detail</a>
0206	Developing others		3-Average		0	<a href="#">Team Competency Detail</a>
0208	Stress tolerance		3-Average		0	<a href="#">Team Competency Detail</a>
0300	Resource Planning		2-Below Average		0	<a href="#">Team Competency Detail</a>

#### Total Match

Indicates how many competency and accomplishment points the team has been awarded for the job task

#### Total Possible Points

Indicates how many total competency and accomplishment points are possible for the task.

#### Competency Match Points

Indicates how many of the team points are from competencies.

#### Possible Competency Points

Indicates how many of the task points are from competencies.

## Competency Detail

#### Team Competency

Indicates whether any member of the team has the competency at the required proficiency.

#### Number of Employees

Displays how many team members have the competency at the required proficiency level.

#### Team Competency Detail

Click to access the Competency Match Detail page and view which team members have the required competency.

## Compare Team to Job Task - Other Items Match Page

Use the Compare Team to Job Task - Other Items Match page (CM\_TEAM\_ROLE2) to compare the accomplishments required by a job task with the team members' accomplishments.

### Navigation

Workforce Development, Profile Management, Profiles, Profile Matching, Compare Team to Job Task, Other Items Match

### Image: Compare Team to Job Task - Other Items Match page

This example illustrates the fields and controls on the Compare Team to Job Task - Other Items Match page. You can find definitions for the fields and controls later on this page.

Competency Match		Other Items Match	
<b>Team</b>		<b>Job Task</b>	
Team KU02	Project Managers	Business Unit GBIBU	
Profile Type PERSON	Person	Job Task K10001	Project Management
Total Match Points 4		Total Possible Points 27	
Other Item Match Points 0		Possible Other Item Points 3	
<a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">View All</a>      <a href="#">First</a>   <a href="#">1 of 1</a>   <a href="#">Last</a>			
Content Type	Description	Importance	Team Item
Tests or Examinations	Customer Service Skills	3-Average	<input type="checkbox"/>
			Number of Employees 0
		<a href="#">Team Details</a>	

### Total Match Points

Indicates how many content item points the team has been awarded for the job task

### Total Possible Points

Indicates how many total content item points are possible for the task.

### Other Item Match Points

Indicates how many of the team points are from content items other than competencies.

### Possible Other Item Points

Indicates how many of the task points are from content items other than competencies.

### Other Items

#### Team Item

Indicates whether any team member has the required item.

#### Number of Employees

Displays how many team members have the item.

#### Team Details

Click to access the Team Details page and view which team members have the required item.



# Running Content Catalog and Profile Reports

---

## Reporting Content Catalog Items

This topic discusses how to:

- Run the Content Catalog Listing report
- View categories assigned to competency categories or types.

### Page Used to Run the Content Catalog Report

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Content Catalog Listing	JPM_CATLIST_RPT	Set Up HCM, Product Related, Profile Management, Content Catalog, Content Catalog Listing, Content Catalog Listing	Run the Content Catalog Listing report (JPM_CATI_RPT) that lists the content items that have been set up for a selected content type or for all content types. Access the report in Report Manager.
Competency Summary	CM_COMPETENCY_SUMM	Set Up HCM, Product Related, Profile Management, Content Catalog, Competency Summary, Competency Summary	Review the category that is assigned to competencies. You can view competencies in a selected competency category or a competency type.

### Content Catalog Listing Page

Use the Content Catalog Listing page (JPM\_CATLIST\_RPT) to run the Content Catalog Listing report (JPM\_CATI\_RPT) that lists the content items that have been set up for a selected content type or for all content types. Access the report in Report Manager.

## Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Content Catalog Listing, Content Catalog Listing

### Image: Content Catalog Listing page

This example illustrates the fields and controls on the Content Catalog Listing page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Content Catalog Listing' page. At the top, there's a title 'Content Catalog Listing'. Below it, on the left, is 'Run Control ID 1'. In the center, there's a 'Language' dropdown menu currently showing 'English'. To the right of the language dropdown are two links: 'Report Manager' and 'Process Monitor'. Further right is an orange 'Run' button. Below a horizontal line, there are three more fields: 'Content Type' with a text input showing 'COMPETENCY' and a magnifying glass icon; 'As of Date' with a date input showing '02/04/2013' and a calendar icon; and 'Status' with a dropdown menu showing 'Active'.

#### Content Type

Select the content type you want the report to include. Leave this field blank to generate a report of content items for all content types.

#### As of Date

Select a date to generate a list of content items effective as of the date specified. Leave this field blank to generate a report of content items for all dates.

#### Status

Select *Active* to include only items with an *Active* status in the report, *Inactive* to include only inactive items, or leave the field blank to include both active and inactive items.

## Related Links

[Setting Up to Use BI Publisher Reports and Profiles](#)

## Competency Summary Page

Use the Competency Summary page (CM\_COMPETENCY\_SUMM) to review the category that is assigned to competencies.

You can view competencies in a selected competency category or a competency type.



## Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, Competency Summary, Competency Summary

### Image: Competency Summary page

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

The screenshot shows the 'Competency Summary' page. At the top, there are two filters: 'Competency Category' (a dropdown menu) and 'Competency Type' (a text input field containing 'ACCNT' with a search icon). To the right of these is the label 'Accountability'. Below the filters is a table with three columns: 'Competency', 'Description', and 'Category'. The table contains eight rows of data. Above the table, there are navigation controls: 'Personalize', 'Find', 'View All', and a table icon. To the right of these are 'First', '1-8 of 8', and 'Last'.

Competency	Description	Category
0156	Recognized as job expert	Knowledge
0201	Accountability for decisions	Ability
0202	Understands decision process	Knowledge
0203	Displays confidence & maturity	Other
0241	Works well under pressure	Ability
0802	Exhibits no racism or sexism	Other
FJC010	HR Policies & Procedures	Knowledge
HXCMP1	Comp Mgmt Test	Ability

Select a competency category or type to list the competencies in that category or type. The competencies are listed in order of competency code.

## Running Profile Reports

These topics discuss how to:

- Run the Person Profile report.
- Run the Non-Person Profile report.

