
PeopleSoft CRM 9.2: Workforce Communications

June 2016

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Hazardous Applications Notice

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and

expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

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>.

Access to Oracle Support

Oracle customers that have purchased support 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.

Contents

| | |
|--|------------|
| Preface..... | vii |
| Understanding the PeopleSoft Online Help and PeopleBooks..... | vii |
| PeopleSoft Hosted Online Help..... | vii |
| Locally Installed Help..... | vii |
| Downloadable PeopleBook PDF Files..... | vii |
| Common Help Documentation..... | viii |
| Field and Control Definitions..... | viii |
| Typographical Conventions..... | viii |
| ISO Country and Currency Codes..... | ix |
| Region and Industry Identifiers..... | ix |
| Translations and Embedded Help..... | x |
| Using and Managing the PeopleSoft Online Help..... | x |
| PeopleSoft CRM Related Links..... | x |
| Contact Us..... | x |
| Follow Us..... | xi |
| Chapter 1: Getting Started with PeopleSoft Workforce Communications..... | 13 |
| PeopleSoft Workforce Communications Overview..... | 13 |
| PeopleSoft Workforce Communications Features..... | 15 |
| PeopleSoft Workforce Communications Business Processes..... | 17 |
| PeopleSoft Workforce Communications Integrations..... | 19 |
| PeopleSoft Workforce Communications Implementation..... | 20 |
| Chapter 2: Setting Up Workforce Communications..... | 23 |
| Understanding Installation Options..... | 23 |
| Setting Installation Options..... | 23 |
| Page Used to Enable Workforce Communications..... | 23 |
| General Options Page..... | 23 |
| Understanding Roles Used with Workforce Communications..... | 24 |
| Enabling the Person of Interest Role for Use With Audience Builder..... | 25 |
| Page Used to Enable the Person of Interest Role for Use With Audience Builder..... | 25 |
| Marketing/Dialog Role Enablement Page..... | 26 |
| Chapter 3: Creating Audiences with Workforce Communications..... | 27 |
| Defining Audiences..... | 27 |
| Defining Audiences for Workers and Persons of Interest..... | 27 |
| Pages Used to Define Audiences for Workers and Persons of Interest..... | 28 |
| Create a Target Audience Step 1: Select Roles Page..... | 28 |
| Create a Target Audience Step 2: Define Selection Criteria Page..... | 28 |
| Defining Audience Security..... | 29 |
| Pages Used to Secure an Audience..... | 30 |
| Understanding Audience Security..... | 30 |
| Audience – Audience Detail Page..... | 30 |
| Audience – Team Page..... | 31 |
| Chapter 4: Working with Dialogs..... | 33 |
| Understanding Dialogs..... | 33 |
| Understanding Dialog Security..... | 33 |
| Dialog Security..... | 33 |
| Individual Survey Security..... | 33 |
| Aggregate Survey Security..... | 33 |

| | |
|---|-----------|
| Profile Security..... | 34 |
| Worker and Person of Interest Security..... | 34 |
| Anonymous Survey Data..... | 34 |
| Setting Up Survey Ratings and Score Bracket..... | 35 |
| Pages Used to Set up Survey Ratings and Score Brackets..... | 35 |
| Survey Rating Page..... | 35 |
| Score Brackets Page..... | 36 |
| Defining Dialog Security..... | 38 |
| Pages Used to Define Dialog Security..... | 38 |
| Dialog Designer – Dialog Information Page..... | 38 |
| Dialog Designer – Team Page..... | 39 |
| Chapter 5: Analyzing Program and Dialog Results..... | 43 |
| Understanding Workforce Reports..... | 43 |
| Available Reports..... | 43 |
| Setting Up Workforce Surveys..... | 45 |
| Pages Used to Set Up Workforce Surveys..... | 45 |
| Time Frame Group – Period Definition Page..... | 45 |
| Time Frame Group – Usage and Status Page..... | 47 |
| Setup Options Page..... | 48 |
| Role to Dimension Mapping Page..... | 50 |
| Age Groups Page..... | 53 |
| Years Employed Page..... | 54 |
| Staging Data for Workforce Surveys..... | 56 |
| Page Used to Stage Data for Workforce Surveys..... | 56 |
| Stage Data for Reporting Page..... | 57 |
| Incremental Refresh Mode..... | 57 |
| Refresh Dimension References Mode..... | 58 |
| Analyzing Workforce Reports..... | 59 |
| Pages Used to Analyze Workforce Reports..... | 59 |
| Workforce Survey List Pagelet..... | 59 |
| Personalize Page..... | 61 |
| Viewing the Workforce Survey Analysis Report..... | 61 |
| Launching the Workforce Survey Analysis Report..... | 62 |
| Viewing the Workforce Survey Analysis Report..... | 62 |
| Appendix A: Data Synchronized from HR to CRM..... | 67 |
| Worker Profile Group..... | 67 |
| Worker - Job Information Profile Group..... | 67 |
| Worker Provider Groups Profile Group..... | 69 |
| Person of Interest Profile Group..... | 69 |
| Appendix B: Profiles Containing HR Data..... | 71 |
| Job Data..... | 71 |
| Job Data – Global..... | 74 |
| Job Data – Federal..... | 76 |

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 Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help 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 Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Online Help 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 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 field. For instructions, select About This Help, Managing Locally Installed PeopleSoft Online Help, Enabling the Search Button and Field in the Contents sidebar of the online help site.

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 families 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 family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, 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: 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>Typographical Convention</i> | <i>Description</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. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (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. |

| <i>Typographical Convention</i> | <i>Description</i> |
|--|---|
| & (ampersand) | <p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p> |
| ⇒ | <p>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.</p> |

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)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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.

PeopleSoft CRM Related Links

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

Follow Us



[Facebook.](#)



[YouTube](#)



[Twitter@PeopleSoft_Info.](#)



[PeopleSoft Blogs](#)



[LinkedIn](#)

Getting Started with PeopleSoft Workforce Communications

PeopleSoft Workforce Communications Overview

Human Resources (HR) organizations are under growing pressure to produce better results at a time when budget, personnel and other critical resources are limited. Success in this environment can be challenging and requires organizations to focus resources on the most strategic initiatives – those that provide the greatest value to the organization and align with organizational goals and objectives. PeopleSoft Workforce Communications is a comprehensive solution for planning and delivering HR programs and surveys to the workforce and can help HR organizations address these challenges.

PeopleSoft Workforce Communications is the first and only solution in the market that enables HR organizations to:

- Deliver the right message to the right audience.
- Capture workforce feedback and take action.
- Gain program insight and quantify success.

Examples of HR programs and surveys that can be managed end-to-end using Workforce Communications include:

- Organizational change management communications.
- Cultural brand awareness.
- Open enrollment communications.
- Policy and compliance communications.
- Manager assessed workforce planning.
- Health and wellness programs.
- Alumni community communications and development.

Workforce Communications includes functionality from the PeopleSoft Online Marketing and PeopleSoft Marketing applications, allowing users to:

- Create audiences.
- Create and update profiles.
- Create and execute Online Marketing dialogs for the purpose of sending email communications and of sending or posting on a web page links to Online Marketing surveys.

- Report on Online Marketing dialogs.
- Administer Online Marketing and related components.

With Workforce Communications, users will have the ability to target Workers and Person of Interests as recipients or targets of the email communications and web pages.

Delivering the Right Message to the Right Audience

Whether a HR program's objectives are to increase employee participation in health and wellness programs, strengthen the organizational brand or ensure timely compliance with HR policies, if the program and message are not communicated to the right people at the right time it will not be successful. To maximize HR program success and achieve the best possible outcome, HR organizations can plan and deliver targeted, coordinated HR programs and the necessary communications, aligning employee behavior with organizational goals using PeopleSoft Workforce Communications.

- Successful HR program planning and execution involves various people who need to work together as a unit. With PeopleSoft Workforce Communications, programs can be planned and run collaboratively in which stakeholders can set budgets, track costs, develop task lists and assign owners with ease. All HR team members participating in the planning and deployment of the program can stay in sync through various stages of the life cycle, helping to keep the program on track.
- Communicating HR programs and messages effectively requires the right communication methods or channels and the right level of workforce exposure to the message being communicated. PeopleSoft Workforce Communications enables you to plan and deploy multi-channel, multi-stepped HR program communications, ensuring maximum reach and assured message delivery.
- Messaging in HR programs needs to be relevant and reach the right workforce population. PeopleSoft Workforce Communications includes a wizard-based component that enables you to target defined groups of individuals. The content of the communication can be personalized to the recipient, delivering relevant content that they are more likely to read and benefit from. Additional tools allow you to identify groups that have previously received communications and avoid "spamming" your workforce.

Capturing Workforce Feedback and Taking Action

HR organizations can create a direct line of communication with the workforce via surveys using PeopleSoft Workforce Communications. HR organizations can build and roll out surveys to targeted groups of individuals for the purpose of assessment, feedback, satisfaction, preferences and more. Survey responses can be used by HR for organizational decision-making, enabling HR to be more strategic. Surveys used in combination with HR programs provide the instant feedback necessary for continuous improvement of HR programs.

- Insight gained from workforce survey results can provide HR with the information needed to develop a more successful HR strategy and to play an important role in influencing decision making at a corporate level. PeopleSoft Workforce Communications delivers a scoring framework to quickly assess satisfaction, engagement and comprehension—all critical components to developing a robust strategy.
- Surveys are a great mechanism to capture feedback for your HR programs to improve the quality of HR programs, to reduce the cost of programs and to assess whether the target audience of your program gets the message. With PeopleSoft Workforce Communications, you can assess the success of programs throughout their life cycles, resulting in higher-quality and lower-cost programs because you know what works and what doesn't.

- Personalization in surveys helps keep workers engaged and motivated about their participation. With PeopleSoft Workforce Communications, survey questions can be dynamically displayed so that individuals answer only the questions that are relevant to them. Follow-up actions can also be automated to be based on how an individual responds to a survey or interacts with an email or web page. Employees feel connected and informed, and that their opinions and concerns are being heard and addressed, which improves engagement and ultimately customer satisfaction and loyalty.

Gaining Program Insight and Quantifying Success

HR programs need to be analyzed to understand their effectiveness and to measure returns on investment. PeopleSoft Workforce Communications enables you to put more decision and support tools in the hands of the decision makers, enabling them to make informed recommendations and take appropriate action. Analysts and managers at all levels can review, analyze and quantify their HR initiatives.

- Monitoring a program's execution in real time can help HR organizations gauge program effectiveness and change course if needed, saving both time and money. PeopleSoft Workforce Communications-delivered analytics enable analysts and managers to understand program performance immediately and modify the program or target workforce population while it is in progress to ensure the best outcome.
- HR programs that are run without tight oversight can quickly lead to cost overruns. With PeopleSoft Workforce Communications, costs incurred can be tracked against their allocated budgets, helping to identify areas in which costs could be cut or services could be modified.
- Survey results could reveal risks and under-performing areas of the organization. PeopleSoft Workforce Communications can help HR understand trends in workforce engagement, make sense of critical feedback or data captured, and identify workforce populations that are the most and least engaged.

PeopleSoft Workforce Communications Features

PeopleSoft Workforce Communications features have been grouped into the following categories:

- HR Programs and Communications.
- Surveys.
- Reporting and Analytics.
- Integration and Security.

HR Programs and Communications

In PeopleSoft Workforce Communications, HR initiatives are represented by programs. A program is an initiative planned by the HR organization to achieve a specific objective such as launch a career development and training program, increase worker productivity or reduce worker medical claims. You can define the following types of programs in PeopleSoft Workforce Communications:

- *Dialog*: A dialog is defined when an HR organization needs to conduct personalized, online (email or web) communications with the workforce.

- *Campaign*: A campaign is defined when an HR organization needs to perform a coordinated set of manual or automated actions to accomplish the shared objectives of an initiative. These actions are called activities of the campaign.
- *Roll Up*: A roll up program serves as the common parent to one or more campaign or dialog programs. It is defined when several individual programs need to be managed together as part of a “master” HR initiative.

Surveys

In today’s competitive world, HR organizations need to constantly collect information from the workforce with the intent of improving their skills, satisfaction and productivity. Online surveys provide an inexpensive and effective mechanism to gather such information. With PeopleSoft Workforce Communications, surveys can be designed and rolled out to targeted groups of individuals to collect feedback, understand preferences, assess skills or identify training needs. Surveys can be deployed independently in a dialog, or as part of a bigger HR program. Results of surveys are recorded and available for reporting purposes for the life of the dialog. Survey feedback is critical to assess a program’s reach and comprehension as well as to identify improvement areas, enabling organizations to develop a plan of action. In cases in which respondent privacy is important, surveys can be run anonymously.

Surveys in a dialog flow are web documents with built-in surveying features. In addition to general read-only text, surveys contain user-enterable fields such as text boxes or a set of questions, each requiring one of the different types of answers – single choice, multiple choices, yes/no, and so on. When a survey is deployed online, respondents can complete the required information and then submit it. A built-in Scoring Framework allows survey designers to add weights to survey questions and their answer choices.

Each organization can define and deploy its own surveys. Some examples of how surveys can be used include:

- Career development and skill assessment.
- Employee engagement and satisfaction.
- New hire and exit Interviews.
- Health and wellness programs.
- Equal opportunity compliance programs.

Reporting and Analytics

PeopleSoft Workforce Communications provides a number of operational and analytic reports allowing decision makers to view survey results, gauge the effectiveness of HR initiatives, make informed recommendations and take appropriate action.

PeopleSoft Workforce Communications reports help you answer the following types of questions:

- Which initiatives were most successful?
- Has the initiative resulted in the committed goal of cost reduction?
- What % of recipients responded to the survey?
- How many people opened the email communication? Who didn’t open it?
- Which workforce demographic is the most and least satisfied or engaged?

- How are satisfaction and engagement related to other factors?
- How do you get the right talent in the right position?
- How many contractors have we hired as a result of alumni programs?

