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PEOPLESOFT

PeopleSoft HCM 9.2: HCM Portal Pack

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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

PeopleSoft Hosted Documentation

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

Locally Installed Help

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

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

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

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

Downloadable PeopleBook PDF Files

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

Common Help Documentation

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

- Application Fundamentals

- Using PeopleSoft Applications

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

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

Field and Control Definitions

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

Typographical Conventions

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

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

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

ISO Country and Currency Codes

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

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

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

Region and Industry Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America

- North America

Industry Identifiers

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

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

Access to Oracle Support

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

Documentation Accessibility

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

Using and Managing the PeopleSoft Online Help

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

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

PeopleSoft HCM Related Links

PeopleSoft Information Portal on Oracle.com

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

HCM Abbreviations

Contact Us

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

Follow Us

Get the latest PeopleSoft updates on Facebook.

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Chapter 1

Getting Started with HCM Portal Pack

HCM Portal Pack Pagelets

PeopleSoft HCM pagelets include:

- Birthday Alerts pagelet.
- Anniversary Alerts pagelet.
- Direct Reports pagelet.
- Employee Leave Summary pagelet.
- Manager Leave Summary pagelet.
- Stock Options pagelet.
- Paychecks pagelet.
- Company Directory pagelet.
- Organization Directory pagelet.
- Employee Performance pagelet.
- Upcoming Training pagelet.
- Schedule Training pagelet.
- Employee Expiring Licenses pagelet.
- Manager Expiring Licenses pagelet.
- Open Positions pagelet.
- Time Management Alerts pagelet.
- Workforce Availability pagelet.
- Direct Reports Phones pagelet.

PeopleSoft HCM to ELM On Demand pagelets include:

- Instructor Center pagelet.
- Manager Learning Center pagelet.
- My Learning pagelet.

- My Team Learning pagelet.

PeopleSoft HCM on Demand pagelets include:

- Administer Career Plans pagelet.
- Administer Succession Plans pagelet.
- Employee Profile pagelet.
- Manage Careers & Successions pagelet.
- Manager Profile Management pagelet.
- My Development Documents pagelet.
- My Performance Documents pagelet.
- Profile Administrator Home pagelet.
- Team Development Documents pagelet.
- Team Performance Documents pagelet.
- ePerformance Administration pagelet.
- My Career Plan pagelet.

PeopleSoft TalentLinks pagelets include:

- My Compensation Activities pagelet.
- eCompensation Admin Home pagelet.
- eCompensation Administration pagelet.

Related Links

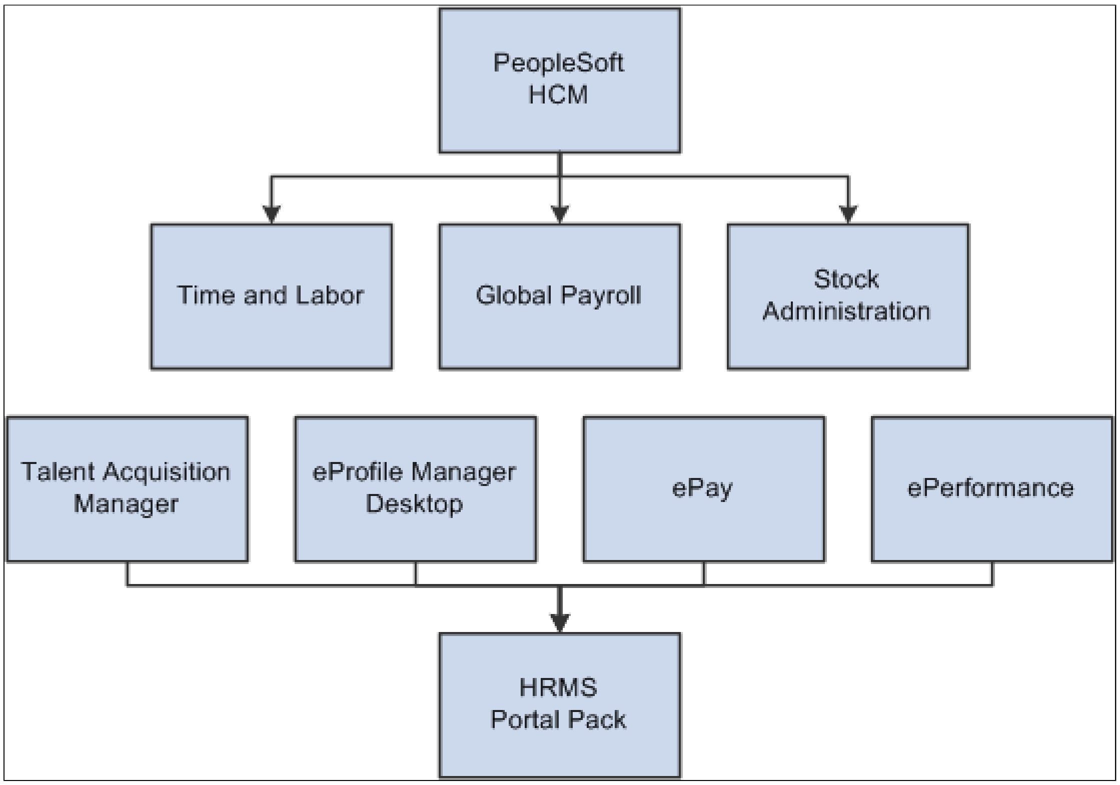
Viewing Employee Pagelets
Viewing Manager Pagelets

HCM Portal Pack Integrations

The HRMS Portal Pack includes portal pagelets that provide access to key data from your PeopleSoft HCM system. The portal pack is intended to supplement the core business applications with pagelets for your portal's homepage.

Image: PeopleSoft HRMS Portal Pack data sources

This graphic shows the PeopleSoft HCM applications that feed data to the HRMS Portal Pack.



This documentation discusses integration considerations in the implementation topics.

HCM Portal Pack Implementation

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

Other Sources of Information

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

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

Chapter 2

Understanding HCM Portal Pack

HCM Portal Pack Overview

The PeopleSoft HCM Portal Pack provides a collection of pagelets that you can individually select to appear on a corporate intranet or extranet homepage. The individual pagelets provide information gathered from various PeopleSoft HCM applications.

PeopleSoft Pagelet Activation and Personalization

HRMS Portal Pack includes portal pagelets that provide at-a-glance access to essential data from your system. The portal pack supplements other PeopleSoft HCM applications that provide the underlying data.

When you install HRMS Portal Pack, users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

Users can configure their portal homepages with three narrow columns or one narrow and one wide column. What appears to the user is determined by the pagelets dynamically.

See Displaying Portal Pagelets.

Note: Each pagelet can be configured to use any of the HCM access types. PeopleSoft recommends using the same access type for each pagelet. This ensures consistency when managers of direct reports view the different pagelets to help improve performance. To set up the access type, access the Direct Reports Setup component by selecting Set Up HCM, Common Definitions, Direct Reports for Managers, Direct Reports Setup.

	Some pagelets support personalization that enables individual users to configure content displayed in their pagelet; the Customize button in the pagelet title bar alerts you to this capability. Click the button to access the Personalization page.

Related Links

Personalizing Pagelets

HCM Portal Pack Pagelets

This section lists the pagelets the make up HRMS Portal Pack and identifies:

- The name and object name of the pagelets.
- The audience for the pagelet: employees, customers, or suppliers.
- The functional role of the person who uses the pagelet.

  These are business process functional roles not delivered as such by PeopleTools user security roles.
- The pagelet's enabling application.

  The enabling application provides the data that appears in the pagelet. If the enabling application has not been licensed, the pagelet won't work.

This table lists the pagelets and their enabling applications:

Pagelet Name and Object Name	***Audience***	***Functional Role***	***Enabling Applications***
Birthday Alerts CO_PE_MGR_BIRTHDAY	Employees	Manager	Human Resources (HR) eProfile Manager Desktop
Anniversary Alerts CO_PE_MGR_HIREDT	Employees	Manager	HR eProfile Manager Desktop
Direct Reports CO_PE_MGRRPTS_COMP	Employees	Manager	HR PeopleSoft eProfile Manager Desktop
Employee Leave Summary HR_PE_EMPL_LEAVE	Employees	Employee	HR PeopleSoft Global Payroll or Absence Management
Manager Leave Summary HR_PE_MGR_LEAVE	Employees	Manager	HR Global Payroll or Absence Management
Stock Options ST_PE_OPTION	Employees	Employee	HR PeopleSoft Stock Administration
Paychecks PY_PE_PAYCHECK	Employees	Employee	HR PeopleSoft Payroll for North America PeopleSoft ePay
Company Directory HRCD_SRCH_PGLT	Employees	Employee	HR

Pagelet Name and Object Name	***Audience***	***Functional Role***	***Enabling Applications***
Organization Directory EO_PE_CDCOMPDIR	Employees	Employee	HR
Employee Performance EP_PE_ALERT	Employees	Manager	HR PeopleSoft ePerformance
Upcoming Training CO_PE_EMP_TRAINING	Employees	Manager	HR
Scheduled Training CO_PE_MGR_TRAINING	Employees	Employee	HR
Employee Expiring Licenses CO_PE_EXP_LIC_EMP	Employees	Employee	HR
Manager Expiring Licenses CO_PE_EXP_LIC	Employees	Manager	PeopleSoft HR
Open Positions CO_PE_VACPOS	Employees	Manager	HR (optional functionality) PeopleSoft Talent Acquisition Manager Solutions
Time Management Alerts TL_PE_MGR_TMMGT	Employees	Manager	HR Time and Labor (optional) Absence Management
Workforce Availability TL_PE_MGR_WRKFRC	Employees	Manager	HR PeopleSoft Time and Labor (optional) PeopleSoft Absence Management
Direct Reports Phones CO_PE_EMPLPHN_COMP	Employees	Manager	HR eProfile Manager Desktop

Related Links

Viewing Employee Pagelets
Viewing Manager Pagelets

Chapter 3

Setting Up HCM Portal Pack

Defining Default Settings for the Employee Performance Alerts Pagelet

To define default settings for the Employee Performance Alerts Settings page, use the Employee Performance Alerts Setup (EP_ALERT_SETUP) component.

This topic discusses how to:

- Activate the Employee Performance pagelet.
- Define settings for the Employee Performance Alerts pagelet personalizations.

Page Used to Define Default Settings for the Employee Performance Alert Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Employee Performance Alerts Setup	EP_ALERT_SETUP	Set Up HCM, Product Related, ePerformance, Pagelet Alerts, Employee Performance Alerts Setup	Define settings for the Employee Performance Alerts Setup page.

