PeopleSoft EPM 9.1 Workforce Planning PeopleBook

April 2012

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SKU epm91pwfp-b0412

Contents

PeopleSoft Workforce Planning Preface

This preface discusses:

- PeopleSoft products.
- Related PeopleBooks.
- Deferred processing.
- Common elements used in Workforce Planning.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products from Oracle:

- Oracle's PeopleSoft Workforce Rewards.
- Oracle's PeopleSoft HRMS.

Related PeopleBooks

The *PeopleSoft Workforce Planning PeopleBook* provides implementation and processing information for Workforce Planning.

Additional, essential information describing the setup and design of your system appears in these companion volumes of documentation:

- *PeopleSoft Enterprise Performance Management Fundamentals PeopleBook.*

  This book provides information that is needed to complete the core setup for all PeopleSoft EPM applications. It also describes the system architecture, the mapping of data into the warehouse, and EPM Foundation tools and processes.

- *PeopleSoft Workforce Analytic Applications PeopleBook.*

  Workforce Planning shares setup with other workforce analytic applications. Much of this setup is described in this book.

Deferred Processing

Several pages in Workforce Planning operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

Common Elements Used in Workforce Planning

This section lists common elements used in Workforce Planning.

SetID	Provides the ID code for a TableSet. A TableSet is a group of tables (records) necessary to define your company's structure and processing options.
Effective Date	Establishes the date that the row in the table becomes effective. It determines when you can view and change the information. Pages and batch processes that use the information use the current row.
Status	Indicates whether a row in a table is active or inactive. You cannot select inactive rows on pages or use them for running batch processes.
Description	Allows free-flow text up to 30 characters that describes what you are defining.
Run Control ID	Identifies specific run control settings for a process or report.
Report ID	Identifies the report.
Program Name	Provides the PeopleSoft Enterprise Performance Management program name for which you are running the report or process.
When	Specifies the frequency with which you want to run a process. You can choose *Once,Always,* or *Don't.*
Last Run On	Indicates the date on which the report or process was last run.
As Of Date	Indicates the last date for which the report or process includes data.
Scenario ID	Provides an identifier for a specific scenario.

Model ID	Provides an identifier for a model. A model uniquely identifies the types of data that you want to include in a scenario. For example, you might want to review revenue by region at a very high-level scope. Or, if you use Workforce Planning, you might want to review only those activities that relate to a certain product line for certain types of resources from a very narrow scope.
Fiscal Year	Specifies the fiscal year for your scenario or process run.
Period	Specifies the accounting period for the object that is being defined or the process that is being run.
Job ID	Specifies an instance of an engine.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with Workforce Planning

This chapter provides an overview of Workforce Planning and discusses:

- Workforce Planning business processes.
- Workforce Planning implementation.

Workforce Planning Overview

PeopleSoft Workforce Planning is an analytical application that you use to review the skills that your workforce has, which skills it needs, and what needs to be done to obtain those skills. With Workforce Planning you:

- Create a central repository of all of your organization's competencies and accomplishments, from PeopleSoft HRMS and other sources, in the Operational Warehouse - Enriched (OWE).
- Compile and review an inventory of your current workforce's competencies and accomplishments.
- Define your organization's current competency strategy, or other alternate, and forward-looking competency strategies.
- Analyze the match, and gap, between the current workforce competency inventory and the competency strategy requirements to determine what competencies you require.
- Conduct in-depth analysis of competency requirements.
- Link strategic goals and competencies directly to individual employees.
- Determine knowledge capital needs for mid- to long-term business planning.
- Reduce hiring time and expense, lower training costs, and increase productivity across the organization.

Process Flow

To set up and use Workforce Planning, you:

1. Set up EPM Foundation and the Operational Warehouse - Enriched (OWE).
2. Import, by ETL, data from HRMS source tables into the OWE.
3. Create a centralized repository of all your internal and external workforce and competency data, in the OWE.

4. Perform setup tasks specific to Workforce Planning for trees, workforce groups, mapping proficiency, tasks, and roles.
5. Review the inventory of workforce competencies.
6. Define competency strategies and set up competency models.
7. (Optional) Run the Value Allocation process.
8. Run the Match process.
9. Assess the match between the workforce competency inventory and the competency strategies.

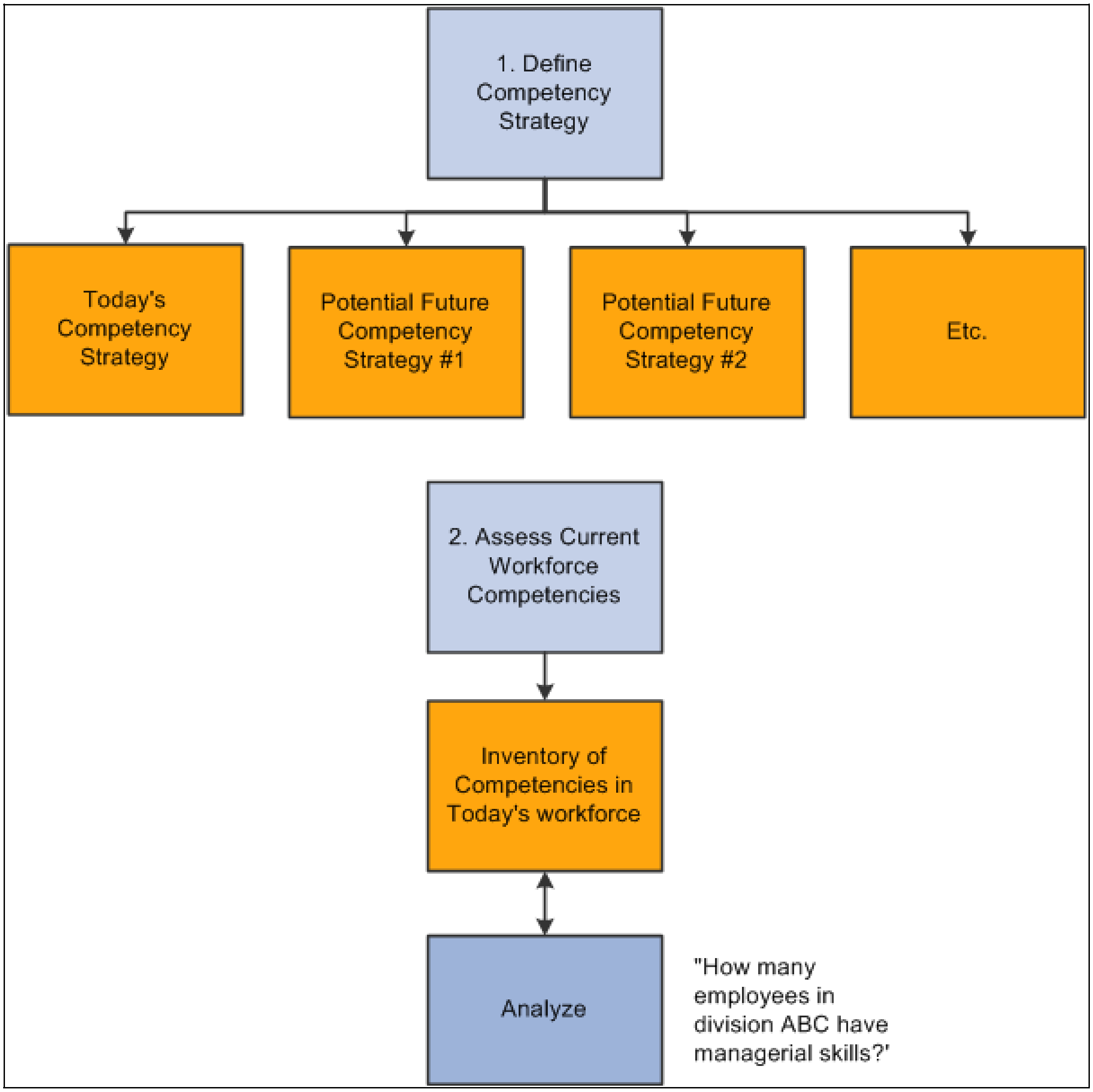
See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*

See *PeopleSoft Workforce Analytic Applications 9.1 PeopleBook*

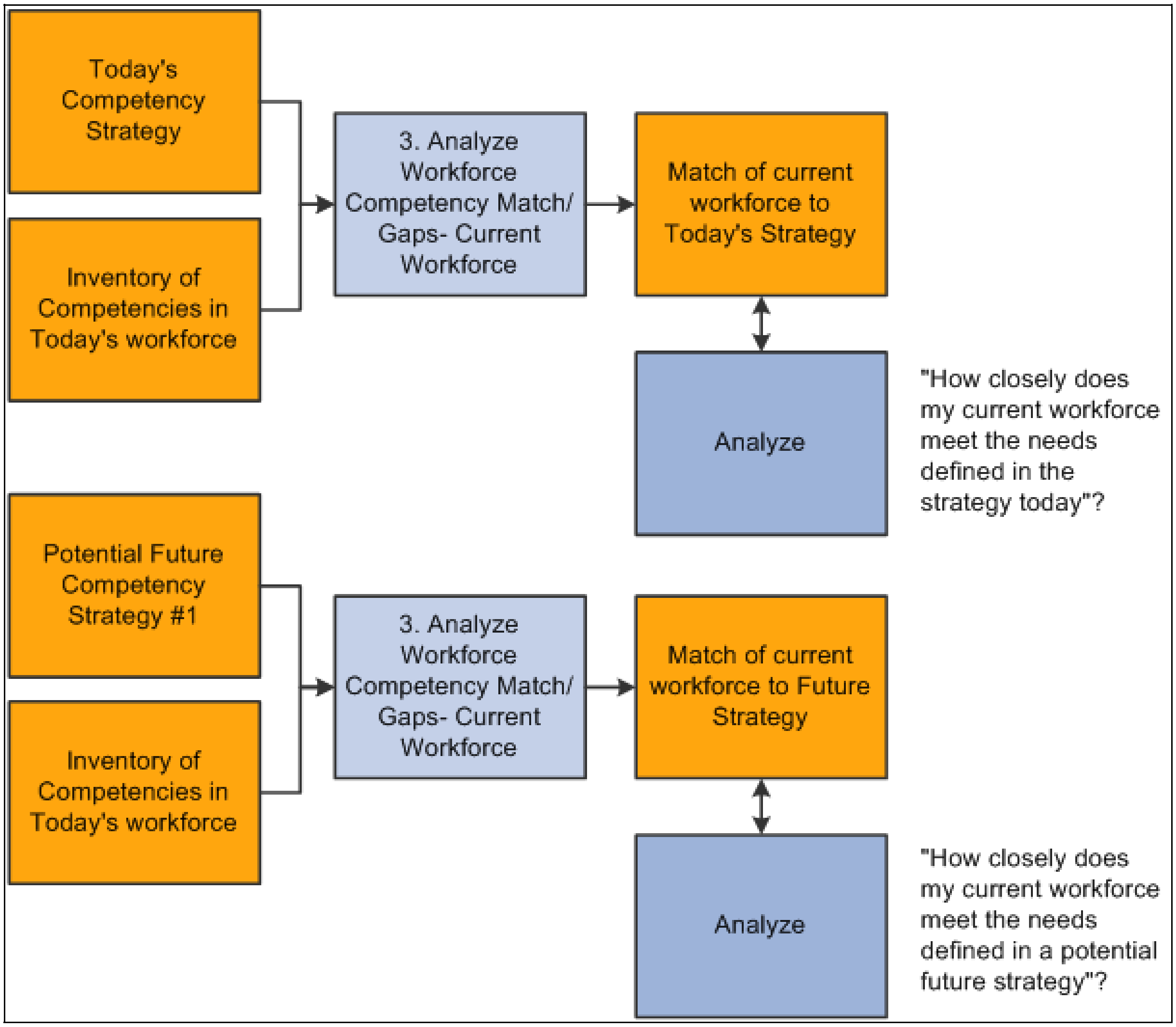
Workforce Planning Business Processes

This application is part of the Development and Deployment business processes.

The following process flow illustrates the Workforce Planning processes:



High-level business process diagram for Workforce Planning — part 1



High-level business process diagram for Workforce Planning — part 2

Workforce Planning Implementation

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

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, ETL job reports, and data models. A complete list of these resources is in the preface, with information about where to find the most current version of each.

See Also

PeopleSoft PeopleTools PeopleBook: Setup Manager

PeopleBooks and the Online Library

Chapter 2

Setting Up Workforce Planning

This chapter provides an overview of Workforce Planning setup and discusses how to:

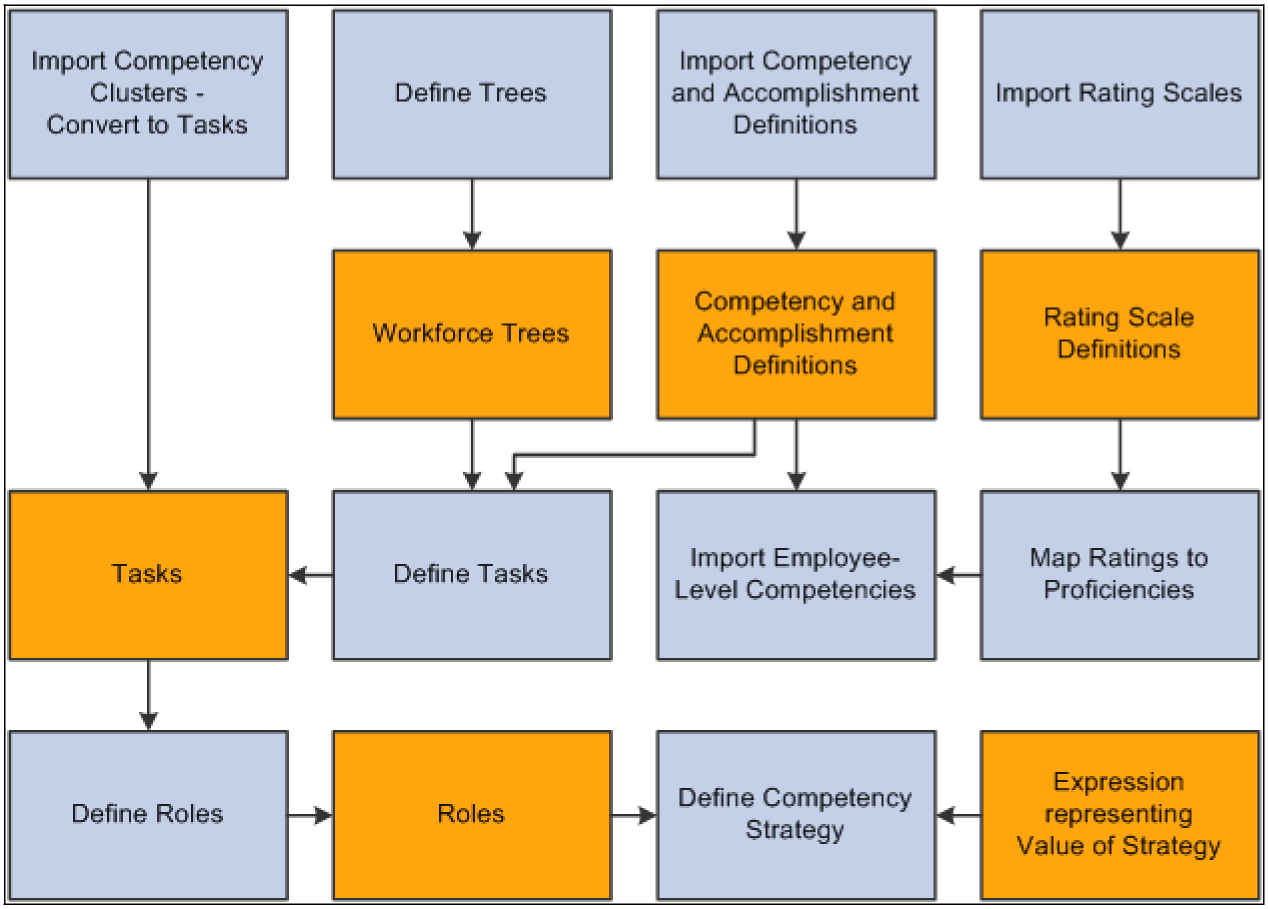
- Review competency, accomplishment, and cluster definitions.
- Specify workforce trees.
- Map review ratings to proficiencies.
- Set up workforce planning groups.
- Define tasks and roles.

Understanding Workforce Planning Setup

To set up Workforce Planning, you perform the following steps:

1. Review data that is imported from HRMS.
2. Specify workforce trees (after you have created your workforce trees).
3. Map review ratings to proficiencies (after loading the competency definitions and rating scales, but prior to loading employee-level competency information).
4. Define workforce groups.
5. Define tasks.
6. Define roles.