## Pages Used to Run Profile Reports

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Person Profile Report	JPM_PPROF_RPT	Workforce Development, Profile Management, Reports, Person Profile Report, Person Profile Report	Run the Person Profile report (JPM_JPPP_RPT) to generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the employee ID in brackets in the report description.
Non-Person Profile Report	JPM_NPPROF_RPT	Workforce Development, Profile Management, Reports, Non-Person Profile Report, Non-Person Profile Report	Run the Non-Person Profile report (JPM_JPNP_RPT) to generate a PDF file for each profile listed in the run parameters. Each report shows all items in the profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the profile ID in brackets in the report description.
Competency Inventory	RUNCTL_PER011	Workforce Development, Profile Management, Reports, Competency Inventory, Competency Inventory	Run the Competency Inventory report (PER011) that lists employees in a department and their competencies.  Run the Refresh Employees Table Application Engine process (PER099) before running this report to include any new employees and their associated competencies. To run this process navigate to Set Up HCM, System Administration, Database Processes, Refresh EMPLOYEES Table.  Use the same run control ID for both the Refresh Employee Table process and the Competency Inventory report.
License/Certificate Report	RUNCTL_CMM007	Workforce Development, Profile Management, Reports, Licenses/Certificate Renewal, Licenses/Certificate Renewal	Run the License/Certificate report (CMM007) that lists employees who need to renew a license or certificate.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Internal Resume	RUNCTL_PER034	Workforce Development, Profile Management, Reports, Internal Resume, Internal Resume	Run the Internal Resume report (PER034) that creates a resume-like document from the data contained in PeopleSoft tables, including the employee's PERSON profile. Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards.

## Person Profile Report Page

Use the Person Profile Report page (JPM\_PPROF\_RPT) to run the Person Profile report (JPM\_JPPP\_RPT) to generate a PDF file for each person listed in the run parameters.

Each report shows all items in the person's profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the employee ID in brackets in the report description.

### Navigation

Workforce Development, Profile Management, Reports, Person Profile Report, Person Profile Report

### Image: Person Profile Report page

This example illustrates the fields and controls on the Person Profile Report page. You can find definitions for the fields and controls later on this page.

**Person Profile Report**

Run Control ID 1    Report Manager    Process Monitor    Run

Language English

Report Request Parameter(s)

\*As of Date 02/04/2013

**Profile Types**    Find | View All    First 1 of 1 Last

Profile Type PERSON    Person

**Profile Search Results**    Personalize | Find | View All | First 1-2 of 2 Last

*Empl ID	Name
KU0005	Reza Aliverdi
KU0007	Betty Locherty

**As of Date**

The report lists the person's profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Person Profile page.

**Profile Type**

Select the profile types associated with profiles you want to print, adding a row for each profile type. The system displays person profile types only.

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**Note:** After you select a profile type, you cannot change it.

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**EmplID**

For each profile type, select the person IDs for the profiles that you want to print. You must select at least one person.

**Related Links**

[Setting Up to Use BI Publisher Reports and Profiles](#)

**Non-Person Profile Report Page**

Use the Non-Person Profile Report page (JPM\_NPPROF\_RPT) to run the Non-Person Profile report (JPM\_JPNP\_RPT) to generate a PDF file for each profile listed in the run parameters.

Each report shows all items in the profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the profile ID in brackets in the report description.

**Navigation**

Workforce Development, Profile Management, Reports, Non-Person Profile Report, Non-Person Profile Report

**Image: Non-Person Profile Report page**

This example illustrates the fields and controls on the Non-Person Profile Report page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Non-Person Profile Report' page. At the top, there are controls for 'Run Control ID' (set to 1), 'Language' (set to English), and a 'Run' button. Below these are links for 'Report Manager' and 'Process Monitor'. A section titled 'Report Request Parameter(s)' contains a '\*Effective Date' field set to 02/04/2013. The 'Profile Types' section shows a table with one row: 'JOB' (Job). Below this is the 'Profile Search Results' section, which includes a table with two columns: '\*Profile ID' and 'Description'. The table contains one row: '150001' (Consultant-Jr). Navigation controls like 'Find', 'View All', 'First', '1 of 1', and 'Last' are present throughout the interface.

**Effective Date**

The report lists the profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Non-person Profile page.

**Profile Type**

Select the profile types associated with the profiles that you want to print, adding a row for each profile type. The system displays non-person profile types only.

**Profile ID**

For each profile type, select the profiles that you want to print.

**Related Links**

[Setting Up to Use BI Publisher Reports and Profiles](#)



# (GBR) Managing National Vocational Qualifications

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## Understanding NVQs

National Vocational Qualifications (NVQs) reflect the skills, knowledge, and understanding that employees possess, much like competencies. As with other accomplishments, NVQs enable transfer and progression, both within areas of competence and between them.

The national Qualifications and Curriculum Authority (QCA) coordinates the development and specification of NVQ standards. Refer to the QCA website <http://www.qca.org.uk> for further information. NVQ competence areas derive from a functional analysis of business roles and provide structure for competence-based qualifications. The qualifications are unit-based; the number and size of units varies between areas of competence. A unit is achieved when an enrolled employee is assessed as having competent skills and knowledge.

The following areas of work are currently covered by the NVQ system:

- Tending animals, plants, and land.
- Extracting and providing natural resources.
- Constructing.
- Engineering.
- Transporting.
- Providing health, social, and protective services.
- Providing goods and services.
- Manufacturing.
- Providing business services.
- Developing and extending knowledge and skill.
- Communicating.

NVQ competence levels include the following:

<b>Level</b>	<b>Definition</b>
Level 1	Competence that involves the application of knowledge and skills in the performance of a range of varied work activities, most of which may be routine or predictable.

<b>Level</b>	<b>Definition</b>
Level 2	Competence that involves the application of knowledge and skills in a significant range of varied work activities and performed in a variety of contexts. Some of the activities are complex or non-routine, and there is some individual responsibility and autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement.
Level 3	Competence that involves the application of knowledge and skills in a broad range of varied work activities performed in a variety of contexts, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often required.
Level 4	Competence that involves the application of knowledge and skills in a broad range of complex, technical or professional work activities, performed in a wide range of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present.
Level 5	Competence that involves the application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Substantial personal autonomy and significant responsibility for the work of others and for the allocation of substantial resources is important, as personal accountability for analysis and diagnosis, design, planning, execution, and evaluation.