Reports available for use with PeopleSoft Workforce Communications include:

- *Configurable Workforce Search:* HR survey responses received from the workforce can contain certain information that needs to be preserved for future use. For example, an exit interview survey question could ask workers if they would likely consider rejoining the organization in the future. The answer received from each respondent could be stored in a custom profile field associated with workers and then reviewed by HR if the need to target alumni in a recruitment effort arises. PeopleSoft Workforce Communications provides a powerful, configurable search mechanism by which profile fields created to store survey responses can be used as workforce search criteria.
- *Dialog Performance Report:* The success of an HR communications initiative rolled out as a dialog greatly depends on how effectively it reaches its target audience and how well the audience responds to it. The Dialog Performance interactive report displays key reach and response-related performance measures by dimensions such as dialog actions and audiences. Dialog reach measurements such as email hard and soft bounces, click through counts, ratio of emails opened to emails delivered, and so on are available for reporting purposes. Dialog response measurements such as response count, page visits, number of people submitting a survey, and so on can also be displayed.
- *Survey Analysis Report:* A HR survey could be sent out to an audience consisting of a large number of workers. Every respondent of the survey has unique attributes: age, gender, experience level, job title, location, and so on. The Survey Analysis interactive report enables HR management to slice and dice results of a scored survey across respondents simply by dragging and dropping these attributes onto the report.
- *Survey Overall Responses Report:* The distribution of answer choices selected by respondents for each question in a survey (for example, how many employees use a particular benefit program, or how many people are extremely dissatisfied with their manager) can be seen in the Overall Responses report.
- *Survey Individual Responses Report:* Answers to every individual question in a survey for a respondent (for example, the reason she gave for leaving in her exit interview) can be viewed in the Individual Response report. HR can use this report in cases in which a detailed review of every response must be performed.

PeopleSoft Workforce Communications Business Processes

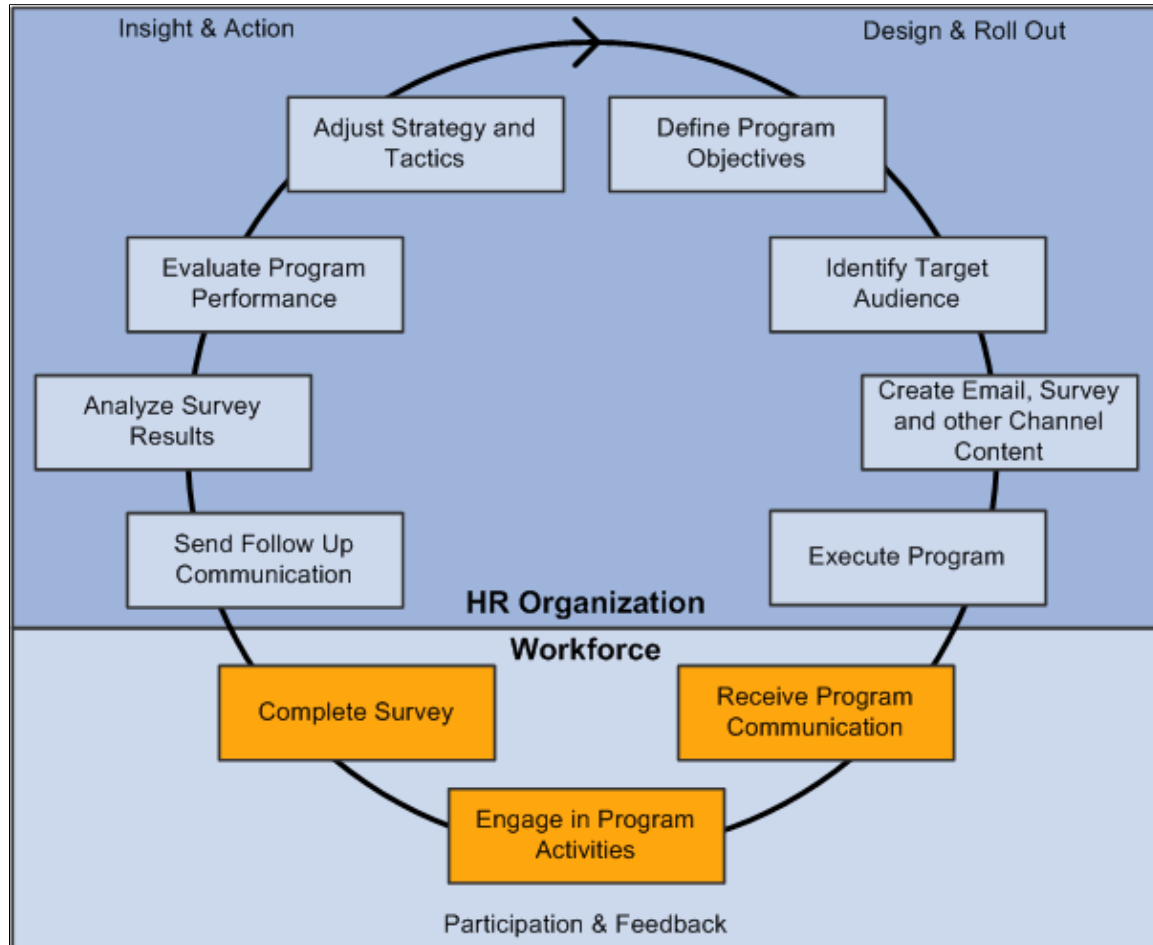
Using Workforce Communications to create and analyze employee surveys requires that you perform a number of tasks. This topic guides you in creating a dialog and provides a brief overview of the specific tasks involved. They include:

- Design and roll out.
- Participation and feedback.
- Insight and action.

- Analyzing survey results.

Image: Workforce Communications business process

The following process flow illustrates the PeopleSoft Workforce Communications business processes, from the initial access and setup through final survey analysis:



Note: Because Workforce Communications bundles functionality from both PeopleSoft Online Marketing and PeopleSoft Marketing, you should familiarize yourself with the business processes and functionality of these applications as well.

Design and Roll Out

In this phase, the HR organization designs an HR program and rolls it out to the workforce. The phase consists of the following steps:

- *Define Program Objectives:* Specify the measurable goals and objectives that the HR program is intended to accomplish.
- *Identify Target Audience:* Identify the specific workforce population that the HR program is designed to serve.

- *Create Email, Survey, and other Channel Content:* Compose rich, personalized email communications and interactive surveys for email or intranet deployment. Create other channel content like posters, postcards, flyers and so on.
- *Execute Program:* Send out communications and deploy intranet web pages and surveys.

Participation and Feedback

In this phase, the targeted workforce population participates in the HR program and then provides feedback to the HR organization. The phase consists of the following steps:

- *Receive Program Communication:* Received personalized email communications, links to web surveys, and other channel content.
- *Engage in Program Activities:* Participate in program activities as outlined by the communication—for example, join an activity group or attend an HR-conducted event.
- *Complete Survey:* Answer personalized, dynamic survey questions to provide feedback and other inputs regarding program effectiveness.

Insight and Action

In this phase, the HR organization evaluates program performance and survey results, and acts on the information. The phase consists of the following steps:

- *Send Follow Up Communication:* Depending on how a respondent answered the survey, send follow-up emails and surveys if required.
- *Analyze Survey Results:* Use analytic reporting tools to analyze survey results across the targeted workforce population.
- *Evaluate Program Performance:* Gauge program effectiveness by evaluating metrics: for example, number of employees who opened an email, clicked on a survey link, completed the survey, and so on. Compare program results with intended goals.
- *Adjust Strategy and Tactics:* Based on all information gathered during program execution, modify the current HR program or redesign it for its next iteration.

Related Links

PeopleSoft Online Marketing

PeopleSoft Marketing

PeopleSoft Workforce Communications Integrations

PeopleSoft Workforce Communications integrates with versions 8.8, 8.9, 9.1, and 9.2 of PeopleSoft HCM using EIPs.

The purpose of this integration is to synchronize worker, Person of Interest (POI) and worker job information from HR to CRM. The HR information can be used in the following areas:

- To build audiences based on HR criteria.

- For personalization of content in email and web documents.
- As criteria for determining the dynamic content displayed in email and web documents.
- Logic in the dynamic branching of dialogs.

Note: Some of the HR data can only be used for creating audiences.

Some of the data synchronized from HCM into CRM tables is made available as CRM Profiles, which enables the data to be used for the purposes previously described. This profile data is also used for reporting—the Survey Analysis Report, delivered with Workforce Communications, leverages HCM information to allow analysis of the data based on HR criteria and profile information.

Before you can use Workforce Communications, you must set up the appropriate EIPs to move data into your CRM system. For a description of these EIPs, refer to the “Managing Enterprise Integration for PeopleSoft CRM” topic of the Business Object Management documentation. The relevant EIPs appear in the table in the “PeopleSoft CRM Foundation EIPs” topic and include *HCM* in the Direction of Integration column.

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

Related Links

Business Object Management

PeopleSoft Workforce Communications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features 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 PeopleSoft documentation.

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

| Component | Component Interface | Reference |
|--|----------------------------|---|
| Dimension Value Groups RY_SVY_GROUP | RY_SVY_GROUP_CI | See Understanding Workforce Reports . |
| Survey Ratings RY_SVY_RATING | RY_SVY_RATING_CI | See Understanding Workforce Reports . |
| Role to Dimension Mapping RY_SVY_ROLE_DIM | RY_SVY_ROLE_DIM_CI | See Understanding Workforce Reports . |
| Survey Setup Options RY_SVY_SETUP | RY_SVY_SETUP_CI | See Understanding Workforce Reports . |

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, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the *Application Fundamentals*, *Business Object Management*, and *PeopleSoft Product and Item Management* with information on where to find the most up-to-date version of each.

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

Setting Up Workforce Communications

Understanding Installation Options

Depending on the products you have licensed and enabled, you will have different options available to you with Workforce Communications. Workforce Communications itself is designed for the purpose of planning, building, and deploying programs for and sending communications to Workers and Persons of Interest (POIs) only. The Workforce Communications installation option has some logic to restrict the ability to create audiences consisting only of Workers and POIs. If you want to target programs for and communicate to external audiences (for example, to create marketing campaigns targeted at customers or potential customers), you must also license PeopleSoft Marketing and Online Marketing.

Setting Installation Options

Before you can use Workforce Communications, you must enable it on the Installation Options page.

Page Used to Enable Workforce Communications

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------|-------------------------------|---|
| <u>General Options Page</u> | RB_INSTALLATION | Enable the Workforce Communications option. |

General Options Page

Use the General Options page (RB_INSTALLATION) to enable the Workforce Communications option.

Navigation

Set Up CRM, Install, Installation Options

Image: General Options page

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

| PeopleSoft Products | |
|--|---|
| <input checked="" type="checkbox"/> CRM Portal Pack | <input checked="" type="checkbox"/> Multichannel Communication |
| <input checked="" type="checkbox"/> CTI Integration | <input checked="" type="checkbox"/> Online Marketing |
| <input checked="" type="checkbox"/> Event Management | <input checked="" type="checkbox"/> Order Capture |
| <input checked="" type="checkbox"/> HelpDesk | <input checked="" type="checkbox"/> Order Capture - Self Service |
| <input checked="" type="checkbox"/> HelpDesk for Human Resources | <input checked="" type="checkbox"/> Sales |
| <input checked="" type="checkbox"/> HelpDesk-Employee Self Service | <input checked="" type="checkbox"/> Service Center for Higher Education |
| <input type="checkbox"/> Incentive Management | <input checked="" type="checkbox"/> Support |
| <input checked="" type="checkbox"/> Integrated FieldService | <input checked="" type="checkbox"/> Support-Customer Self Service |
| <input checked="" type="checkbox"/> Marketing | <input checked="" type="checkbox"/> Workforce Communications |
| | <input checked="" type="checkbox"/> PIM Server Sync |

Workforce Communications

Select this check box to enable Workforce Communications.

Understanding Roles Used with Workforce Communications

The following table shows the roles that are delivered for use with Workforce Communications, along with the default users who belong to the roles.

| <i>Role Name</i> | <i>Employee/Person Name</i> | <i>User</i> | <i>Capabilities and Typical Users</i> |
|----------------------------|------------------------------------|--------------------|--|
| WFC Profile Administrator | James Clooney | WFCPADMIN | Creates and modifies profiles. Typically HR Administrators or HR Analysts. |
| WFC Audience Administrator | Charles Baran | WFCAADMIN | Creates audiences. Typically an HR Analyst or HR Administrator. |
| WFC Dialog Manager | Francine Holmes | WFCDMGR | Creates and manages dialogs and documents. Typically an HR Analyst or Mid-Level/Executive Level Manager's Analyst. |
| WFC Campaign Manager | Frederick Martin | WFCCMGR | Creates and manages marketing campaigns and programs, and related objects. Typically an HR Analyst or Mid-Level/Executive Level Manager's Analyst. |

| Role Name | Employee/Person Name | User | Capabilities and Typical Users |
|------------------------------|-----------------------------|-------------|--|
| Worker and POI Administrator | John Johanssen | WRKPOIADMIN | Manages Workers and Persons of Interest. Typically an HR Administrator. |
| WFC Dialog Reports Analyst 2 | Alexa Klein | WFCRPT2 | Views individual survey results. Typically HR Analyst, HR Management or Mid-Level/Executive Level Manager's Analyst. |
| WFC Dialog Reports Analyst 1 | Chris Baker | WFCRPT1 | Views aggregate survey reports. Typically HR Analyst, HR Management, Mid-Level/Executive Level Management and their Analysts. |
| WFC System Administrator | Carlos Martin | WFCSADMIN | Performs setup and administration components that are required to install and use Workforce Communications, including the setup for reporting features and installation options. Typically an HR System Administrator or HR Administrator. |
| WFC Super User | Kurt Riddler | WFCSUSR | Has access to all functions for all roles identified for Workforce Communications. |

Enabling the Person of Interest Role for Use With Audience Builder

Before you can use the Person of Interest role with Workforce Communications, it must be enabled.

Note: The Person of Interest role is enabled by default; this is for informational purposes only.

Page Used to Enable the Person of Interest Role for Use With Audience Builder

| Page Name | Definition Name | Usage |
|--|------------------------|---|
| <u>Marketing/Dialog Role Enablement Page</u> | RA_MKT_ROLE | Enable the Person of Interest role for use in the Audience Builder. |

Marketing/Dialog Role Enablement Page

Use the Marketing/Dialog Role Enablement page (RA_MKT_ROLE) to enable the Person of Interest role for use in the Audience Builder.

Navigation

Set Up CRM, Product Related, Marketing, Marketing/Dlg Role Enablement

Image: Marketing/Dialog Role Enablement page

This example illustrates the fields and controls on the Marketing/Dialog Role Enablement page. You can find definitions for the fields and controls later on this page.

| Marketing/Dialog Role Enablement | | | |
|---|-----------------------|-----|----------------------------|
| Role Description | | | |
| Role Description Person of Interest <input checked="" type="checkbox"/> Active Individual Role Person of Interest <input type="checkbox"/> Related to Organization | | | |
| Modify System Data This object is maintained by PeopleSoft. | | | |
| Created | 09/09/2008 2:39PM PDT | VP1 | Oprid for CRMSKT, CRMQABAK |
| Modified | 09/09/2008 2:39PM PDT | VP1 | Oprid for CRMSKT, CRMQABAK |

Role Description

Enter *Person of Interest* to enable this role.