Related Links

Viewing the Employee Performance Pagelet

Activating the Employee Performance Pagelet

The Employee Performance pagelet is a self-service pagelet that managers can use to quickly check the status of the performance documents for which they are responsible. For a given document type, the pagelet lists each employee's name, the due date, and a color-coded button that identifies if the document is complete, on schedule, behind schedule, or cancelled.

To enable managers to use the pagelet, you must:

1. Activate the Employee Performance pagelet.
2. Define the default rules for the pagelet.

Related Links

PeopleSoft Pagelet Activation and Personalization

Employee Performance Alerts Setup Page

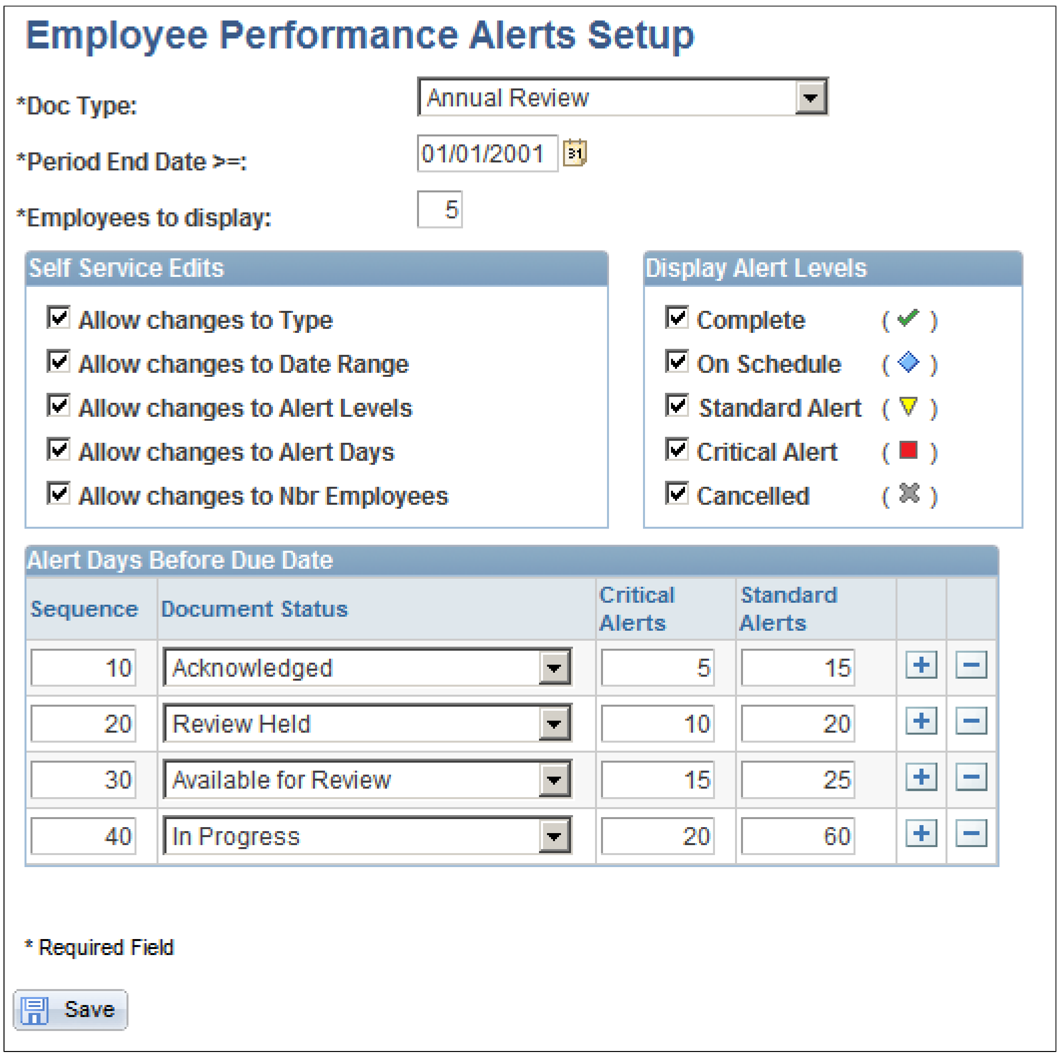
Use the Employee Performance Alerts Setup page (EP_ALERT_SETUP) to define settings for the Employee Performance Alerts Setup page.

Navigation

Set Up HCM, Product Related, ePerformance, Pagelet Alerts, Employee Performance Alerts Setup

Image: Employee Performance Alerts Setup page

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



Doc Type (document type)

Select the type of document to list on the Employee Performance pagelet. You define document types on the Document Types page.

See "Defining Document Types *(PeopleSoft HCM 9.2: ePerformance)*".

Period End Date >= (period end greater than or equal to)	Select the end date for the performance period for which documents are to be listed. The system lists documents with the same period end date or later.
Employees to display	Enter the number of employees to list on the pagelet. If the number of employees with documents exceeds this number, the pagelet automatically includes a More link that enables the manager to list all employees with the selected document type.

Self Service Edits

Use this group box to define how much control managers can have over the appearance of their Employee Performance pagelet. If you select any of the check boxes here, the manager can change the selected default settings. To change the settings on the Employee Performance pagelet, click the Customize button on the pagelet to access the Employee Performance Alerts Settings page.

See Defining Default Settings for the Employee Performance Alerts Pagelet.

Allow changes to Type	Select to enable managers to pick a document type other than the one you selected in the Type field.
Allow changes to Date Range	Select to enable managers to enter a different date range.
Allow changes to Alert Levels	Select to enable managers to determine which alerts should appear on the pagelet.
Allow changes to Alert Days	Select to enable managers to change the number of days before the due date that triggers the alerts.
Allow changes to Nbr Employees (allow changes to number of employees)	Select to enable managers to change the number of employees that are listed on the pagelet when the pagelet is opened.

Display Alert Levels

Use this group box to select the types of alerts that should appear. Select the corresponding check box for each alert to display.

Alert Days Before Due Date

Use this group box to select the statuses that are to trigger alerts and the number of days prior to the due date that an alert is to be considered standard versus critical.

Sequence	Enter the order in which this document status is to appear on the Employee Performance Alerts Personalization page. See Defining Default Settings for the Employee Performance Alerts Pagelet.
Document Status	Select the status to trigger an alert. Values are: *Acknowledged, Available for Review, Cancelled, Completed, In Progress, Not Started* and *Review Held.*

	See "Understanding Inquiry Pages *(PeopleSoft HCM 9.2: ePerformance)*".
Critical Alerts and Standard Alerts	These fields apply only if you select Critical Alert and Standard Alert in the Display Alert Levels group box. Enter the number of days before a document's due date that a critical alert button or a standard alert button is to appear if the document is still in the selected status. For example, suppose that you select the status *In Progress,* and enter *30* in the Critical Alerts field and *60* in the Standard Alerts field. This causes the standard alert button to appear on the pagelet when a document is in progress from 31 to 60 days before its due date. The critical alert button appears if the document is still in progress 30 days or less before the due date.

Related Links

Defining Default Settings for the Employee Performance Alerts Pagelet

Employee Performance Alerts Settings Page

Defining Default Settings for the Open Positions Pagelet

To set default settings for the Open Positions pagelet, use the Open Positions Setup (CO_PE_VACPOS_SETUP) component.

This topic discusses how to:

- Activate the Open Positions pagelet.
- Define default rules for the Open Positions pagelet.

Page Used to Define Default Settings for the Open Positions Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Setup Open Positions	CO_PE_VACPOS_SETUP	Set Up HCM, Product Related, HRMS Portal Pack, Setup Open Positions, Setup Open Positions	Define default rules for the Setup Open Positions pagelet personalization options.

Related Links

Personalize Open Positions Page

Activating the Open Positions Pagelet

The Open Positions pagelet is a self-service pagelet that managers can use to quickly check the status of open positions. The pagelet displays position information and links to other related position pages.

To enable managers to use the pagelet, you must:

1. Activate the Open Positions pagelet.
2. Define the default settings for the pagelet.

Related Links

PeopleSoft Pagelet Activation and Personalization

Setup Open Positions Page

Use the Setup Open Positions page (CO_PE_VACPOS_SETUP) to define default rules for the Setup Open Positions pagelet personalization options.

Navigation

Set Up HCM, Product Related, HRMS Portal Pack, Setup Open Positions, Setup Open Positions

Image: Setup Open Positions page

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

Display Position Description Link

Select to display the Position Description link. This link provides access to the Position Description page where you can view the position description.

Display/Create Job Req and Review Job Req links (display/create job requisitions and review job requisitions links)

Select to display the job requisition links. This link provides access to the Job Requisition page where you can review existing job requisitions or create a new one.

Related Links

Personalize Open Positions Page

Enabling MapQuest for the Organization Directory Pagelet

To enable MapQuest on the Organization Directory pagelet, use the Organization Directory (EO_PE_CDADMIN_CMP) component.

This topic discusses how to enable MapQuest for locations on the Organization Directory pagelet.

Page Used to Enable MapQuest for Locations on the Organization Directory Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Organization Directory - Pagelet Administration	EO_PE_CDADMIN_PNL	Set Up HCM, Install, Product and Country Specific, Organization Directory	Enable MapQuest for locations when using the Organization Directory pagelet.

Organization Directory - Pagelet Administration Page

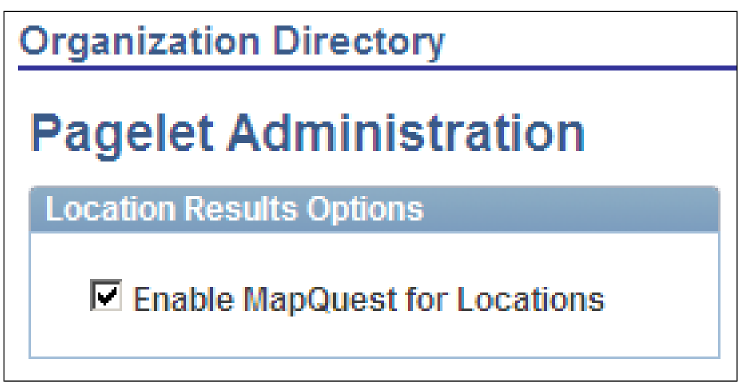
Use the Organization Directory - Pagelet Administration page (EO_PE_CDADMIN_PNL) to enable MapQuest for locations when using the Organization Directory pagelet.