This diagram provides a conceptual overview of these setup steps:



Conceptual overview of the Workforce Planning setup tasks

Reviewing Competency, Accomplishment, and Cluster Definitions

Review data that is imported from HRMS and loaded into the data warehouse tables, using pages in the EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS menu. For example, use pages in this menu to review competency, accomplishment, and cluster definitions. This information is documented in the *PeopleSoft Workforce Analytic Applications 9.1 PeopleBook.*

Specifying Workforce Trees

You use the Workforce Analytics, Workforce Analytics Setup, Setup Workforce Trees page to specify the names of the workforce trees that the Workforce Planning system is to use. This page is documented in the *PeopleSoft Workforce Analytic Applications 9.1 PeopleBook.*

Mapping Review Ratings to Proficiencies

Use the Proficiency Map page to map review ratings from HRMS to proficiency levels. When you complete this page is important. The overall sequence of events for using this page is:

1. Load HRMS rating models and review ratings into the data warehouse tables.
2. Use the Proficiency Map page in Workforce Planning to map review rating values to proficiency levels.
3. Load employee-level competencies from HRMS.

   The system converts rated proficiencies to the standard values that are mapped in the Proficiency Map page.
4. View the results on the Review Competency Inventory Worker Competencies page.

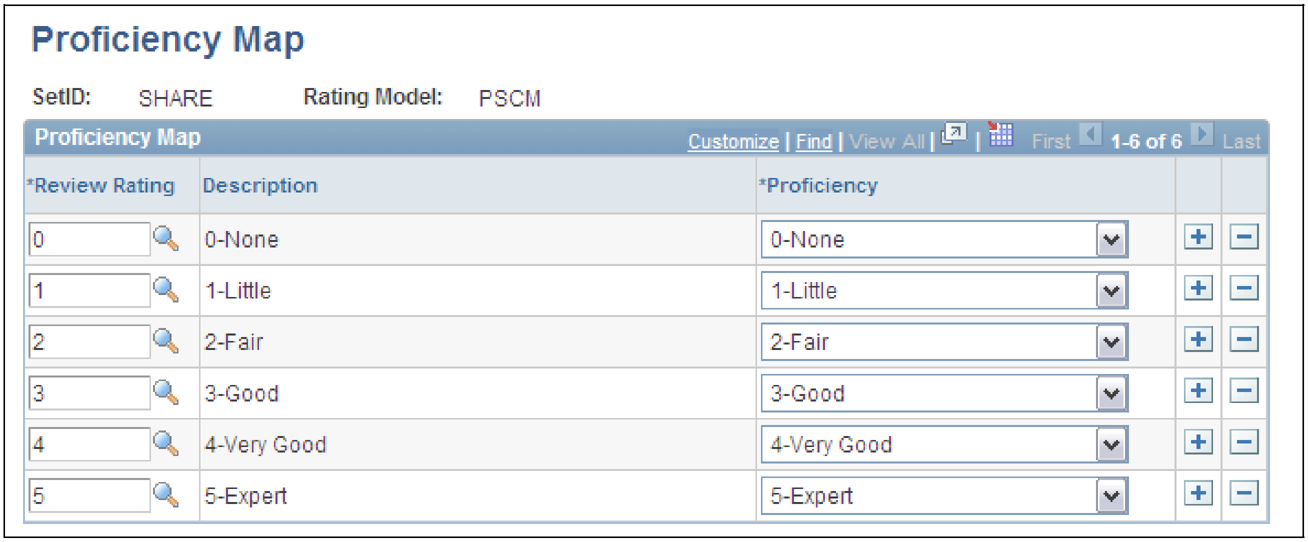
   A grid tab called Rating from Source shows the original proficiency rating.
5. The Workforce Match process assumes that all proficiencies are converted to the mapped values.

Page Used to Map Review Ratings to Proficiencies

Page Name	***Definition Name***	***Navigation***	***Usage***
Proficiency Map	WA_RATING_MAP	Workforce Analytics, Workforce Planning, Setup and Process, Setup Proficiency Map, Proficiency Map	Map a standard proficiency level to each HRMS review model and review rating combination.

Mapping Review Ratings to Proficiencies

Access the Proficiency Map (Workforce Analytics, Workforce Planning, Setup and Process, Setup Proficiency Map, Proficiency Map) page.



Proficiency Map page

Note. Prompt list values for the rating model are from the WA_RTGMDL_R00 table.

Review Rating

For each review rating in the Rating Model field, the system provides a row of data in the grid. Prompt list values for the review rating are from the WA_REVWRTG_R00 table.

Proficiency

For each rating model and review rating combination, select the appropriate proficiency level. The system uses this mapping when you load employee-level competency information.

Setting Up Workforce Planning Groups

In Workforce Planning, you use workforce groups on the Competency Strategy Model page to define the workers who are candidates for the Match process. You set up workforce groups in the Workforce Group setup component. Review the results of the group build process using the Workforce Group inquiry page. These pages are documented in the *PeopleSoft Workforce Analytic Applications 9.1 PeopleBook.*

Note. If you do not see the results of your workforce groups in the Workforce Groups inquiry page, the reason may be row-level security. In addition to PeopleTools page security, you can strictly limit access to scenarios using scenario-level security. The Workforce Group inquiry page features scenario-level security, because other workforce analytic applications using this page require this type of row-level security. You may need to add the scenario to EPM Security by going to EPM Foundation, EPM Security, Security By User, User Dimension Access, *or* EPM Foundation, EPM Security, Security By Role, Role Dimension Access. Then Run the process to Update Security using EPM Foundation, EPM Security, Advanced, Request Security Processing.

See Also

PeopleSoft Workforce Analytic Applications 9.1 PeopleBook, "Setting Up Workforce Groups and Group Sets"

Defining Tasks and Roles

To define tasks and roles, use the WA_TASK_D00.GBL and WA_ROLE_D00.GBL components.

This section provides an overview of tasks and roles and discusses how to:

- Set up tasks.
- Specify accomplishment details.
- Set up roles.

Understanding Tasks and Roles

In Workforce Planning, a role is a grouping of competencies, accomplishments, and tasks that are required for a worker to perform a certain function in the organization. In HRMS, a role is defined by a job code, position, job task, or job family. In Workforce Planning, we exclude job task and job family from our role definition. HRMS roles that are defined by job code or position are mapped and imported as a Workforce Planning role during data migration. Use the Roles page both to edit imported or existing roles and to create new roles.

In Workforce Planning, a task is a sub-grouping of competencies and accomplishments that are required for you to perform a task within a role. In HRMS, these are called competency clusters. Competency clusters that are defined in HRMS are mapped and imported as Workforce Planning tasks during data migration. In addition, roles that are defined in HRMS as job tasks or job families are also mapped and imported as Workforce Planning tasks. Use the Tasks page both to edit imported and existing tasks and to create new tasks.

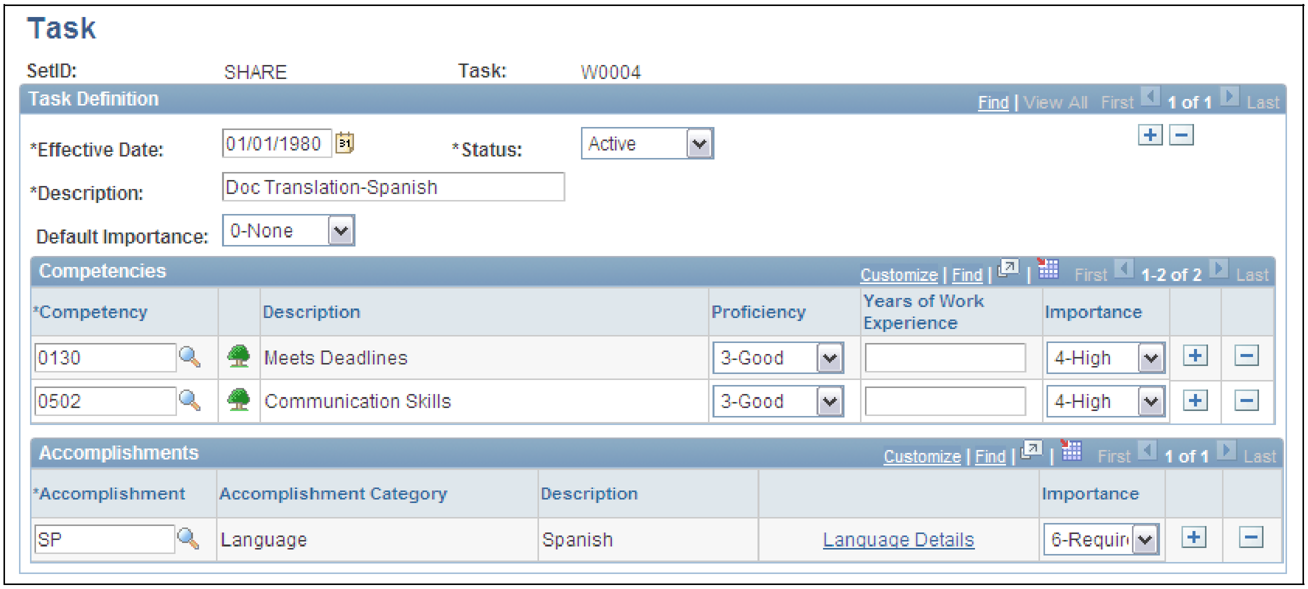
Pages Used to Set Up Tasks and Roles

Page Name	***Definition Name***	***Navigation***	***Usage***
Task	WA_TASK_D00	Workforce Analytics, Workforce Planning, Setup and Process, Setup Task, Task	Define tasks as a collection of competencies and accomplishments that are needed for you to perform a particular task. You use these task definitions on the Role setup page to define roles.
Degree Details	WA_TASKACMP_EDU_SP	Click the Degree Details link on the Task page.	Enter additional details for an accomplishment that is a degree.

Page Name	***Definition Name***	***Navigation***	***Usage***
License/Certification Details	WA_TASKACMP_LIC_SP	Click the License/Certification Details link on the Task page.	Enter additional details for an accomplishment that is a license or certification.
Language Details	WA_TASKACMP_LNG_SP	Click the Language Details link on the Task page.	Enter additional details for an accomplishment that is a language.
Role	WA_ROLE_D00	Workforce Analytics, Workforce Planning, Setup and Process, Setup Role, Role	Define roles, which are groupings of competencies, accomplishments, and tasks that are required for you to perform a certain function in the organization.
Degree Details	WA_ROLEACMP_EDU_SP	Click the Degree Details link on the Role page.	Enter additional details for an accomplishment that is a degree.
License/Certification Details	WA_ROLEACMP_LIC_SP	Click the License/Certification Details link on the Role page.	Enter additional details for an accomplishment that is a license or certification.
Language Details	WA_ROLEACMP_LNG_SP	Click the Language Details link on the Role page.	Enter additional details for an accomplishment that is a language.

Setting Up Tasks

Access the Task page (Workforce Analytics, Workforce Planning, Setup and Process, Setup Task, Task).



Task page

Task Definition

Default Importance

Select a value from the list of translate table values. Valid values for this field, and for the Importance field used elsewhere on this page, provide a relative importance scale from *0* to *6* with the following meanings:

0: None

1: Least

2: Low

3: Medium

4: High

5: Highest

6: Required

Clone Task

In Add or Correction mode, you can use this field to select an existing task definition, clone it, and then modify it to save time and effort when creating a new but similar task definition.

Competencies

Competency

Select a competency from the list of prompt values, which are from the COMPETENCY_D00 table.

Select from Competency Tree

Click this button or select a competency from the Competency tree. To select additional competencies for this task, add rows of data.

Proficiencyand**Yrs Experience** (years experience)	For each competency indicate the required Proficiency level and Yrs Experience (years of experience). The Proficiency and Yrs Experience are used in the Match process to evaluate the relative fit of a workers tasks and competencies within a competency strategy.
Importance	For each competency, indicate the required importance. This is used in the Match processes to evaluate the relative value or fit of a worker's tasks and competencies within a competency strategy. The importance is used in the Value Allocation process to allocate the strategy value to the competencies.

Accomplishments

Select an accomplishment from the list of prompt values, which are from the ACCOMP_D00 table. To select additional accomplishments for this task, add rows of data.

When you select an accomplishment, the system displays the Accomplishment Category. Valid values are *Test*,*Membership*,*National Vocational Qualification*,*Honor/Award*,*Degree*,*Lic/Certif* (license or certification), and *Language.*

If the accomplishment that you select is a degree, license or certification or language, the system displays the Degree Details,License/Certification Details, or Language Details links, as applicable. Click one of these links to access the Degree Details, License/Certification Details, or Language Details page. Collectively, these three pages are called the Accomplishment Details pages.

For each accomplishment, indicate the required importance. The importance is used in the Match processes to evaluate the relative value or to fit a worker's tasks and accomplishments within a competency strategy. The importance is used in the Value Allocation process to allocate the strategy value to the accomplishments.

Specifying Accomplishment Details

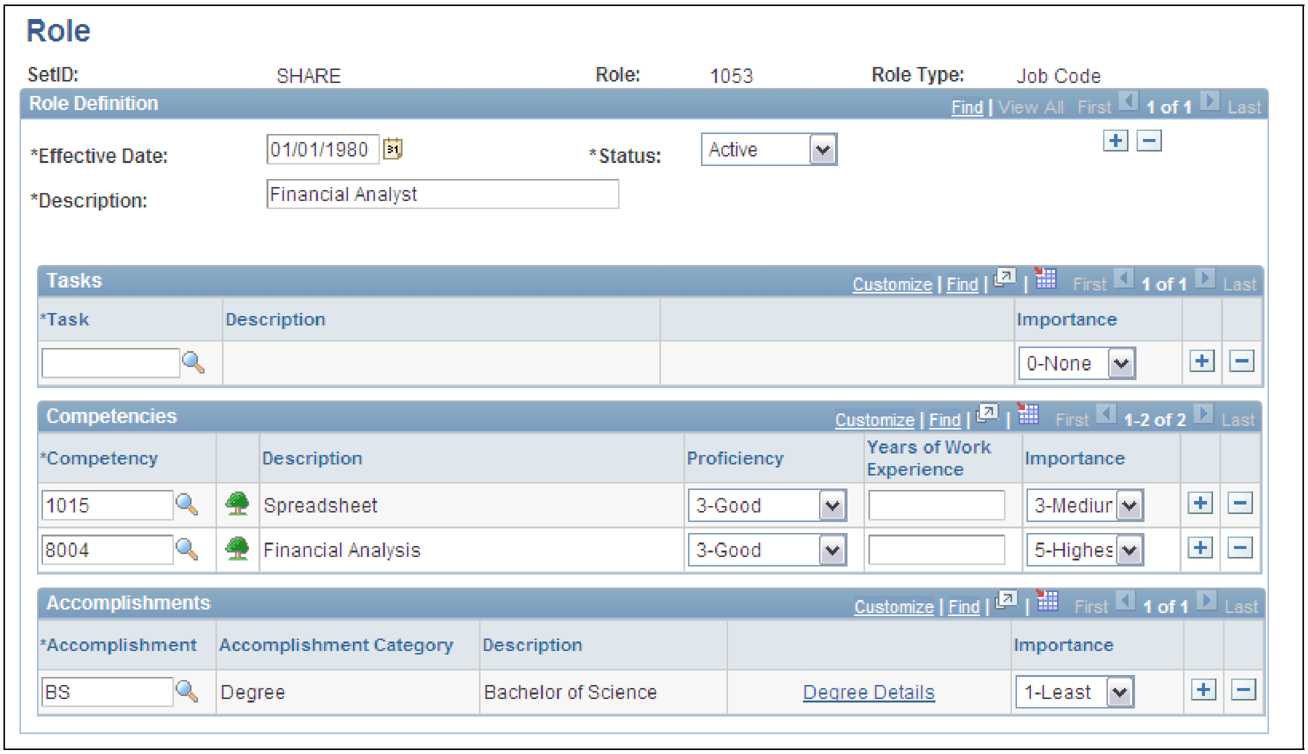
Access the Accomplishment Details pages using the links on the Task page or from other pages in the system. The Accomplishment Details pages are simple pages with only one or a few fields on each, as summarized in the following table:

Page	*Fields*	*Usage*
Degree Details	Major Code	Select a code for the primary major for which the degree was granted.
License/Certification Details	Country and State	Indicate the country and state that the license or certification was granted by.

Page	***Fields***	***Usage***
Language Details	Reading Proficiency,Speaking Proficiency, and Writing Proficiency	Indicate the appropriate proficiency level for each of these fields. Valid values are *Low*,*Moderate* and *High*. The proficiency is used in the Match process to evaluate the relative fit of a worker's language accomplishment within a competency strategy.

Setting Up Roles

Access the Role page (Workforce Analytics, Workforce Planning, Setup and Process, Setup Role, Role).