Individual Role

Select *Person of Interest* from the list of available choices.

Chapter 3

Creating Audiences with Workforce Communications

Defining Audiences

In PeopleSoft Workforce Communications, an audience is a targeted group of people that an HR program is designed to reach. Effective targeting is crucial because it ensures that an HR initiative affects or influences only the intended set of people, allowing programs to be run in an effective and cost-efficient manner. For example, a new hire survey should be sent out only to workers who have been recently hired and haven't previously completed the survey. Both dialogs and campaign programs can have audiences associated with them.

Audiences can be either fixed or dynamic. A *fixed audience* is defined when the group of people it targets does not change over time. For example, the list of employees who attended a particular training session in the past is a fixed audience. But in many cases, the target group changes over time, so such an audience needs to be generated dynamically. If current members of the organization's fitness club have to be sent a newsletter on the first day of every month, then the target group can be generated only at the time of sending the newsletter. This type of audience is defined as *adynamic audience*.

The Audience Builder tool provides an intuitive, wizard-like interface for nontechnical users to create powerful selection queries to build audiences of workers or POIs (persons of interest). Selection conditions specified can be based on a person's HR profile fields, such as job information, demographic data, employment status, and so on. For example, an audience of all US managers who have been hired within the last three months could be defined. PeopleSoft Workforce Communications delivers numerous worker and POI profile fields that are ready to be used. Selection conditions can also be based on a person's membership in another audience, survey results and execution history of dialogs.

The WFC Audience Administrator role is responsible for creating audiences.

Defining Audiences for Workers and Persons of Interest

This topic describes how to define audiences for workers and persons of interest.

Note: The process of defining audiences, as well as an explanation of other audience types, is described in detail in the PeopleSoft Marketing. This topic concerns audience definition only as it relates specifically to Workforce Communications.

See [Understanding Roles Used with Workforce Communications](#).

See "Understanding Audiences" (PeopleSoft CRM for Marketing Applications 9.2).

Pages Used to Define Audiences for Workers and Persons of Interest

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| Create a Target Audience Step 1: Select Roles Page | RA_LB_STEP_1 | Begin the process of defining selection criteria for audiences. |
| Create a Target Audience Step 2: Define Selection Criteria Page | RA_LB_STEP_2 | Define the selection criteria for the audience. |

Create a Target Audience Step 1: Select Roles Page

Use the Create a Target Audience Step 1: Select Roles page (RA_LB_STEP_1) to begin the process of defining selection criteria for audiences.

Navigation

Marketing, Manage Audiences

Click Create a New Audience, and then click Define Selection Criteria.

Image: Create a Target Audience Step 1: Select Roles page

This example illustrates the fields and controls on the Create a Target Audience Step 1: Select Roles page. You can find definitions for the fields and controls later on this page.

Create a Target Audience

1 2 3 Process Overview

Step 1: Select Roles

| Roles | |
|--------------------------|-----------------------|
| <input type="checkbox"/> | Contact for a Company |
| <input type="checkbox"/> | Consumer |
| <input type="checkbox"/> | Contact for a Partner |
| <input type="checkbox"/> | Worker |
| <input type="checkbox"/> | Person of Interest |

Return to Audience Details Next Step >>

Roles

Select the roles you want to include in the audience (Worker, Person of Interest, or both).

Create a Target Audience Step 2: Define Selection Criteria Page

Use the Create a Target Audience Step 2: Define Selection Criteria page (RA_LB_STEP_2) to define the selection criteria for the audience.

Navigation

Click the Next Step button on the Create a Target Audience Step 1: Select Roles page.

Image: Create a Target Audience Step 2: Define Selection Criteria page

This example illustrates the fields and controls on the Create a Target Audience Step 2: Define Selection Criteria page. You can find definitions for the fields and controls later on this page.

Profile Field

Click the lookup next to the Profile Field prompt to display a list of profile fields. Click the Individuals link, then either Workers or Persons of Interest to display the list of available profile fields.

Note: Audience Builder provides unrestricted access to all Worker and Person of Interest data in Workforce Communications. Some administrators might prefer that only a centralized, trusted administrator have the ability to build and provide access to audiences. Worker and Person of Interest specific profile fields can be used to generate targeted lists for use in program communications. You can find a list of profiles usable with Workforce Communication in the [Job Data](#), [Job Data – Federal](#), and [Job Data – Global](#) topics.

See [Job Data](#), [Job Data – Global](#), and [Job Data – Federal](#).

See [Defining Audience Security](#).

Defining Audience Security

Workforce Communications includes security that restricts users' access to only those audiences that they have been authorized to view. This prevents non-authorized individuals from seeing the members of an audience.

In an HR setting, this security allows a centralized administrator to build audiences and then make those audiences available to specific groups.

Pages Used to Secure an Audience

| Page Name | Definition Name | Usage |
|---|-----------------|---|
| Audience – Audience Detail Page | RA_LIST_MAIN | Specify whether an audience is secured. |
| Audience – Team Page | RA_LIST_TEAM | Specify which users or roles are authorized to access the audience. |

Understanding Audience Security

Workforce Communications includes various entry points to the audience (such as Marketing activities and the Dialog Designer). At each of these entry points (for example, Online Marketing's Dialog Designer), validation occurs to ensure that the user attempting to access it is either its owner, a team member, or a member of the team role associated with the audience. If the validation fails, the user is not allowed to transfer to the audience and an error message is displayed.

Audience – Audience Detail Page

Use the Audience – Audience Detail page (RA_LIST_MAIN) to specify whether an audience is secured.

Navigation

Marketing, Manage Audiences

Image: Audience page

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

The screenshot displays the 'Audience' page interface. At the top, there are navigation links: Save, Add Audience, Search, Refresh, Clone, and Send SMS. Below this, the 'Audience' section shows the Owner as 'Stu Marx' and the Status as 'In Design', with a 'Last Updated' timestamp of '06/13/2014 12:06AM'. The 'Audience Definition' section includes fields for '*Audience Name' (Employee Satisfaction Survey), '*Audience Source' (Internal using Audience Builder), 'Owner Name' (Stu Marx), '*Status' (In Design), and '*Type' (Fixed Audience). There is also a 'Description' field and a 'Last Updated' timestamp. Below these fields are checkboxes for 'Published' and 'Secured Audience'. The 'Audience Information' section shows 'Selection Criteria' as 'No selection criteria has been defined.' with a 'Define Selection Criteria' button. The 'Audience/Count Generation' section includes 'Date Last Generated', 'Count' (0), and 'Generate Audience/Count' options (None, Date, Now). There is also an 'Audience Generation Log' field and a 'Clone Audience' button at the bottom.

Secured Audience

Select this check box to define the audience as a secured audience.

Audience – Team Page

Use the Audience – Team page (RA_LIST_TEAM) to specify which users or roles are authorized to access the audience.

Navigation

Click the Team tab on the Audience page.

Image: Audience - Team page

This example illustrates the fields and controls on the Audience - Team page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Audience' page with the 'Team' tab selected. The page header includes 'Save', 'Add Audience', 'Search', 'Refresh', 'Clone', and 'Send SMS'. The audience name is 'Employee Satisfaction Survey' and the owner is 'Stu Marx'. The status is 'In Design' and the last updated date is '06/13/2014 12:06AM'. The 'Team' tab is active, showing a list of team members with columns for 'Owner' and '*Name'. Below the list is an 'Add Team Member' button. The 'Team Roles' section has a table with columns for '*Role Name' and 'Description', and an 'Add Team Role' button. The 'Marketing Center Information' section has a table with columns for '*Marketing Center', 'Description', 'Institution', and 'Center Type', and an 'Add Marketing Center' button.

Team Members

Add the individual team members whom you want to grant permission to see and edit the audience. You can associate individual workers or entire roles as team members—in the case of roles, each individual worker who has that role is considered a team member.

Team Roles

Add the roles to which you want to grant permission to see the audience. Roles leverage the PeopleTools security roles. You can create groups of people, assign a PeopleTools security role to that group, and reuse the group in the future. For example, you might create a “North American Benefits” role, then associate that role with each audience that is related to North American benefits.

Chapter 4

Working with Dialogs

Understanding Dialogs

With PeopleSoft Workforce Communications, initiatives that require automated, one-way or two-way online communications between HR and the workforce can be implemented using dialogs. A dialog program defines a flow or a sequence of actions that describe which workforce population would be reached, what kind of communication would be sent, when it would be sent, how responses would be handled and how subsequent follow up interactions would be performed. Dialogs can be rolled out independently or as part of a higher-level roll up program.

For a detailed description of online dialogs and their creation, refer to the Online Marketing documentation.

Related Links

PeopleSoft Marketing

Understanding Dialog Security

You can set security for online dialogs, defining which users and roles can access them and who can view the individual and aggregate reports that are generated from dialog data. You can set security for dialogs, different types of survey reports, audiences, and profiles. You can also set up surveys to be anonymous, so respondents' identifying information is not included with their survey responses.

Dialog Security

When dialog security is specified for a dialog, the Marketing Program search will only display those dialogs that users are authorized to access, based on User ID or whether they belong to a role that has been given permission to view the dialog. Permissions are set in the Team tab on the Dialog Designer page. Note that the dialog owner has access to the dialog by default.

Individual Survey Security

Individuals and roles can be given permission to view reports that contain survey responses from individual members of the audiences targeted by the dialog.

Aggregate Survey Security

Individuals and roles can be given permission to view the aggregate Workforce Survey Analysis report for the specified dialog.

Profile Security

Access to profile definitions is available only to users with the WFC Profile Administrator role and associated permission lists. Profile managers can determine which of the Profile Groups are visible for Workers and Persons of Interest, and under what conditions (based on user role and other configurable conditions) those profiles and profile groups are visible.

Worker and Person of Interest Security

Access to Worker and Person of Interest components is granted to users with the Workforce Administrator role and associated permission lists. Visibility to specific pages within the Worker record is controlled by CRM application security and the Secured Worker role that limits visibility to sensitive worker data based on the user role.

Anonymous Survey Data

Workforce Communications provides the ability to allow employees, contingent workers, and persons of interest to complete dialog surveys anonymously. This enables confidentiality in responses when needed for surveys relating to satisfaction, engagement, or anything else of a sensitive nature.

For example, employees that attended an all-hands meeting can complete a survey to confidentially provide their feedback about the meeting's effectiveness. Depending on the information they provide, the system does one of the following.

Note: The most common scenario is for respondents to receive the survey link in an email, rather than by way of a web site.

If the Survey Link Was Received in Email

If the survey link was received in email, the system associates the survey with the person to whom it was emailed unless the Track click-through by recipient option is not selected in the email document. The Online Marketing documentation regarding adding a web link to an email document describes this option in more detail.

Note: Be aware that although Online Marketing will not track identifying information about an email recipient if the Track click-through by recipient option is not selected in the email document, if the dialog contains a last name and email address field and these fields are filled out, the survey will be associated with the respondent.

See "Understanding Email Documents" (PeopleSoft CRM for Online Marketing 9.2).

If the Survey Link Was Accessed from a Website

Surveys can be accessed from a web page. Surveys can be configured to provide a self-identification page where the recipient will need to provide their first name, last name, and email address. Once they've provided this info, the following validation will occur.

- If the last name and email address are provided (by default—this is configurable on the Online Marketing Matching Rules page), the system checks to see if the employee exists in the database. If the employee does exist, the system stores the survey associates those survey results with the employee.

- If the last name and email address are provided but employee does not exist in the database, the system creates a new Person, then creates a record for the survey associated to this new person.

Note: If the dialog is marked for “Worker,” no new person record is created in the system.

- If the last name and email address are not provided (that is, if the respondent chooses to respond anonymously) or not requested at all, the system bypasses the database and creates a record for the survey with no identifying information associated.

Setting Up Survey Ratings and Score Bracket

This topics describes how to set up survey ratings and score brackets for dialog surveys.

Pages Used to Set up Survey Ratings and Score Brackets

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------------------|------------------------|---|
| Survey Rating Page | RY_SVY_RATING | Define interpretive meanings for each survey score bracket. |
| Score Brackets Page | RY_SVY_SCORES | Enable derivation of the Score Bracket dimension values. |

Survey Rating Page

Use the Survey Rating page (RY_SVY_RATING) to define interpretive meanings for each survey score bracket.

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Survey Ratings

Image: Survey Rating page

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

| *Rating Code | *Survey Type | *Rating Description | Image |
|--------------|--------------|---------------------|----------------------------|
| 1A | Workforce | Very Low | PS_ORANGE_STAR_1_ICN ★ |
| 1B | Workforce | Low | PS_ORANGE_STAR_2_ICN ★★ |
| 1C | Workforce | Average | PS_ORANGE_STAR_3_ICN ★★★ |
| 1D | Workforce | High | PS_ORANGE_STAR_4_ICN ★★★★ |
| 1E | Workforce | Very High | PS_ORANGE_STAR_5_ICN ★★★★★ |

* Required Field

Survey Ratings allow each Score Bracket to be assigned an interpretive meaning so that surveys designed with dissimilar score brackets can still be compared in the Workforce Survey Analysis Report.

You can set up Survey Ratings at any point, and use them with multiple dialogs. After they have been created, survey rating can be assigned to Score Brackets in one or more dialogs as needed.

Note: This setup is performed by the WFC System Administrator as needed, and the information is used only with the Survey Analysis Report.

| | |
|---------------------------|---|
| Rating Code | A unique code that has to be assigned to each Rating. This value is mandatory. |
| Survey Type | For Workforce Communications, this value must be set to <i>Workforce</i> . |
| Rating Description | A textual description of the Survey Rating. This value is mandatory. |
| Image | Each rating can be associated with an image that will be used to visually display the meaning of a rating on the Workforce Survey List pagelet and in the Workforce Survey Analysis Report's configurable search results. This value is optional. |

Note: If a user tries to delete a Survey Rating that is already tied to a Score Bracket, then an error message is displayed and the action will not be allowed.

Score Brackets Page

Use the Score Brackets page (RY_SVY_SCORES) to enable derivation of the Score Bracket dimension values.