Navigation

Set Up HCM, Install, Product and Country Specific, Organization Directory

Image: Organization Directory - Pagelet Administration page

This example illustrates the fields and controls on the Organization Directory - Pagelet Administration page. You can find definitions for the fields and controls later on this page.



Select the Enable MapQuest for Locations check box to have the system provide a company location link that will open up a MapQuest window when performing a location search from the pagelet.

See Viewing the Organization Directory Pagelet.

Chapter 4

Using HCM Portal Pack Pagelets

Common Elements in HCM Portal Pack Pagelets

Number of Rows (1 to 99)

Enter the number of rows to display on the page.

Days to view in the future

Enter the number of days in the future that the system should use to display upcoming events.

Days to view in the past

Enter the number of days in the past that the system should use to display past events.

Maximum displayed rows

Enter the maximum number of rows that should appear on the page. This only limits the number of rows that appear and does not limit the amount of information that the system retrieves.

More

Click this link to view more information.

Indicates that an approaching date is within the defined alert limit.

Click the Customize button to define the number of rows and columns you want to display on a pagelet. Not all pagelets can be personalized.

Displaying Portal Pagelets

You can control the pagelet selection and, optionally the layout, for your users by using the Portal homepage feature in PeopleTools. To make pagelets available for selection and display:

1. Select PeopleTools, Portal, Structure and Content.
2. Select the Portal Objects link on the Structure and Content page.
3. Select the Homepage link.
4. Select the Tabs link.
5. Select the Edit link for My Page in the Content References grid.
6. Access the Tab Content page (select the Tab Content tab).
7. Use the Tab Content page to select pagelets and define their behavior. Select *Required* or *Req-Fix* to make the pagelets always appear on users' homepages. Using *Req-Fix* also prevents pagelets from being moved on the homepage.

8. Use the Tab Layout page to arrange any required pagelets.

Note: Access to pagelets is also controlled by the standard PeopleTools component security. Even with the pagelet selected using the previous procedure, you cannot see the pagelet as a content choice unless you also have the PeopleTools security to access the component through your role and its permission lists.

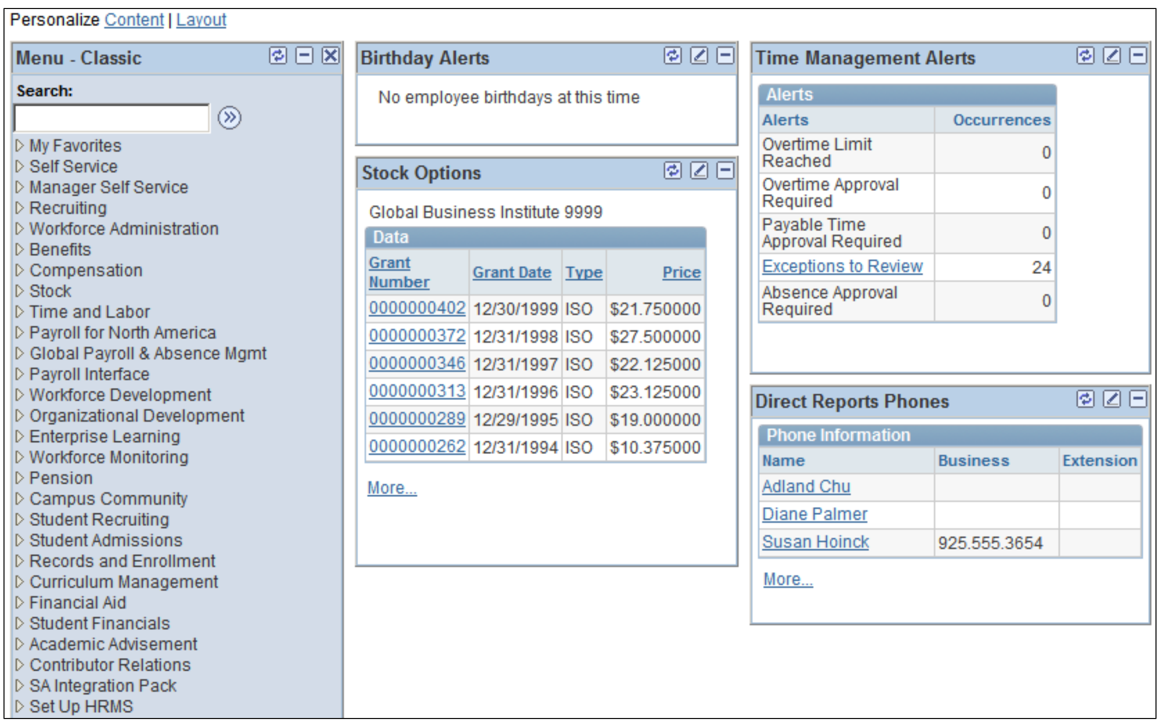
See the product documentation for *PeopleTools: Portal Technology*.

The next example displays a personalized homepage using PeopleSoft HCM portal pagelets. After defining portal objects in PeopleTools, individual users can click the Content link in the upper left-hand corner to define pagelets for their homepage, and click the Layout link to arrange their homepage elements. The example uses a three-column layout.

By default, portal pagelets display action bars in the upper right-hand corner that, depending on the pagelet properties, enable you to minimize, personalize, or remove the pagelet from the homepage.

Image: Portal pagelet example

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



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

Personalizing Pagelets

Each individual user can personalize the content for their pagelets by clicking the Customize (pencil) button on the pagelet headers. This topic discusses how to:

- Personalize the Direct Reports pagelet.

- Personalize the Employee Leave Summary pagelet.
- Personalize the Manager Leave Summary pagelet.
- Personalize the Stock Options pagelet.
- Personalize the Employee Performance pagelet.
- Personalize the Upcoming Training pagelet.
- Personalize the Scheduled Training pagelet.
- Personalize the Setup Open Positions pagelet.
- Personalize the Time Management Alerts pagelet.
- Personalize the Workforce Availability pagelet.
- Personalize the Direct Reports Phones pagelet.

Pages Used to Personalize Pagelets

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Alerts	CO_PE_OPR_BIRTH_PG CO_PE_OPR_ANNIV_PG CO_PEOPRLIC_EMP_PG CO_PE_OPREXPLIC_PG	• Click the Customize button on the Birthday Alerts pagelet. • Click the Customize button on the Anniversary Alerts pagelet. • Click the Customize button on the Employee Expiring Licenses pagelet. • Click the Customize button on the Manager Expiring Licenses pagelet.	Define default display preferences. You can define the number of days to view in the future and in the past and the maximum number of rows to display on the Birthday Alerts, Anniversary Alerts, Employee Expiring Licenses, and Manager Expiring Licenses pagelet.
Personalize Direct Reports	CO_PE_OPR_DIRPT_PG	Click the Customize button on the Direct Reports pagelet.	Specify the maximum number of rows to display on the Direct Reports pagelet, and specify if you want the business phone, employee ID, job title, or location to also display.
Select Job Title	HR_PE_EMPL_LV_EXT	• Click theCustomize button on the Employee Leave Summary pagelet. • Click the Customize button on the Manager Leave Summary pagelet.	Specify settings to display on the Manager Leave Summary page and the Employee Leave Summary page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Stock Options	ST_PE_OPTION_PREF	Click the Customize button on the Stock Options pagelet.	Specify the display preferences and display fields to display on the Stock Options pagelet.
Employee Performance Alerts Settings	EP_PE_OPR_ALERT	Click the Customize button on the Employee Performance pagelet.	Specify the display preferences, alert levels, and alert days before due date to display on the Employee Performance pagelet.
Personalize Upcoming Training	CO_PE_TRN_MGR_N	Click the Customize button on the Upcoming Training pagelet.	Specify the number of rows to display on the Upcoming Training pagelet, and specify the days to view each item the future.
Personalize Scheduled Training	CO_PE_TRN_MGR_PG	Click the Customize button on the Scheduled Training pagelet.	Specify the number of rows to display on the Scheduled Training pagelet, and specify the days to view each item the future.
Personalize Open Positions	CO_PE_VACPOS_CUST	Click the Customize button on the Open Positions pagelet.	Specify the number of rows to display on the Open Positions pagelet. System administrators define additional default display settings on the Pagelet Administration - Open Positions page.
Personalize Time Management Alerts	TL_PE_MGR_TMMGT_P	Click the Customize button on the Time Management Alerts pagelet.	Select the alerts to display on the Time Management Alerts pagelet.
Personalize Workforce Availability	TL_PE_MGR_WRKFRC_P	Click the Customize button on the Workforce Availability pagelet.	Select the alerts to display on the Workforce Availability pagelet.
Personalize Phones	CO_PE_OPR_PHN_PG	Click the Customize button on the Direct Reports Phones pagelet.	Specify the number of rows to display on the Direct Reports Phones pagelet, and specify the phone types (business, home, campus, mobile and so on) to display.
Personalize My Reports	PSRF_PGLT_OPTIONS	Click the Customize button on the My Reports pagelet.	Specify the maximum number of reports within a specified number of days or hours that should display on the My Reports pagelet.

Personalize Direct Reports Page

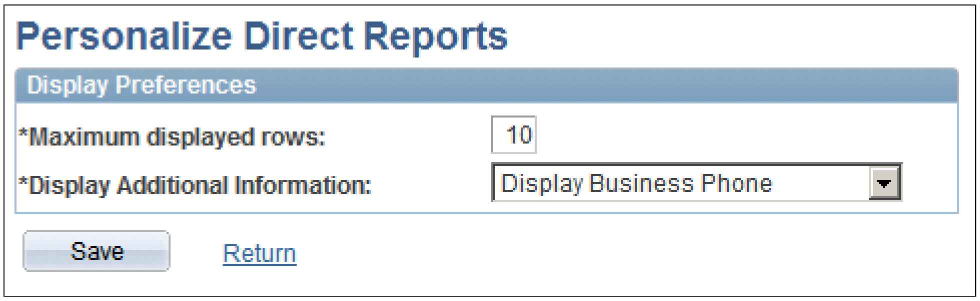
Use the Personalize Direct Reports page (CO_PE_OPR_DIRPT_PG) to specify the maximum number of rows to display on the Direct Reports pagelet, and specify if you want the business phone, employee ID, job title, or location to also display.

Navigation

Click the Customize button on the Direct Reports page.