Role page

Valid values for role type are:

Job Code For roles loaded from HRMS job data.

Position For roles loaded from HRMS position data.

Qualification Profile Reserved for future use (integration with PeopleSoft Resource Management application).

External Dictionary For roles loaded from a third-party dictionary provider.

External Competency Management For roles loaded from a non-PeopleSoft competency management system.

Role Definition

Clone Role In Add or Correction mode, you can use the Clone Role field to select an existing role definition, clone it, and then modify it to save time and effort when creating a new but similar role definition.

Tasks

Task Select a task, if applicable, from the prompt list values. Values are from the WA_TASK_D00 table. When you add a task to a role, the system imports the task competencies and accomplishments.

Note. Later, if a source task is changed (to include additional competencies, for example), the system does not propagate the change to the existing roles that incorporate the task.

Importance Indicate the importance of the task. The importance is used in the Match processes to evaluate the relative value or fit of a worker's role tasks in a given competency strategy. The importance is also used in the Value Allocation process to allocate the strategy value to the competencies and accomplishments.

View Details When you select a task, the system displays the View Details link. Click this link to open a new window to the Task page, and review the task definition.

Competencies and Accomplishments Group Boxes

Competency and **Accomplishment** The fields in the Competencies and Accomplishments group boxes are the same fields as described in the page discussion for the Task page.

Chapter 3

Reviewing Your Workforce Competency Inventory

This chapter provides an overview of the review competency inventory process and discusses how to:

- Analyze workforce competencies.
- Analyze organizational competencies.
- Analyze workforce accomplishments.
- Analyze organizational accomplishments.
- Analyze worker competencies and accomplishments.

Understanding the Review Competency Inventory Process

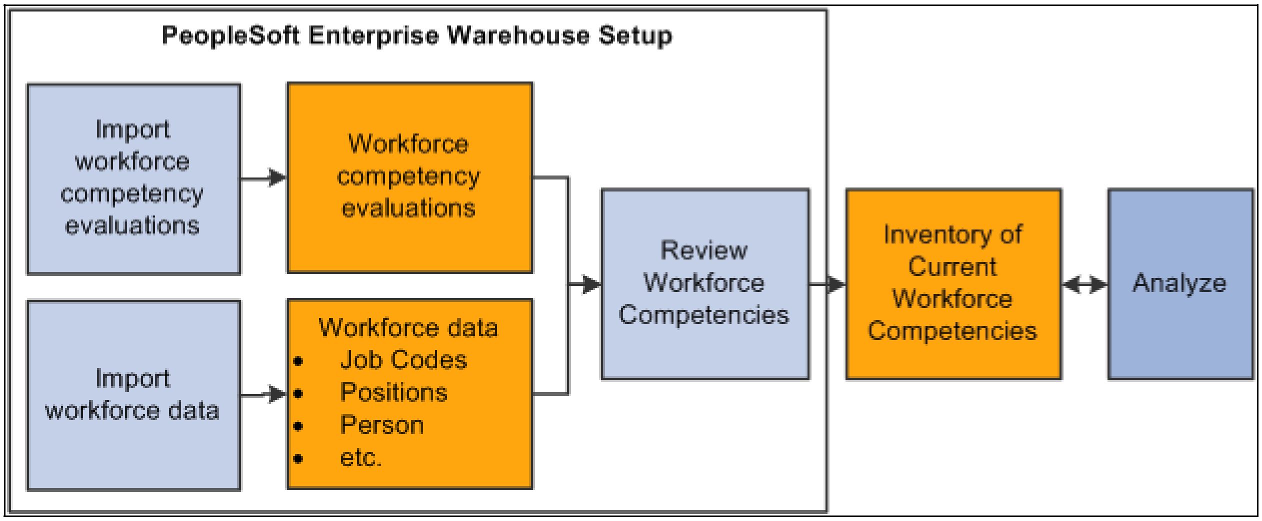
You can view a list of the competencies that are possessed by a single worker or by the entire workforce. You can limit the scope of this inventory by searching on a variety of dimensions such as department, location, company, job code, business unit, or employee ID.

You can use the data to answer questions and analyze trends. For example, you can answer questions such as:

- How many employees in Department 0125, Human Resources, have managerial skills?
- Which office locations have the greatest number of people who are Certified Public Accountants (CPAs)?

You don't need to perform additional Workforce Planning setup or processing to review the imported competency inventory. The inquiry pages that you use to review the workforce competencies and accomplishments use table views of the WA_COMPTNCY_F00 and WA_ACMPLISH_F00 tables.

The following diagram illustrates this overall process:



Leveraging the repository of data in the Operational Warehouse - Enriched

Analyzing Workforce Competencies

You can analyze your workforce competencies with the Competency Search page.

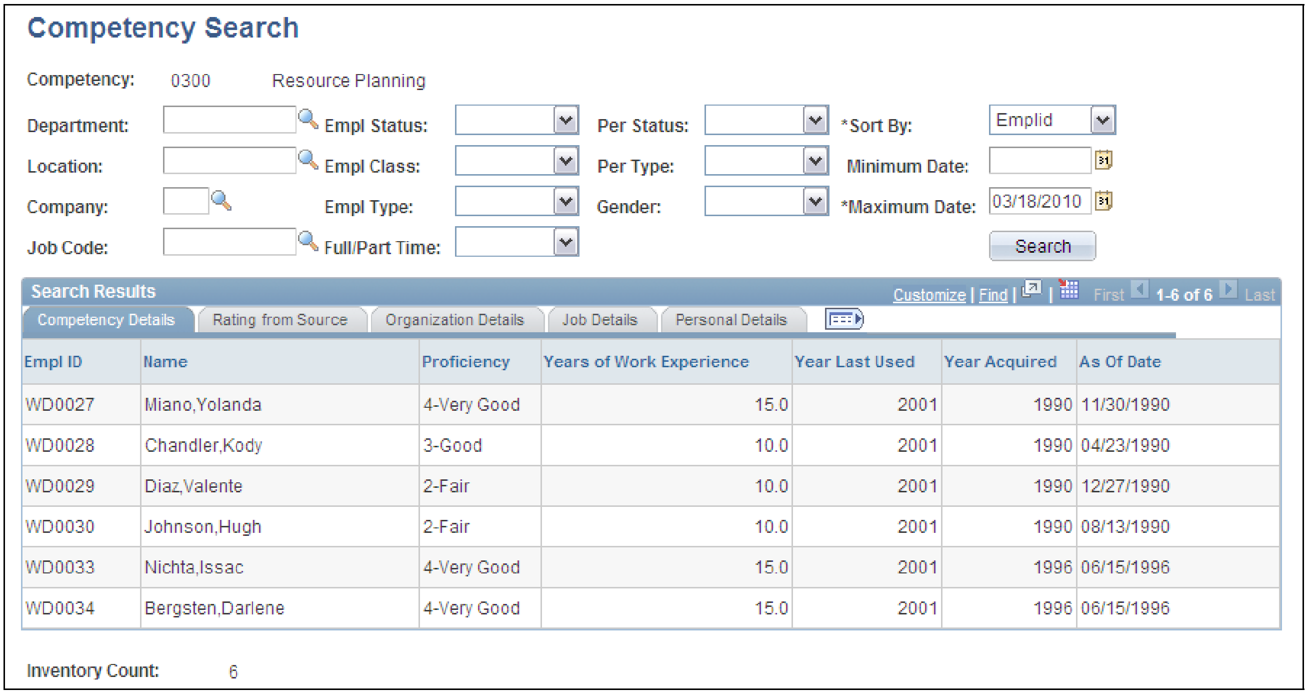
This section discusses how to search for competencies.

Page Used to Analyze Workforce Competencies

Page Name	***Definition Name***	***Navigation***	***Usage***
Competency Search	WA_WP_CMPT_INV	Workforce Analytics, Workforce Planning, Review and Analyze, Search Competency, Competency Search	Search for a list of employees having a specified competency.

Searching for Competencies

Access the Competency Search page (Workforce Analytics, Workforce Planning, Review and Analyze, Search Competency, Competency Search).



Competency Search

Competency: 0300 Resource Planning

Department: | Empl Status: | Per Status: | *Sort By: Emplid
Location: | Empl Class: | Per Type: | Minimum Date:
Company: | Empl Type: | Gender: | *Maximum Date: 03/18/2010
Job Code: | Full/Part Time: | Search

Search Results — Customize | Find | First 1-6 of 6 Last

Competency Details | Rating from Source | Organization Details | Job Details | Personal Details

Empl ID	Name	Proficiency	Years of Work Experience	Year Last Used	Year Acquired	As Of Date
WD0027	Miano,Yolanda	4-Very Good	15.0	2001	1990	11/30/1990
WD0028	Chandler,Kody	3-Good	10.0	2001	1990	04/23/1990
WD0029	Diaz,Valente	2-Fair	10.0	2001	1990	12/27/1990
WD0030	Johnson,Hugh	2-Fair	10.0	2001	1990	08/13/1990
WD0033	Nichta,Issac	4-Very Good	15.0	2001	1996	06/15/1996
WD0034	Bergsten,Darlene	4-Very Good	15.0	2001	1996	06/15/1996

Inventory Count: 6

Competency Search page

Narrowing Search Criteria

To answer specific queries or questions, use any of the multiple dimensions at the top of the page to narrow the search criteria.

The bottom of the page displays the search results for each worker who meets the search criteria. The results come from the WA_WP_CMPT_VW table.

Sort By Select *EmplID* or *Name* to sort the search results.

Search Click to initiate the search.

Inventory Count Displays the total number of workers who meet the current search criteria.

Competency Details Tab

Proficiency is converted to a common Workforce Planning scale during data loading, based on the values that are entered on the Map Proficiency page.

Rating From Source Tab

The page displays the rating model and review rating before they are converted to the Workforce Planning proficiency scale. For example, if you load data from Human Resources, this page shows the rating model and review rating used within Human Resources.

Job Details Tab

This information comes from the JOB_F00 table.

Personal Details Tab

This information comes from the PERSONAL_D00 table.

Analyzing Organizational Competencies

You can review your competency inventory for your organization using the Competency Inventory page.

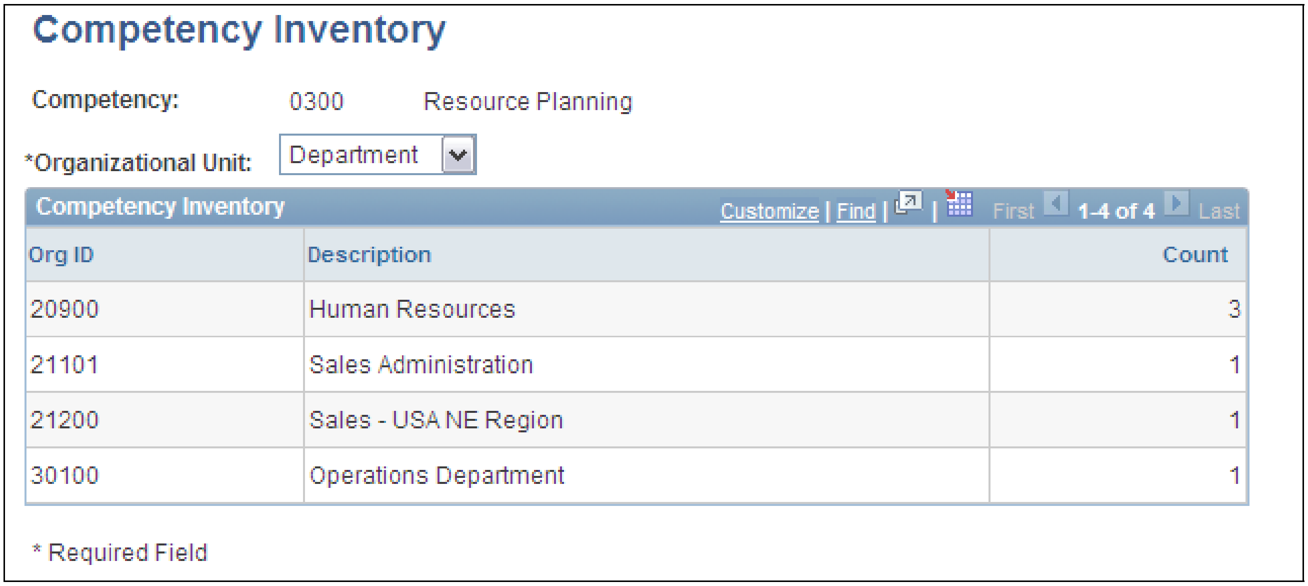
This section discusses how to review your competency inventory.

Page Used to Analyze Organizational Competencies

Page Name	*Definition Name*	*Navigation*	*Usage*
Competency Inventory	WA_WP_CMPT_INV_ORG	Workforce Analytics, Workforce Planning, Review and Analyze, Review Competency Inventory, Competency Inventory	Search for competencies by organizational unit, such as department, location, company, or job code.

Reviewing Your Competency Inventory

Access the Competency Inventory page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Competency Inventory, Competency Inventory).



Org ID	Description	Count
20900	Human Resources	3
21101	Sales Administration	1
21200	Sales - USA NE Region	1
30100	Operations Department	1

Competency Inventory page

The count is the number of workers in the organizational unit who have the competency. Results are from the WA_WP_CMPORG_VW table. Use Organizational Unit to view data by *Company*,*Department*,*Jobcode*, or *Location.*

Analyzing Workforce Accomplishments

You can review and analyze your workforce accomplishments using the Accomplishment Search page.

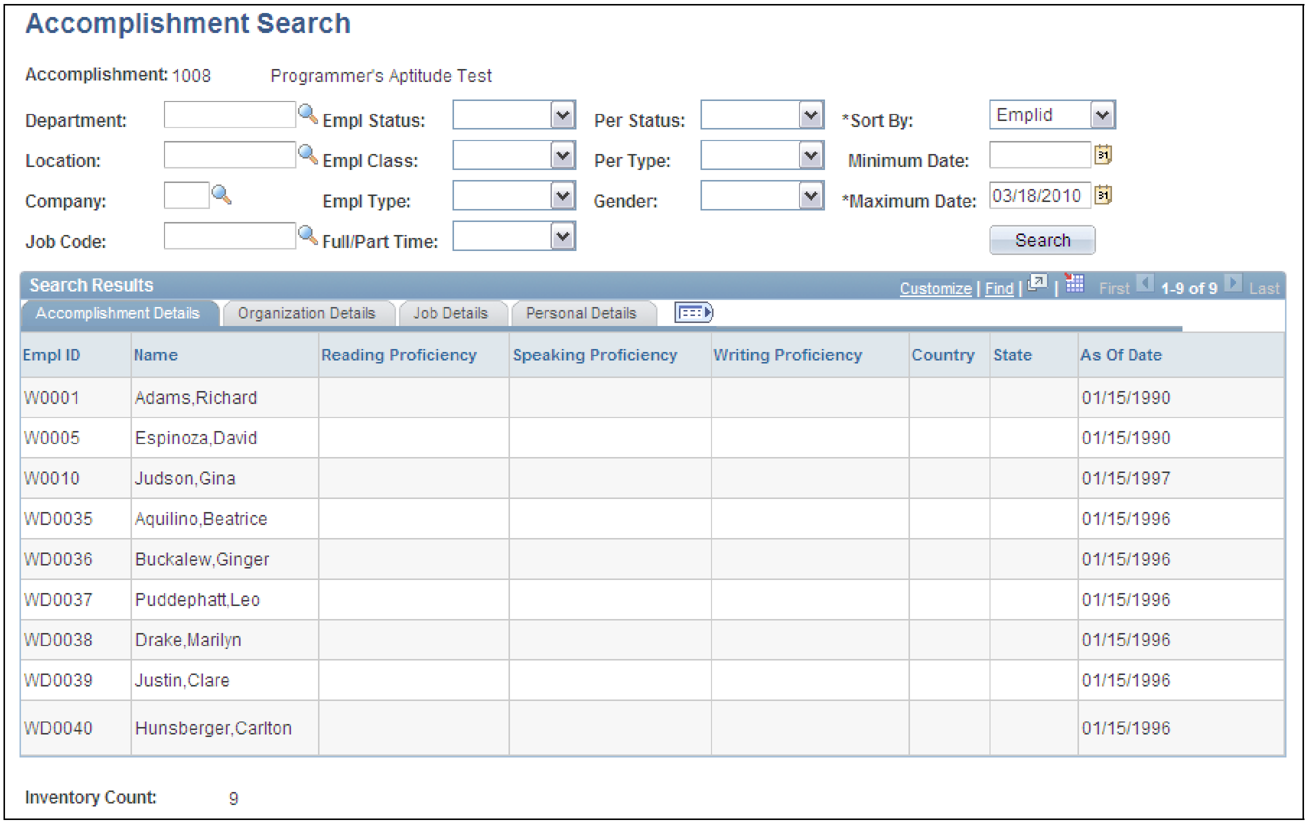
This section discusses how to search for workforce accomplishments.