Navigation

Marketing, Score Brackets

Image: Score Brackets page

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

Score Brackets

Dialog Name Employee Engagement

Lowest Possible Score 225 **Highest Possible Score** 1350

| *Sequence | *Minimum Score | *Maximum Score | **Description | Rating | | |
|-----------|----------------|----------------|---------------|-----------|--|--|
| 1 | 225 | 450 | 225-450 | Very Low | | |
| 2 | 451 | 590 | 451-590 | Low | | |
| 3 | 591 | 800 | 591-800 | Average | | |
| 4 | 801 | 1000 | 801-1000 | High | | |
| 5 | 1001 | 1200 | 1001-1200 | Very High | | |

Add Score Bracket

Note: This setup is performed by the user who sets up the dialogs, and the information is used only with the Survey Analysis Report.

When you select a Dialog Survey, the dialog's name is displayed in read-only form in the header of the Score Brackets page, along with the Lowest Possible Score and Highest Possible Score values for the dialog. These values are calculated by querying the dialog's document setup tables, and they define the score bounds of the Survey. You can use them as a reference while defining your Score Brackets.

Sequence

Score Brackets are sorted by Sequence number by default.

When a new row is added, the Sequence number for that row is calculated by incrementing the highest existing Sequence number on the page by 1. Users can change Sequence numbers, but they should have unique values and must be whole numbers (including 0).

Minimum Score

The lower end of a Score Bracket. This value must be a whole number (including 0).

Maximum Score

The higher end of a Score Bracket. This value must be a whole number (including 0) and must be greater than the Minimum Score value.

Note: Do not define overlapping Score Brackets, nor leave gaps between Score Brackets.

Description

The description of the Score Bracket—the value that is displayed in the Workforce Analysis Interactive Report filter for Score Brackets. When Minimum Score and Maximum Score values are specified, the Description field is automatically populated with the value Minimum Score – Maximum Score (for example, *0 – 20*), but the user can change this (for example, *0 to 20*).

Rating

Use this prompt to choose a previously defined Survey Rating to be assigned to the Score Bracket (as applicable to the Survey Type, which in the case of Workforce Communications is *Workforce*). When the average score of a Survey is calculated on the Workforce Survey List Pagelet and the Configurable Search Results for the Workforce Survey Analysis Report, this Rating value is displayed next to it, thus allowing the user to better interpret survey results.

Image display column

This read-only column displays the image that corresponds to the Survey Rating chosen for the Score Bracket, providing a preview of what will be displayed on the pagelet and on the configurable search results screen.

Add Score Bracket

Click this button to add a new Score Bracket row. Note that Score Brackets are specific to individual dialogs.

Note: If the survey dialog contains multiple survey documents, then all the documents will be considered when calculating the Lowest and Highest Possible Score values. Thus, users should not create survey dialogs that link documents using conditional logic because the system could double-count questions when generating low and high scores. The system will not prevent you from creating survey dialogs with documents containing conditional logic, but you should be aware that if you do so, the low and high scores will not be accurate.

See [Setting Up Survey Ratings and Score Bracket](#).

Updating Score Brackets

You can safely update score brackets for a survey before it has any responses. However, if you want to update a Score Bracket (that is, update a row that already exists on the Score Bracket page) and any responses exist for the survey associated with it, a warning message will display if you try to do any of the following:

- Update the Minimum Score value.
- Update the Maximum Score value.
- Update the Description.
- Delete the row.

The warning message will indicate that deleting or updating Score Brackets associated with surveys that have responses can result in the generation of incorrect results in the Survey Analysis Report. In order to prevent this from happening, you should save changes on the Score Brackets page and then run the Stage Data for Reporting Application Engine program with the Refresh Dimension References option selected.

See [Staging Data for Workforce Surveys](#).

Defining Dialog Security

These topics discuss how to define a secure dialog and specify dialog access.

Pages Used to Define Dialog Security

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|--|
| Dialog Designer – Dialog Information Page | RY_DIALOG | Specify that a dialog is secured. |
| Dialog Designer – Team Page | RY_DIALOG_TEAM | Specify dialog security access for team members. |

Dialog Designer – Dialog Information Page

Use the Dialog Designer – Dialog Information page (RY_DIALOG) to specify that a dialog is secured.

Navigation

Marketing, Dialog Designer, Dialog

Image: Dialog Designer - Dialog Information page

This example illustrates the fields and controls on the Dialog Designer - Dialog Information page. You can find definitions for the fields and controls later on this page.

Dialog Designer

Save | Check | Options | Link Report | Clone | Search | Add Dialog

Dialog Name: New Hire Survey Status: In Design

Dialog | Flow | Audiences | Documents | Elements | Team

Dialog Information

Dialog ID: 20068

*Dialog Name: New Hire Survey

Description: This dialog contains the New Hire Survey broadcast email flow and the New Hire Survey.

Start Date: 01/01/2009

End Date: 12/31/2015

*Business Unit: HR HelpDesk

*New Individuals' Role: Worker

Objective: Workforce Communications

Owner: Jorge Menendez

Approval Status: Approved

☐ Login Required

☐ Secure Dialog by Team Member

Dialog Status

| In Design | In Test | Live | Paused | Broadcast Hold | Completed | Archived |
|-----------|---------|---------|--------|----------------|-----------|----------|
| | Test | Go Live | | | | Archive |

Secure Dialog by Team Member Select this check box to define the dialog as a secure dialog.

Selecting the Secure Dialog check box on the Dialog Designer page restricts access and visibility to the dialog and its related reports. When a dialog is secured, users will be unable to access the Dialog Designer and dialog reports for the secured dialog. Additionally, the dialog is not returned in configurable search results for the Dialog Designer and dialog related reports.

Dialog Designer – Team Page

Use the Dialog Designer – Team page (RY_DIALOG_TEAM) to specify dialog security access for team members.

Navigation

Marketing, Dialog Designer, Team

Image: Dialog Designer - Team page

This example illustrates the fields and controls on the Dialog Designer - Team page. You can find definitions for the fields and controls later on this page.

Dialog Designer

Save | Check | Options | Link Report | Clone | Search | Add Dialog

Dialog Name: New Hire Survey Status: In Design

Dialog | Flow | Audiences | Documents | Elements | **Team**

Team Members Personalize | Find | View All | First 1-4 of 4 Last

| Owner | *Name | Dialog | Individual Reports | Aggregate Reports |
|-------------------------------------|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> | Kurt Riddler | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Jack Diamond | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | George DeAngelis | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Jorge Menendez | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Add Team Member

Team Roles Personalize | Find | View All | First 1-3 of 3 Last

| *Role Name | Description | Dialog | Individual Reports | Aggregate Reports |
|----------------------------|-------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| WFC Dialog Manager | WFC Dialog Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| WFC Dialog Reports Analyst | WFC Dialog Reports Analyst L1 | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| WFC Dialog Reports Analyst | WFC Dialog Reports Analyst L2 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Add Team Role

Marketing Center Information Personalize | Find | View All | First 1 of 1 Last

| *Marketing Center | Description | Institution | Center Type |
|-------------------|-------------|-------------|-------------|
| | | | |

Add Marketing Center

Team Members

This section displays the list of team members associated with the dialog.

Owner

This check box is selected to identify the dialog owner. Only one check box can be selected, because a dialog can only have one owner—by default, this is the person who created the dialog. If there are multiple team members, you can choose a different dialog owner by selecting the check box next to that person's name.

Name

Individuals who are manually added as team members. This list initially includes at least one individual—the owner of the list (by default the creator of the dialog).

Add Team Member

Click this button to add a team member to the list.

Role Name

Select a role name from the list. Roles leverage the PeopleTools security roles. You can create groups of people, assign PeopleTools security roles to the groups, and then reuse the groups in the future.

Dialog

Select this check box to give the user or role authorization to access the dialog and its related programs and campaigns.

Individual Reports

Select this check box to give the user or role authorization to run the individual reports. The user or role is restricted to reports that convey the survey results for each individual respondent for that specific dialog

Aggregate Reports

Select this check box to give the user or role authorization to run the aggregate reports for a specific dialog.

Add Team Role

Click this button to add a new team role. Roles leverage the PeopleTools security roles. You can create groups of people, assign PeopleTools security roles to the groups, and then reuse the groups in the future.

Chapter 5

Analyzing Program and Dialog Results

Understanding Workforce Reports

PeopleSoft Workforce Communications provides a number of operational and analytic reports allowing decision makers to view survey results, gauge the effectiveness of HR initiatives, make informed recommendations and take appropriate action.

Trends identified among various demographics can be used to cut costs, increase productivity, improve the workplace and retain staff. Program performance metrics can be used to plan future HR programs as well as chalk out the future course of action that needs to be taken by the organization.

PeopleSoft Workforce Communications reports help you answer the following types of questions:

- Which initiatives were most successful?
- Has the initiative resulted in the committed goal of cost reduction?
- What percentage of recipients responded to the survey?
- How many people opened the email communication? Who didn't open it?
- Which workforce demographic is the most and least satisfied or engaged?
- How are satisfaction and engagement related to other factors?
- How do you get the right talent in the right position?
- How many contractors have been hired as a result of alumni programs?

Workforce reports are intended for use by HR management, HR analysts, and management teams that need visibility to survey and dialog response information. Because the reports are available to a broader audience than administrative reports, it is important to maintain security by restricting access only to those who have permission to view their information.

See [Defining Audience Security](#), [Defining Audiences for Workers and Persons of Interest](#), and [Defining Audience Security](#).

See [Understanding Dialogs](#) and [Understanding Dialog Security](#).

Available Reports

Workforce Communications includes several reports that you can use to analyze your workforce data. These include:

- Workforce Survey List pagelet.
- Workforce Survey Analysis Report.

- Survey Individual Response Report.
- Survey Overall Response Report.
- Dialog Performance Report.

Note: If you have enabled Marketing Center Security, you can use the Marketing Center hierarchy with the Workforce Survey Analysis Report, Survey Individual Response Report, and Survey Overall Response Report.

See "Understanding Marketing Center Security" (PeopleSoft CRM for Higher Education 9.2).

Workforce Survey List Pagelet

The Workforce Survey List is a portal pagelet displaying a summary of dialogs showing survey scores across all respondents. From here, users can drill down to the Workforce Survey Analysis Report to perform advanced analysis for a specific dialog. Only those dialogs for which you are identified as a team member appear on this list.

See [Understanding Dialogs](#) and [Understanding Dialog Security](#).

Workforce Survey Analysis Report

The Workforce Survey Analysis Report (an ACE Interactive Report) is accessible from the Workforce Survey List pagelet and from the menu. It allows advanced analysis of survey results across various dimensions. For example, an HR survey could be sent out to an audience consisting of a large number of workers. Every respondent of the survey has unique attributes in terms of their age, gender, experience level, job title, location, and so on. The Survey Analysis interactive report enables HR management to slice and dice results of a scored survey across respondents simply by dragging and dropping these attributes onto the report. Types of questions that can be answered include:

- Which group has reaped the most benefits from a particular campaign?
- Has any improvement been made in worker productivity this year as compared to last year?
- Are employees in a particular office location or department more engaged than others?
- Which department or group scored the highest or lowest?

Survey Individual Response Report

Answers to every individual question in a survey for a respondent can be viewed in the Individual Response report. HR can use this report in cases in which a detailed review of every response needs to be performed. The following types of questions can be answered:

- What stated skill set does a particular worker bring to the table?
- What reason for leaving did an employee enter in her exit interview?

Survey Overall Responses Report

The distribution of answer choices selected by respondents for each question in a survey can be seen in the Overall Responses report. HR users can deduce answers to questions such as:

- How many employees who use the organization use a particular benefit or program?

- What are the three top technical skills that workers in a particular department possess?
- How many people are extremely dissatisfied with their managers?

Dialog Performance Report

The success of an HR communications initiative rolled out as a dialog greatly depends on how effectively it reaches its target audience and how well the audience responds to it. The Dialog Performance interactive report displays key reach and response-related performance measures by dimensions such as dialog actions and audiences. Dialog reach measurements such as email hard and soft bounces, click through counts, ratio of emails opened to emails delivered, and so on are available for reporting purposes. Dialog response measurements such as response count, page visits, number of people submitting a survey, and so on can also be displayed.

Note: The Dialog Performance Report is described in the PeopleSoft Online Marketing documentation.

See "Understanding Interactive Reports" (PeopleSoft CRM for Marketing Applications 9.2).

Setting Up Workforce Surveys

To define dimension value groups, survey ratings, dimension mapping, and survey setup options, use the Dimension Value Groups, Survey Ratings, Role to Dimension Mapping, and Survey Setup Options components. Use the RSF_ASGN_RY_SVY_GROUP, RY_SVY_RATING, RY_SVY_ROLE_DIM, and RY_SVY_SETUP component interfaces to load data into the tables for these component.

Pages Used to Set Up Workforce Surveys

| Page Name | Definition Name | Usage |
|--|------------------------|---|
| <u>Time Frame Group – Period Definition Page</u> | RSF_TF_MAIN | Model the Time dimension (quarters and years). |
| <u>Time Frame Group – Usage and Status Page</u> | RSF_TF_MAIN | Specify that a survey is to be used for Workforce Communications. |
| <u>Setup Options Page</u> | RY_SVY_SETUP | Specify basic setup information for workforce surveys. |
| <u>Role to Dimension Mapping Page</u> | RY_SVY_ROLE_DIM | Map reporting dimensions to a role for a given survey type. |
| <u>Age Groups Page</u> | RY_SVY_AGE | Calculate Age Group dimension values. |
| <u>Years Employed Page</u> | RY_SVY_YRS | Calculate the Years Employed dimension value. |

Time Frame Group – Period Definition Page

Use the Time Frame Group – Period Definition page (RSF_TF_MAIN) to model the Time dimension (quarters and years).