Image: Personalize Direct Reports page

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



Display Additional Information

Values include:

- *Display Business Phone*
- *Display Employee Id*
- *Display Job Title*
- *Display Location*

Select Job Title Page

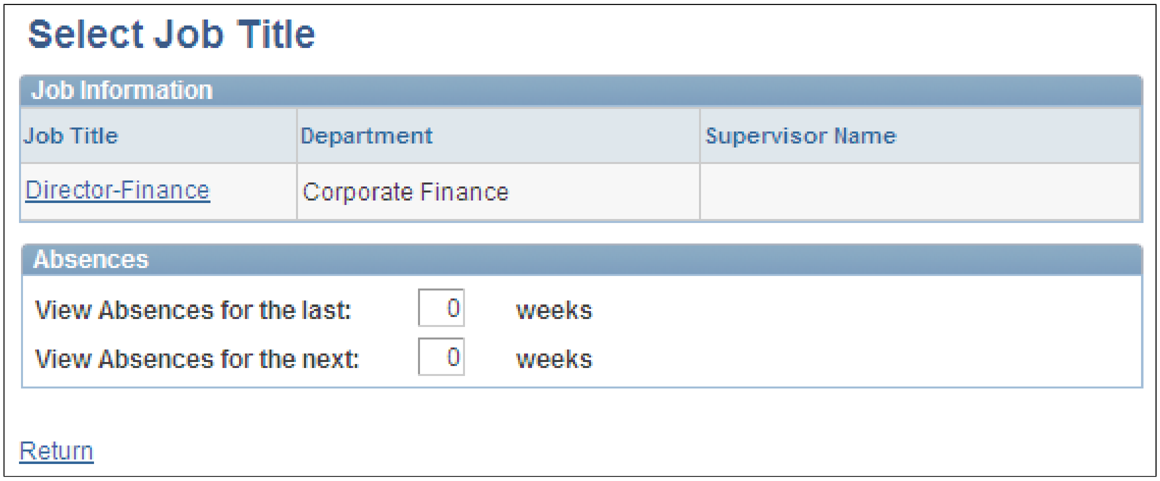
Use the Select Job Title page (HR_PE_EMPL_LV_EXT) to specify settings to display on the Manager Leave Summary page and the Employee Leave Summary page.

Navigation

- Click theCustomize button on the Employee Leave Summary pagelet.
- Click the Customize button on the Manager Leave Summary pagelet.

Image: Select Job Title page for the Manager Leave Summary pagelet

This example illustrates the fields and controls on the Select Job Title page for the Manager Leave Summary pagelet. You can find definitions for the fields and controls later on this page.



View Absences for the last and View Absences for the next

Enter the number of weeks in the past and in advance for which you want to display absence information.

Note: These fields appear only on the manager version of this pagelet.

Personalize Stock Options Page

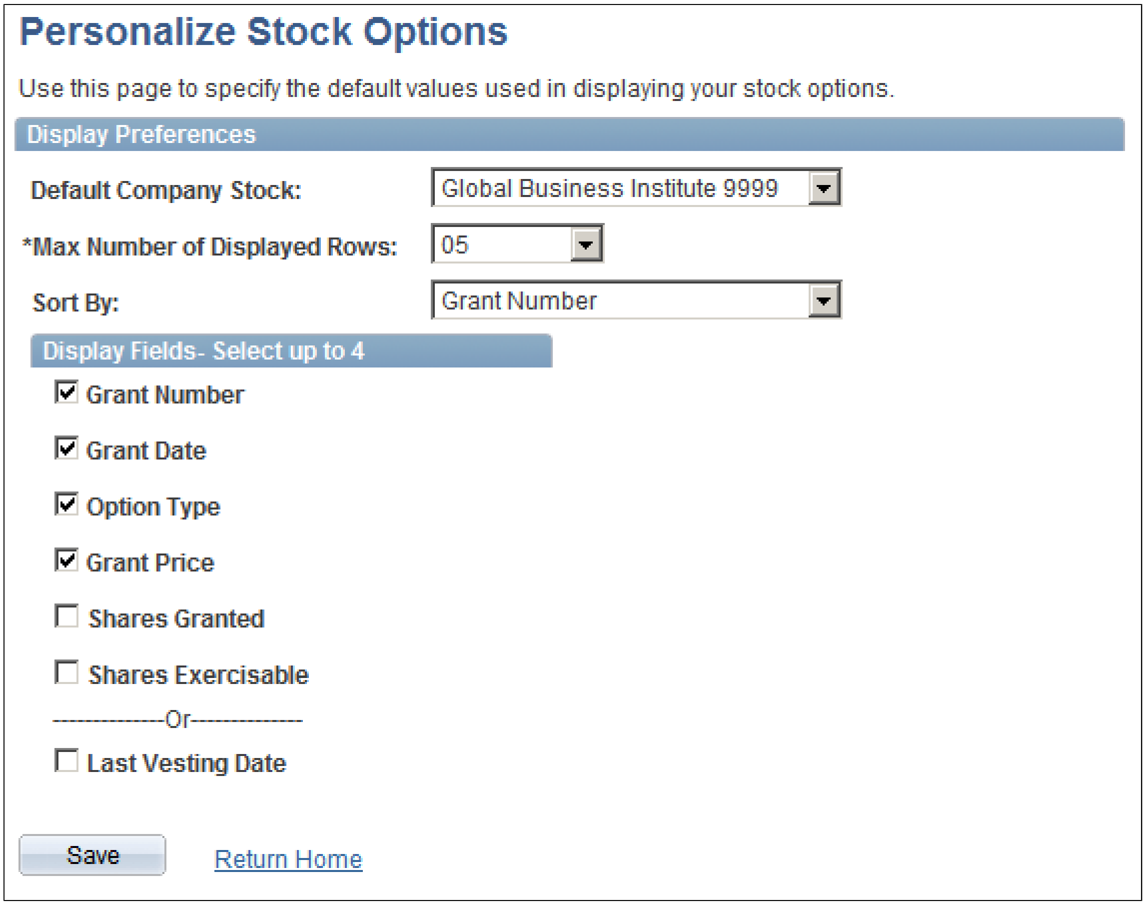
Use the Personalize Stock Options page (ST_PE_OPTION_PREF) to specify the display preferences and display fields to display on the Stock Options pagelet.

Navigation

Click the Customize button on the Stock Options pagelet.

Image: Personalize Stock Options page

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



Display Preferences

Default Company Stock	Select the company for which you want to display stock option information.
Max Number of Displayed Rows (maximum number of displayed rows)	For multiple stock option grants, select the number of rows to appear on the pagelet. If the number of grants exceeds the number of rows, the system automatically displays the More link.
Sort By	Define how the information is sorted. Values are: *Grant Date, Grant Number, Grant Price,* and *Option Type.*

Display Fields - Select up to 4

Each check box that you select appears on the pagelet. You can select up to four fields from this list. Selecting Last Vesting Date overrides all of the other display options.

Grant Number	Displays the grant issue number.
Grant Date	Displays the issue date of each grant listed.
Option Type	Displays the type of option for each grant.
Grant Price	Displays the issue price for each grant.
Shares Granted	Displays the number of shares granted for each grant.
Shares Exercisable	Displays the number of shares currently exercisable for each grant listed.
Last Vesting Date	Displays only the last date that options vested and does not display any additional information about the options.

Employee Performance Alerts Settings Page

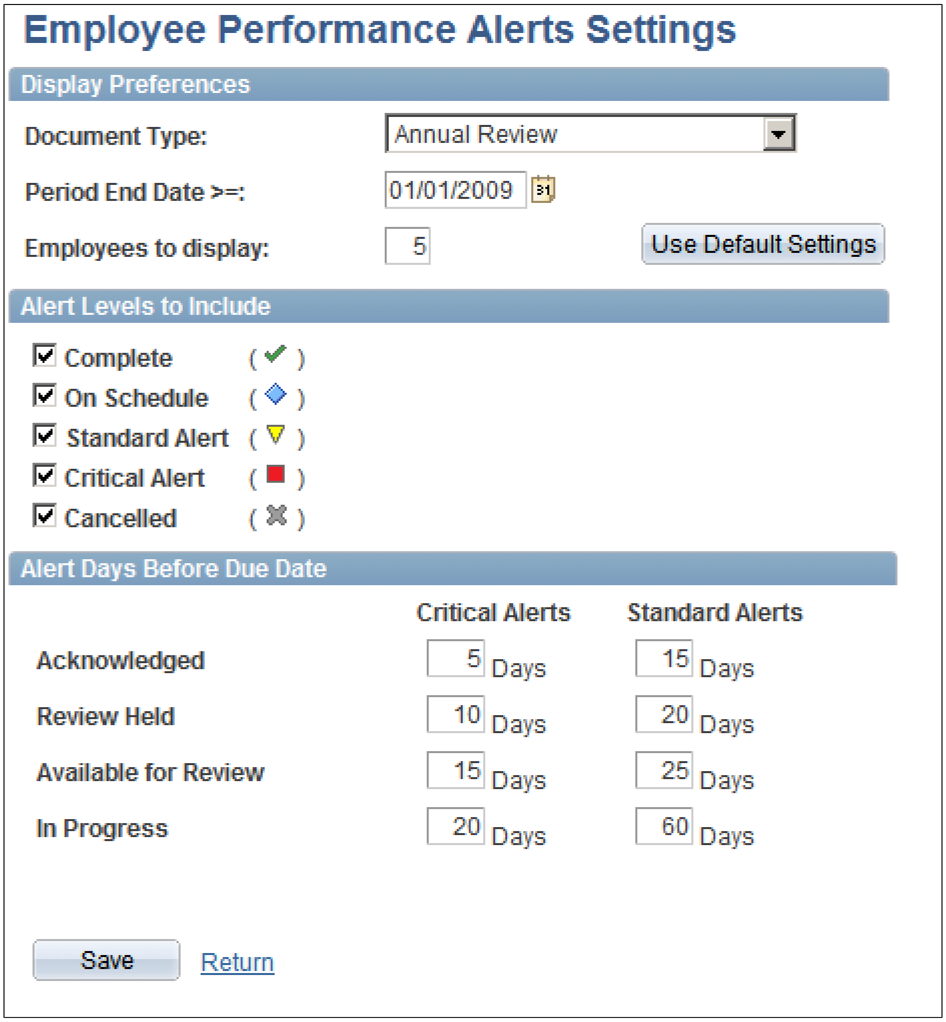
Use the Employee Performance Alerts Settings page (EP_PE_OPR_ALERT) to specify the display preferences, alert levels, and alert days before due date to display on the Employee Performance pagelet.

Navigation

Click the Customize button on the Employee Performance pagelet.

Image: Employee Performance Alerts Settings page

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



Document Type

Select the type of document that you want to appear. You define document types on the Document Types page.

Period End Date >=

Select the end date of the performance period for which documents are to be listed. The system lists documents with the same date or later than the date entered here.