Several organizations develop, deliver, award, and preserve the quality of NVQs:

- *Sector bodies* identify, define, and update employment-based standards of competence for groups of occupations.
- *Awarding bodies* also develop NVQ standards. Additionally, they monitor the assessment process and award NVQs and unit certificates. They verify that employees are assessed fairly and consistently across all assessment centers.

The National Database of Vocational Qualifications contains comprehensive information on NVQs, including the units that make up each qualification, key skills, and units specifically developed for assessors and verifiers.

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## Setting Up NVQ Information

These topics provide an overview of NVQ setup and discuss how to specify awarding bodies for NVQs.

### Understanding NVQ Setup

To track NVQs, you need to define the following:

- NVQ content items.



- NVQ unit content items.
- NVQ Element content items.

NVQ units are divided into elements and you track an employee's progress for each element separately.

- Awarding bodies.

NVQs, NVQ units, and NVQ elements are stored in the content catalog. Use the following delivered content types for NVQs:

<b>Content Type</b>	<b>Description</b>
NVQ ELEMENT	Use to define the elements associated with NVQ units.
NVQ UNIT	Use to define the NVQ units that are required by NVQs.
NVQ	Use to define the NVQ codes.

The content types are related as follows:

- NVQ ELEMENT is a child of NVQ UNIT. This enables an element content item to be defined for different NVQ Unit content items. Satisfying the element only satisfies it within a specific NVQ Unit.
- NVQ UNIT supports NVQ.

This enables one NVQ unit to be linked to more than one NVQ. Satisfying one NVQ Unit qualifies as completion within all NVQs that are supported by the NVQ Unit.

When you set up NVQs, NVQ units, and NVQ elements, use the Relationship page in the Content Item component to link these items.

Set up NVQ data as follows:

1. Set up the NVQs, NVQ units, and NVQ elements in the content catalog.
2. Set up awarding body name and location using the NVQ Award Body Table component (NVQ\_AWARD\_BODY).
3. Assign awarding bodies to NVQs using the NVQ Award Bodies component (NVQ\_DETAILS).

## Related Links

[Understanding the Content Catalog](#)

## Pages Used to Set Up NVQ Awarding Bodies

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
NVQ Award Body Table	NVQ_AWARD_TBL	Set Up HCM, Product Related, Profile Management, Content Catalog, NVQ Award Body Table, NVQ Award Body Table	Define name and location information for NVQ awarding bodies.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
NVQ Award Bodies	NVQ_DETAILS	Set Up HCM, Product Related, Profile Management, Content Catalog, NVQ Award Bodies, NVQ Award Bodies	Specifying awarding bodies for NVQs that you have defined in the content catalog. You must set up NVQs and the NVQ Award Body Table values in before you can use this page.

## NVQ Award Bodies Page

Use the NVQ Award Bodies page (NVQ\_DETAILS) to specifying awarding bodies for NVQs that you have defined in the content catalog.

You must set up NVQs and the NVQ Award Body Table values in before you can use this page.

### Navigation

Set Up HCM, Product Related, Profile Management, Content Catalog, NVQ Award Bodies, NVQ Award Bodies

### Image: NVQ Award Bodies page

This example illustrates the fields and controls on the NVQ Award Bodies page. You can find definitions for the fields and controls later on this page.

<b>Level</b>	Displays the NVQ level that is defined for the NVQ in the content catalog.
<b>Expiry Date</b>	Displays the date on which current NVQ details will be reviewed by the awarding bodies.
<b>Reference and Awarding Body</b>	Select one or more awarding bodies. Enter the reference numbers for each awarding as provided by the NVQ.

## Processing Employees' NVQs

These topics discuss how to:

- Register employees for NVQ programs.
- Enter NVQ review information.
- Track NVQ unit status.
- Enter NVQ unit detail.
- Enter NVQ unit element detail.
- View NVQ information from a person's profile.

## Pages Used to Process Employees' NVQs

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Enroll NVQ	NVQ_EMPLNVQS	Workforce Development, Profile Management, Manage NVQ GBR, Enroll NVQ, Enroll NVQ	Register employees for NVQ programs.
NVQ Review	NVQ_REVIEW	Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Review	Enter an NVQ review.
NVQ Unit Plan	NVQ_UNIT_PLAN	Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Unit Plan	Populate and track unit status for an NVQ review.
Unit Detail	NVQ_UNIT_PLAN_SEC	Click the Detail link for an NVQ unit on the NVQ Unit Plan page.	Enter details for an NVQ unit being reviewed.
Element Detail	NVQ_EMPELEM_SEC	Click the Detail link for an element on the Unit Detail page.	Enter details for an element of an NVQ unit being reviewed.
View NVQs View NVQ Units	JPM_PROF_DTL_SEC	Click the NVQ or NVQ Unit link within the Person Profile page, NVQ tab.	View NVQ and NVQ Units details for a given person's profile.

## Enroll NVQ Page

Use the Enroll NVQ page (NVQ\_EMPLNVQS) to register employees for NVQ programs.

## Navigation

Workforce Development, Profile Management, Manage NVQ GBR, Enroll NVQ, Enroll NVQ

### Image: Enroll NVQ page

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

The screenshot shows the 'Enroll NVQ' page for employee Ramina Jones (Person ID: KG0008). The page is divided into two main sections: 'NVQ Status' and 'Registration Details'. In the 'NVQ Status' section, the NVQ is 'KGNVQ1' at 'Level 1'. The 'Status' is set to 'Enrolled' from a dropdown menu. The 'Start' date is '01/01/2000'. The 'Certificate Award Date' is '07/11/2000'. The 'Completed' field is empty. In the 'Registration Details' section, the 'Registration Date' and 'Registration Number' fields are also empty. The page includes navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last'.

#### Status

Enter the status of the NVQ for which you are registering the employee. Valid values are:

- *Achieved*: Select to indicate that the employee achieved the NVQ. You can select this value only if all of the associated NVQ units have a status of Completed.
- *Cancelled*: Select to cancel the employee's registration for the NVQ program.
- *Enrolled*: Select to enroll the employee in the NVQ program.
- *Previous Achievement*: Select to indicate that the employee already achieved this NVQ prior to enrollment in this program.

#### Start

Enter the date on which you set the NVQ status.

#### Certificate Award Date

Enter the date of the NVQ certificate award. This field is available only if you select *Achieved* or *Previous Achievement* in the Status field.

#### Completed

Enter the date on which the NVQ was completed. This field is available only if you select *Achieved* or *Previous Achievement* in the Status field.