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Time Frames

Image: Time Frame Group - Period Definition page

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

Timeframes | **Sales Information**

Time Frame Group

Time Frame Group SURVEY *Description Survey Analysis

Time Frame Periods Personalize | Find | [?] [x] First 1-25 of 25 Last

Period Definition | Usage & Status

| *Frequency | *Period | Time Frame | *Begin Date | *End Date | *Description | Short Description | | |
|------------|-----------|------------------|-----------------|-----------------|--------------|-------------------|---|---|
| Annual | FY2007 | SURVEY-FY2007 | 01/01/2007 [31] | 12/31/2007 [31] | FY2007 | | + | - |
| Annual | FY2008 | SURVEY-FY2008 | 01/01/2008 [31] | 12/31/2008 [31] | FY2008 | | + | - |
| Annual | FY2009 | SURVEY-FY2009 | 01/01/2009 [31] | 12/31/2009 [31] | FY2009 | | + | - |
| Annual | FY2010 | SURVEY-FY2010 | 01/01/2010 [31] | 12/31/2010 [31] | FY2010 | | + | - |
| Annual | FY2011 | SURVEY-FY2011 | 01/01/2011 [31] | 12/31/2011 [31] | FY2011 | | + | - |
| Quarterly | Q1-FY2007 | SURVEY-Q1-FY2007 | 01/01/2007 [31] | 03/31/2007 [31] | Q1-FY2007 | | + | - |
| Quarterly | Q2-FY2007 | SURVEY-Q2-FY2007 | 04/01/2007 [31] | 06/30/2007 [31] | Q2-FY2007 | | + | - |
| Quarterly | Q3-FY2007 | SURVEY-Q3-FY2007 | 07/01/2007 [31] | 09/30/2007 [31] | Q3-FY2007 | | + | - |
| Quarterly | Q4-FY2007 | SURVEY-Q4-FY2007 | 10/01/2007 [31] | 12/31/2007 [31] | Q4-FY2007 | | + | - |
| Quarterly | Q1-FY2008 | SURVEY-Q1-FY2008 | 01/01/2008 [31] | 03/31/2008 [31] | Q1-FY2008 | | + | - |
| Quarterly | Q2-FY2008 | SURVEY-Q2-FY2008 | 04/01/2008 [31] | 06/30/2008 [31] | Q2-FY2008 | | + | - |
| Quarterly | Q3-FY2008 | SURVEY-Q3-FY2008 | 07/01/2008 [31] | 09/30/2008 [31] | Q3-FY2008 | | + | - |
| Quarterly | Q4-FY2008 | SURVEY-Q4-FY2008 | 10/01/2008 [31] | 12/31/2008 [31] | Q4-FY2008 | | + | - |
| Quarterly | Q1-FY2009 | SURVEY-Q1-FY2009 | 01/01/2009 [31] | 03/31/2009 [31] | Q1-FY2009 | | + | - |
| Quarterly | Q2-FY2009 | SURVEY-Q2-FY2009 | 04/01/2009 [31] | 06/30/2009 [31] | Q2-FY2009 | | + | - |

Modified 08/11/2009 4:57PM PDT WFCUSUR

Time Frame Groups are set up by WFC System Administrator, and must be set up in order for the Survey Analysis Report to run. After they are created, Time Frame Groups are selected in the Setup Options page. They are used to specify which quarterly and yearly time frames will be used for the Survey Analysis Report.

Time Frame Group

The name of the time frame group. By default, this value is set to *Survey Analysis*, but the name is configurable. This ensures that other applications that use the Time Frame Group component (such as Sales) do not display Workforce Communications reporting time periods.

Period Definition

In Workforce Communications analytics, the smallest unit of time (period) tracked for reporting is *Quarter*. Quarters roll up to the corresponding Annual (Year) period (though other time periods are available in CRM, only *Quarter* and *Year* are used with Workforce Communications). The administrator must set up Quarterly and Annual time periods in the Time Frames component so that the Interactive Reports can use them. The

periods themselves can be based on the organization's fiscal calendar, regular calendar, or any other calendar.

All the time periods defined must have the usage of *Survey* and must be created within a single Time Frame Group; this Time Frame Group is then specified during setup as the group to be used for Workforce Communications reporting. The administrator should take care to set up time periods accurately so that every Survey Submitted date in the system falls into exactly one quarterly period and exactly one annual period in the specified Time Frame Group. Further, the administrator should ensure that no time periods other than Quarter and Year are defined in a Time Frame Group to be used for Workforce Communications.

Note: Time period names must be 14 characters or fewer.

Time Frame Group – Usage and Status Page

Use the Time Frame Group – Usage and Status page (RSF_TF_MAIN) to specify that a survey is to be used for Workforce Communications.

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Time Frames

Image: Time Frame Group - Usage and Status page

This example illustrates the fields and controls on the Time Frame Group - Usage and Status page. You can find definitions for the fields and controls later on this page.

Timeframes

Sales Information

Time Frame Group

Time Frame Group

SURVEY

*Description

Survey Analysis

Time Frame Periods

Personalize

Find

First

1-25 of 25

Last

Period Definition

Usage & Status

| *Frequency | *Period | Time Frame | *Period Use | *Status | | | |
|------------|-----------|------------------|-------------|---------|---|---|--|
| Annual | FY2007 | SURVEY-FY2007 | Survey | Active | + | - | |
| Annual | FY2008 | SURVEY-FY2008 | Survey | Active | + | - | |
| Annual | FY2009 | SURVEY-FY2009 | Survey | Active | + | - | |
| Annual | FY2010 | SURVEY-FY2010 | All | Active | + | - | |
| Annual | FY2011 | SURVEY-FY2011 | All | Active | + | - | |
| Quarterly | Q1-FY2007 | SURVEY-Q1-FY2007 | Survey | Active | + | - | |
| Quarterly | Q2-FY2007 | SURVEY-Q2-FY2007 | Survey | Active | + | - | |
| Quarterly | Q3-FY2007 | SURVEY-Q3-FY2007 | Survey | Active | + | - | |
| Quarterly | Q4-FY2007 | SURVEY-Q4-FY2007 | Survey | Active | + | - | |
| Quarterly | Q1-FY2008 | SURVEY-Q1-FY2008 | Survey | Active | + | - | |
| Quarterly | Q2-FY2008 | SURVEY-Q2-FY2008 | Survey | Active | + | - | |
| Quarterly | Q3-FY2008 | SURVEY-Q3-FY2008 | Survey | Active | + | - | |
| Quarterly | Q4-FY2008 | SURVEY-Q4-FY2008 | Survey | Active | + | - | |
| Quarterly | Q1-FY2009 | SURVEY-Q1-FY2009 | Survey | Active | + | - | |
| Quarterly | Q2-FY2009 | SURVEY-Q2-FY2009 | Survey | Active | + | - | |

Modified

08/11/2009 4:57PM PDT

WFCSUSR

Period Use

Select the Workforce Communications Time Frame Group from the available list. You can create a Time Frame Group with any name for Workforce Communications, but you should ensure that the name you choose does not conflict with other time frames (such as those used in the Sales component) so that these components do not use the Workforce Communications time frames.

All Workforce Communications time periods must be created within a single Time Frame Group.

Setup Options Page

Use the Setup Options page (RY SVY SETUP) to specify basic setup information for workforce surveys.

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Setup Options

Image: Setup Options page

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

This page allows administrators to associate a Time Frame Group and a list of marketing objectives to a survey type. The setup is performed by the administrator; for the Survey Type of *Workforce*, you specify the time frame group to be used for the report's time frame.

Survey Type

For the Workforce Survey Analysis Report in Workforce Communications, this value is set to *Workforce*.

Time Frame Group

Specifies which Time Frame Group is to be used in the Survey Analysis report.

Note: The Time Frame Group name must be 14 characters or fewer.

SetID

The SetID to which the Objective is associated.

Objective

When a new dialog is created in Online Marketing, a marketing objective can be assigned to it. Objectives are SetID-specific and can be user defined. For example, a user could create an objective called “Employee Satisfaction Survey” and assign it to all survey dialogs that are Employee Satisfaction related, and another user could create another objective called “New Hire Survey” and assign it to all survey dialogs that are meant to be sent to new hires.

The Setup Option screen allows association of a survey type to a set of marketing objectives (for different Set IDs). This allows all dialogs belonging to a particular survey type to be identified. In the above example, the Employee Satisfaction Survey and New Hire Survey marketing objectives can be associated with the Workforce survey type. This would mean that the Workforce

Survey List Pagelet and Workforce Survey Analysis Report that belong to the Workforce survey type will only report on dialogs assigned to either of these two objectives. You can assign as many Objectives as you like to be associated with Workforce Communications surveys, and any dialog that has an Objective that matches an Objective that you have defined on the Setup Options page will be visible in the Workforce Survey Analysis report for that dialog.

At least one Objective must be associated with the Workforce survey type in order for the report to function correctly. By default, an Objective named Workforce Communications is delivered, but you can define more. Refer to the Online Marketing and Marketing Applications documentation for more information about defining Objectives.

See "Understanding Email Documents" (PeopleSoft CRM for Online Marketing 9.2).

See [Time Frame Group – Period Definition Page](#).

Role to Dimension Mapping Page

Use the Role to Dimension Mapping page (RY_SVY_ROLE_DIM) to map reporting dimensions to a role for a given survey type.

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Role to Dimension Mapping

Image: Role to Dimension Mapping page

This example illustrates the fields and controls on the Role to Dimension Mapping page. You can find definitions for the fields and controls later on this page.

Role to Dimension Mapping

Map Dimensions Find | View All First 1 of 2 Last

Role WFC Dialog Reports Analyst L1

Survey Type Workforce

Dimensions

- ☒ Survey
- ☒ Year
- ☒ Quarter
- ☒ Score Bracket
- ☒ Survey Rating
- ☒ Department
- ☒ Location
- ☒ Country
- ☒ Job Title
- ☒ Gender
- ☒ Age Group
- ☒ Years Employed

☐ Check All / Clear All

*Default Department

The Role to Dimension Mapping page is used to define which roles will be able to see specified reporting dimensions in the Workforce Survey Analysis Interactive Report. For example, you might want to allow entry-level HR analysts to see results by location, but not by age group or gender.

Survey Type

For the purposes of Workforce Communications, the Survey Type is always set to *Workforce*.

Dimensions

For the Survey Type of Workforce, the following dimensions are available for selection:

- Country
- Gender
- Age Group

- Department
- Job Title
- Location
- Years Employed
- Survey Rating

The following dimensions are mandatory and their check boxes cannot be cleared:

- Quarter
- Year
- Survey
- Score Bracket

Hiding certain dimensions helps to make the report less cluttered for people who do not need to see particular dimensions (for example, an executive might not need to break down survey results by gender, but an analyst might). Also, hiding dimensions can be used to provide a simple security mechanism in case where breakdown of measures by certain dimensions should not be allowed. For example, a user can be prevented from slicing data by job title if there is no business need to do so.

Note that if a user's role does not have access to a particular dimension, that dimension will not be available for that user in the Survey Analysis Report. Further, if a user has more than one role used in Workforce Communications analytics, each with different Role to Dimension mappings, then the *less restrictive* setting takes precedence. For example, if a user belongs to two custom end user roles named Role 1 and Role 2, where Role 1 does not have permission to view the Job Title dimension but Role 2 does have permission, then the user will see the Job Title dimension in the Survey Analysis Report.

Users assigned to custom roles that do not have Role to Dimension mappings created will only see the four mandatory dimensions (Quarter, Year, Survey, and Score Bracket).

Default

Specify the default dimension that should appear on interactive grid on the Survey Analysis tab of the Workforce Survey Analysis Interactive Report for the user with specified role. Any one of the selected dimensions except Score Bracket and Survey Rating can be specified as the default dimension for the role. As delivered, Department is set as the default.

Note: It is possible, though very unlikely, that a user can belong to two or more end user roles, with each assigned a different default dimension. If this occurs, the dimension name that appears first on the Role to Dimension Mapping page is chosen as the default dimension to display on the interactive grid.

Age Groups Page

Use the Age Groups page (RY_SVY_AGE) to calculate Age Group dimension values.

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Dimension Value Groups

Image: Age Groups page

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

Age Groups

Years Employed

Age Group

Personalize | Find | First 1-5 of 5 Last

| *Sequence | *Minimum Age | *Maximum Age | *Description | |
|-----------|--------------|--------------|----------------|--|
| 1 | 0 | 17 | 0 - 17 years | |
| 2 | 18 | 35 | 18 - 35 years | |
| 3 | 36 | 49 | 36 - 49 years | |
| 4 | 50 | 65 | 50 - 65 years | |
| 5 | 66 | 100 | 66 - 100 years | |

Add Age Group

Age groups are a one-time setup, defined by the WFC System Administrator. Age group setup is used to specify the age group into which a particular survey respondent falls.

- Sequence

Age groups are sorted by Sequence number by default. When a new row is added, the Sequence number for that row is calculated by incrementing the highest existing Sequence number on the page by 1. Users can change Sequence numbers, but they should have unique values and must be whole numbers (including 0).
- Minimum Age

The lower end of an age group. This value must be a whole number (including 0).
- Maximum Age

The higher end of an age group. This value must be a whole number and must be greater than the Minimum Age value.
- Description

The description of the Age Group—the value that is displayed in the Survey Analysis Report filter for Age Group. When Minimum Age andMaximum Age values are specified, theDescription field is automatically populated with the value

Minimum Age – Maximum Age (for example, *18 – 20*), but the user can change this (for example, *18 to 20 years*).

Add Age Group

Click this button to add a new age group to the list.

How Age Group is Computed

The system computes a respondent's Age Group by doing the following:

1. Calculate the age of the person in years by taking the date the person submitted the survey and subtracting the Date of Birth, then converting this value to years.
2. Using the defined age groups, determine the age group range into which the person should be placed.

Updating Age Groups

You can safely update age groups for a survey before it has any responses. However, if you want to update an age group (that is, update a row that already exists on the Age Groups page) and if any survey responses exist in the system, a warning message will display if you try to do any of the following:

- Update the Minimum Age value.
- Update the Maximum Age value.
- Update the Description.
- Delete the row.

The warning message will indicate that deleting or updating age groups can result in the generation of an incorrect Survey Analysis Report. In order to prevent this from happening, you should save changes on the Age Groups page and then run the Stage Data for Reporting Application Engine program with the Refresh Dimension References option selected.

See [Staging Data for Workforce Surveys](#).

Years Employed Page

Use the Years Employed page (RY_SVY_YRS) to calculate the Years Employed dimension value.

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Dimension Value Groups, Years Employed

Image: Years Employed page

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

| *Sequence | *Minimum Years | *Maximum Years | *Description |
|-----------|----------------|----------------|----------------|
| 1 | 0 | 5 | 0 - 5 years |
| 2 | 6 | 10 | 6 - 10 years |
| 3 | 11 | 20 | 11 - 20 years |
| 4 | 21 | 30 | 21 - 30 years |
| 5 | 31 | 40 | 31 - 40 years |
| 6 | 41 | 100 | 41 - 100 years |

Add Years Employed

Years Employed is a one-time setup, defined by the WFC System Administrator. Years Employed setup is used to specify a range of years into which a particular survey respondent falls.