Employees to display

Enter the number of employees to list on the pagelet.

Use Default Settings

Click to reset the values on the page to the values that you defined when you last set up this page. Values are defaulted from product level.

Note: This button does not appear on the Employee Performance Alerts Setup (EP_ALERT_SETUP) page when you are defining the settings . It appears only on the Employee Performance Alerts Setup (EP_PE_OPR_ALERT) page, which is accessed when a user clicks Customize from the Employee Performance pagelet.

Note: Fields that display on this page are defined on the Employee Performance Alerts Setup page and may vary depending on the setup defined there.

Alert Levels to Include

Select the desired alert levels to include on the Employee Performance page.

Alert Days Before Due Date

For each document status type *(Acknowledged, Review Held, Available for Review, In Progress, Cancelled* and*Complete),* define the number of days before a document's due date that a critical or standard alert appears.

Related Links

Defining Default Settings for the Employee Performance Alerts Pagelet
"Defining Document Types *(PeopleSoft HCM 9.2: ePerformance)*"

Personalize Upcoming Training Page

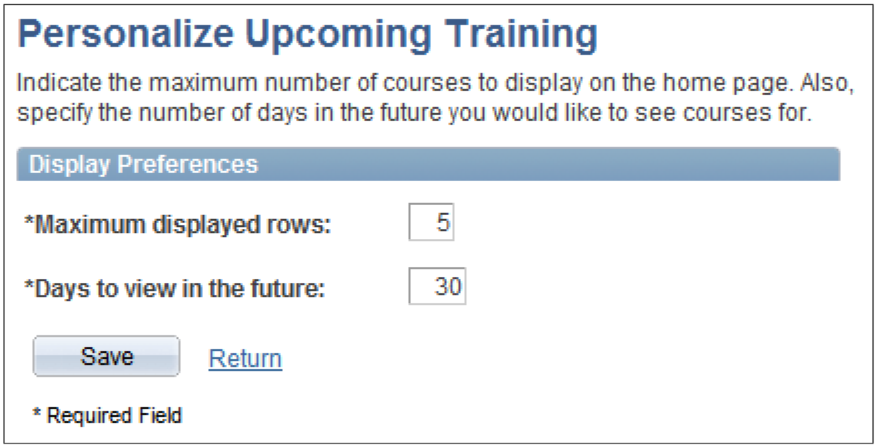
Use the Personalize Upcoming Training page (CO_PE_TRN_MGR_N) to specify the number of rows to display on the Upcoming Training pagelet, and specify the days to view each item the future.

Navigation

Click the Customize button on the Upcoming Training pagelet.

Image: Personalize Upcoming Training page

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



Maximum displayed rows	Enter the number of rows of training information you want to display on the Upcoming Training pagelet.
Days to view in the future	Enter the number of days into the future for which you want to see upcoming training.

Personalize Scheduled Training Page

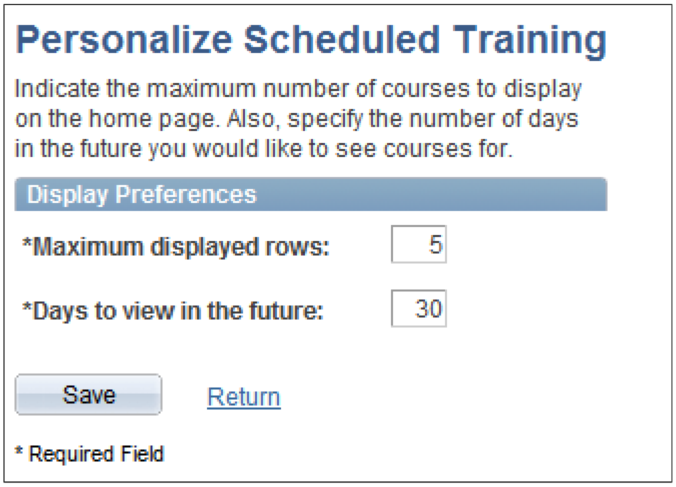
Use the Personalize Scheduled Training page (CO_PE_TRN_MGR_PG) to specify the number of rows to display on the Scheduled Training pagelet, and specify the days to view each item the future.

Navigation

Click the Customize button on the Scheduled Training pagelet.

Image: Personalize Scheduled Training page

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



Maximum displayed rows	Enter the number of rows of training information you want to display on the Scheduled Training pagelet.
Days to view in the future	Enter the number of days into the future for which you want to see scheduled training.

Personalize Open Positions Page

Use the Personalize Open Positions page (CO_PE_VACPOS_CUST) to specify the number of rows to display on the Open Positions pagelet.

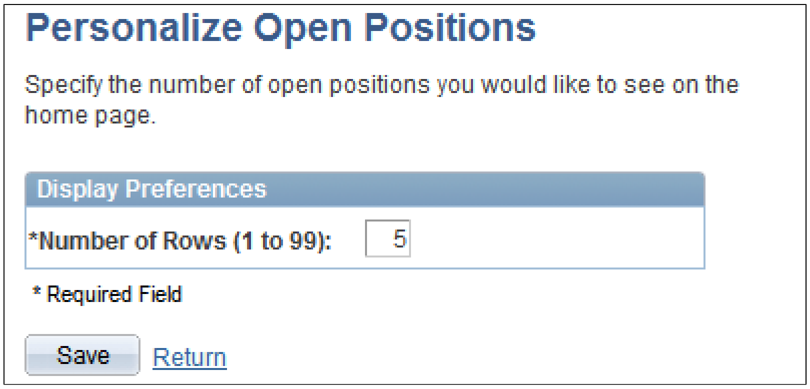
System administrators define additional default display settings on the Pagelet Administration - Open Positions page.

Navigation

Click the Customize button on the Open Positions pagelet.

Image: Personalize Open Positions page

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



Enter the number of positions that you want to display on the Open Positions pagelet.

Personalize Time Management Alerts Page

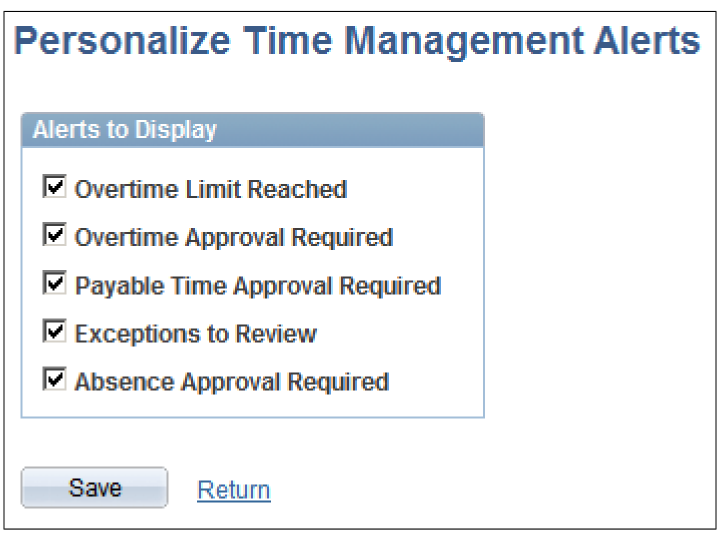
Use the Personalize Time Management Alerts page (TL_PE_MGR_TMMGT_P) to select the alerts to display on the Time Management Alerts pagelet.

Navigation

Click the Customize button on the Time Management Alerts pagelet.

Image: Personalize Time Management Alerts page

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



Use this page to select which time management alerts you want to make available on the Time Management Alert pagelet.

Overtime Limit Reached	Select to display those employees who have reached the overtime limit.
Overtime Approval Required	Select to display those employees who have requested overtime approval.
Payable Time Approval Required	Select to display those employees who have payable time which requires approval.
Exceptions to Review	Select to display time reporting exceptions that require review.
Absence Approval Required	Select to display requested Global Payroll absences which require approval.

Related Links

"Understanding the Time Reporting Process *(PeopleSoft HCM 9.2: Time and Labor)*"

Personalize Workforce Availability Page

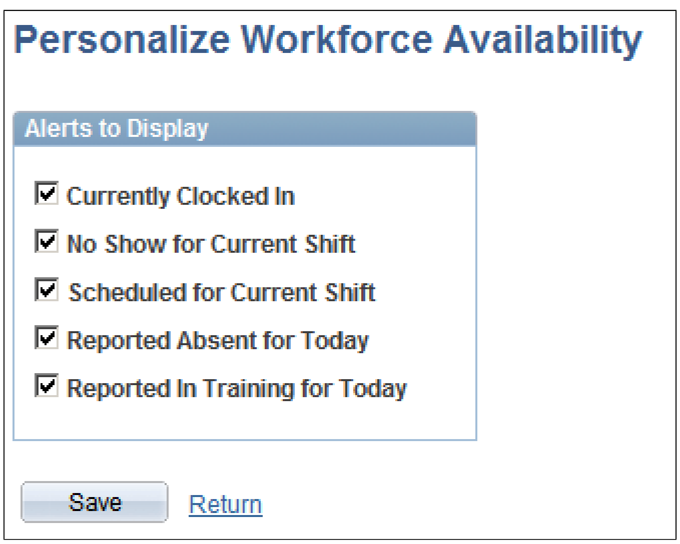
Use the Personalize Workforce Availability page (TL_PE_MGR_WRKFRC_P) to select the alerts to display on the Workforce Availability pagelet.

Navigation

Click the Customize button on the Workforce Availability pagelet.

Image: Personalize Workforce Availability page

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



Use this page to select which workforce availability alerts you want to make available on the Workforce Availability pagelet.

Currently Clocked In	Select to display employees who are currently clocked in for the current punch shift.

No Show for Current Shift

Select to display employees who are scheduled for the current punch shift but have not clocked in.

Scheduled for Current Shift

Select to display employees who are scheduled for the current punch shift.

Reported Absent for Today

Select to display employees who are reported as absent.

If PeopleSoft Global Payroll is installed, the system determines if any absences are reported in the absence pages. In addition, the system detects any leave time reporting codes (TRCs) in the PeopleSoft Time and Labor application's reported elapsed time, which is not a Global Payroll absence.

Reported In Training for Today

Select to display employees who have scheduled, approved training for the day.

This count will include the attendance statuses from the Training Administration business process of currently attending, completed, enrolled, approved and authorized.