#### Registration Date and Registration Number

Enter the date the employee registered for the NVQ program along with any registration number assigned to the employee.

When you save this page, the system updates the Manage Profiles profile tables with the enrollment information using the SetPersonProfileItems service. You can then view the enrollment information when you access the Person Profile page for the employee, but it cannot be updated from this page.

## NVQ Review Page

Use the NVQ Review page (NVQ\_REVIEW) to enter an NVQ review.

### Navigation

Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Review

### Image: NVQ Review page

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

The screenshot shows the NVQ Review page interface. At the top, there are tabs for 'NVQ Review' and 'NVQ Unit Plan'. Below the tabs, the user's name 'Ramina Jones' and 'Empl ID KG0008' are displayed. The page shows 'NVQ NVQ 1' with 'Status Enrolled' and 'Level 1'. A 'NVQ Tracking' section contains a search bar with 'Find | View All' and 'First 1 of 1 Last'. Below this, there are input fields for 'Review Date' (07/11/2000), 'Type' (Standard Meeting), 'Reviewer' (KG0001), and 'Description'. The 'Reviewer' field is linked to 'Indira Tendulkar'. The 'Description' field is a large text area.

#### Review Date

Enter or view the date of the review.

#### Type

Select the type of review you are entering. Valid values are:

- *Brief Meet*
- *Meeting*
- *Requested*
- *Review*

#### Reviewer

Enter the ID of the reviewer.

#### Description

Enter any pertinent notes you want to record for the review.

---

**Note:** You must also enter information in the required fields on the NVQ Unit Plan page before you can save the information on the NVQ Review page.

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## NVQ Unit Plan Page

Use the NVQ Unit Plan page (NVQ\_UNIT\_PLAN) to populate and track unit status for an NVQ review.

## Navigation

Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Unit Plan

### Image: NVQ Unit Plan page

This example illustrates the fields and controls on the NVQ Unit Plan page. You can find definitions for the fields and controls later on this page.

The screenshot shows the NVQ Unit Plan page for employee Ramina Jones (Empl ID KG0008). It displays details for NVQ 1, Status Enrolled, and Level 1. The NVQ Tracking section shows a review date of 07/11/2000 and a table of units.

Unit	Title	Optional	Unit Status	Detail	Description
1 KGUNIT1	NVQ Unit 1	<input type="checkbox"/>	I	<a href="#">Detail</a>	In Progress
1 KGUNIT2	NVQ Unit 2	<input type="checkbox"/>	D	<a href="#">Detail</a>	Submitted

This page enables you to track the status of the NVQ units associated with an NVQ program in which an employee is enrolled. Each time you create a new review on the NVQ Review page, you must populate the NVQ units on this page and enter a value in the Unit Status column for each unit.

### Populate NVQ Units

Click to populate the NVQ Tracking, Data grid with the units defined with a *Supports* relationship with the content item associated with the NVQ. Once you have populated the grid, this button is no longer visible.

### Unit Status

Select the status for each NVQ unit in the NVQ Tracking, Data grid. Valid values are:

- *C (Completed)*
- *D (Submitted)*
- *I (In Progress)*
- *N (Not Started)*
- *P (Planned)*

---

**Note:** The system changes the status to *Completed* automatically for a unit when you enter a date in the Completed field on the Unit Detail page. All NVQ units associated with an NVQ must have a status of *Completed* before you can set the NVQ status to *Achieved* on the Enroll NVQ page.

---

### Detail

Click to access the Unit Detail page.

When you create and save a new review using the Track NVQ component, the system updates the Manage Profiles profile tables using the SetPersonProfileItems service (or the DeletePersonProfileItems

service if you deleted a review). You can then view the tracking information for both the NVQ and NVQ Units content sections on the Person Profile page.

## Unit Detail Page

Use the Unit Detail page (NVQ\_UNIT\_PLAN\_SEC) to enter details for an NVQ unit being reviewed.

### Navigation

Click the Detail link for an NVQ unit on the NVQ Unit Plan page.

### Image: Unit Detail page

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

Unit Detail

Competency KGUNIT1

Unit Title NVQ Unit 1

Start Date

Expected

Completed

Evidence

Presented

Submitted

Description

Elements

Element Code	Title	Detail
KGEL1	NVQ Element 1	<a href="#">Detail</a>
KGEL3	NVQ Element 3	<a href="#">Detail</a>
KGEL5	NVQ Element 5	<a href="#">Detail</a>

OK

Cancel

- Start Date

Enter the date on which the employee began the NVQ unit.
- Expected

Enter the date on which the employee is expected to complete the NVQ unit.
- Completed

Enter the actual date on which the employee completed the NVQ unit. When you enter a date in this field and click the OK button, the system automatically sets the status of the NVQ unit to *Completed*.
- Presented

Enter the date on which the evidence was presented.
- Submitted

Enter the date on which the evidence was submitted.
- Description

Enter information regarding evidence submitted by the employee toward the completion of the NVQ unit.
- Detail

Click to access the Element Detail page.

Element Detail Page

Use the Element Detail page (NVQ\_EMPLELEM\_SEC) to enter details for an element of an NVQ unit being reviewed.

Navigation

Click the Detail link for an element on the Unit Detail page.

Image: Element Detail page

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

Element Detail

Element Code KGEL1

Title NVQ Element 1

Start Date

Expected

Completed

Description

OK

Cancel

- Start Date

Enter the date on which the employee began the element.
- Expected

Enter the date on which the employee is expected to complete the element.
- Completed

Enter the actual date on which the employee completed the element.
- Description

Enter any information pertinent to the completion of the element.

View NVQs or View NVQs Units Page

Use the View NVQs page (JPM\_PROF\_DTL\_SEC) to view NVQ and NVQ Units details for a given person's profile.



## Navigation

Click the NVQ or NVQ Unit link within the Person Profile page: NVQ tab.

### Image: View NVQs page

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

Person Profile

View NVQs

Empl ID KG0008      Ramina Jones  
Profile Type PERSON      Person

This page displays the item details. The Content Item can only be changed through NVQ

Details
Find | View All
First 1 of 1 Last

Effective Date 01/01/1900  
NVQ KGNVQ1      NVQ 1  
Review Type Standard Meeting  
Reviewer ID KG0001      Indira Tendulkar  
Status Active  
Source Manage NVQ GBR  
NVQ Status Enrolled  
NVQ Start Date 01/01/2000  
NVQ Completion Date  
Review Date 07/11/2000  
Registration Date  
Certificate Award Date  
Registration Number  
  
Description

Cancel

The Details section on this page displays the original NVQ enrollment values that you entered on the Enroll NVQ page. Each review that you enter for this NVQ using the Track NVQ component appears on this page as an additional effective-dated row with updated values.