Sequence

Years Employed values are sorted by Sequence number by default. When a new row is added, the Sequence number for that row is calculated by incrementing the highest existing Sequence number on the page by 1. Users can change Sequence numbers, but they should have unique values and must be whole numbers (including 0).

Minimum Years

The lower end of a Years Employed tier. This value must be a whole number (including 0).

Maximum Years

The higher end of a Years Employed tier. This value must be a whole number and must be greater than the Minimum Years value.

Description

The description of the Years Employed tier—the value that is displayed in the Survey Analysis Report filter for Years Employed. When Minimum Years and Maximum Years values are specified, the Description field is automatically populated with the value Minimum Years– Maximum Years (for example, *1 – 5*), but the user can change this (for example, *1 to 5 years*).

Years Employed

Click this button to add a new Years Employed tier to the list.

How Years Employed is Computed

The system computes a respondent's Years Employed tier by doing the following:

1. Calculate the number of years the person was employed by taking the date the person submitted the survey and subtracting the Hire Date, then converting this value to years.
2. Using the defined Years Employed tier, determine the tier into which the person should be placed.

Updating Years Employed

You can safely update Years Employed tiers for a survey before it has any responses. However, if you want to update a tier (that is, update a row that already exists on the Years Employed page) and any survey responses exist in the system, a warning message will display if you try to do any of the following:

- Update the Minimum Years value.
- Update the Maximum Years value.
- Update the Description.
- Delete the row.

The warning message will indicate that deleting or updating Years Employed tiers can result in the generation of incorrect interactive reports. In order to prevent this from happening, you should save changes on the Years Employed page and then run the Stage Data for Reporting Application Engine program with the Refresh Dimension References option enabled.

See [Staging Data for Workforce Surveys](#).

Staging Data for Workforce Surveys

Before data from Workforce Communications surveys can be analyzed, it must be extracted in raw form from the tables where it is stored, transformed by retrieving and calculating various dimension values, and loaded into a table that is used for reporting purposes. This extract, transform, and load (ETL) process improves the performance of the Workforce Survey List pagelet and the Workforce Survey Report. It also allows a “snapshot” of a person's HR attributes (such as job, location, and department) to be stored, since these attributes change over time.

Workforce Communications uses an Application Engine program named Stage Data for Reporting to implement the ETL process. The program can be run on demand or scheduled to run periodically (for example, nightly). You should run the program with the Incremental Refresh option when survey responses come in, and with the Refresh Dimension References option when you make changes to your setup data (for example Age Group, Score Bracket, or Years Employed definitions).

Workforce survey data is staged by the WFC System Administrator.

Page Used to Stage Data for Workforce Surveys

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| Stage Data for Reporting Page | RY_EE_STG | Transforms survey response data and stores it in tables used for reporting. |

Stage Data for Reporting Page

Use the Stage Data for Reporting page (RY_EE_STG) to transform survey response data and store it in tables used for reporting.

Navigation

Set Up CRM, Product Related, Marketing, Surveys, Stage Data for Reporting

Image: Stage Data for Reporting page

This example illustrates the fields and controls on the Stage Data for Reporting page. You can find definitions for the fields and controls later on this page.

Stage Data for Reporting

Run Control ID: 111 Report Manager Process Monitor Run

Run Mode

- ☒ **Incremental Refresh**
Stages unprocessed survey response rows into "Reporting Fact" table.
- ☐ **Refresh Dimension References**
Updates references to the Score Brackets, Age Groups, and Year Employed dimension values on staged data.

Incremental Refresh

When the Application Engine program is run with this option, only the previously unprocessed rows in the Online Marketing tables holding survey responses will be processed and added to the reporting table. This is the default option.

Refresh Dimension References

When this option is chosen, the Age Group, Years Employed, and Score Bracket IDs in each row in the reporting table are updated with the latest values if changes were made to any of these since the last Application Engine program was run in this mode.

The Application Engine program must be run in this mode after changes are made to the Age Groups, Years Employed, or Score Brackets setup information so that the reporting table correctly reflects the changes made.

Incremental Refresh Mode

When Incremental Refresh mode is selected and the Stage Data for Reporting program is run, the following actions occur.

Determine Rows to be Processed

The program first determines which rows in the survey data table need to be processed. Only rows belonging to dialogs that have the following considerations are eligible for processing:

- The Objective value is associated with the Survey Type of *Workforce*.
- At least one Survey document exists in the dialog.

- The survey response row has a Status of *Complete*.

The program also checks whether a person has submitted the same survey multiple times. If two or more unprocessed rows in completed status are found for the same survey and for the same person in a single Quarter (as defined in the Time Frames setup), then only the latest row is processed. When adding this row to the reporting table, the program checks to ensure that a row for the same person, for the same survey, and for the same Quarter does not already exist due to previous processing. If such a row does exist, then that row is replaced with the new row.

Determine Information About Respondent

Next, the system checks to see if the respondent can be identified (that is, if a BO_ID exists in the database) or is anonymous. If the respondent is not anonymous, the following information is determined:

- Department
- Job Title
- Location
- Gender
- Country
- Date of Birth
- Hire Date
- Role (Worker or Person of Interest)

If the respondent is anonymous, these values are considered to have a default value of *Unknown*. This is also true of any dimensions that are not supplied for a particular identifiable respondent (for example, if a respondent with the Role of *Person of Interest* does not have a Department value).

Next, the respondent's Age Group is calculated by using the Date of Birth and then computing the Age Group into which he or she falls. If the respondent is anonymous, the Age Group is given the value of *Unknown*.

Similarly, the respondent's Years Employed tier is calculated using the most recent Hire Date on the person's record and then computing the Years Employed tier into which this value falls. As with Age Group, this value is set to *Unknown* for anonymous respondents.

Next, the Score Bracket into which the survey score falls is calculated by comparing the respondent's answers with the Score Brackets that were set up for the survey.

Finally, the Quarterly and Annual time periods into which the survey completion date falls is calculated.

All of the calculated data is stored as a row in the reporting table.

Refresh Dimension References Mode

When Refresh Dimension References mode is selected and the Stage Data for Reporting program is run, the following actions occur:

1. Determine whether changes were made to any of the following setup values since the last time the Application Engine program was run:

- Age Groups
 - Years Employed
 - Score Bracket
2. If the Age Group setup values were changed, the Age Group IDs in the reporting table are updated to match the new setup values.
 3. If the Years Employed setup values were changed, the Years Employed Tier IDs are updated on all rows of the reporting table.
 4. If the Score Bracket setup values for any survey were changed, then the Score Bracket ID is updated in the reporting table, but only for those surveys affected. Surveys that were not affected remain as they were.

Analyzing Workforce Reports

Workforce Communications includes the following reports that you can use to analyze your survey data.

Note: The Dialog Performance Report is described in the PeopleSoft Marketing Applications documentation.

See [Understanding Workforce Reports](#).

See "Understanding Interactive Reports" (PeopleSoft CRM for Marketing Applications 9.2).

Pages Used to Analyze Workforce Reports

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| Workforce Survey List Pagelet | N/A | Display the dialog surveys to which the user has access. |
| Personalize Page | RY_EE_PRSNL | Personalize the items to appear on the Workforce Survey List pagelet. |
| Workforce Survey Analysis Report | RY_EE_SRY_RPT | Display workforce survey data in graphical form. |

Workforce Survey List Pagelet

Use the Workforce Survey List pagelet to display the dialog surveys to which the user has access.

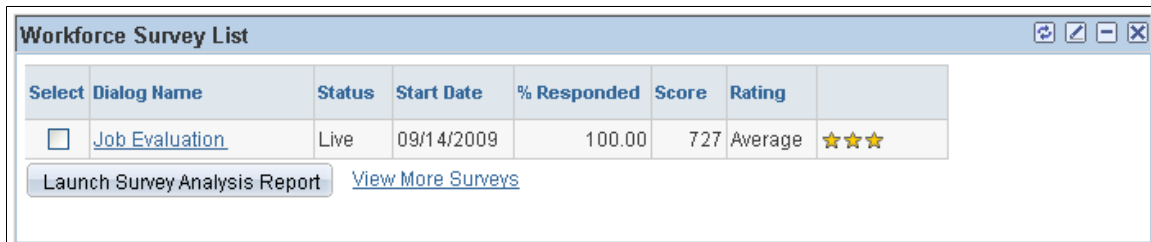
Navigation

Personalize, Content

Select the Workforce Survey List check box in the Marketing group box.

Image: Workforce Survey List

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



| Select | Dialog Name | Status | Start Date | % Responded | Score | Rating | |
|--------------------------|--------------------------------|--------|------------|-------------|-------|---------|-----|
| <input type="checkbox"/> | Job Evaluation | Live | 09/14/2009 | 100.00 | 727 | Average | ☆☆☆ |

[Launch Survey Analysis Report](#)
[View More Surveys](#)

The Workforce Survey List pagelet displays the list of Workforce Communications Survey Dialogs available to the user for analysis. The pagelet is available in the Marketing section of the CRM homepage; you display it by selecting it in the Personalize Content page accessible through the Marketing section.

| | |
|--------------------------------------|--|
| Select | Select one or more surveys for analysis by selecting the check boxes next to their names. |
| Dialog Name | The name of the Workforce Communications survey dialog. Click the dialog name to display the Survey Analysis Report for that dialog. |
| Status | The dialog's current status. |
| Start Date | The dialog's start date. |
| % Responded | This value is calculated by taking the number of respondents and dividing it by the number of people to whom the survey was sent, then multiplying the result by 100. Note that this value will be blank if the number of people the survey was sent to cannot be determined, because no audiences are tied to it. |
| Score | The average survey score, calculated across all survey respondents. |
| Rating | The survey rating derived from the Score Bracket into which this calculated average score falls. |
| Image | This column displays the image associated with the specified Rating on the Score Brackets setup page. If no image was associated, this column is blank. |
| Launch Survey Analysis Report | Click this button to display the Workforce Survey Analysis Report for the selected surveys. |

View More Surveys

Click this link to display a configurable search page. The default values on this page are the Business Unit, Start Date, and End Date defined in the pagelet's Personalize page.

Personalize Page

Use the Personalize page (RY_EE_PRSNL) to personalize the items to appear on the Workforce Survey List pagelet.

Navigation

Click the Edit icon in the upper right corner of the Workforce Survey List pagelet

Image: Personalize page

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

The screenshot shows a web interface titled "Personalize". Below the title is a section labeled "Personalization Criteria" with a blue header. Inside this section, there are three fields: "*Business Unit" with a text input and a magnifying glass icon, "Number of Rows" with a text input containing the value "5", and "*Sort By" with a dropdown menu showing "Start Date". Below these fields are two buttons: "Save" and "Return to Home".

Pagelet personalization is performed by each individual user, to specify the items they want to view on the page and how they want to sort them.

Business Unit

The business unit containing the survey dialogs accessible to users. This field is required.

Number of Rows

The number of rows to be displayed on the pagelet.

Sort By

Select *Start Date* or *Dialog Name* to specify how you want to sort the surveys that appear on the pagelet. *Start Date* is the default value.

Remember that survey dialogs will only appear on the pagelet for users or roles who are authorized to view them.

Viewing the Workforce Survey Analysis Report

Access the Workforce Survey Analysis Report (Marketing, Interactive Reports, Workforce Survey Analysis.)

Launching the Workforce Survey Analysis Report

When you access the Workforce Survey Analysis Report, a configurable search page is displayed, showing the surveys that the user or role can view. Only those users or roles with the Aggregate Reports permission (defined on the Dialog Designer – Team setup page). You must specify a business unit for the search; all other fields are optional.

After the search has completed, you can view one or more surveys (for example, if you wanted to compare a previous year's survey with this year's version. Choose one or more surveys by selecting their Select check boxes, then click the Launch Survey Analysis Report button to launch the reports. You can also click a dialog name in the result list to launch the report for that survey.

Viewing the Workforce Survey Analysis Report

The Workforce Survey Analysis Report contains two tabs:

- Workforce Survey Analysis.
- By Score Bracket.

Survey Analysis Tab

The Survey Analysis tab shows measures by dimensions other than Score Bracket, assuming that they have been enabled for the user's role. The default dimension chosen for the user's role in the Role to Dimension Mapping screen appears by default on the Y axis of the analytic grid.