Page Used to Analyze Workforce Accomplishments

Page Name	***Definition Name***	***Navigation***	***Usage***
Accomplishment Search	WA_WP_ACMP_INV	Workforce Analytics, Workforce Planning, Review and Analyze, Search Accomplishment, Accomplishment Search	Search for a list of employees having a specified accomplishment.

Searching for Workforce Accomplishments

Access the Accomplishment Search page (Workforce Analytics, Workforce Planning, Review and Analyze, Search Accomplishment, Accomplishment Search).



Accomplishment Search page

Narrowing Your Search

At the bottom of the page, the system displays the search results for each worker who meets the search criteria. The results come from the WA_WP_ACMP_VW table.

Sort By Select *EmplID* or *Name* to sort the search results.

Search Click to initiate the search.

Inventory Count Displays the total number of workers who meet the current search criteria.

Job Details Tab

This information is from the JOB_F00 table.

Personal Details Tab

This information is from the PERSONAL_D00 table.

Analyzing Organizational Accomplishments

You can review your organizational accomplishments using the Accomplishment Inventory page.

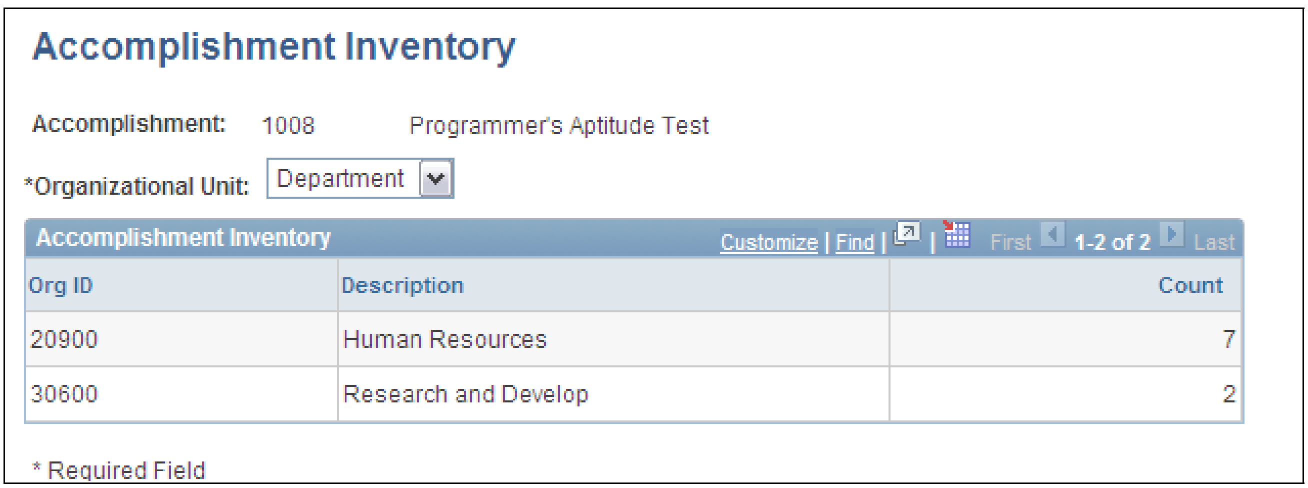
This section discusses how to review your accomplishment inventory.

Page Used to Analyze Organizational Accomplishments

Page Name	***Definition Name***	***Navigation***	***Usage***
Accomplishment Inventory	WA_WP_ACMP_INV_ORG	Workforce Analytics, Workforce Planning, Review and Analyze, Review Accomplishment, Accomplishment Inventory	Search for accomplishments by organizational unit, such as department, location, company, or job code.

Reviewing Your Accomplishment Inventory

Access the Accomplishment Inventory page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Accomplishment, Accomplishment Inventory).



Accomplishment Inventory page

The count is the number of workers in the organizational unit who have the accomplishment. Results are from the WA_WP_ACMORG_VW table. Use the Organizational Unit field to sort results by *Company, Department,Jobcode,* or *Location.*

Analyzing Worker Competencies and Accomplishments

This section discusses how to:

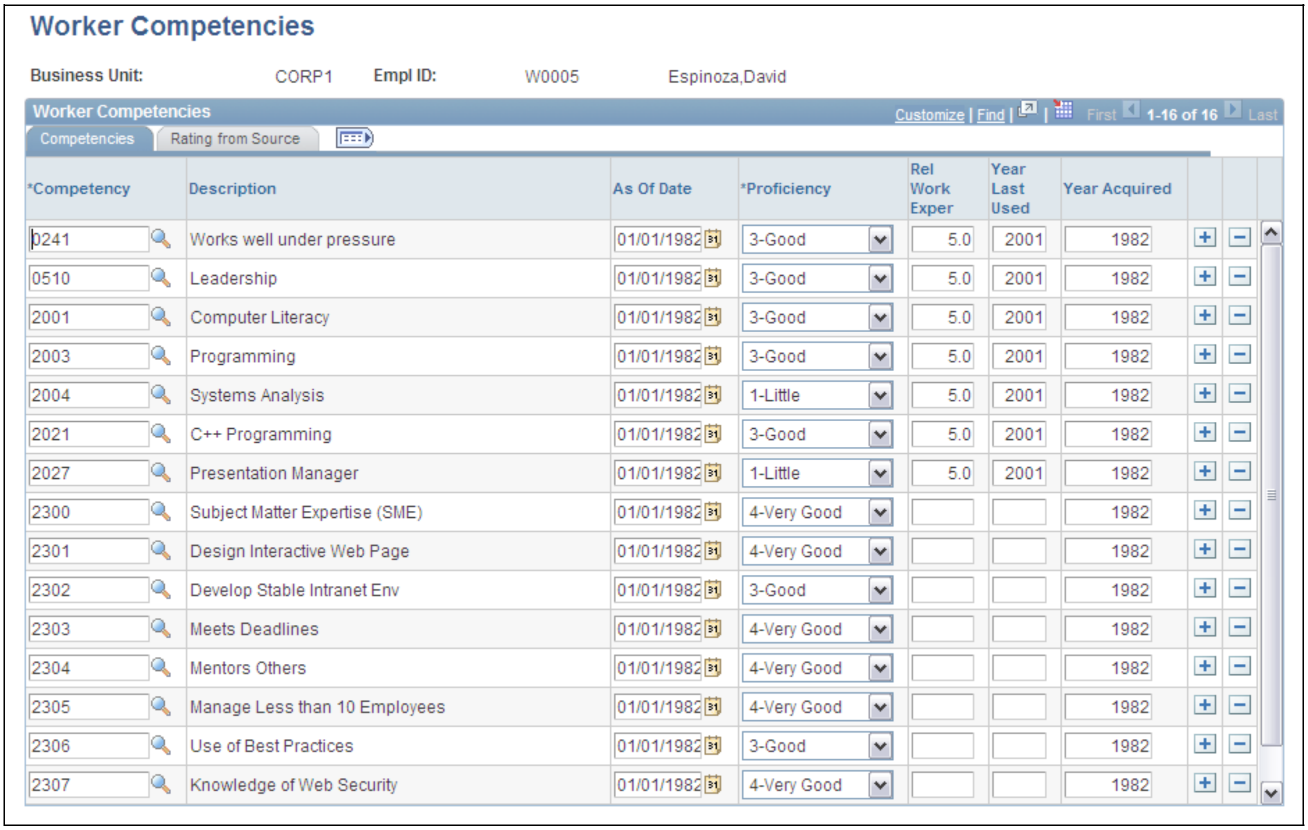
- Review and update worker competencies.
- Review and update worker accomplishments.

Pages Used to Analyze Worker Competencies and Accomplishments

Page Name	***Definition Name***	***Navigation***	***Usage***
Worker Competencies	WA_COMPTNCY_F00	Workforce Analytics, Workforce Planning, Setup and Process, Worker Competencies, Worker Competencies	Generate a list of the competencies for a specified employee.
Worker Accomplishments	WA_ACMPLISH_F00	Workforce Analytics, Workforce Planning, , Setup and Process, Worker Accomplishments, Worker Accomplishments	Generate a list of accomplishments for a specified employee.

Reviewing and Updating Worker Competencies

Access the Worker Competencies page (Workforce Analytics, Workforce Planning, Setup and Process, Worker Competencies, Worker Competencies).



Worker Competencies

Business Unit: CORP1 Empl ID: W0005 Espinoza,David

Worker Competencies — Customize | Find | First 1-16 of 16 Last

Competencies | Rating from Source

*Competency	Description	As Of Date	*Proficiency	Rel Work Exper	Year Last Used	Year Acquired
0241	Works well under pressure	01/01/1982	3-Good	5.0	2001	1982
0510	Leadership	01/01/1982	3-Good	5.0	2001	1982
2001	Computer Literacy	01/01/1982	3-Good	5.0	2001	1982
2003	Programming	01/01/1982	3-Good	5.0	2001	1982
2004	Systems Analysis	01/01/1982	1-Little	5.0	2001	1982
2021	C++ Programming	01/01/1982	3-Good	5.0	2001	1982
2027	Presentation Manager	01/01/1982	1-Little	5.0	2001	1982
2300	Subject Matter Expertise (SME)	01/01/1982	4-Very Good			1982
2301	Design Interactive Web Page	01/01/1982	4-Very Good			1982
2302	Develop Stable Intranet Env	01/01/1982	3-Good			1982
2303	Meets Deadlines	01/01/1982	4-Very Good			1982
2304	Mentors Others	01/01/1982	4-Very Good			1982
2305	Manage Less than 10 Employees	01/01/1982	4-Very Good			1982
2306	Use of Best Practices	01/01/1982	3-Good			1982
2307	Knowledge of Web Security	01/01/1982	4-Very Good			1982

Worker Competencies page

The system displays the competencies for this employee. Results come from the WA_COMPTNCY_F00 table. You can add rows of data to this page.

Competencies Tab

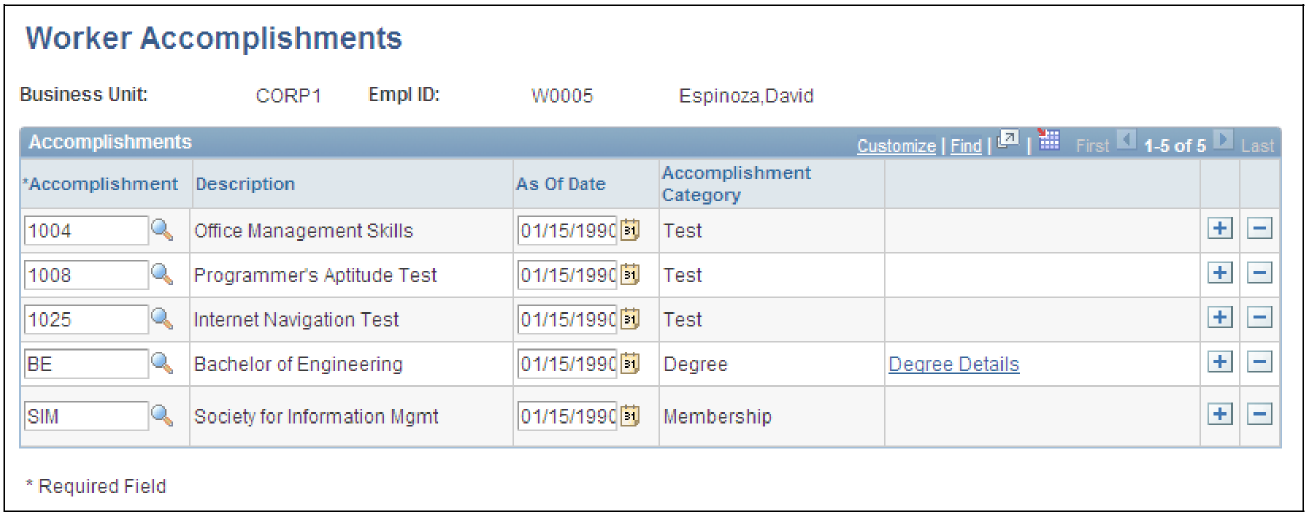
Proficiency is converted to a common Workforce Planning scale during data loading, based on the values that are entered on the Map Proficiency page.

Rating From Source Tab

The page uses the rating model and review rating before they are converted to the Workforce Planning proficiency scale. For example, if you load data from human resources, this page shows the rating model and review rating that are used within human resources.

Reviewing and Updating Worker Accomplishments

Access the Worker Accomplishments page (Workforce Analytics, Workforce Planning, , Setup and Process, Worker Accomplishments, Worker Accomplishments).



Worker Accomplishments

Business Unit: CORP1 **Empl ID:** W0005 Espinoza,David

Accomplishments Customize | Find | First 1-5 of 5 Last

*Accomplishment	Description	As Of Date	Accomplishment Category	
1004	Office Management Skills	01/15/1990	Test	
1008	Programmer's Aptitude Test	01/15/1990	Test	
1025	Internet Navigation Test	01/15/1990	Test	
BE	Bachelor of Engineering	01/15/1990	Degree	Degree Details
SIM	Society for Information Mgmt	01/15/1990	Membership	

* Required Field

Worker Accomplishments page

The system displays the accomplishments for this employee. Results come from the WA_ACMPLISH_F00 table. You can add rows of data to this page.

If applicable, the page displays an accomplishment details link. In the preceding example, the system displays the Degree Details link. Similar links are available for language details and license or certificate details.

Chapter 4

Managing Competency Strategies and Values

This chapter provides an overview of managing competency strategy and discusses how to:

- Define a competency strategy.
- Define a competency strategy model.
- (Optional) Allocate value to roles and competencies.
- View the Value Allocation process results.

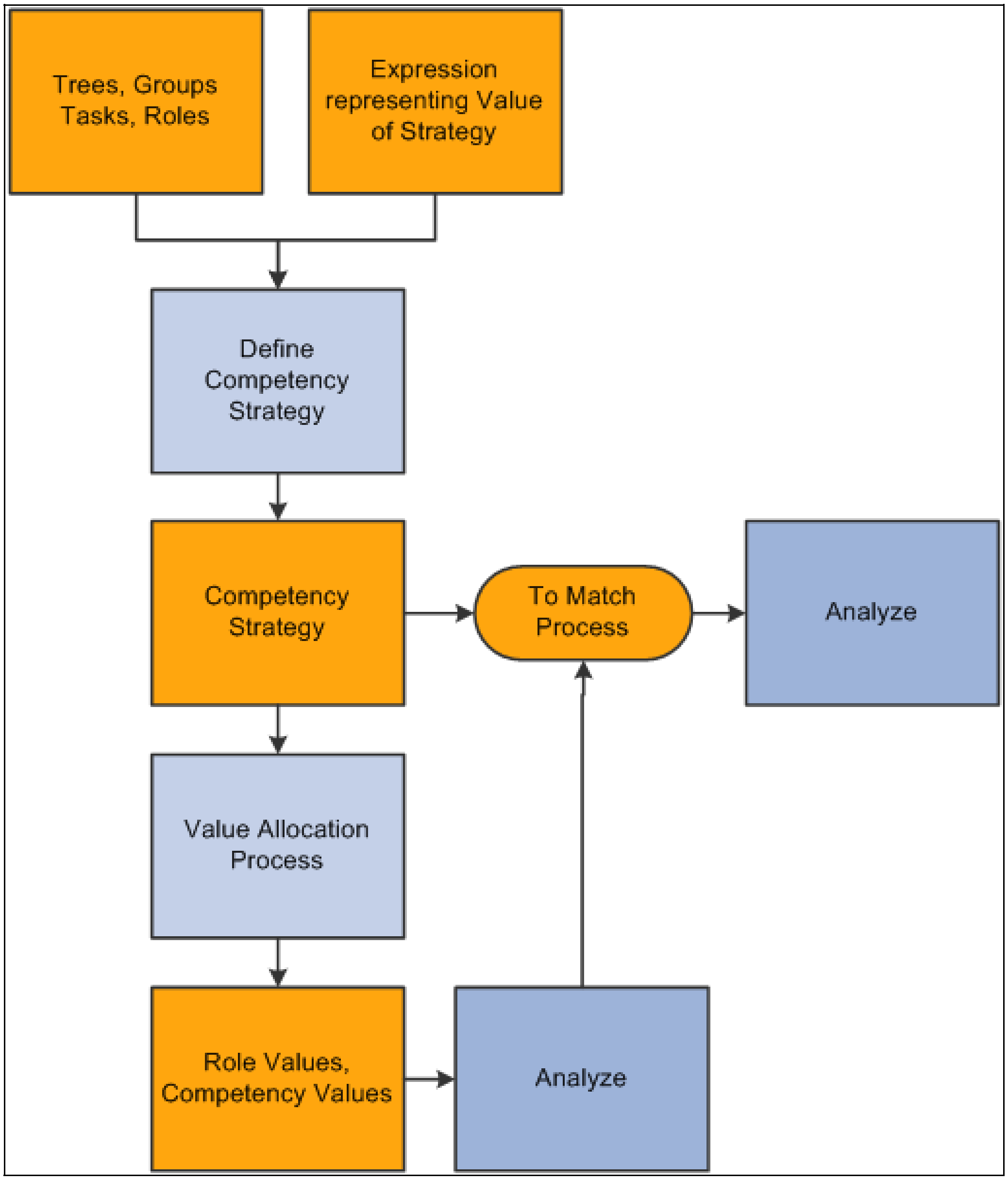
Understanding Managing Competency Strategy

Follow these steps to define a competency strategy and allocate values to the strategy:

1. Prepare a strategy.
2. Define the strategy and assign roles, tasks, competencies, and accomplishments to the strategy.
3. Specify a value for the entire strategy (required only if you want to run the Value Allocation process, otherwise optional).
4. Set up a competency strategy model for use in the scenario.
5. (Optional) Run the Value Allocation Application Engine process (WA_VALUE) to allocate the values among roles in the strategy.
6. (Optional) View the results of the value allocation process.