Personalize Phones Page

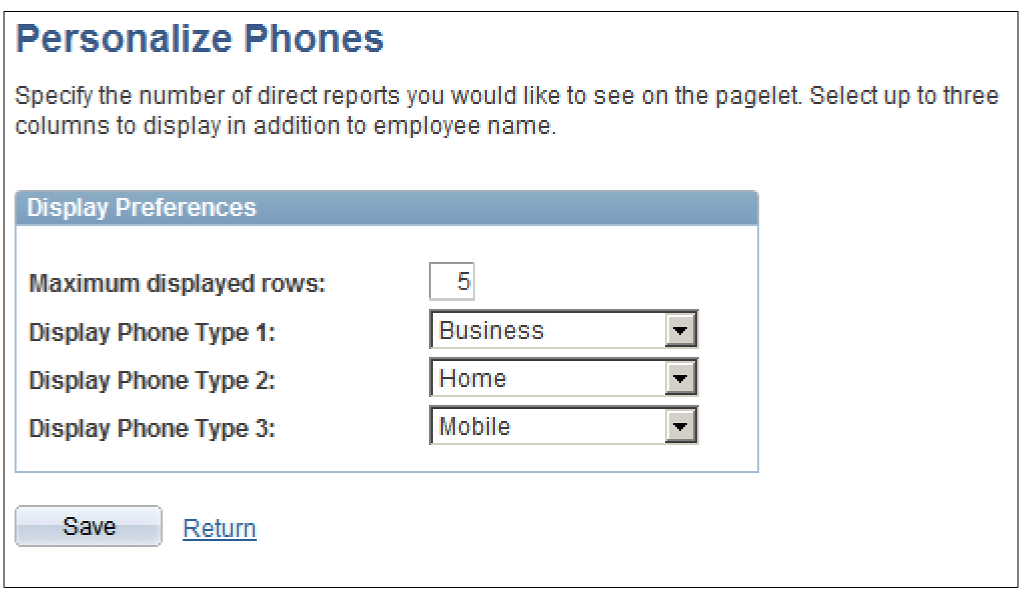
Use the Personalize Phones page (CO_PE_OPR_PHN_PG) to specify the number of rows to display on the Direct Reports Phones pagelet, and specify the phone types (business, home, campus, mobile and so on) to display.

Navigation

Click the Customize button on the Direct Reports Phones pagelet.

Image: Personalize Phones page

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



Display Phone Type 1	Select up to three phone types and in the order in which you want them to appear.

Viewing Manager Pagelets

This topic discusses:

- Viewing the Birthday Alerts pagelet.
- Viewing the Anniversary Alerts pagelet.
- Viewing the Direct Reports pagelet.
- Viewing the Manager Leave Summary pagelet.
- Viewing the Organization Directory pagelet.
- Viewing the Employee Performance pagelet.
- Viewing the Scheduled Training pagelet.
- Viewing the Manager Expiring Licenses pagelet.
- Viewing the Open Positions pagelet.
- Viewing the Time Management Alerts pagelet.
- Viewing the Workforce Availability pagelet.
- Viewing the Direct Reports Phones pagelet.

Note: You can personalize many of these pagelets, so they can appear differently in the application than described in this documenation.

Related Links

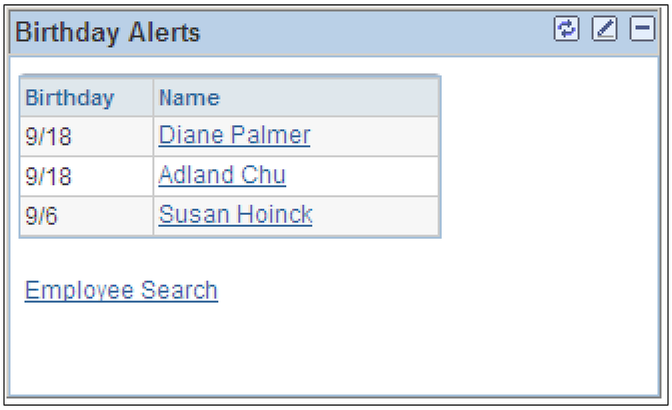
Personalizing Pagelets

Viewing the Birthday Alerts Pagelet

The Birthday Alerts pagelet displays upcoming employee birthdays.

Image: Birthday Alerts pagelet

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



Managers use this pagelet to view the birth dates for their direct reports.

Click an employee name to access the Employee Information page in PeopleSoft eProfile where you can view additional information about a specific employee and access links to pages with more specific employee information.

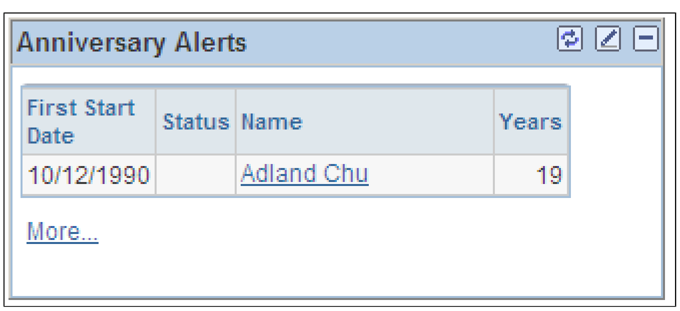
Click Employee Search to access the Employee Search page to look for a specific employee.

Viewing the Anniversary Alerts Pagelet

The Anniversary Alerts pagelet displays upcoming employee job anniversaries.

Image: Anniversary Alerts pagelet

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



Managers use this pagelet to view the hire date for their direct reports.

Click an employee name to access the Employee Information page where you can view additional information about a specific employee and access links to pages with more specific employee information.

This pagelet uses time and labor group security or defaults to department security to determine the employees reporting to a manager. The reporting structure also depends on the association to the manager's row security permission list.

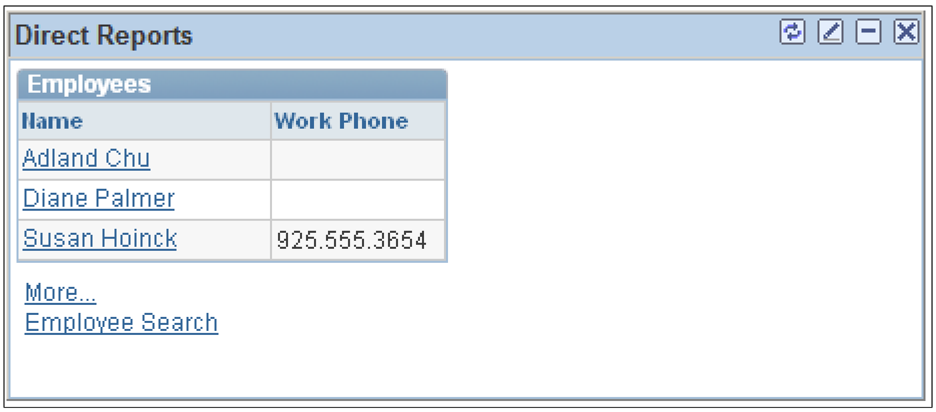
The date that appears in the First Start Date column is the current date, unless the time and labor date is enabled on the Time and Labor Permission List page for the manager's row security permission list.

Viewing the Direct Reports Pagelet

The Direct Reports pagelet displays information on direct reports.

Image: Direct Reports pagelet

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



Managers use this pagelet to view a list of their direct reports.

Name	Click a link in the Name column to access the View Employee Personal Information page where you enter data and click Continueto access the Employee Information page in eProfile. On the Employee Information page in eProfile, you can view additional details for a specific employee. The Employee Information page also contains links to related employee data pages.
More	Click to access a wide version of the pagelet with multiple columns showing. additional data. The narrow version displays only the data specified in the Display Additional Information filed on the Personalize Direct Reports page.
Employee Search	Click to access the Employee Search page where you can define search criteria to find a specific employee.
Skill	Click to access the Current Team Profiles page for profiles to which you have security access, where you can view detailed information regarding the skills of a selected employee.

	Note: The Skilllink appears only on the wide version of the Direct Reports pagelet.
Training	Click to access the Training Summary page where you can view detailed information regarding training for a specific employee. **Note:** The Traininglink appears only on the wide version of the Direct Reports pagelet.

Viewing the Manager Leave Summary Pagelet

The Manager Leave Summary pagelet displays information about absence requests from employees.

This pagelet displays information for absence requests. Select a value in the Your Employee's Absence Request to access Absence Requests page. You use the page to review absence requests by status and to access absence requests details.

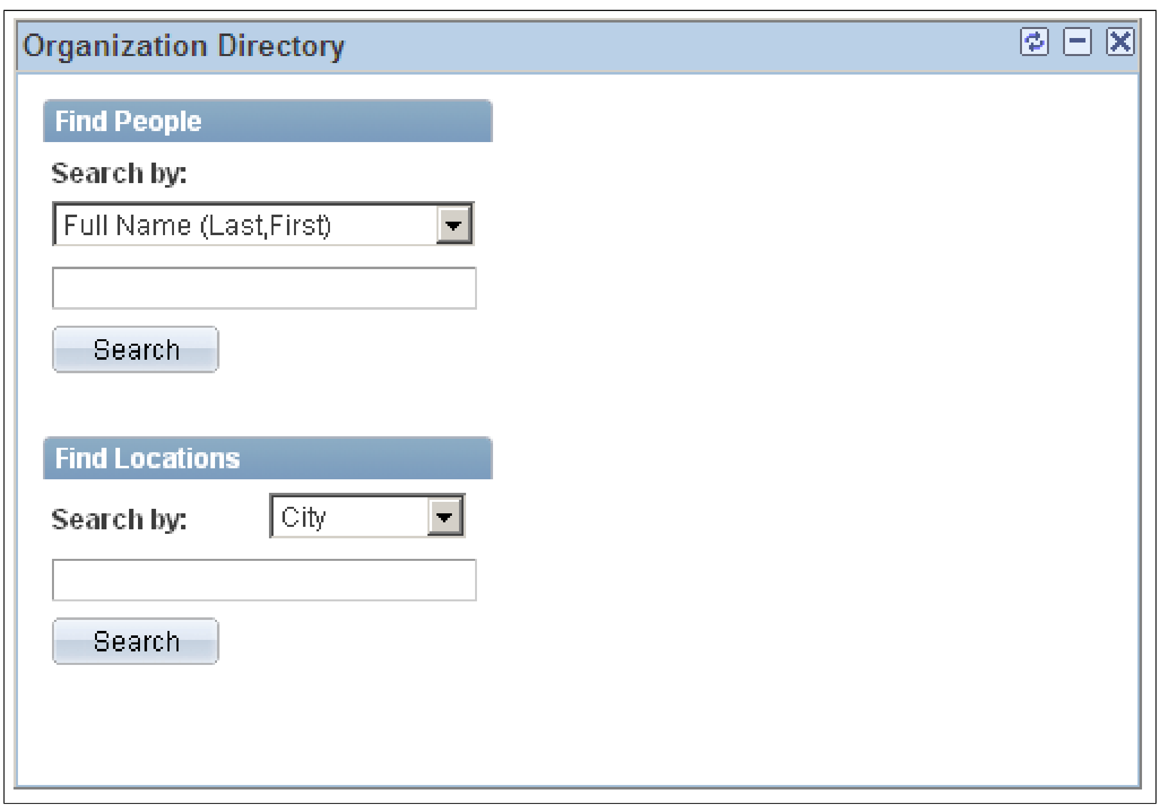
Click the More link to view additional requests if they exist.