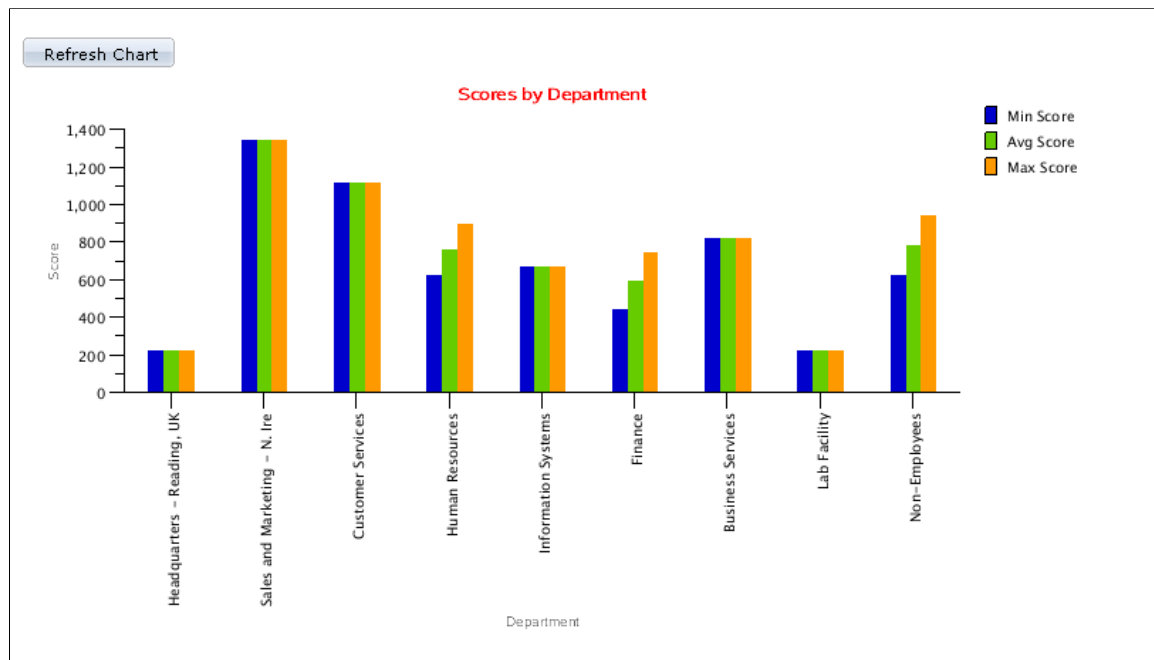
Image: Survey Analysis tab (1 of 2)

This example illustrates the fields and controls on the Survey Analysis tab (1 of 2). You can find definitions for the fields and controls later on this page.

| Survey Analysis By Score Bracket | | | | | |
|---|-------------|------------------------|-----------|-----------|-----------|
| <div> <div>Survey: Job Evaluation</div> <div>Location: All Locations</div> <div>Gender: All Genders</div> <div>Year: ANNUAL</div> <div>Country: All Countries</div> <div>Age Group: All Age Groups</div> <div>Quarter: All Quarters</div> <div>Job Title: All Jobs</div> <div>Years Employed: All Years Employed</div> </div> | | | | | |
| | Respondents | % of Total Respondents | Min Score | Max Score | Avg Score |
| All Departments | 12 | 100.00 | 225 | 1350 | 727 |
| Headquarters - Reading, UK | 1 | 8.33 | 225 | 225 | 225 |
| Sales and Marketing - N. Ire | 1 | 8.33 | 1350 | 1350 | 1350 |
| Customer Services | 1 | 8.33 | 1125 | 1125 | 1125 |
| Human Resources | 2 | 16.67 | 625 | 900 | 763 |
| Information Systems | 1 | 8.33 | 675 | 675 | 675 |
| Finance | 2 | 16.67 | 450 | 750 | 600 |
| Business Services | 1 | 8.33 | 825 | 825 | 825 |
| Lab Facility | 1 | 8.33 | 225 | 225 | 225 |
| Non-Employees | 2 | 16.67 | 625 | 950 | 788 |

Image: Survey Analysis tab (2 of 2)

This example illustrates the fields and controls on the Survey Analysis tab (2 of 2). You can find definitions for the fields and controls later on this page.



The following data is displayed in the analytic grid:

Filters

Survey: The selected survey.

Year: The year in which the survey falls.

Quarter: The quarter in which the survey falls.

Other dimensions: The other dimensions that have been enabled for the user's role on the Role to Dimension Mapping setup page, with the exception of *Score Brackets* and *Survey Rating*.

Grid

The grid's Y axis shows the default dimension chosen on the Role to Dimension Mapping page for the user's role. The X axis shows the measures:

- Respondents.
- % of Total Respondents (which is the Respondent Count for the cell divided by the total number of respondents to the survey * 100).
- Min Score.
- Max Score.
- Average Score.

Refresh Chart

Click this button to refresh the graphical chart from data in the grid. You should click this button any time the data in the grid changes to ensure that the grid and the chart are displaying the same data.

Chart

This bar chart plots Average, Min, and Max Scores on the Y axis. The X axis of the chart is determined by the Y axis dimension of the grid. If there are multiple dimensions on the grid's Y axis, then the outermost dimension is displayed on the chart's X axis.

By Score Bracket Tab

This report uses Score Bracket as the default dimension of the Y axis of the analytics grid. All other dimensions enabled for the user’s role are also displayed.

Image: By Score Bracket tab (1 of 2)

This example illustrates the fields and controls on the By Score Bracket tab (1 of 2). You can find definitions for the fields and controls later on this page.

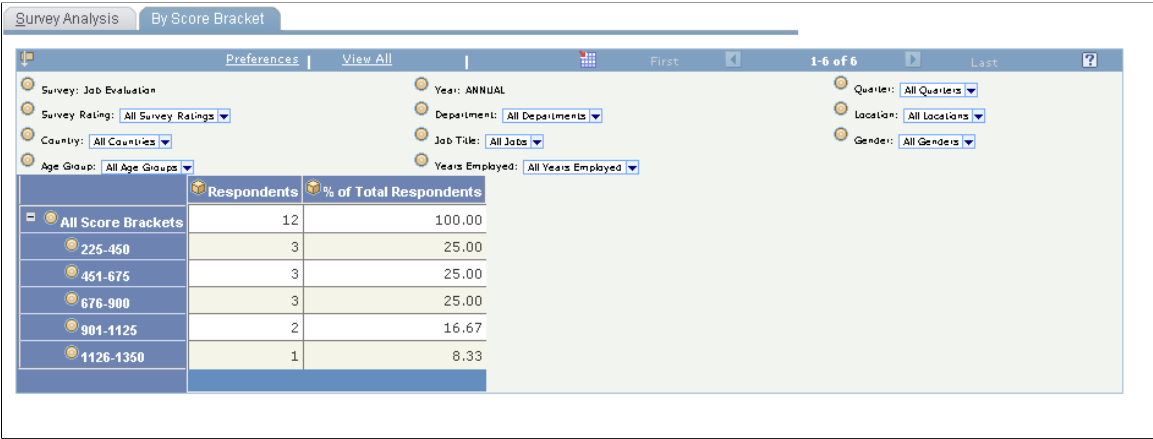
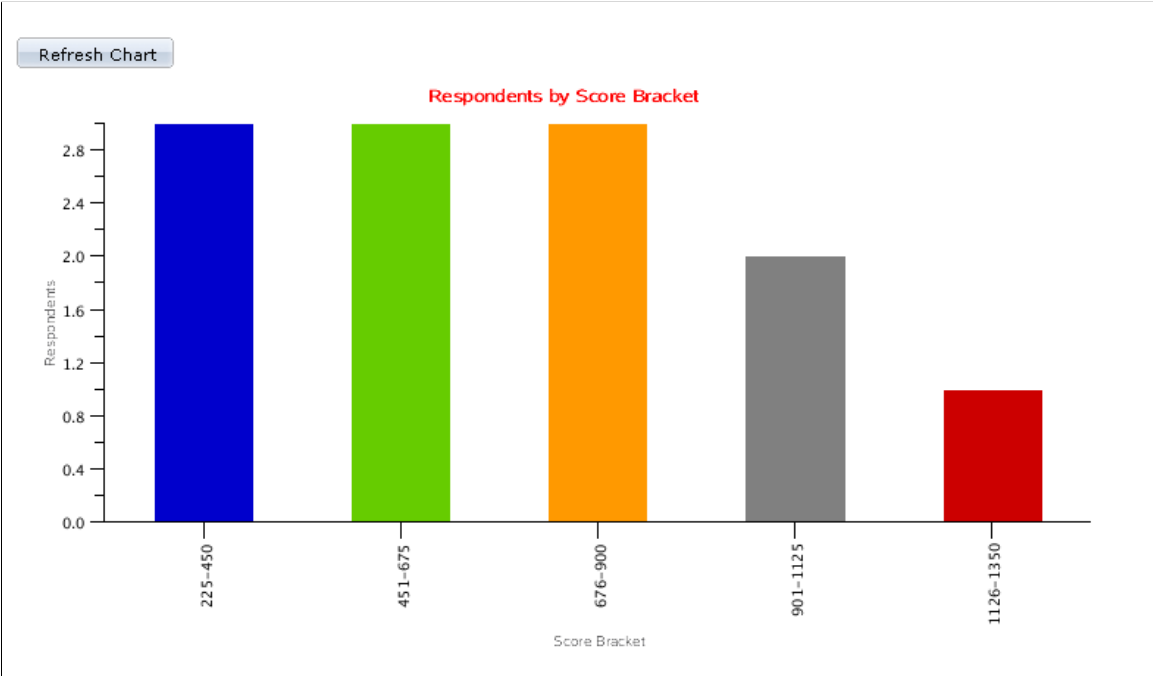


Image: By Score Bracket tab (2 of 2)

This example illustrates the fields and controls on the By Score Bracket tab (2 of 2). You can find definitions for the fields and controls later on this page.



Filters

- Survey:* The selected survey.
- Year:* The year in which the survey falls.
- Quarter:* The quarter in which the survey falls.

Other dimensions: The other dimensions that have been enabled for the user's role on the Role to Dimension Mapping setup page.

Grid

The grid's Y axis shows the Score Brackets.

The X axis shows:

- Respondents.
- % of Total Respondents (Respondent count (for cell) divided by the total number of survey respondents * 100).

Refresh Chart

Click this button to refresh the graphical chart from data in the grid. You should click this button any time the data in the grid changes to ensure that the grid and the chart are displaying the same data.

Chart

This bar chart plots Respondents (# of Respondents) on the Y axis. The X axis is specified by the Y-axis dimension of the analytics grid. If there are multiple dimensions on the Y axis of analytic grid, then the outermost dimension is shown on the chart's X axis.

Appendix A

Data Synchronized from HR to CRM

Worker Profile Group

These fields are grouped in the Profile Group named Worker Profile. The navigation is Workforce, Worker, Details.

| <i>Profile Name</i> | <i>Profile Folder</i> | <i>Field Label Name</i> | <i>Use Type</i> | <i>Field Name</i> |
|----------------------------|------------------------------|--------------------------------|----------------------------|--------------------------|
| Worker | Individuals | Person ID | Map Field Choice to Prompt | PERSON_ID |
| Employee ID | Map Field Choice to Prompt | EMPLID | | |
| Contact Flag | Map Field Choice to Prompt | CONTACT_FLAG | | |
| Language | Map Field Choice to Prompt | RB_LANGUAGE_CD | | |
| Driver's License | | | | |
| License Issued By | | | | |
| License Expires | | | | |
| PIM Account Name | | | | |
| Pref. Contact | | | | |
| Pref. Notification | | | | |

Worker - Job Information Profile Group

In CRM, one employee can have multiple Jobs. One row of data exists for each Job that an employee has. Only the most current effective dated Job information for each employee is stored as Profile fields. These fields are grouped in the Profile Group named Job Information. The navigation is Workforce, Worker, Job.

| <i>Profile Name</i> | <i>Profile Folder</i> | <i>Field Label Name</i> | <i>Use Type</i> | <i>Field Name</i> |
|----------------------------|------------------------------|--------------------------------|------------------------|--------------------------|
| Worker Job Information | Individuals | Worker Role | | |

| Profile Name | Profile Folder | Field Label Name | Use Type | Field Name |
|---------------------------------------|----------------------------|-------------------------|----------------------------|-------------------|
| Assignment Start | | | | |
| Effective Date | Date | EFFDT | | |
| Effective Sequence | Integer | SEQUENCE_NUMBER | | |
| Employee Status | Map Field Choice to Prompt | EMPL_STATUS | | |
| HR Status | Map Field Choice to Prompt | HR_STATUS | | |
| Job Indicator | Map Field Choice to Prompt | JOB_INDICATOR | | |
| Source Indicator | Map Field Choice to Prompt | SOURCE_IND | | |
| Regular or Temp | Map Field Choice to Prompt | REG_TEMP | | |
| Full Time or Part Time | Map Field Choice to Prompt | FULL_PART_TIME | | |
| Job Code SetID | Map Field Choice to Prompt | SETID_JOBCODE | | |
| Job Code | Map Field Choice to Prompt | JOBCODE | | |
| Job Description | | | | |
| Department SetID | Map Field Choice to Prompt | SETID_DEPT | | |
| GL Business Unit | | | | |
| Worker Job Information (continued) | Individuals | Department ID | Map Field Choice to Prompt | DEPTID |
| Dept. Description | | | | |
| Location SetID | Map Field Choice to Prompt | SETID_LOCATION | | |
| Location Code | Map Field Choice to Prompt | LOCATION | | |
| Location Desc | | | | |
| Physical Location | | | | |
| Time Zone | | | | |

| Profile Name | Profile Folder | Field Label Name | Use Type | Field Name |
|---------------------|----------------------------|-------------------------|-----------------|-------------------|
| Holiday Schedule | | | | |
| Supervisor ID | Map Field Choice to Prompt | SUPERVISOR_ID | | |
| Supervisor | | | | |
| Office Code | | | | |
| Manager Level | | | | |
| Manager ID | | | | |
| Manager Group | | | | |
| Manager Dept | | | | |
| Manager Position | | | | |

Worker Provider Groups Profile Group

In CRM, an employee can be a member of multiple Provider Groups. One row of data exists for each Provider Group to which an employee is a member. Only Provider Groups with a Status of Active are stored. The fields are grouped in the Profile Group named “Provider Groups.” The navigation is Workforce, Worker, Groups.

| Profile Name | Profile Folder | Field Label Name | Use Type | Field Name |
|------------------------|----------------------------|-------------------------|----------------------------|-------------------|
| Worker Provider Groups | Individuals | SetID | Map Field Choice to Prompt | SETID |
| Provider Group Name | | | | |
| Status | | | | |
| Person ID | Map Field Choice to Prompt | PERSON_ID | | |
| Provider Group ID | Map Field Choice to Prompt | PROVIDER_GRP_ID | | |

Person of Interest Profile Group

For Persons of Interest, the information about the individual is contained within the Person record in CRM. Most Person fields that are needed are already contained in the Person Basic table and are available for use as Profiles. The following field is needed in addition to those already available. This field is

grouped in the Profile Group named “Persons of Interest.” The navigation is Customers CRM, Search Person.

| <i>Profile Name</i> | <i>Profile Folder</i> | <i>Field Label Name</i> | <i>Use Type</i> | <i>Field Name</i> | <i>Description</i> |
|----------------------------|------------------------------|--------------------------------|----------------------------|--------------------------|---|
| Person of Interest | Individuals | POI Type | Map Field Choice to Prompt | POI_TYPE | Identifies the type of Person of Interest (COBRA, External Payroll, and so on). |

Appendix B

Profiles Containing HR Data

Job Data

Job data is information about an employee's job—for example, hiring, promotion, change of position, salary increase, and so forth. Each employee will have one or more changes occurring to his or her Job Data record.