Note. Specifying a competency strategy value and running the Value Allocation process (WA_VALUE) are optional steps. However, to run the Match process (WA_MATCH) you must first set up a competency strategy as outlined in steps 1, 2, and 4 in the preceding steps.

The following diagram illustrates this overall process:



Conceptual overview of the Manage Competency Strategy and Value Allocation

Defining a Competency Strategy

To define a competency strategy, use the WA_WP_STRAT_DFN.GBL component.

This section provides an overview of competency strategy and discusses how to:

- Enter a competency strategy definition and value.
- Specify roles for a competency strategy.
- Review role tasks for a competency strategy.

- Review role competencies for a competency strategy.

Understanding Competency Strategy

Use the pages in the Competency Strategy component (Definition, Roles, Tasks and Competencies) to define a competency strategy and identify the roles and competencies that are essential to accomplishing your strategic business goals. You can define multiple, effective-dated competency strategies, and specify the required workforce roles for each. For example, you can define your organization's current competency strategy, or one or more potential future strategies based on forecasted changes in your business operations. You are not required to define both current and forecasted strategies. You can define one, or the other, or both depending on your analysis. You also can identify the monetary value of each strategy, role, and competency.

Before you begin, take some time to consider the strategy of your organization and plan your approach. Some specific questions to think about are:

- What new products or services does your organization need to provide?
- What existing products or services does your organization want to grow, reduce, or eliminate?
- What workforce roles does the organization need to meet its strategic plans or goals?

If you want to express the value of your strategy, roles, and competencies in monetary terms, then consider these questions:

- How do you want to determine this value, as a flat amount or based on a formula?
- What DataMaps and measures contain the value information that you need for setting up your constraint?

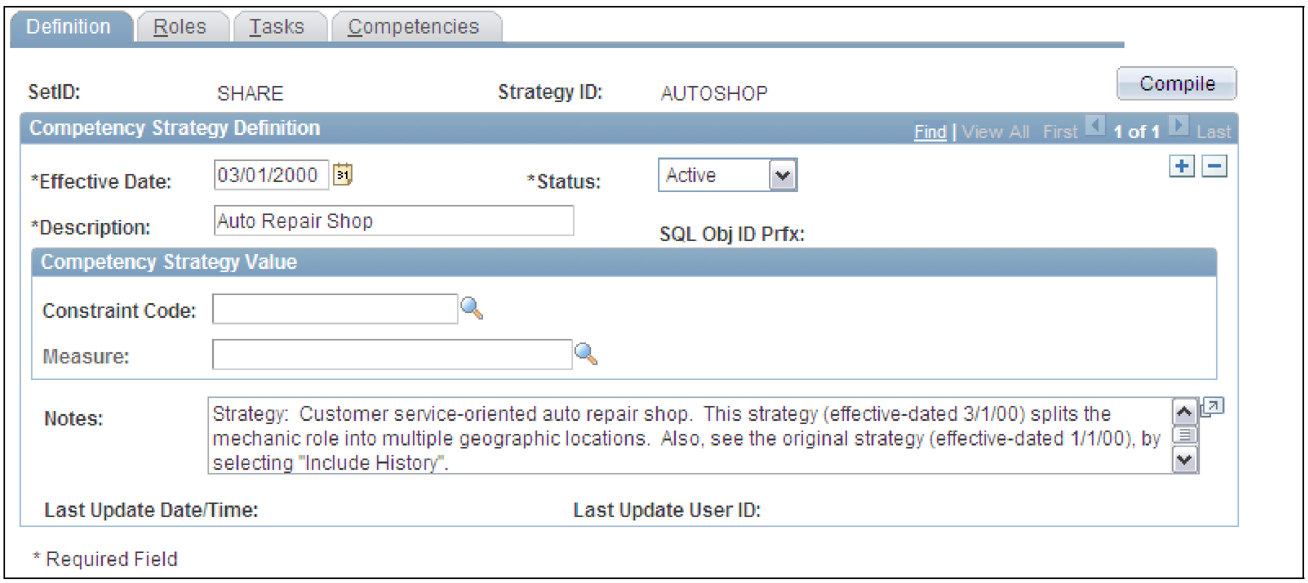
Pages Used to Define a Competency Strategy

Page Name	***Definition Name***	***Navigation***	***Usage***
Competency Strategy - Definition	WA_WP_STRATEGY	Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Definition	Identify a competency strategy that is required for your organization to meet strategic objectives, and specify the value of the overall strategy to the organization.
Competency Strategy - Roles	WA_WP_ROLES	Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Roles	Specify the roles that are required to support the competency strategy.
Role Comments page	WA_WP_RL_COMNTS_SP	Click the Comments button on the Competency Strategy - Roles page	Enter comments about a role.

Page Name	Definition Name	Navigation	Usage
Competency Strategy - Tasks	WA_WP_TASKS	Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Tasks	Review the tasks that are associated with the specified roles, and review the importance of the tasks.
Competency Strategy - Competencies	WA_WP_COMPETENCY	Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Competencies	Review the competencies and accomplishments that are associated with the specified roles, and specify their proficiency, experience level, and importance.

Entering a Competency Strategy Definition and Value

Access the Competency Strategy - Definition page (Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Definition).



Competency Strategy - Definition page

Compile Click to have the system build, or compile, the underlying SQL.

Competency Strategy Value

Constraint Code, and **Measure**	You can define the monetary value of the overall strategy to your organization. You use the Constraint Code field to define the value based on any of the tables and fields in the warehouse. The flat amount can be in any table in the system. For example, the flat amount could be in a sales or revenue table, a budgeted amount in a budget, or a projected figure from business planning. The constraint identifies the table that stores the value amount. It references a DataMap and TableMap. Prompt values for the Constraint Code field are from the PF_CONSTR_DEFN table. **Note.** You set up constraints using the EPM Foundation, Business Metadata, Constraints and Expressions, Constraint page.
Measure	You can define the monetary value of the overall strategy to your organization. You use the Measure field to define the value based on any of the tables and fields in the warehouse. The flat amount can be in any table in the system. For example, the flat amount could be in a sales or revenue table, a budgeted amount in a budget, or a projected figure from business planning. The measure identifies the particular field, or column, in the TableMap source table that contains the amount value.

Setting Up a Constraint for a Flat Amount

One basic approach to setting up a constraint for a flat amount is to specify the competency strategy value as a flat amount. To aid you, we deliver, as samples, the following system objects and metadata (under SetID of SHARE) for you to use as examples while setting up your system:

- WA_WP_VALUE_FLT table, containing the WA_WP_STRAT VALUE field.
- TableMap WP_VALUE, pointing to TableMap record WA_WP_VALUE_FLT.
- DataMap WP_VALUE, containing DataMap field WA_WP_STRAT_VALUE.
- Constraint WP_VALUE, which points to the WP_STRAT_VALUE field in the WP_VALUE DataMap.

Using the WA_WP_VALUE_FLT table, you must enter the value amount in the WP_STRAT_VALUE field using a method such as ETL or SQL Insert.

Understanding Currency Code Defaulting for the Competency Strategy Value

The system retrieves a monetary value using the constraint that you specify on this page, although the page does not display the amount or the currency code. The default currency for the competency strategy value is the one that is specified as the default value for the business unit.

When setting up the constraint to use for the competency strategy value, you must select an amount field (measure). Make sure that it is a base currency amount field in the same currency as the default.

Compiling the Rule

Save

If you are using a constraint to define your strategy value, then the system automatically compiles the SQL for your rule when you save your work. The SQL Object ID Prefix field is then displayed.

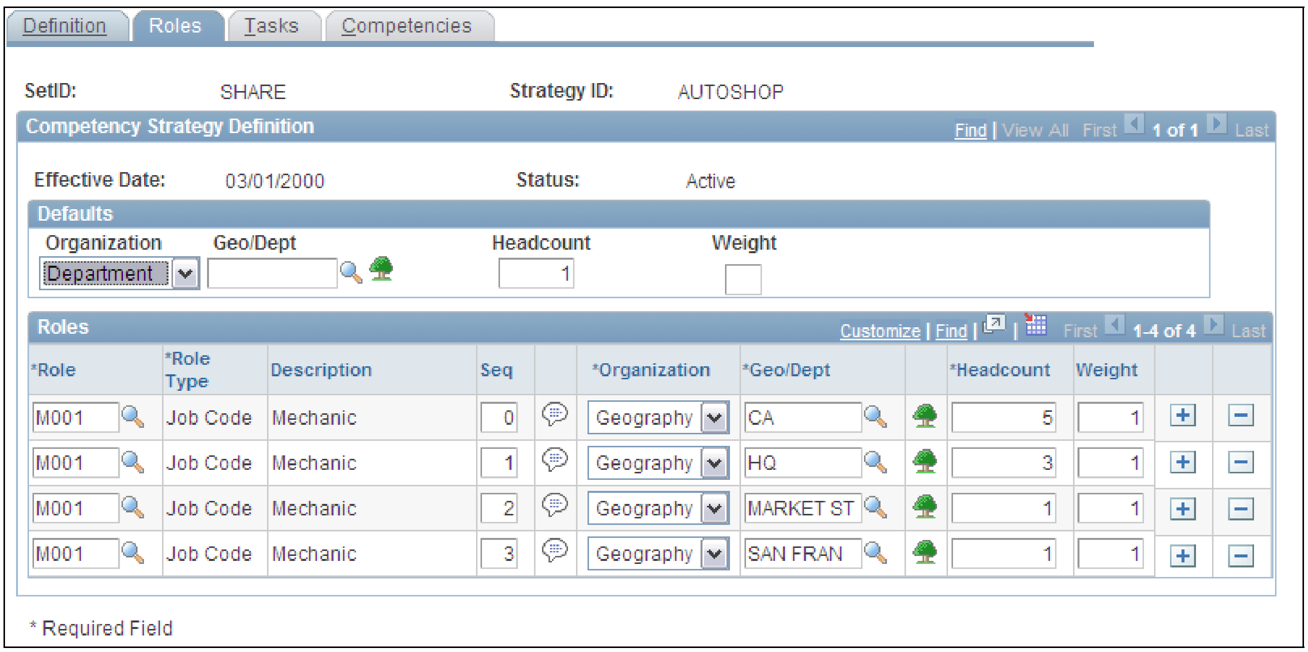
If you have entered a strategy value using a constraint, when you save changes to the page, the system updates the Last Update Date/Time and Last Update User ID fields. If you set up a strategy with no value constraint, the system does not update these fields.

Compile Rule

Click to compile the SQL for the rule. The SQL Object ID Prefix field is then displayed.

Specifying Roles for a Competency Strategy

Access the Competency Strategy - Roles page (Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Roles).



Competency Strategy - Roles page

Defaults

You can specify the defaults for the following parameters, which the system uses when populating rows in the Roles group box:

Organization

The Organization and Geo/Dept (geography/department) fields work together. First you can select an organization type of either *Department* or *Geography.*

Geo/Dept (geography or department identification)

When you select an organization type of *Geography,* you are choosing to define the organization for this competency strategy based on geographical region (location). In this case, you can select a Geography ID from the prompt list values, or you can click the Select from Tree button to select a node from the Geography tree.

When you select an organization type of *Department,* you are choosing to define the organization based on a department. In this case, you can select a department from the prompt list values, or you can click the Select from Tree button to select a node from the Organization tree.

The trees that you access using this page are the default trees that you specified on the Workforce Trees setup page.

Headcount

Enter the number of workers that are needed in a role to fit the competency strategy. The system uses the headcount during the Match process to find that number of workers who match the specified role. The system does not distinguish between full-time and part-time workers; a part-time worker who is a role match accounts for a full headcount.

Weight

Assign a relative importance, or weight, for the roles. On the Definition page, you can use a constraint to specify a value for the entire strategy. When you run the Value Allocation process, the system allocates the strategy value to the roles within the strategy, based on the relative weight that you assign here. The weight is specified as a number of points greater than 0.

Roles

Role

Add a row and complete the fields for each role that you want to include in the competency strategy.

To enter a role, select from the prompt list values, which are from the WA_ROLE_VW table. The system displays the associated role type and description.

When you enter a role, the system retrieves the related tasks, competencies, and accomplishments from the setup tables, and populates the fields on the Competency Strategy - Tasks and Competency Strategy - Competencies pages.

Note. If you later change the role in the setup tables (to include additional competencies, for example) this change is not automatically reflected in the Competency Strategy component. You can include the new data in the Competency Strategy component by updating it with a new effective-dated row. Or you can also, in Correction mode, remove the role and add it again.

Seq (sequence)

The sequence number provides a method for you to avoid entering duplicate rows into the system. For example, you could enter two rows of data that appear to be identical, except that the sequence number makes them unique:

The following table displays two rows of data that appear to be identical, but have a unique sequence number.

Role	**Sequence**	**Organization**	**Geo/Dept**
R013	0	Geography	United States (selected from the Geography table).
R013	1	Department	United States (selected from the Organization-Department tree).

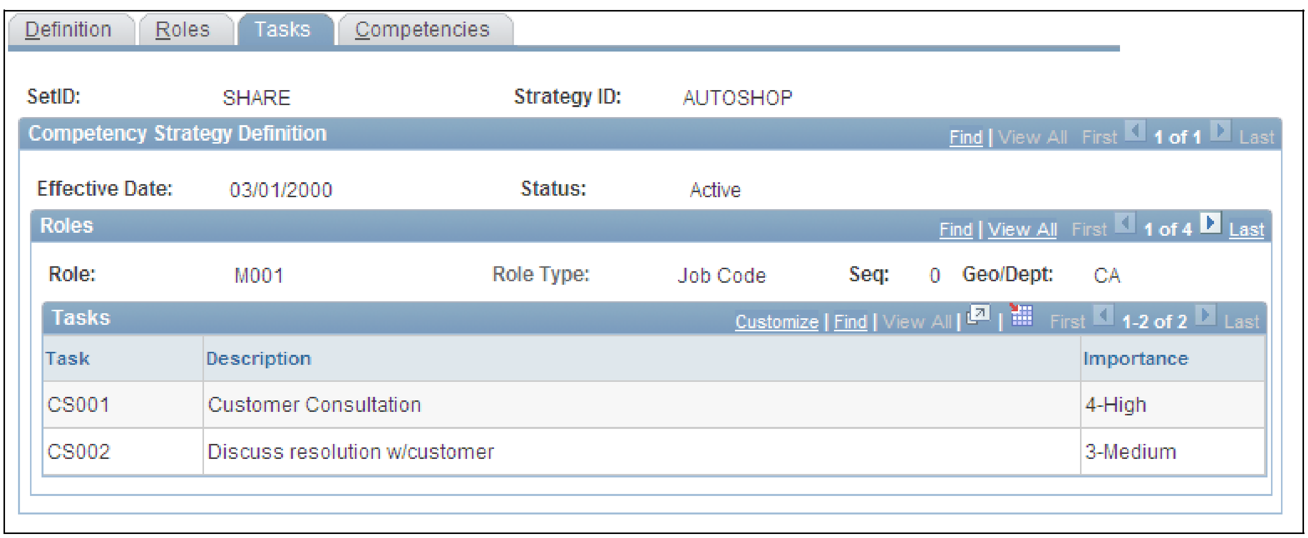
The choice is yours as to which values to use as sequence numbers. For example, you might adopt a convention to always use 0 as a default, and then use 1, 2, 3 and so on as differentiators. The numbers have no effect on the actual sequence of Value Allocation or Match engine processing.

Comments Click to access the Comments page. Use this page to enter additional comments about the role. This might be helpful in cases where you add a new sequence number, and change something small such as one of the proficiencies.