### Image: View NVQ Units page

This example illustrates the fields and controls on the View NVQ Units page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'View NVQ Units' page within a 'Person Profile' context. At the top, it displays 'Empl ID KG0008' and 'Ramina Jones', and 'Profile Type PERSON' and 'Person'. Below this is a message: 'This page displays the item details. The Content Item can only be changed through NVQ.' The main section is titled 'Details' and contains a table of NVQ unit information. The table has columns for 'Effective Date', 'NVQ Unit', 'Status', 'Source', 'Unit Status', 'EmplID', 'Expected Completion Date', 'Start Date', 'Completion Date', 'Evidence Presented', 'Submission Date', 'Review Date', 'Description', and 'Reviewer'. The data row shows 'Effective Date 07/11/2000', 'NVQ Unit KGUNIT1', 'Status Active', 'Source Manage NVQ GBR', 'Unit Status In Progress', 'EmplID KG0008', 'Expected Completion Date', 'Start Date', 'Completion Date', 'Evidence Presented', 'Submission Date', 'Review Date 07/11/2000', 'Description', and 'Reviewer'. At the bottom, there is a 'Cancel' button and a 'Related Content NVQ Elements' link.

Effective Date	NVQ Unit	Status	Source	Unit Status	EmplID	Expected Completion Date	Start Date	Completion Date	Evidence Presented	Submission Date	Review Date	Description	Reviewer
07/11/2000	KGUNIT1	Active	Manage NVQ GBR	In Progress	KG0008						07/11/2000		

Each effective-dated row on the View NVQ Units page displays information for an NVQ review. You can view details for elements associated with an NVQ unit by clicking the NVQ Elements link.

### Related Links

[Person Profile Page](#)

## Reviewing NVQ Summaries

These topics discuss how to:

- Review an employee's NVQs.
- Review employees associated with an NVQ.

## Pages Used to Review NVQ Information

Page Name	Definition Name	Navigation	Usage
NVQs by Employee	NVQ_SUMMARY1	Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Employee, NVQs by Employee	Review all NVQs associated with an employee.
NVQs by Qualification	NVQ_SUMMARY2	Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Qualification, NVQs by Qualification	View the employees associated with an NVQ.

### NVQs by Employee Page

Use the NVQs by Employee page (NVQ\_SUMMARY1) to review all NVQs associated with an employee.

#### Navigation

Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Employee, NVQs by Employee

#### Image: NVQs by Employee page

This example illustrates the fields and controls on the NVQs by Employee page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'NVQs by Employee' page. At the top, the employee's name 'Matabele Brooke' and 'Empl ID KG0004' are displayed. Below this, the NVQ 'NVQ2' is shown with a status of 'Enrolled' and 'Level 2'. A 'View Options' group box contains buttons for 'All', 'Completed', 'Submitted', 'In Progress', 'Planned', and 'Remaining'. Below the buttons is a table titled 'NVQ Status' with columns for Unit, NVQ Unit, Unit Title, Status, Started, Planned, Submitted, and Completed. The table shows one unit, '1 KGUNIT2', with a status of 'In Progress'. Navigation links like 'Personalize', 'Find', 'View All', and 'First/Last' are also visible.

The system lists the NVQ units sorted by status and date. Click a button in the View Options group box to see only those units of a given status.

**Note:** Only those NVQ units listed in the employee's PERSON profile are included. The system does not check employees' profiles of any other type.

## NVQs by Qualification Page

Use the NVQs by Qualification page (NVQ\_SUMMARY2) to view the employees associated with an NVQ.

### Navigation

Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Qualification, NVQs by Qualification

### Image: NVQs by Qualification page

This example illustrates the fields and controls on the NVQs by Qualification page. You can find definitions for the fields and controls later on this page.

The system lists all the employees associated with the selected NVQ, sorted by status and date. Click a button in the View Options group box to see only those employees of a given status.

## Running NVQ Reports

These topics list the pages used to run NVQ reports and discuss how to run the Initialize Plan process.

**Note:** You must run the Initialize Plan process before running the Employee Plan (NVQ006) report.

## Pages Used to Run NVQ Reports

Page Name	Definition Name	Navigation	Usage
NVQ001	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Employee Status, NVQ001	Run the NVQ - Employee Status report (NVQ001). This report lists employees assigned to an NVQ and their status.
NVQ002	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Unit Listing, NVQ002	Run the NVQ - Unit Listing report (NVQ002) that lists all defined NVQ units.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
NVQ003	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, NVQ Listing, NVQ003	Run the NVQ - NVQ Listing report (NVQ003) that lists all defined NVQs.
NVQ004	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Unit/Element, NVQ004	Run the NVQ – Unit/Element Listing report (NVQ004) that lists the elements associated with NVQ units.
Initialize Plan	RUNCTL_NVQ005	Workforce Development, Profile Management, NVQ Reports GBR, Initialize Plan, Initialize Plan	Run the Initialize Plan process (NVQ005) for a selected employee. This SQR process compiles the data required for the Employee Unit Plan report (NVQ006).
NVQ006	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Employee Plan, NVQ006	Run the Employee Unit Plan report (NVQ006). This report summarizes an employee's NVQ Unit plan.  You must run the Initialize Plan process (NVQ005) before you can generate the report.

## NVQ005 Page

Use the Initialize Plan page (RUNCTL\_NVQ005) to run the Initialize Plan process (NVQ005) for a selected employee.

This SQR process compiles the data required for the Employee Unit Plan report (NVQ006).

### Navigation

Workforce Development, Profile Management, NVQ Reports GBR, Initialize Plan, Initialize Plan

### Image: Initialize Plan page (NVQ005 process)

This example illustrates the fields and controls on the Initialize Plan page (NVQ005 process). You can find definitions for the fields and controls later on this page.

**Initialize Plan**

Run Control ID 1      Report Manager      Process Monitor      **Run**

Language English ▼

**Report Request Parameter(s)**

Empl ID KG0008 🔍      Ramina Jones

Use this page to run the Initialize Plan process (NVQ005) that compiles the data required to generate the Employee Unit Plan report (NVQ006).