Viewing the Organization Directory Pagelet

The Organization Directory pagelet displays search fields to locate employees by name and or location.

Image: Organization Directory pagelet

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



Employees use this pagelet to search for people or locations.

Related Links

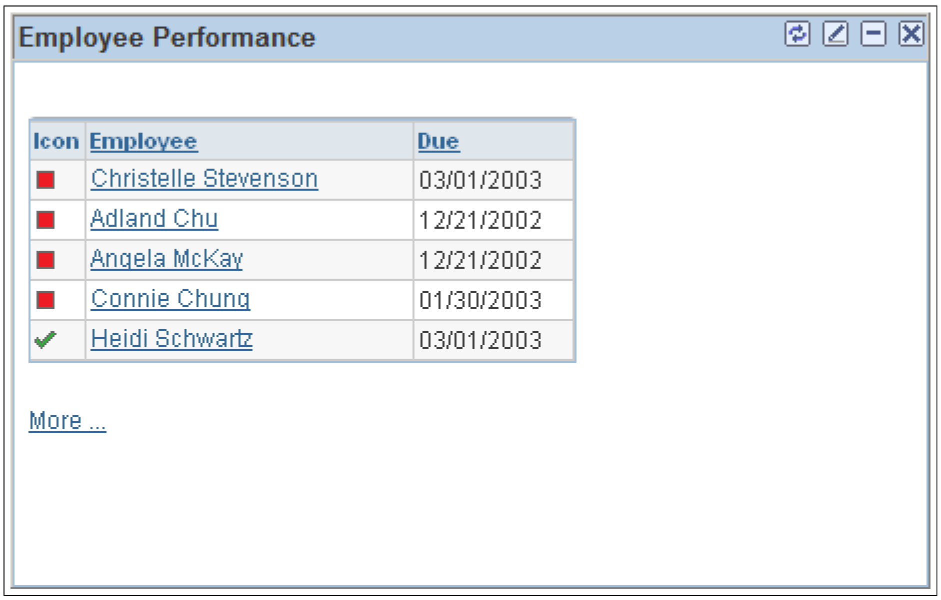
Enabling MapQuest for the Organization Directory Pagelet

Viewing the Employee Performance Pagelet

The Employee Performance pagelet displays summarized employee performance information.

Image: Employee Performance pagelet

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



Managers use this pagelet to check the status of the performance document for which they are responsible. The pagelet lists the employees with performance documents, the dues dates, and an indicator that shows whether a document is complete, on schedule, behind schedule, or cancelled.

Employee	Click an employee name link to access the Maintain Performance Document page. The type of document that appears on the Maintain Performance Document page depends on the document types that you set up on the Employee Performance Alerts Settings page.
More	Click this link to access performance information for additional employees.

Related Links

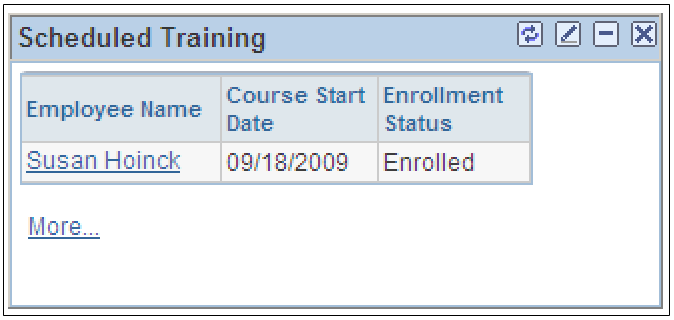
Defining Default Settings for the Employee Performance Alerts Pagelet

Viewing the Scheduled Training Pagelet

The Scheduled Training pagelet displays employee training that has been scheduled. The page also displays the course start date and the enrollment status.

Image: Scheduled Training pagelet

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



Click an employee name link to access the Training Summary page where you can view details regarding the selected employee's training. The Training Summary page provides detailed information on training including internal and external training and courses that have been completed.

Click the More link to access the Scheduled Training page.

Related Links

"Reviewing Training History Information *(PeopleSoft HCM 9.2: eDevelopment)*"

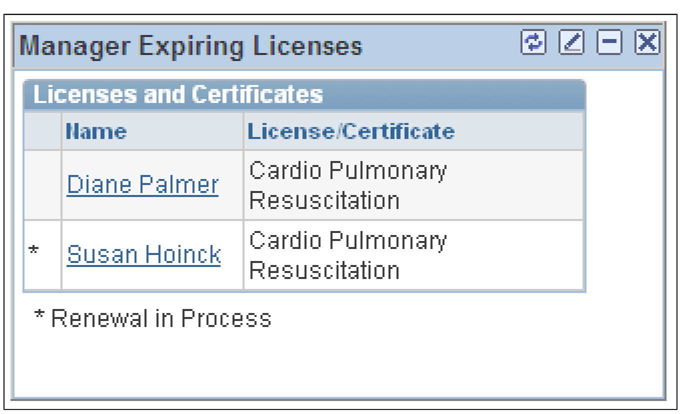
"Understanding the Self-Service Training Development Process *(PeopleSoft HCM 9.2: eDevelopment)*"

Viewing the Manager Expiring Licenses Pagelet

The Manager Expiring Licenses pagelet displays employee information on licenses and certificates which employees hold related to their jobs.

Image: Manager Expiring Licenses pagelet

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



An asterisk next to the employee name implies that the license is being renewed. Click an employee name link to access the License/Certificate Detail page to view details of a selected employee's license or certificate.

Viewing the Open Positions Pagelet

The Open Positions pagelet displays information on positions currently open.

Image: Open Positions pagelet

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

Position Displays the position title.

Position Headcount Displays the number of open positions for the corresponding position.

More Click to access the complete list of open positions.

Related Links

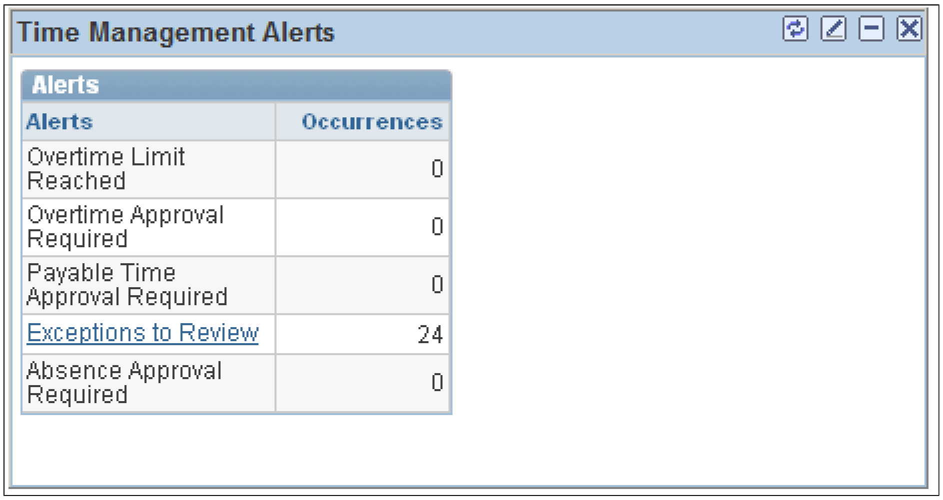
Defining Default Settings for the Open Positions Pagelet

Viewing the Time Management Alerts Pagelet

The Time Management Alerts pagelet displays time related events and occurrences alerts.

Image: Time Management Alerts pagelet

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



Alert links on this pagelet are active only if there are occurrences to report and action to be taken.

The pagelet uses time and labor group security or defaults to department security to determine employees reporting to a manager, depending on the association to the manager's row security permission list. In addition, the date is determined as the current date, unless the time and labor system date is enabled on the Time and Labor Permission List page for the manager's row security permission list.

Note: This page requires implementation of Time and Labor.

Overtime Limit Reached

Click to access the View Overtime Balances page where you can view detailed information regarding overtime limits reached by employees.

Click Get My Employees or Get Employees in Group on the View Overtime Balances page to view the overtime limits and balances.

The occurrences equal the count of the employees that are shown to have exceeded their overtime limit when you view overtime balances.

Overtime Approval Required

Click to access the Approve Overtime Requests page where you can view and approve overtime requests for employees.

The occurrences indicate the number of requests to be approved. This value equals the count of the employees that appear on the Select an Employee Request page.

Payable Time Approval Required

Click to access the Approve Payable Time page where you can view and approve reported payable time.

The occurrences indicate the number of rows of payable time to be approved.

Exceptions to Review

Click to access the Manage Time Exceptions page where you can view time reporting exceptions generated through time reporting.

The occurrences indicate the number of exceptions to review.

Absence Approval Required

Click to view and approve Global Payroll absence requests for employees.

This link only displays if Global Payroll is installed. The occurrences indicate the number of absence requests to be approved.