For each Role you add, the system also displays the default values for the Organization,Geo/Dept (geography or department identification), Headcount, and Weight fields You can add or change these values as needed.

Reviewing Role Tasks for a Competency Strategy

Access the Competency Strategy - Tasks page (Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Tasks).

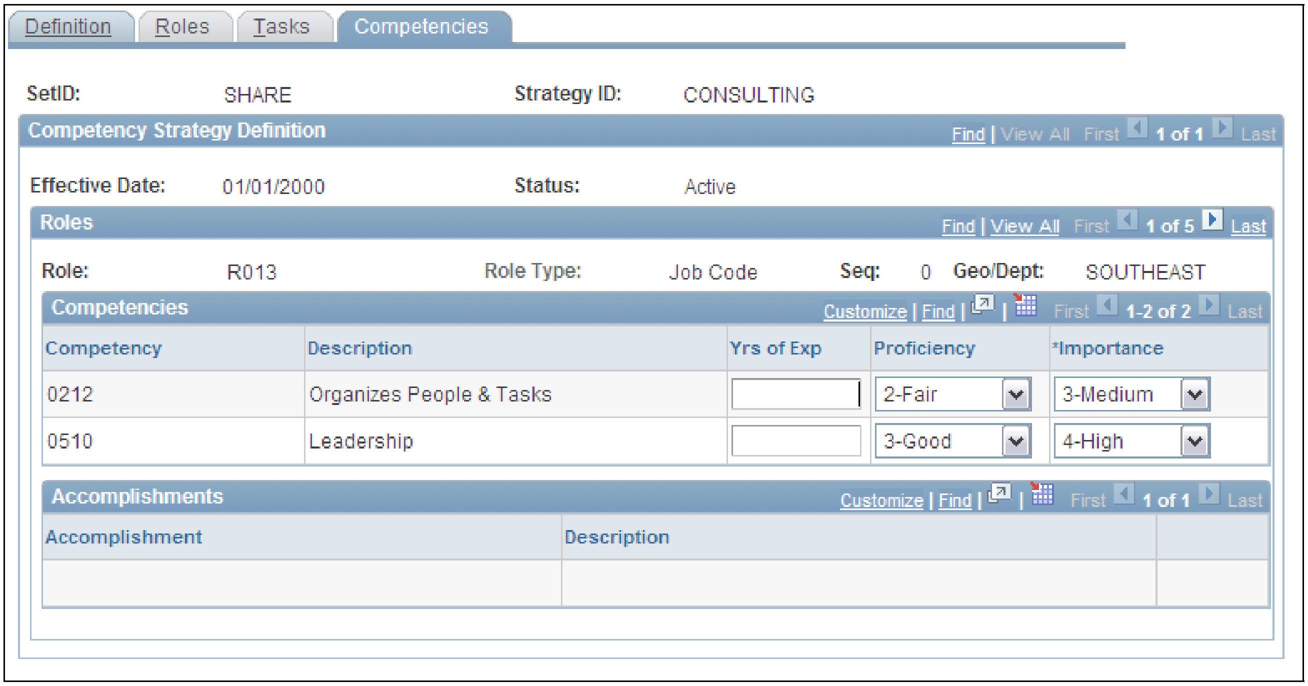


Competency Strategy - Tasks setup page

Role	When you enter a role on the Competency Strategy - Role page, the system retrieves the related tasks from the setup tables and populates the fields on this page. You cannot insert or delete rows. All of the fields on this page are display only.

Reviewing Role Competencies for a Competency Strategy

Access the Competency Strategy - Competencies page (Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Strategy, Competencies).



Competency Strategy - Competencies setup page

Role	When you enter a role on the Competency Strategy - Role page, the system retrieves the related competencies and accomplishments from the setup tables and populates the fields on this page. You can not insert or delete rows. Most of the fields on this page, with three exceptions, are display-only.
Yrs of Exp (years of experience)	You can edit this field for each competency and accomplishment. The Match process compares these requirements against the workers in the current competency inventory.
Proficiency	You can edit the required Proficiency field for each competency and accomplishment. The Match process compares these requirements against the workers in the current competency inventory.

Importance

You can edit this field for these competencies and accomplishments. The Value Allocation process allocates the role value to these competencies and accomplishments based on the importance that you assign here. The Match process uses importance to calculate the fit score. The valid values for importance are *0* (none), *1* (least), *2* (low), *3* (medium), *4* (high), *5* (highest) and *6* (required). If a competency or accomplishment has an importance of 6, then the worker must have this competency or accomplishment in order to be considered a match in the Match process.

Defining a Competency Strategy Model

To define a competency strategy model use the WA_WP_MODEL_DFN.GBL component and follow these steps:

1. Set up the model identification.
2. Complete the model definition.

The model definition includes these basic elements:

- Model ID
- Workforce Group ID
- Competency Strategy ID
- Roles
- Match parameters

Prerequisites

Before you can define a competency strategy model, you must set up model IDs using the Models page. This page is documented in the *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook.*

See Also

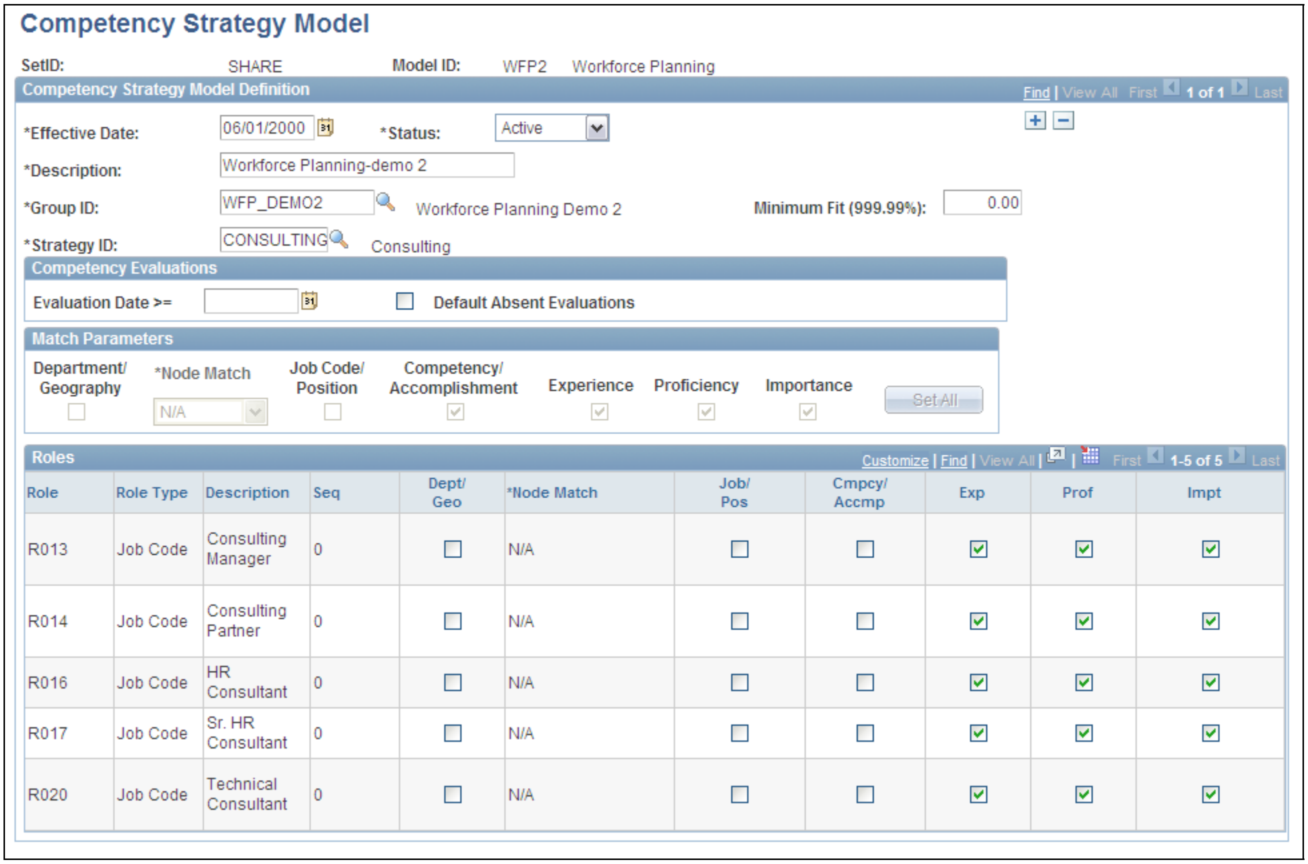
PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook, "Setting Up Models and Scenarios," Defining Models and Scenarios

Page Used to Define a Competency Strategy Model

Page Name	*Definition Name*	*Navigation*	*Usage*
Competency Strategy Model	WA_WP_MODEL_DFN	Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Model, Competency Strategy Model	Define a competency strategy model, including rules for group ID, strategy ID, and match parameters.

Setting up a Competency Strategy Model

Access the Competency Strategy Model page (Workforce Analytics, Workforce Planning, Setup and Process, Setup Competency Model, Competency Strategy Model).



Competency Strategy Model page

Competency Strategy Model Definition

Model ID

You can associate each effective-dated model ID with only one workforce group ID and one strategy ID.

Group ID

Defines the set of workers within the workforce who are subject to the Match process. Prompt list values for this field are from the WA_CP_GROUP_DFN table.

Strategy ID

Defines all the roles and associated competencies and accomplishments that are required for the model. Prompt list values for Strategy ID are from the WA_STRAT_DFN table. The system retrieves all of the roles for the competency strategy and populates the first four columns (Role, Role Type, description, and Sequence) in the grid at the bottom of the page.

Minimum Fit (999.99%)

Specify the minimum fit that is needed for the system to consider a worker a match. This is the calculated fit, in percent, that you want to see between a worker's competencies and the competencies that are required for the strategy. What percentage do you consider a match, 80 percent or better, or is 100 percent the only acceptable match for your scenario? If you leave it zero, then all matches will be returned.

Competency Evaluations

Evaluation Date >= (evaluation date is greater than or equal to)	Limit match processing to only those workers whose competency evaluations were performed on or after a given date.
Default Absent Evaluations	Instruct the system how to handle match processing for workers who do not have a competency evaluation. Selecting the check box indicates to the system that you want workers without competency evaluations to have them supplied by default from the role definition for the employee's job code or position. In essence, this means that you assume the worker possesses all the competencies that are required for role types of job code or position. If no role definition exists for the employee's job code or position, then nothing happens. Leaving the check box deselected directs the system to exclude those workers from the analysis, that is, employees with no competency data will not be considered for Match processing. You can see how many workers in a scenario have their competencies supplied by default by viewing the count on the Statistics inquiry page. The system does not supply accomplishments by default.

Match Parameters

Use the fields in this group box to select default match parameters for the roles in the grid. You first select from among the default options in the Match Parameters group box by picking and choosing one at a time. Then click the Set All button to set the check boxes in the Roles grid to match what has been selected in the Match Parameters group box.

Department/Geography	Select to narrow candidate selection for the Match process. The system evaluates only workers in the organization who are specified in the competency strategy. If you do not select this check box, the system evaluates all workers in the workforce group who are specified at the top of this page.
Node Match	Works in conjunction with the Department/Geography field. Use this field to specify, in cases in which the organization is tree-based, whether a worker's organization value should be compared to just the node, or to the node and all of its children.
Job Code/Position	Select to further narrow candidate selection for the Match process. The system evaluates only workers whose job code or position match the role job code or position. This check box is enabled only if the role is of type job code or position.
Competency/Accomplishment	Select to indicate whether the system should evaluate a worker's total fit by competencies and accomplishments.
Experience	Select to indicate whether the system should evaluate a worker's total fit by experience.
Proficiency	Select to indicate whether the system evaluates a worker's total fit by proficiency.

Importance	Select to indicate whether the system evaluates a worker's total fit by importance.

Roles

The system displays the roles for the competency strategy that are specified at the top of the page in this grid. The first four columns Role,Role Type,Description, and Sequence are display-only. You cannot add or delete rows of data from the strategy.

You can edit the match parameters for each role if you want them to be different from the defaults. The information in this grid is stored in the WA_WP_MODEL_SEQ table. The overall model definition is stored in the WA_WP_MODEL_DFN table.

Allocating Value to Roles and Competencies (Optional)

This section provides an overview of the value allocation process and discusses how to:

- Set up a scenario definition.
- Set up the process run control for the Value Allocation process.

Understanding the Value Allocation Process

Use the Value Allocation process (WA_VALUE) to define and allocate monetary values to the roles and competencies in a competency strategy. To perform Value Allocation for a competency strategy, follow these steps:

1. Set up the scenario definition.
2. Complete the scenario process run control definition.
3. Run the Value Allocation process.

Note. Value Allocation is an optional feature and independent from the Match process. If you choose not to perform Value Allocation, then you can skip this section of the chapter. Proceed directly to the next chapter, which covers running the Match process.

The Value Allocation process (WA_VALUE) calculates the monetary value of the competency strategy using the constraint in the strategy definition. The process then allocates the strategy value to the roles within the strategy, based on the role weightings. The process then allocates the role values to the competencies and accomplishments within each role, based upon the importance that is placed on each.

The input tables for the process are the WA_WP_STRAT_DFN table and its children.

The output tables for the process are:

WA_WP_R_VAL_F00	Contains the allocation of monetary value at the role level.

WA_WP_C_VAL_F00 Contains the allocation of monetary value at the competency and accomplishment level.

Setting Up a Scenario Definition

You set up scenario IDs using the EPM Foundation Scenarios component. That is where you specify the model and calendar, and otherwise define a scenario. The component is documented in the *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook.*

See Also

PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook, "Setting Up Models and Scenarios," Defining Models and Scenarios

Setting Up the Process Run Control for the Value Allocation Process

You set up and run Workforce Planning jobstreams for the Value Allocation, Match, and Merge processes by accessing the Run Jobstream page directly from the Workforce Analytics, Workforce Planning menu. The Run Jobstream page is documented in the*PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook.*

The run control definition includes these basic elements:

- Business unit.
- Scenario ID.
- Fiscal year and accounting period.
- Jobstream ID.

Fiscal Year and Accounting Period

Regardless of which run control page you use, run Workforce Planning scenarios for a fiscal year and accounting period. Do not run them based on an as of dated jobstream.

Jobstream ID

The prompt list values for the jobstream ID are those jobstreams that are associated with an engine ID of WA_VALUE or WA_MATCH. The delivered jobstreams are:

Jobstream ID	*Job ID*	*Application Engine ID*
WA_VALUE	WA_VALUE WA_VAL_MRG	WA_VALUE PF_MERGE

Jobstream ID	Job ID	Application Engine ID
WA_MATCH	WA_MATCH WA_MCH_MRG	WA_MATCH PF_MERGE
WA_WFP_ALL	WA_STR_VAL WA_STR_MCH WA_STR_MRG	WA_VALUE WA_MATCH PF_MERGE

See Also

PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook, "Streamlining Processing with Jobstreams"

Viewing the Value Allocation Process Results

You can review the results of the Value Allocation process using the Value Allocation Results inquiry component, which consists of the following three pages:

- Role Values
- Competency and Accomplishment Values
- Competency Values

This section discusses how to:

- Review the role value allocation results.
- Review the role competency and accomplishment value details.
- Review the competency values.

Pages Used to Review the Value Allocation Process

Page Name	Definition Name	Navigation	Usage
Role Values	WA_WP_ROLE_VAL_CHT	Workforce Analytics, Workforce Planning, Review and Analyze, Review Value Allocation, Role Values	Review the overall strategy value and the allocated value of the roles within a competency strategy.

Page Name	***Definition Name***	***Navigation***	***Usage***
Competency and Accomplishment Values	WS_WP_ROLE_DRL_CHT	Click the Detail link on the Role Values page	Review the competency and accomplishment values for a selected role within a competency strategy.
Competency Values	WA_WP_C_VAL_CHT	Workforce Analytics, Workforce Planning, Review and Analyze, Review Value Allocation, Competency Values	Review the overall strategy and the allocated value of the competencies and accomplishments within a competency strategy.