**Language**

Automatically populated based on the run control ID that you selected.

Override the default language if necessary.

## Appendix A

# Content Type and Profile Type Properties

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## Understanding Properties

When you set up a content type, you select the properties, or field names, that are shared by items of that type. The system displays the properties that you define for a content type as fields on the Item Details page when you set up content items. These properties will be used to describe the content items when you define them.

After you add content types to the profile type to create content sections, you will then add the properties that will be available for viewing or updating a profile item. When users add profile items to the profile, the system displays the properties you define for the content section.

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**Note:** The properties defined for a content type do not have any impact on the profile type content section properties.

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The order in which properties are displayed on the Item Details page or in profiles is determined by the page field ordering and cannot be altered.

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**Note:** The order in which properties are added to the profile type content section or to the Content Type has no impact on the display order.

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The tables in this topic list the properties in the order that they are displayed.

### Related Links

[Setting Up Content Types and Properties](#)

[Content Section Page](#)

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## Content Type Properties

This table lists the properties (field names) that you can add to a content type in the Content Types component, the order in which the properties are displayed on the Item Details page, the default label text, and the type of information you can track using this property.

<i><b>Property</b></i>	<i><b>Default Label Text</b></i>	<i><b>Description</b></i>
JPM_CAT_ITEM_ID	Content Item ID	The system populates this field with the item ID.  <b>Note:</b> This is a required property and the system adds it to all new content types.

<b>Property</b>	<b>Default Label Text</b>	<b>Description</b>
EFFDT	Effective Date	<p>The item's effective date.</p> <hr/> <p><b>Note:</b> This is a required property and the system adds it to all new content types.</p> <hr/>
EFF_STATUS	Status as of Effective Date	<p>The item status as of the effective date.</p> <hr/> <p><b>Note:</b> This is a required property and the system adds it to all new content types.</p> <hr/>
JPM_DESCR90	Description	<p>The item description. It is used as a related display field for the item ID in the profile.</p> <hr/> <p><b>Note:</b> This is a required property and the system adds it to all new content types.</p> <hr/>
DESCRLONG	Long Description	A long description of the content item.
DESCRSHORT	Short Description	A short description of the content item.
CM_CATEGORY	Category	<p>The category to which an item belongs. An item can belong to one category only.</p> <p>This property is useful for competency-related content types. However you can also use content groups to group items.</p>
JPM_CAT_ITEM_SRC	Content Item Source	Specifies the origin of a content item. Valid values are: <i>Customer Defined</i> , <i>DDI</i> , <i>Lominger</i> , or <i>PDI</i> .
RATING_MODEL	Rating Model	The rating model. Use this field if the content type is associated with rating models.
COUNTRY	Country	<p>The country in which this item applies.</p> <p>This property is useful for content types that have country-specific items.</p>
EP_SUB_LEVEL	Level	The level of the item. When this row is entered in a content type, the List field appears. Select a list that contains the values you want to use. Lists and valid values are defined on the Custom Prompt page. This property is used with sub-competencies.
EDUCATION_LVL	Education Level	The education level desired or required for this content item.



<b>Property</b>	<b>Default Label Text</b>	<b>Description</b>
TYPE_OF_STUDY_GER	Type Of Study	(DEU) A German property that indicates the type of study. Valid values are: <i>Chemistry, Commerce, Constr/Mining, Electronic, Food, Forestry, Glass, Hotels, Mechanic, Other, Printing, Public Sector, and Textiles</i> . This property is used with degrees.
FIELD_OF_STUD_GER	Field Of Study	(DEU) A German property that indicates the field of study ( <i>Commercial, Industrial, or Technical</i> ). This property is used with degrees.
FP_DEGREE_LVL	Level	(FRA) The degree level. This field is used for French Public Sector only.
HP_STATS_DEG_LVL	Stats-Can Degree Level	(CAN) The Canadian degree level.
SATISFACTION_MTHD	Satisfaction Method	Use to specify how an element is achieved. Valid values are: <i>Attend Training Course, Dispensation Given, Off Job Training, On Job Training, Possess License/Certificate, Recognition of Prior Learning, Supervisor Assessment</i> . This property is used with the ELEMENT content type.
NVQ_LEVEL	Level	(GBR) The level of an NVQ (1, 2, 3, 4 or 5)
JPM_DURATION_1	Duration (1)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (1) field, which defines the duration unit.
JPM_DURATION_TYPE1	Duration Type (1)	Specifies the units for the Duration (1) field. Select from <i>Days, Months, Years, or Hours</i> .
JPM_DURATION_2	Duration (2)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (2) field, which defines the duration unit.
JPM_DURATION_TYPE2	Duration Type (2)	Specifies the units for the Duration (2) field. Select from <i>Days, Months, Years, or Hours</i> .
JPM_YN_1	User Yes/No (1)	A generic Yes/No check box. If the check box is selected, it indicates Yes, and if it is not selected this indicates No.
JPM_YN_2	User Yes/No (2)	A generic Yes/No check box.

<b>Property</b>	<b>Default Label Text</b>	<b>Description</b>
JPM_YN_3	User Yes/No (3)	A generic Yes/No check box.
JPM_YN_4	User Yes/No (4)	A generic Yes/No check box.
JPM_YN_5	User Yes/No (5)	A generic Yes/No check box.
JPM_DATE_1	User Date (1)	A generic date field.
JPM_DATE_2	User Date (2)	A generic date field.
JPM_TEXT254_1	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT254_2	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT254_3	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT254_4	User Text - 254 Char	A comment field of up to 254 characters.
JPM_TEXT1325_1	User Text - 1325 Char	A comment field of up to 1325 characters.
JPM_TEXT1325_2	User Text - 1325 Char	A comment field of up to 1325 characters.

## Profile Type Properties

This table lists the properties (field names) that you can add to a content section in the Profile Types component, the order in which the properties are displayed on the profile page, the property attributes, and any special Profile Management processing tied to the property.

<b>Content Property</b>	<b>Data Type</b>	<b>Max. Length</b>	<b>Prompt Value Source</b>	<b>Country Section</b>	<b>Special Processing</b>
EFFDT	Date				Automatically included in the content section.  If effective dated content is not desired, then it can be removed.
JPM_CAT_ITEM_ID	Character	12			Automatically included in the content section if the content type has not been defined as free form.
JPM_ADHOC_DESCR	Character	80			Automatically included for free-form content types.