Related Links

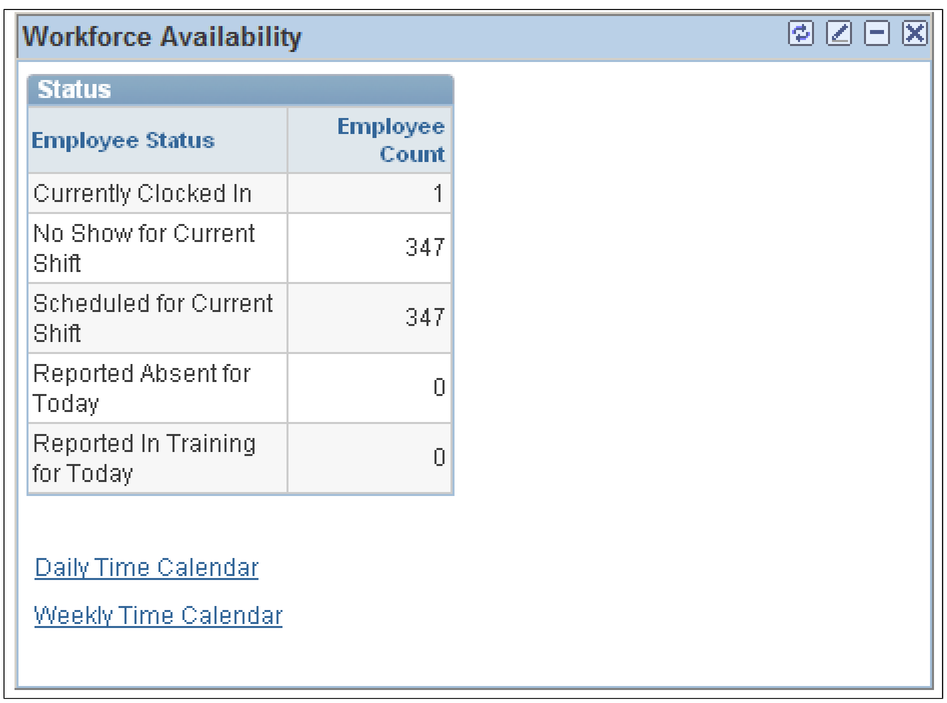
"Managing Exceptions *(PeopleSoft HCM 9.2: Time and Labor)*"

Viewing the Workforce Availability Pagelet

The Workforce Availability pagelet displays summarizes current availability and general absence information.

Image: Workforce Availability pagelet

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



Click the Customize button in the upper right-hand corner to define which statuses display in the Employee Status column.

To populate the Employee Count field for the Reported Absent for Today status, the system checks for any absences reported in PeopleSoft Absence Management whether they are designated for PeopleSoft Payroll for North America or for Global Payroll.

The system uses data from the PeopleSoft Enterprise Learning Management application to update the Employee Count field for the Reported in Training for Today status. However, you must enable the application to retrieve the data. To send the training data, the system uses the Scheduled Time Fullsync and Scheduled Time Sync messages. Training data is stored in the PS_SCH_EXT_DTL record.

Daily Time Calendar and Weekly Time Calendar — Click to access the Daily Time Calendar and Weekly Time Calendar pages to view current time-related information on employees. These time calendars provide more detailed information regarding availability details.

Related Links

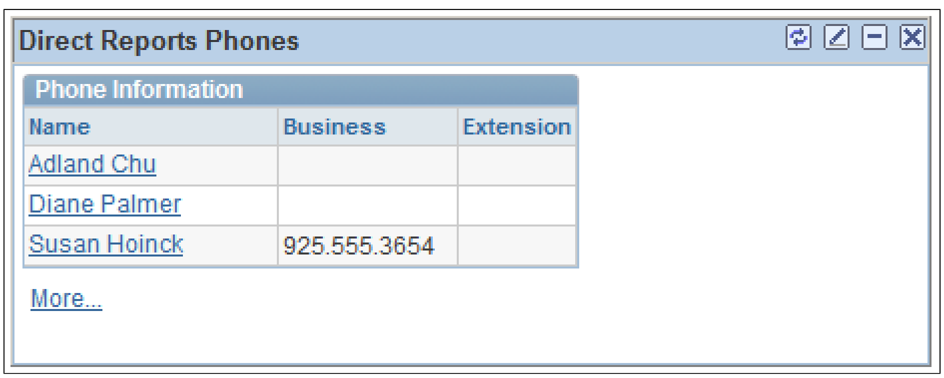
Personalize Workforce Availability Page

Viewing the Direct Reports Phones Pagelet

The Direct Reports Phones pagelet displays employee phone contact information.

Image: Direct Reports Phones pagelet

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



To change the phone type displayed, click theCustomize button in the upper right corner.

Name — Click a value in the Name column to see more details about the direct report.

More — Click to access a wider version of the pagelet with multiple columns showing. additional data.

The narrow version displays only one phone type using Display Phone Type 1 from the Personalize Phones page.

Viewing Employee Pagelets

This topic discusses:

- Viewing the Employee Leave Summary pagelet.
- Viewing the Stock Options pagelet.
- Viewing the Paychecks pagelet.
- Viewing the Upcoming Training pagelet.
- Viewing the Employee Expiring Licenses pagelet.

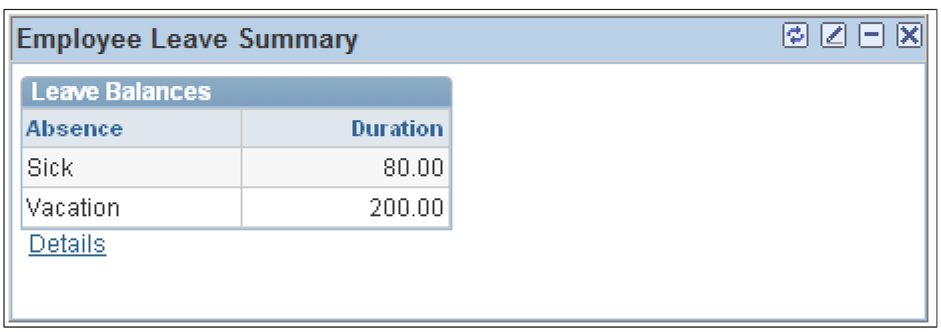
Note: You can personalize many of these pagelets, so they can appear differently in the application than described in this documentation.

Viewing the Employee Leave Summary Pagelet

The Employee Leave Summary pagelet displays absence summary information for the employee.

Image: Employee Leave Summary pagelet

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



This pagelet displays absence summary information for an employee.

For Global Payroll users, payees can review absence history, review absence balances, enter requests for absences, and forecast absence balances as of a particular date.

For Payroll for North America users: Payees can view their leave balances.

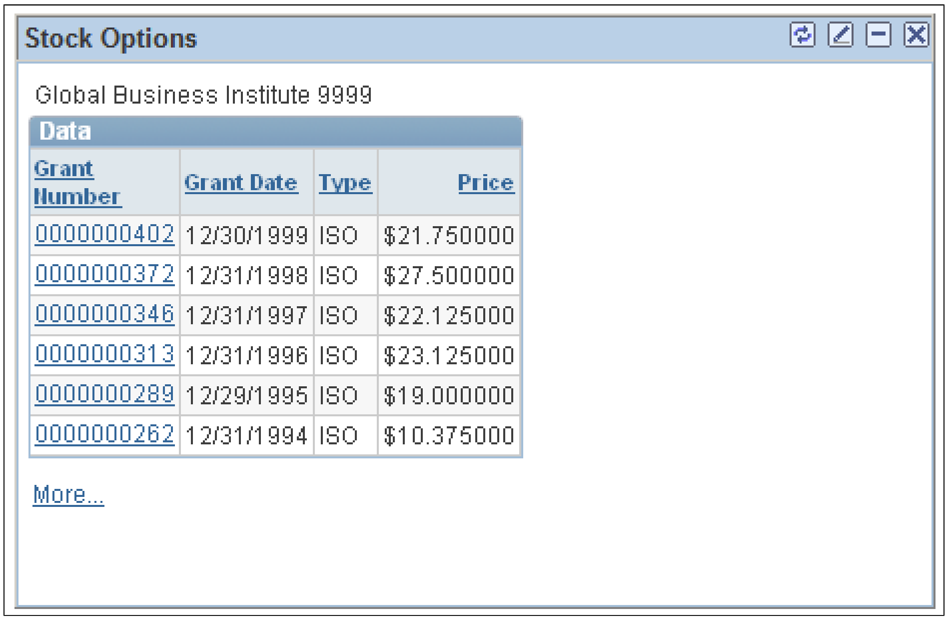
Details Click to access detailed information regarding absences.

Viewing the Stock Options Pagelet

The Stock Options pagelet displays stock option grant information for an employee.

Image: Stock Options pagelet

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



Employees use this pagelet to review detailed information about their stock options.

Grant Number	Click to access the Stock Option Information page where you can view more details about a selected grant.
Grant Date	Displays when the stock was granted.
Type	Displays the type of stock plan.
Price	Displays the granted stock option price.
More	Click to access the Stock Option Summary (ST_GRANT _SUMM_OPT) page where you can view additional data including the number of shares that have been granted and the number of shares currently exercisable for each grant listed.

Related Links

"Understanding Grant Administration *(PeopleSoft HCM 9.2: Stock Administration)*"

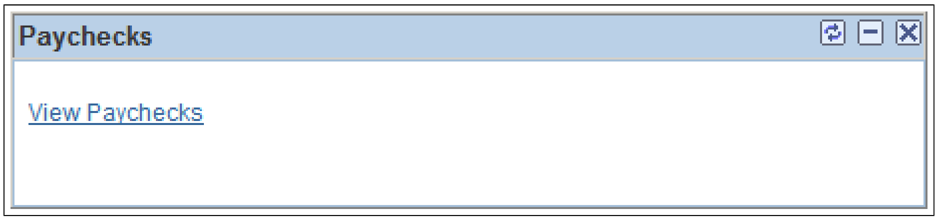
"Understanding Stock Purchase Plan Enrollment *(PeopleSoft HCM 9.2: Stock Administration)*"

Viewing the Paychecks Pagelet

The Paychecks pagelet displays a link to the View Paycheck page.

Image: Paychecks pagelet

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



Click the View Paychecks link to access the View Paycheck (PY_IC_PI_LIST) page where you can select the check date of the payslip to view.

Viewing the Upcoming Training Pagelet

The Upcoming Training pagelet displays upcoming scheduled training, including the course name, start date, and enrollment status.

Image: Upcoming Training pagelet

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

Click a course name link to access the Training Summary Course Details page where you can view more details about a specific training course.

Click the More link to access the Upcoming Training page.

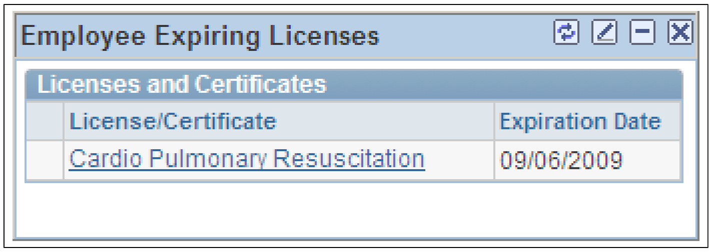
Click the Training Summary link to access the Training Summary page.

Viewing the Employee Expiring Licenses Pagelet

The Employee Expiring Licenses pagelet displays information on employee licenses that are nearing expiration.

Image: Employee Expiring Licenses pagelet

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



Click a license or certificate link to access the License/Certificate Detail page to view more details regarding a specific license or certificate that is expiring. If the renewal has been applied for, an asterisk appears at the left of the link.