Reviewing the Role Value Allocation Results

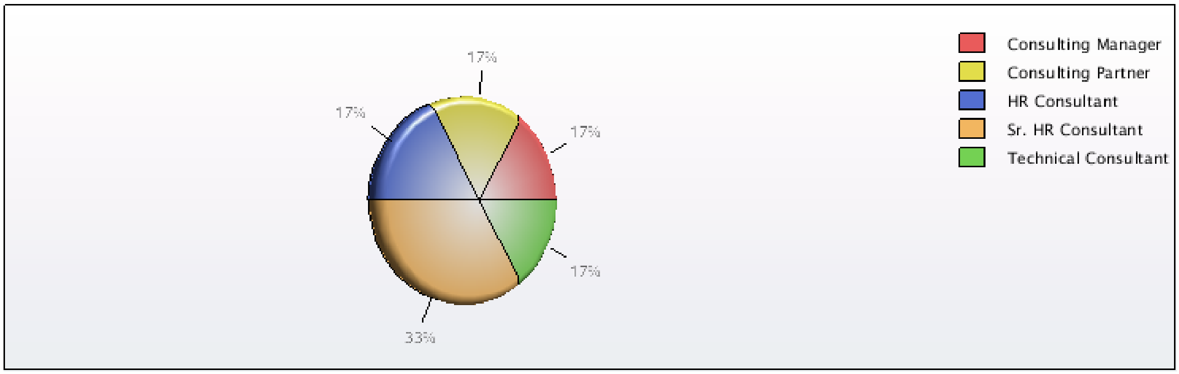
Access the Role Values page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Value Allocation, Role Values).

Value Allocation Results

Role Values

Business Unit: CORP1 Scenario ID: WFP2 Workforce Planning

Fiscal Year: 2000 Accounting Period: 1



Strategy Value: 1,500,000.02 USD

Role Values — Customize | Find | View All | First 1-5 of 5 Last

Role	Role Type	Description	Seq	Value	Currency Code		Weight (%)	Headcount
R013	Job Code	Consulting Manager	0	250,000.01	USD	Detail	16.67	5
R014	Job Code	Consulting Partner	0	250,000.01	USD	Detail	16.67	1
R016	Job Code	HR Consultant	0	250,000.01	USD	Detail	16.67	6
R017	Job Code	Sr. HR Consultant	0	500,000.00	USD	Detail	33.33	2
R020	Job Code	Technical Consultant	0	250,000.01	USD	Detail	16.67	15

Role Values page

When the page appears, you can see value results (monetary values) only if you have entered a strategy value on the Competency Strategy – Definition page.

Chart

The pie chart in the center of the page displays the roles within the scenario and the relative value of each by percentage.

Role Values Grid

The system displays the Strategy Value field just above the Role Values grid.

For each role in the scenario, the system displays the role, role type, role description, sequence number, role value, weight, and headcount.

Details

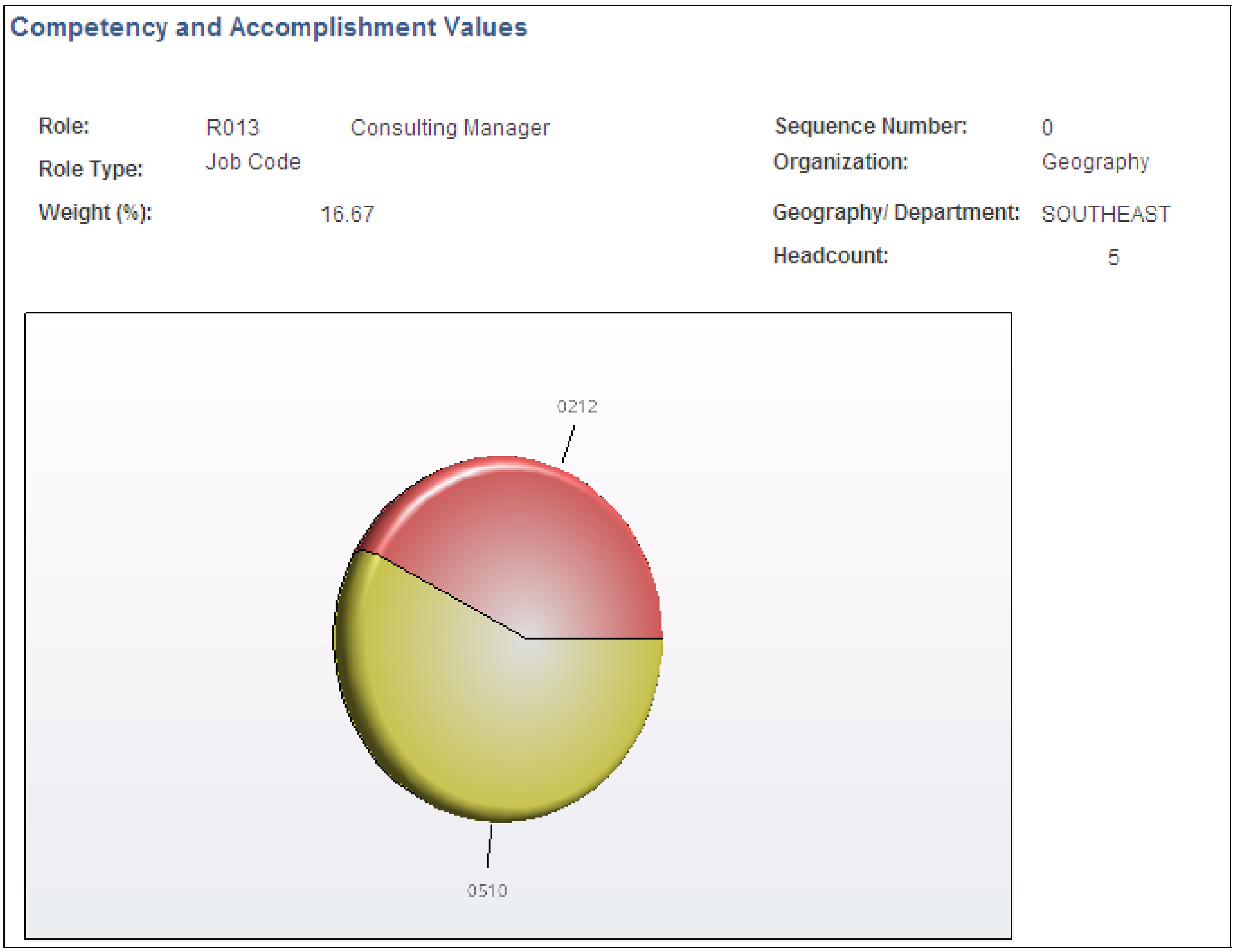
Click to access the Competency and Accomplishment Values page. This page displays the values of competencies and accomplishments within a role.

Competency Values

Click to access the Competency Values page. This page displays the values of competencies and accomplishments regardless of role (for cases for which one competency or accomplishment is used within multiple roles).

Reviewing the Role Competency and Accomplishment Value Details

Access the Competency and Accomplishment Values page (Click the Detail link on the Role Values page).



Competency and Accomplishment Values page 1 of 2

Role Value: 250,000.01 USD

Competency Values — Customize | Find | View All | First 1-2 of 2 Last

Competency	Description	Weight	Value	Currency Code
0212	Organizes People & Tasks	42.86	107,142.86	USD
0510	Leadership	57.14	142,857.15	USD

Accomplishment Values — Customize | Find | View All | First 1 of 1 Last

Accomplishment	Description	Weight	Value	Currency Code

Competency and Accomplishment Values page 2 of 2

When the page appears, you can see value results (monetary values) only if you have entered a strategy value on the Competency Strategy - Definition page.

At the top of the page, the system displays the role ID code and description, role type, sequence number, organization unit, geography or department code, and headcount for the role.

Chart

The pie chart at the center of the page displays the role competencies and accomplishments, and the relative value of each, by percentage.

Competency Values Grid

The system displays the Role Value field just above the Competency Values group box. The system displays each competency in the role, along with its description, calculated weight, value, and currency code.

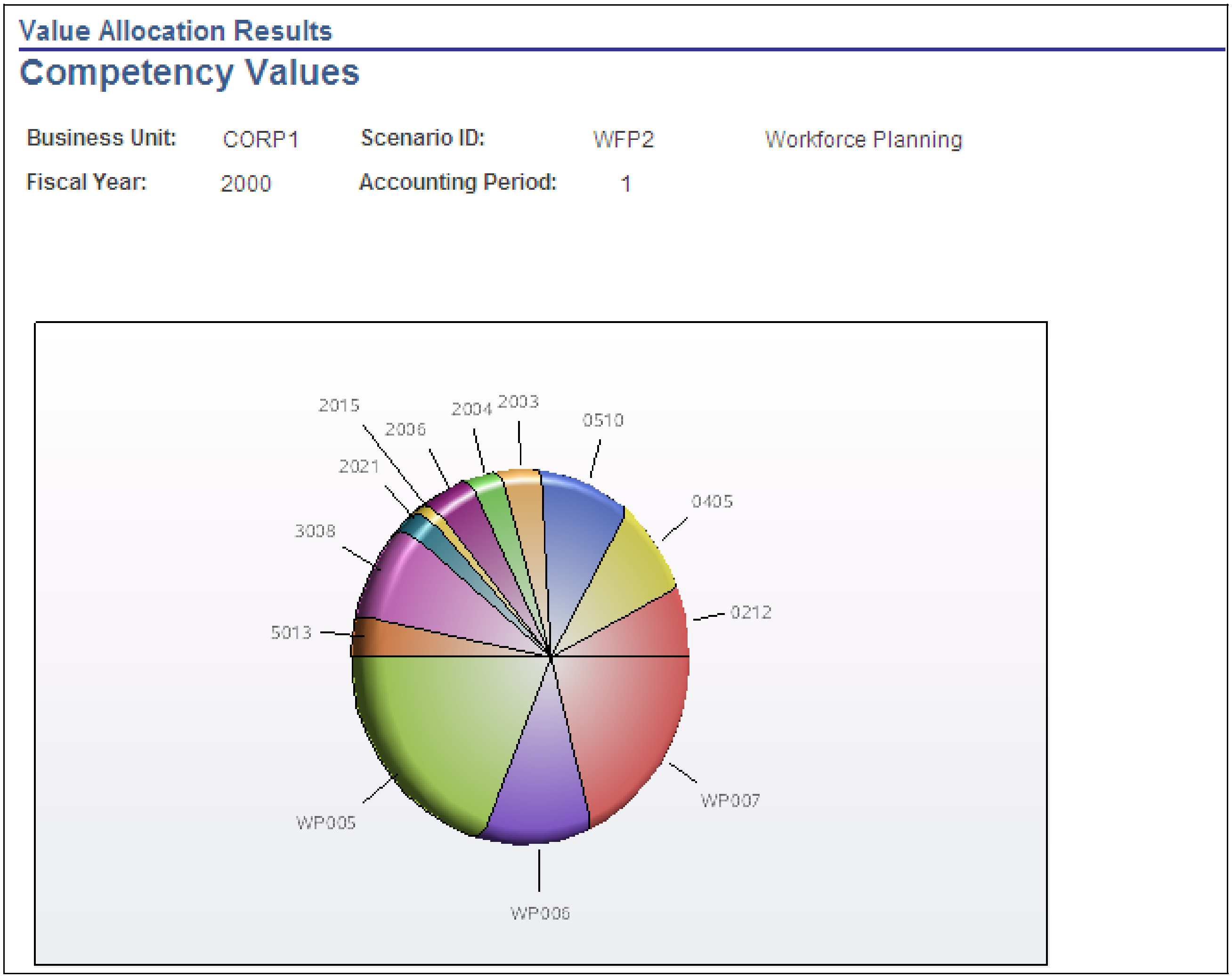
Accomplishment Values Grid

The system displays each accomplishment in the role, along with its description, calculated weight, value, and currency code.

Return	Click this button at the bottom of the page to return to the Role Values page.

Reviewing the Competency Values

Access the Competency Values page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Value Allocation, Competency Values).



Competency Values page 1 of 2

Strategy Value: 1,500,000.02 USD

Competency Values Customize | Find | First 1-13 of 13 Last

Competency	Description	Value	Currency Code
0212	Organizes People & Tasks	107,142.86	USD
0405	Visionary	138,888.89	USD
0510	Leadership	142,857.15	USD
2003	Programming	58,823.53	USD
2004	Systems Analysis	44,117.65	USD
2006	Database Design	58,823.53	USD
2015	COBOL	14,705.88	USD
2021	C++ Programming	29,411.77	USD
3008	Salesmanship	111,111.11	USD
5013	Java	44,117.65	USD
WP005	HR Knowledge	274,725.28	USD
WP006	Presentation Skills	164,835.16	USD
WP007	PeopleSoft HR	310,439.56	USD

Accomplishment Values Customize | Find | First 1 of 1 Last

Accomplishment	Description	Value	Currency Code

Competency Values page 2 of 2

When the page appears, the system displays the business unit, scenario ID code and description, fiscal year and accounting period.

Chart

In the pie chart at the center of the page, the system displays all of the competencies and accomplishments for the selected scenario, fiscal year, and accounting period.

Competency Values Grid

The system displays the overall strategy value just above the Competency Values group box. For each competency in the scenario, the system displays the competency code, description, and calculated value of the competency.

Accomplishment Values Grid

For each accomplishment in the scenario, the system displays the accomplishment code, description, and calculated value of the accomplishment.

Chapter 5

Assessing the Workforce Competency Match

This chapter provides an overview of the workforce competency match process and discusses how to:

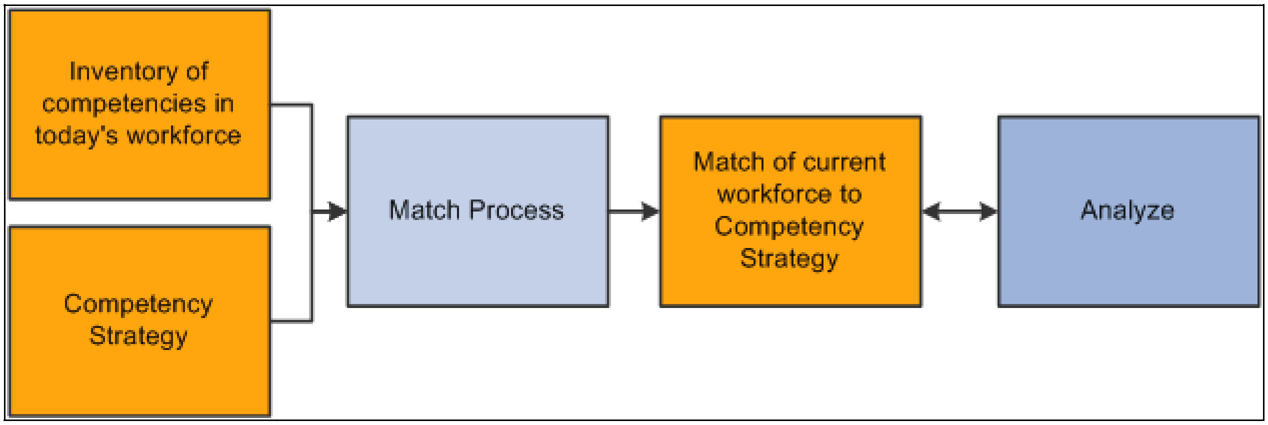
- Set up and run the Match process.
- Assess the competency strategy match and gap.

Understanding the Workforce Competency Match Process

To perform a workforce competency match, you run the Match process (WA_MATCH), which compares the current workforce competency inventory with a given competency strategy. You review and analyze the process results with a series of inquiry pages to assess the match and gap between the two. The overall procedure for assessing the competency match is similar to the procedure for performing a value allocation:

1. Prepare your competency strategy.
2. Define the strategy with the Competency Strategy setup component.
3. Set up a model and scenario.
4. Define the match parameters with the Competency Strategy Model setup page.
5. Use the Competency Strategy process page to run the Match process.
6. Review the results of the competency strategy scenario.

The following diagram illustrates this overall process:



Conceptual overview of the Competency Strategy Match business process

Defining a Competency Strategy for the Match Process

When you define a competency strategy for the Match process, you use the same pages in the Competency Strategy component that you use to set up competency strategy for the Value Allocation process. These pages are documented in the chapter titled "Managing Competency Strategies and Values."

Defining a Competency Strategy Model for the Match Process

To define a competency strategy model for the Match process, you follow the same steps as for the Value Allocation process:

1. Set up the model identification using the Models setup page.

2. Complete the model definition using the Competency Strategy Model page.

This process is documented in the chapter titled "Managing Competency Strategies and Values."

See Also

Chapter 4, "Managing Competency Strategies and Values," Defining a Competency Strategy, page 28

Chapter 4, "Managing Competency Strategies and Values," Defining a Competency Strategy Model, page 36

Setting Up and Running the Match Process

The Match process (WA_MATCH) compares a given competency strategy with the current workforce competency inventory. You can perform matches for both current and forecasted strategies, but you are not required to do both. You can do one, or the other, or both, depending on your analysis. The process output includes *matches* and *gaps.* It takes proficiencies and experience into account.