<b>Content Property</b>	<b>Data Type</b>	<b>Max. Length</b>	<b>Prompt Value Source</b>	<b>Country Section</b>	<b>Special Processing</b>
JPM_CAT_ITEM_QUAL	Character	12			User configurable key tied to a qualifier set.  Instance Qualifier Set 1 must be specified if this property is included.
JPM_CAT_ITEM_QUAL2	Character	12			User configurable key tied to a qualifier set.  Instance Qualifier Set 2 must be specified if this property is included.
EFF_STATUS	Character	1	Translate values A, I		
JPM_JP_ITEM_SRC	Character	4			Automatically set by interfacing products. If this field has a value, then the profile item cannot be updated in Profile Management.
BUSINESS_UNIT	Character	5	Business Unit Table		PERSON profile validations.
LOCATION	Character	10	Location Table		PERSON profile validations.
SETID_DEPT	Character	5	SetID Table		
DEPTID	Character	10	Department Table		
COUNTRY	Character	3	Country Table		PERSON profile validations.
STATE	Character	6	State Table		PERSON profile validations. The validations also automatically set the STATE label based on the country value that is selected.
RATING_MODEL	Character	4	Rating Model table		When adding a profile item, the value automatically defaults from content item definition, then from profile type content section if none exists.
JPM_RATING1	Character	1	Rating Model table		RATING_MODEL property must also be included to enable the prompt values.

<b>Content Property</b>	<b>Data Type</b>	<b>Max. Length</b>	<b>Prompt Value Source</b>	<b>Country Section</b>	<b>Special Processing</b>
JPM_RATING2	Character	1	Rating Model table		RATING_MODEL property must also be included to enable the prompt values.
JPM_RATING3	Character	1	Rating Model table		RATING_MODEL property must also be included to enable the prompt values.
JPM_VERIFY_METHOD	Character	1	Translate values		
JPM_INTEREST_LEVEL	Character	1	Rating Model INT		
NVQ_STATUS	Character	1	NVQ Status translate values		
JPM_IMPORTANCE	Character	1	Importance rating level translate values		
JPM_PERSON_ID_1	Character	11	PERSON_NAME		
SCHOOL_TYPE	Character	3	School Type Table		
SCHOOL_CODE	Character	10	School Table		PERSON profile initialization and validations.
SCHOOL_DESCR	Character	100			Used together with the SCHOOL_CODE property if permitting entry for schools that are not in SCHOOL_TBL.  PERSON profile validations automatically default the school description when a value for SCHOOL_CODE has been entered.
MAJOR_CODE	Character	10	Major Table		PERSON profile initialization and validations.

<b>Content Property</b>	<b>Data Type</b>	<b>Max. Length</b>	<b>Prompt Value Source</b>	<b>Country Section</b>	<b>Special Processing</b>
MAJOR_DESCR	Character	100			MAJOR_DESCR is used together with the MAJOR_CODE property if permitting entry for majors that are not in MAJOR_TBL.  PERSON profile validations automatically default the major description when a value for MAJOR_CODE has been entered.
JPM_MINOR_CD	Character	10	Major Table		PERSON profile initialization automatically defaults the value of MINOR_DESCR when a value for JPM_MINOR_CODE has been entered.
MINOR_DESCR	Character	100			Used together with the JPM_MINOR_CD property if permitting entry for minors that are not in MAJOR_TBL.  PERSON profile initialization and validations automatically default the minor description when a value for JPM_MINOR_CD has been entered.
AVERAGE_GRADE	Character	5			
JPM_OBSTACLE_1	Character	2	Translate values		
JPM_LOC_BUNIT_1	Character	5	Business Unit Table		
JPM_LOCATION_1	Character	10	Location Table		
JPM_LOC_BUNIT_2	Character	5	Business Unit Table		
JPM_LOCATION_2	Character	10	Location Table		
JPM_AREA_PREF_1	Character	2	Geographic Preference Table		
JPM_AREA_PREF_2	Character	2	Geographic Preference Table		
JPM_AREA_PREF_3	Character	2	Geographic Preference Table		

<b>Content Property</b>	<b>Data Type</b>	<b>Max. Length</b>	<b>Prompt Value Source</b>	<b>Country Section</b>	<b>Special Processing</b>
JPM_CNTRY_PREF_1	Character	3	Country Table		
JPM_CNTRY_PREF_2	Character	3	Country Table		
JPM_CNTRY_PREF_3	Character	3	Country Table		
JPM_PROMPT_1	Character	12	User configurable		
JPM_PROMPT_2	Character	12	User configurable		
JPM_INTEGER_1	Number	8			PERSON profile validations.
JPM_PROMPT_3	Character	12	User configurable		
JPM_DECIMAL_1	Number	7.2			
JPM_PROMPT_4	Character	12	User configurable		
JPM_PCT_1	Number	3			
JPM_PROMPT_5	Character	12	User configurable		
JPM_MANDATORY	Character	1	Translate values Y/N		
JPM_YN_1	Character	1	Translate values Y/N		PERSON profile validations.
JPM_PROMPT_6	Character	12	User configurable		
JPM_DATE_1					
JPM_PROMPT_7	Character	12	User configurable		
JPM_DATE_2	Date				PERSON profile validations.
JPM_PROMPT_8	Character	12	User configurable		
JPM_INTEGER_2	Number	8			PERSON profile validations.
JPM_PROMPT_9	Character	12	User configurable		
JPM_DECIMAL_2	Number	7.2			
JPM_PROMPT_10	Character	12	User configurable		
JPM_PCT_2	Number	3			
JPM_PROMPT_11	Character	12	User configurable		