The Job Data folder is a subfolder of the Individuals folder when building selection criteria for an audience.

| Field Label Name | Field Name | Use Type |
|-------------------------|-------------------|----------------------------|
| Employee ID | EMPLID | Map Field Choice to Prompt |
| Employee Record Number | RA_EMPL_RCD | Text |
| Effective Date | EFFDT | Date |
| Effective Sequence | RA_EFFSEQ | Text |
| Department ID | DEPTID | Map Field Choice to Prompt |
| Job Code | JOBCODE | Map Field Choice to Prompt |
| Position Number | POSITION_NBR | Text |
| Employee Status | EMPL_STATUS | Map Field Choice to Prompt |
| Action | ACTION | Map Field Choice to Prompt |
| Action Date | ACTION_DT | Date |
| Action Reason | ACTION_REASON | Text |
| Location | LOCATION | Map Field Choice to Prompt |
| Tax Location Code | TAX_LOCATION_CD | Text |
| Job Entry Date | JOB_ENTRY_DT | Date |
| Department Entry Date | DEPT_ENTRY_DT | Date |
| Position Entry Date | POSITION_ENTRY_DT | Date |
| Shift | SHIFT | Map Field Choice to Prompt |

| Field Label Name | Field Name | Use Type |
|--------------------------------|-------------------|----------------------------|
| Regular or Temp | REG_TEMP | Map Field Choice to Prompt |
| Full or Part Time | FULL_PART_TIME | Map Field Choice to Prompt |
| Company | COMPANY | Text |
| Pay Group | PAYGROUP | Text |
| BAS Group ID | BAS_GROUP_ID | Text |
| Benefits Employee Status | BEN_STATUS | Text |
| Benefits Administration Action | BAS_ACTION | Text |
| COBRA Action | COBRA_ACTION | Text |
| Employee Type | EMPL_TYPE | Text |
| Holiday Schedule | HOLIDAY_SCHEDULE | Text |
| Standard Hours Frequency | STD_HRS_FREQUENCY | Text |
| Officer Code | OFFICER_CD | Map Field Choice to Prompt |
| Employee Class | EMPL_CLASS | Map Field Choice to Prompt |
| Salary Administration Plan | SAL_ADMIN_PLAN | Text |
| Salary Grade | GRADE | Text |
| Grade Entry Date | GRADE_ENTRY_DT | Date |
| Step Entry Date | STEP_ENTRY_DT | Date |
| Salary Matrix Code | SALARY_MATRIX_CD | Text |
| Rating Scale | RATING_SCALE | Text |
| Review Rating | REVIEW_RATING | Text |
| Review Date | REVIEW_DT | Date |
| Compensation Rating | COMP_FREQUENCY | Map Field Choice to Prompt |
| Currency Code | CURRENCY_CD | Map Field Choice to Prompt |
| Business Unit | BUSINESS_UNIT | Text |
| Department SetID | SETID_DEPT | Map Field Choice to Prompt |
| Job Code SetID | SETID_JOBCODE | Map Field Choice to Prompt |
| Location SetID | SETID_LOCATION | Map Field Choice to Prompt |

| Field Label Name | Field Name | Use Type |
|---------------------------|--------------------|----------------------------|
| Salary SetID | SETID_SALARY | Text |
| Regulatory Region | REG_REGION | Text |
| Tipped | DIRECTLY_TIPPED | Map Field Choice to Prompt |
| FLSA Status | FLSA_STATUS | Map Field Choice to Prompt |
| EEO Classification | EEO_CLASS | Map Field Choice to Prompt |
| Function Code | FUNCTION_CD | Text |
| Establishment ID | ESTABID | Text |
| Paid Work Period | PAID_HRS_FREQUENCY | Text |
| Benefit Program | BENEFIT_PROGRAM | Text |
| Union Full or Part Time | UNION_FULL_PART | Text |
| Union Position | UNION_POS | Text |
| Productive Unit | UNITA_PROD_CD | Text |
| Union Code | UNION_CD | Text |
| Bargaining Unit | BARG_UNIT | Text |
| Union Seniority Date | UNION_SENIORITY_DT | Date |
| Date Entered | ENTRY_DT | Date |
| Labor Agreement | LABOR_AGREEMENT | Text |
| Employee Category | EMPL_CTG | Text |
| Employee Subcategory | EMPL_CTG_L1 | Text |
| Employee Subcategory 2 | EMPL_CTG_L2 | Text |
| FICA Status - Employee | FICA_STATUS_EE | Map Field Choice to Prompt |
| Supervisor ID | SUPERVISOR_ID | Map Field Choice to Prompt |
| Reports To | REPORTS_TO | Text |
| HR Status | HR_STATUS | Map Field Choice to Prompt |
| Organization Relationship | PER_ORG | Map Field Choice to Prompt |
| POI Type | POI_TYPE | Text |
| Hire Date | HIRE_DT | Date |

| Field Label Name | Field Name | Use Type |
|---------------------------|--------------------|-----------------|
| Termination Date | TERMINATION_DT | Date |
| Assignment Start | ASGN_START_DT | Date |
| Assignment End | ASGN_END_DT | Date |
| Last Date Worked | LAST_DATE_WORKED | Date |
| Compensation Rate | COMPRATE | Decimal |
| Change Amount | CHANGE_AMT | Decimal |
| Annual Rate | ANNUAL_RT | Decimal |
| Monthly Rate | MONTHLY_RT | Decimal |
| Daily Rate | DAILY_RT | Decimal |
| Hourly Rate | HOURLY_RT | Decimal |
| Annual Benefits Base Rate | ANNL_BENEF_BASE_RT | Decimal |
| Shift Differential Rate | SHIFT_RT | Decimal |
| Standard Hours | RA_STD_HOURS | Text |
| Step | RA_STEP | Text |
| Change Percent | RA_CHANGE_PCT | Text |
| Shift Factor | RA_SHIFT_FACTOR | Text |
| Category Rate | RA_CTG_RATE | Text |
| Paid Hours | RA_PAID_HOURS | Text |
| Paid FTE | RA_PAID_FTE | Text |
| FTE | RA_FTE | Text |
| Work Day Hours | RA_WORK_DAY_HOURS | Text |

Job Data – Global

The following table shows the data from the Job Data – Global Table that is available as selection criteria for building audiences. It appears as a subfolder of the Individuals folder.

| Field Label Name | Field Name | Use Type |
|-------------------------|-------------------|----------------------------|
| Employee ID | EMPLID | Map Field Choice to Prompt |

| Field Label Name | Field Name | Use Type |
|------------------------------------|--------------------|-----------------|
| Employee Record | RA_EMPL_RCD | Text |
| Effective Date | EFFDT | Date |
| Effective Sequence | RA_EFFSEQ | Text |
| Tariff | TARIFF_GER | Text |
| Tariff Area | TARIFF_AREA_GER | Text |
| Performance Group | PERFORM_GROUP_GER | Text |
| Labor Type | LABOR_TYPE_GER | Text |
| Spokesman Committee ID | SPK_COMM_ID_GER | Text |
| Works Council Member | WRKS_CNCL_MEM_GER | Text |
| Hours Type | HOURLY_RATE_FRA | Text |
| Work Accident Type Code | ACCDNT_CD_FRA | Text |
| Value 1 | VALUE_1_FRA | Text |
| Value 2 | VALUE_2_FRA | Text |
| Value 3 | VALUE_3_FRA | Text |
| Value 4 | VALUE_4_FRA | Text |
| Value 5 | VALUE_5_FRA | Text |
| Turnover Action | ACTION_ITA | Text |
| Turnover Action Reason | ACTION_REASON_ITA | Text |
| Works Council Function | WRKS_CNCL_FUNCTION | Text |
| Intercenter Works Council Function | INTERCTR_WRKS_CNCL | Text |
| Pay Group | GP_PAYGROUP | Text |
| Use Pay Group Value | GP_DFLT_ELIG_GRP | Text |
| Eligibility Group | GP_ELIG_GRP | Text |
| Use Pay Group Value 2 | GP_DFLT_CURRTTYP | Text |
| Use Pay Group Value 3 | GP_DFLT_EXRTDT | Text |
| Use Rate As Of | GP_ASOF_DT_EXG_RT | Text |
| Cross Border Worker | BORDER_WALKER | Text |

| Field Label Name | Field Name | Use Type |
|-------------------------|--------------------|-----------------|
| Work Council Role | WRKS_CNCL_ROLE_CHE | Text |
| Works Council ID | WRKS_CNCL_ID_LCL | Text |
| Matricula Number | RA_MATRICULA_NBR | Text |

Job Data – Federal

The following table shows the data from the Job Data – Global Table that is available as selection criteria for building audiences. It appears as a subfolder of the Individuals folder.

| Field Label Name | Field Name | Use Type |
|----------------------------------|--------------------|----------------------------|
| Employee ID | EMPLID | Map Field Choice to Prompt |
| Employee Record | RA_EMPL_RCD | Text |
| Effective Date | EFFDT | Date |
| Effective Sequence | RA_EFFSEQ | Text |
| Effective Date - Government | GVT_EFFDT | Date |
| Proposed Effective Date | GVT_EFFDT_PROPOSED | Date |
| Work In Progress Status | GVT_WIP_STATUS | Text |
| Status Type | GVT_STATUS_TYPE | Map Field Choice to Prompt |
| Nature of Action Code | GVT_NOA_CODE | Text |
| Legal Authority (1) | GVT_LEG_AUTH_1 | Text |
| Authority 1 Description - Part 1 | GVT_PAR_AUTH_D1 | Text |
| Authority 1 Description - Part 2 | GVT_PAR_AUTH_D1_2 | Text |
| Legal Authority (2) | GVT_LEG_AUTH_2 | Text |
| Authority 2 Description - Part 1 | GVT_PAR_AUTH_D2 | Text |
| Authority 2 Description - Part 2 | GVT_PAR_AUTH_D2_2 | Text |
| Not to Exceed Date | GVT_PAR_NTE_DATE | Date |
| Work Schedule | GVT_WORK_SCHED | Map Field Choice to Prompt |
| Sub-Agency | GVT_SUB_AGENCY | Text |
| Eligible for FEHB | GVT_ELIG_FEHB | Text |

| Field Label Name | Field Name | Use Type |
|------------------------------|--------------------|----------------------------|
| FEHB Eligibility Date | GVT_FEHB_DT | Date |
| Pay Rate Determinant | GVT_PAY_RATE_DETER | Text |
| US Federal Step | GVT_STEP | Text |
| Retained Pay Plan | GVT_RTND_PAY_PLAN | Text |
| Retained Pay Table | GVT_RTND_SAL_PLAN | Text |
| Retained Grade | GVT_RTND_GRADE | Text |
| Retained US Federal Step | GVT_RTND_GVT_STEP | Text |
| Pay Basis | GVT_PAY_BASIS | Text |
| Transferred from Agency | GVT_XFER_FROM_AGCY | Text |
| Transferred to Agency | GVT_XFER_TO_AGCY | Text |
| Retirement Plan | GVT_RETIRE_PLAN | Text |
| Annuitant Indicator | GVT_ANN_IND | Text |
| FEGLI Code | GVT_FEGLI | Text |
| FEGLI Living Benefits | GVT_FEGLI_LIVING | Yes/No |
| CSRS Frozen Service | GVT_CSRS_FROZN_SVC | Text |
| Previous Retirement Coverage | GVT_PREV_RET_COVRG | Text |
| FERS Coverage | GVT_FERS_COVERAGE | Map Field Choice to Prompt |
| Type of Appointment | GVT_TYPE_OF_APPT | Text |
| Personnel Office ID | GVT_POI | Text |
| Position Occupied | GVT_POSN_OCCUPIED | Map Field Choice to Prompt |
| Contact Emplid | GVT_CONT_EMPLID | Map Field Choice to Prompt |
| Route to Next | GVT_ROUTE_NEXT | |
| Change Flag | GVT_CHANGE_FLAG | Yes/No |
| TSP Status | GVT_TSP_UPD_IND | Text |
| PI Update Indicator | GVT_PI_UPD_IND | Map Field Choice to Prompt |
| SF-52 Request Number | GVT_SF52_NBR | Text |
| SF-113G Ceiling | GVT_S113G_CEILING | Yes/No |

| Field Label Name | Field Name | Use Type |
|-----------------------------------|--------------------|----------------------------|
| LEO / Fire Position | GVT_LEO_POSITION | Map Field Choice to Prompt |
| Annuity Commencement Date | GVT_ANNUIT_COM_DT | Date |
| Post 65 Basic Life Reduction | GVT_BASIC_LIFE_RED | Text |
| 4 Day Date | GVT_DED_PRORT_DT | Date |
| Retroactive Pay Flag | GVT_RETRO_FLAG | Text |
| Retroactive Deduction Flag | GVT_RETRO_DED_FLAG | Text |
| Retroactive Job Flag | GVT_RETRO_JOB_FLAG | Text |
| Retroactive Base Flag | GVT_RETRO_BSE_FLAG | Text |
| Other Pay Change Flag | GVT_OTH_PAY_CHG | Text |
| Detail Position Number | GVT_DETL_POSN_NBR | Text |
| Annual Benefit Base Rate Override | ANNL_BEN_BASE_OVRD | Yes/No |
| Benefit Program | BENEFIT_PROGRAM | Text |
| Update Payroll Flags | UPDATE_PAYROLL | Text |
| Pay Plan | GVT_PAY_PLAN | Text |
| Pay Flag | GVT_PAY_FLAG | Text |
| NID Change | GVT_NID_CHANGE | Text |
| Base Pay | GVT_COMPRATE | Decimal |
| Hourly Rate with out Location | GVT_HRLY_RT_NO_LOC | Decimal |
| No Locality - Monthly Rate | GVT_MNLY_RT_NO_LOC | Decimal |
| No Locality - Annual Rate | GVT_ANNL_RT_NO_LOC | Decimal |
| Transaction Number | RA_GVT_TRANS_NBR | Text |
| Sequence Number | RA_GVTRANS_NBR_SEQ | Text |
| Retained Step | RA_GVT_RTND_STEP | Text |
| Locality Adjustment | RA_GVTLOCALITY_ADJ | Text |
| Biweekly Rate | RA_GVT_BIWEEKLY_RT | Text |
| Daily Rate | RA_GVT_DAILY_RT | Text |
| Daily Rate no Locality | RA_GVTDLY_RTNO_LOC | Text |

| <i>Field Label Name</i> | <i>Field Name</i> | <i>Use Type</i> |
|--------------------------------|--------------------------|------------------------|
| No Locality Biweekly Rate | RA_GVTBW_RT_NO_LOC | Text |
| Living Benefit Coverage Amount | RA_GVT_LIVING_AMT | Text |
| CSRS Annuity Offset Amount | RA_GVT_ANNUIITY_OFF | Text |
| FEGLI Basic Percent | RA_GVT_FEGLI_BASC | Text |
| FEGLI Optional Percent | RA_GVT_FEGLI_OPT_P | Text |
| FEHB Percent | RA_GVT_FEHB_PCT | Text |