<b><i>Content Property</i></b>	<b><i>Data Type</i></b>	<b><i>Max. Length</i></b>	<b><i>Prompt Value Source</i></b>	<b><i>Country Section</i></b>	<b><i>Special Processing</i></b>
JPM_YN_2	Character	1	Translate values Y/N		
JPM_PROMPT_12	Character	12	User configurable		
JPM_YN_3	Character	1	Translate values Y/N		
JPM_PROMPT_13	Character	12	User configurable		
JPM_DATE_3	Date				PERSON profile validations.
JPM_PROMPT_14	Character	12	User configurable		
JPM_DATE_4	Date				
JPM_PROMPT_15	Character	12	User configurable		
JPM_YN_4	Character	1	Translate values Y/N		
JPM_PROMPT_16	Character	12	User configurable		
JPM_YN_5	Character	1	Translate values Y/N		
JPM_PROMPT_17	Character	12	User configurable		
JPM_DATE_5	Date				
JPM_PROMPT_18	Character	12	User configurable		
JPM_DATE_6	Date				
JPM_PROMPT_19	Character	12	User configurable		
JPM_PROMPT_20	Character	12	User configurable		
JPM_TEXT254_1	Character	254			
JPM_TEXT254_2	Character	254			
JPM_TEXT254_3	Character	254			
JPM_TEXT254_4	Character	254			
JPM_TEXT254_5	Character	254			
JPM_TEXT1325_1	Character	1325			PERSON profile validations.
JPM_TEXT1325_2	Character	1325			
PRACTIC_GRADE_GER	Character	4		DEU	

<b>Content Property</b>	<b>Data Type</b>	<b>Max. Length</b>	<b>Prompt Value Source</b>	<b>Country Section</b>	<b>Special Processing</b>
THEORY_GRADE_GER	Character	4		DEU	
IPE_SW	Character	1	Translate values Y/N	DEU	
EDUC_LVL_AUS	Character	1	Highest education achievement translate values	AUS	
APS_HEDUC_CD_AUS	Character	2	Higher education level translate values	AUS	
FACULTY_CODE	Character	10	JPN Faculty Table	JPN	PERSON profile initialization and validation.
FACULTY_DESCR	Character	100		JPN	FACULTY_DESCR is used together with the FACULTY_CODE property if permitting entry for faculties that are not in FACULTY_TBL_JPN.  PERSON profile initialization automatically default the faculty description when a value for FACULTY_CODE has been entered.
SUBFACULTY_CODE	Character	10	JPN Sub-Faculty Table	JPN	PERSON profile initialization and validation.
SUBFACULTY_DESCR	Character	100		JPN	SUBFACULTY_DESCR is used together with the SUBFACULTY_CODE property if permitting entry for faculties that are not in SBFCLTY_TBL_JPN.  PERSON profile initialization automatically default the faculty description when a value for SUBFACULTY_CODE has been entered.
MAJOR_CATEGORY	Character	1	Education category translate values	JPN	
GVT_CREDIT_HOURS	Character	3		USF	PERSON profile validations.
GVT_CRED_HRS_TYPE	Character	1	Education credit unit translate values	USF	PERSON profile validations.
FP_SUBJECT_CD	Character	3	FPS Degree Subject Table	FPS	



<b>Content Property</b>	<b>Data Type</b>	<b>Max. Length</b>	<b>Prompt Value Source</b>	<b>Country Section</b>	<b>Special Processing</b>
FP_SKIL_HIR	Character	1	Translate values Y/N	FPS	
FP_SKIL_PRM	Character	1	Translate values Y/N	FPS	
FP_SKIL_TEN	Character	1	Translate values Y/N	FPS	
FP_DEGR_REQUIRED	Character	1	Translate values Y/N	FPS	
BONUS_AMOUNT_FRA	Number	5.2		FRA	
BONUS_DT_FRA	Date			FRA	
JPM_SOURCE_ID2	Character	12			Contains the syndication source profile ID. This property is always display-only.
JPM_WF_STATUS	Character	1	Translate values Approved, Denied, Pending, Saved, New		System updates workflow status of a profile item. This property is always display-only.
LASTUPDDTTM	DateTime				Set by system when profile item is added or updated.
LASTUPDOPRID	Character	30			Set by system when profile item is added or updated.

## Property Initializations and Validations

The following initialization/validations are delivered to work with the PERSON Profile Type definition. An entry for the profile type exists in the table JPM\_PKG\_TYPES to specify that the validations in the application class ControllerPerson are active. If these validations are not desired, then the entry for the PERSON profile type can be removed from JPM\_PKG\_TYPES. When creating a new profile type, these validations will be included if the profile type is cloned from the delivered PERSON profile type and the Copy Validations check box is selected.

<b>Property</b>	<b>Profile</b>	<b>Content Type</b>	<b>Validation/Initialization</b>
JPM_TEXT1325_1	PERSON	Competency	Populated with content item description.
JPM_INTEGER_1 JPM_INTEGER_2	PERSON	Competency	Year Acquired must be earlier than or equal to Year Last Used.
EFFDT JPM_DATE_3	PERSON	Membership Honors & Awards	Date issued cannot be greater than end date.

<b>Property</b>	<b>Profile</b>	<b>Content Type</b>	<b>Validation/Initialization</b>
EFFDT JPM_DATE_3	PERSON	Licenses	Issue Date cannot be greater than Expiration Date.
JPM_DATE_3 JPM_DATE_2	PERSON	Membership	Mandate End Date cannot be greater than Mandate Begin Date.
JPM_YN_1 JPM_INTEGER_2	PERSON	Degrees	Graduate Indicator will automatically be selected when Year Acquired is in the past.
GVT_CRED_HRS_TYPE GVT_CREDIT_HOURS	PERSON	Degrees	Credit Hours Type is required if Credit Hours are entered
COUNTRY STATE SCHOOL_CODE	PERSON	Degrees Education Level	Ensures that country, state, and school code values work together.
COUNTRY STATE	PERSON	Licenses	Ensures that country, state values work together.
BUSINESS_UNIT LOCATION COUNTRY	PERSON	Current Location	Initializes values from primary job.
JPM_YN_1 JPM_DATE_3	PERSON	Licenses	Set the Renewal Required field from the content catalog.  If renewal is required, then set expiration date to date issued plus renewal length.
FACULTY_DESCR	PERSON	Degrees	Populate Faculty description from JPN Faculty Table if code specified.
SUBFACULTY_DESCR	PERSON	Degrees	Populate Sub Faculty description from JPN Faculty Table if code specified.
MAJOR_DESCR	PERSON	Degrees	Populate Major description from Major Table if code specified.
MINOR_DESCR	PERSON	Degrees	Populate Minor description from the Major Table if code specified.
SCHOOL_DESCR	PERSON	Degrees Education Level	Populate SCHOOL_DESCR from School Table if code specified.