Reviewing the Main Match Inputs

The following table lists and describes the main match inputs that you define with the Manage Competency Strategy setup pages prior to running the Match process:

Page Name	***Match Input***	***Purpose***
Competency Strategy - Roles	Headcount	Headcount is the requested number of workers for a given role. If the system finds a number of matching workers greater than or equal to this number, it considers the role matched completely. If it finds a number of matching workers less than the headcount requested, it considers this a *gap* in filling the role.
Competency Strategy - Roles	Weight	The system does not use the role weights in Match processing.
Competency Strategy - Competencies	Years of Experience Proficiency	The system compares these requirements against workers in the current competency inventory.
Competency Strategy - Competencies	Importance	The system uses the Importance to determine the fit score at the Competency and Accomplishment level in Match processing.
Competency Strategy Model	Group ID	This parameter defines the population of workers who are in the competency inventory subject to the Match process.
Competency Strategy Model	Minimum Fit	This parameter defines the minimum fit score that is needed for the system to consider a worker a match to strategy requirements.
Competency Strategy Model	Evaluation Date >= Department/Geography (Dept/Geo) Node match Job Code/Position (Job/Pos)	The system uses these parameters, beyond the group ID, to further narrow the set of workers who are in the competency inventory subject to the Match process.

Page Name	***Match Input***	***Purpose***
Competency Strategy Model	Competency/Accomplishment (Cmpcy/Acmp) Experience (Exp) Proficiency (Prof) Importance (Imp)	The system uses these parameters to determine the Fit Score Calculation.

Setting Up a Constraint to Specify a Workforce Group Containing All Active Employees

One approach to setting up your system for Match processing might be to specify, in the Competency Strategy Model page, an overall workforce group containing *All Active Employees.* To aid you, we deliver, as samples, the following system objects and metadata (under setID of SHARE). You can use these to create a constraint that includes all employees on JOB_F00 for whom the employee status is *active.*

- SetID = SHARE
- Table Map: JOB_F00
- DataMap: JOB_F00
- Filter: JOB_F00_ACTIVE
- Constraint: WFP_ACTIVE

Understanding the Match Process and Fit Score Calculations

When you run the Match process, the system matches the workers in your current competency inventory to roles within the competency strategy. Each role in a strategy consists of competencies and accomplishments, with associated requirements for proficiency or years of experience. A role match is achieved when a worker has the required proficiency or experience for each competency or accomplishment. A partial match, or gap, results for workers who have lower proficiencies, or only a subset of the requested competencies.

The process that the system uses for calculating the fit factors for the WA_WP_MATCH_F00 table is summarized in the following way:

1. Calculate the *Competency* or *Accomplishment* factor.

   This factor is a percent based on the number of competencies and accomplishments that an employee has, divided by the number of competencies and accomplishments that are requested.

   a. Update the competencies and accomplishments percentage to 100 percent where they match.

   b. Update the competencies and accomplishments percentage to 0 where they do not match.

2. Calculate the *Proficiency Factor* (for competencies only). This factor is a percentage based on the employee's proficiency, divided by the proficiency that is requested, for each competency.

   a. When the employee proficiency is less than the requested proficiency, the calculation is (Employee Proficiency / Requested Proficiency) * (100).

   b. When the employee proficiency is greater than or equal to the requested proficiency, the percentage is 100 percent. The employee cannot get a percentage greater than 100 percent.

3. Calculate the *Experience Factor* (for competencies only). This factor is a percentage based on the employee's experience, divided by the experience that is requested for each competency.

   a. When the employee experience is less than the requested experience, the calculation is (Employee Experience / Requested Experience) * (100)

   b. When the employee experience is greater than or equal to the requested experience, the percentage is 100 percent. The employee cannot get a percentage greater than 100 percent.

4. Calculate the *Total Fit.* This factor sums the Competency, Accomplishment, Proficiency, and Experience factors for a given role and divides to get the average fit.

   a. For the competencies, the system divides the sum of all the factors by the sum of how many flags are selected on the Model page for each role.

   b. For the accomplishments, no division is necessary because only one factor is possible.

5. Calculate the *Importance Weighting Factor.* The system weights the total fit for each competency or accomplishment, based on the importance assigned. This is done only for those roles for which the Importance check box is selected on the Model setup page.

   a. Sum the total importance for the competencies and accomplishments within a role.

   b. For each competency or accomplishment within a role, run this calculation (Current competency or accomplishment Importance / Total Importance for the role) * (Current competency or accomplishment's total fit from step 4).

The process that the system uses to aggregate fit data (Accomplishment and Competency Fit, Proficiency Fit, Experience Fit, and Total Fit) to the role level for the WA_WP_MCROL_F00 table is summarized in the following way:

1. Sum the fit for each employee, role, and factor.

2. Insert aggregate data for those roles for which they are weighted with an importance, and divide by the number of accomplishments and competencies. Except for the Total Fit, no division occurs because these numbers have been weighted.

3. Insert aggregate data for those roles that are not selected to be weighted with an importance and divide by the number of accomplishments and competencies. The Total fit also is divided because it is not weighted.

Understanding the Match Process Input and Output Tables

The input tables for the process include JOB_F00, LOCATION_D00, WA_COMPTNCY_F00, WA_GROUP_F00, WA_ACMPLISH_F00, WA_ACMP_MAJ_F00, WA_MAP_TREE_TBL, WA_ROLE_D00, WA_WP_STRAT_DFN, WA_WP_CMPCY_SEQ, WA_WP_ACOMP_SEQ, WA_WP_MODEL_TBL, WA_WP_MODEL_SEQ and WA_WP_ROLES_TBL.

The output tables are:

WA_WP_GAP_F00	This table contains all roles for which the headcount requested (from the competency strategy) is greater than the headcount match (in WA_WP_MATCH_F00).
WA_WP_STATS_F00	This table contains statistics about the strategy that the system has processed.
WA_WP_MCROL_F00	This table contains workers that matched a particular role within a strategy. This data is similar to that in WA_WP_MATCH_F00 except that it doesn't show competencies or accomplishments details.
WA_WP_MATCH_F00	This table contains workers that match a particular role within a strategy, the competencies and accomplishments that they matched or did not match, and the fit score of each.

Running the Match Process

To set up the process run control and run the Match process, you perform the same steps as for the Value Allocation process, using the Run Jobstream process page. This is documented in the chapter titled "Managing Competency Strategies and Values." The significant difference is that you run the Match process rather than the Value Allocation process.

See Also

Chapter 4, "Managing Competency Strategies and Values," Allocating Value to Roles and Competencies (Optional), page 40

Assessing the Competency Strategy Match and Gap

After you have run the Match process, you can review the results using four pages in the Match Results inquiry component:

- Summary
- Statistics
- Fit Scores
- Fit Score Details

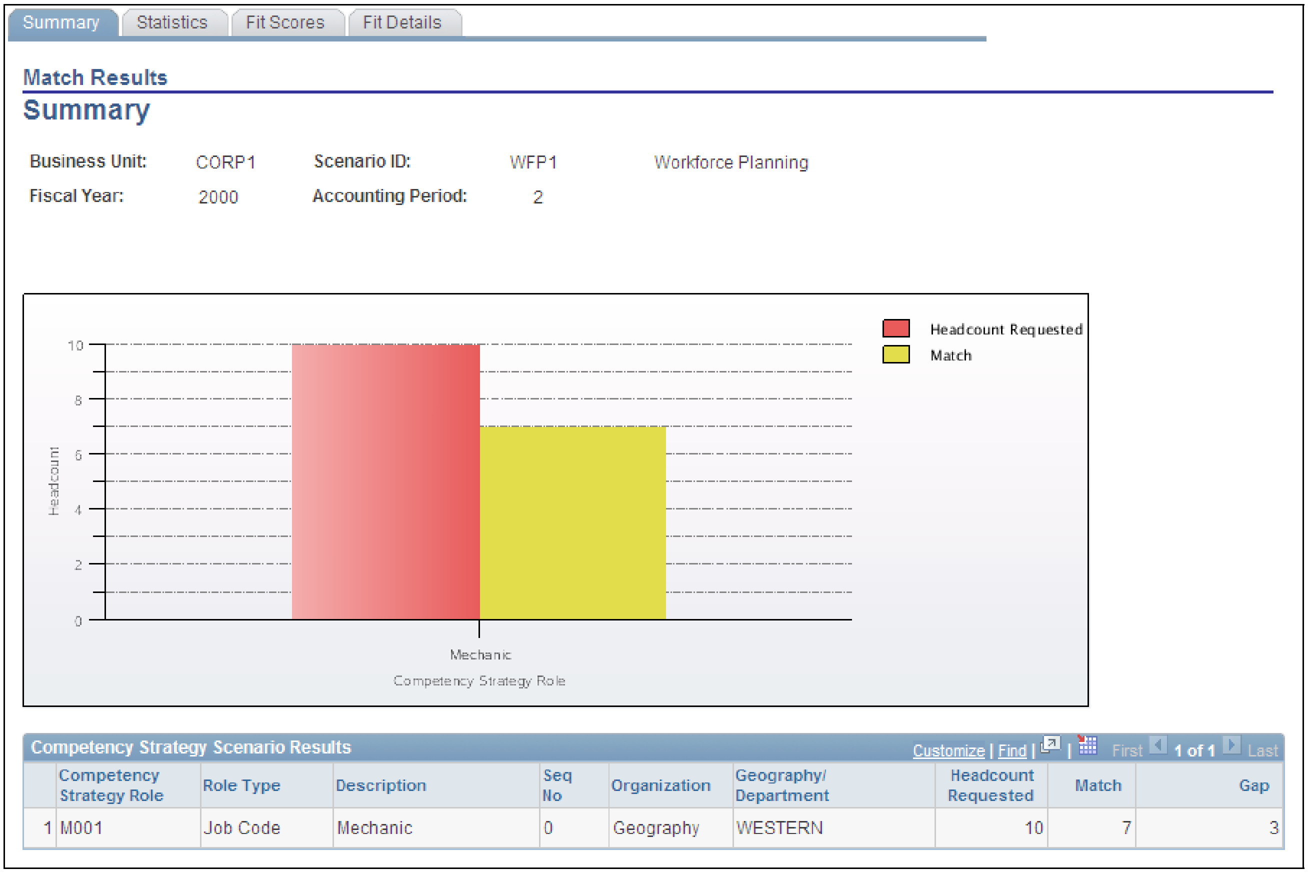
These pages help you to assess the match and gap between your current workforce's competencies and the requirements of your competency strategy. In essence, they help you to see how closely the current workforce meets the needs of your organization, as defined in your competency strategy.

Pages Used to Assess the Competency Strategy Match and Gap

Page Name	***Definition Name***	***Navigation***	***Usage***
Match Results - Summary	WA_WP_GAP_F00_CHRT	Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Summary	Review the high-level results of the Match process. You see a list of the roles in the scenario along with the total fit and total gap (by headcount).
Match Results - Statistics	WA_WP_STATS_F00_CH	Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Statistics	Review statistics about the match process, including total workers in a workforce group and number of workers with competency data.
Match Results - Fit Scores	WA_WP_MCROL_F00_CH	Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Fit Scores	Review a list of the workers who match the roles in the scenario, along with each worker's total fit score for the role. The list is sorted from best fit to worst fit.
Match Results - Fit Details	WA_WP_MATCH_F00_CH	Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Fit Details	Review a list of the workers who match the roles in the scenario, with details about each worker's total fit score and detailed fit scores for the role. For each worker, you can also view the worker's score for individual competencies and accomplishments within the role.

Reviewing a Summary of the Match Results

Access the Match Results - Summary page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Summary).



Match Results - Summary page

Business Unit

The data in this field is based on a unique scenario that you have run.

Scenario ID

The data in this field is based on a unique scenario that you have run.

Fiscal Year

The data in this field is based on a unique scenario that you have run.

Accounting Period

The data in this field is based on a unique scenario that you have run.

Last Updated

This date and time stamp specifies when the Match process was last run for this scenario.

When you assess your scenarios, take care to track which set of scenario results you are viewing. This is especially important when you are reviewing results from multiple pages or multiple scenarios. For example, are you using all four pages to take a deep look at all of the data for a single scenario? Or are you using a single page to compare the results of two different scenarios?

Reviewing the Chart

Headcount Requested

In the center of the page, the system displays a bar chart comparing, for each role in the scenario, the headcount that is requested versus the match.

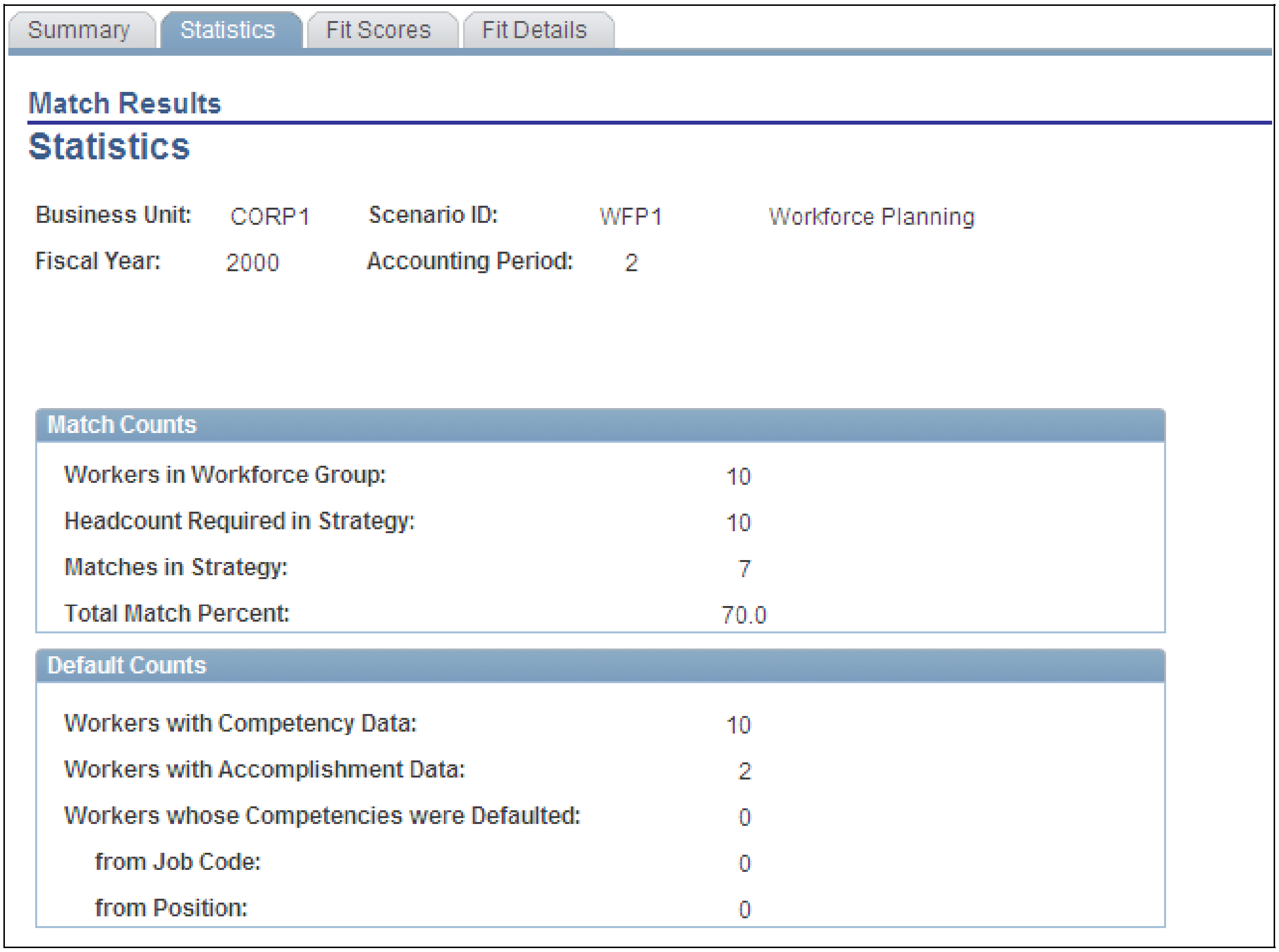
Match	Compared against the headcount requested.

Competency Strategy Scenario Results Grid

Competency Strategy Role	This page lists the roles in the scenario. Each unique row for a competency strategy role is defined by its role type, description, seq no (sequence number), organization, and geography or department identifier.
Headcount Requested	For each required role, the system displays the headcount requested.
Match	For each required role, the system displays the total match.
Gap	For each required role, the system displays the total gap (headcount minus match).

Reviewing the Match Statistics

Access the Match Results - Statistics page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Statistics).



Match Results - Statistics page

Match Counts

Workers in Workforce Group The count of workers who are included in the workforce group for this scenario, regardless of whether the worker has competency data.

Headcount Required in Strategy The total number of headcount that is required for this competency strategy.

Matches in Strategy The total number of worker-to-role matches resulting from the scenario.

Total Match Percent This is calculated from the Headcount Required in Strategy and the Matches in Strategy.

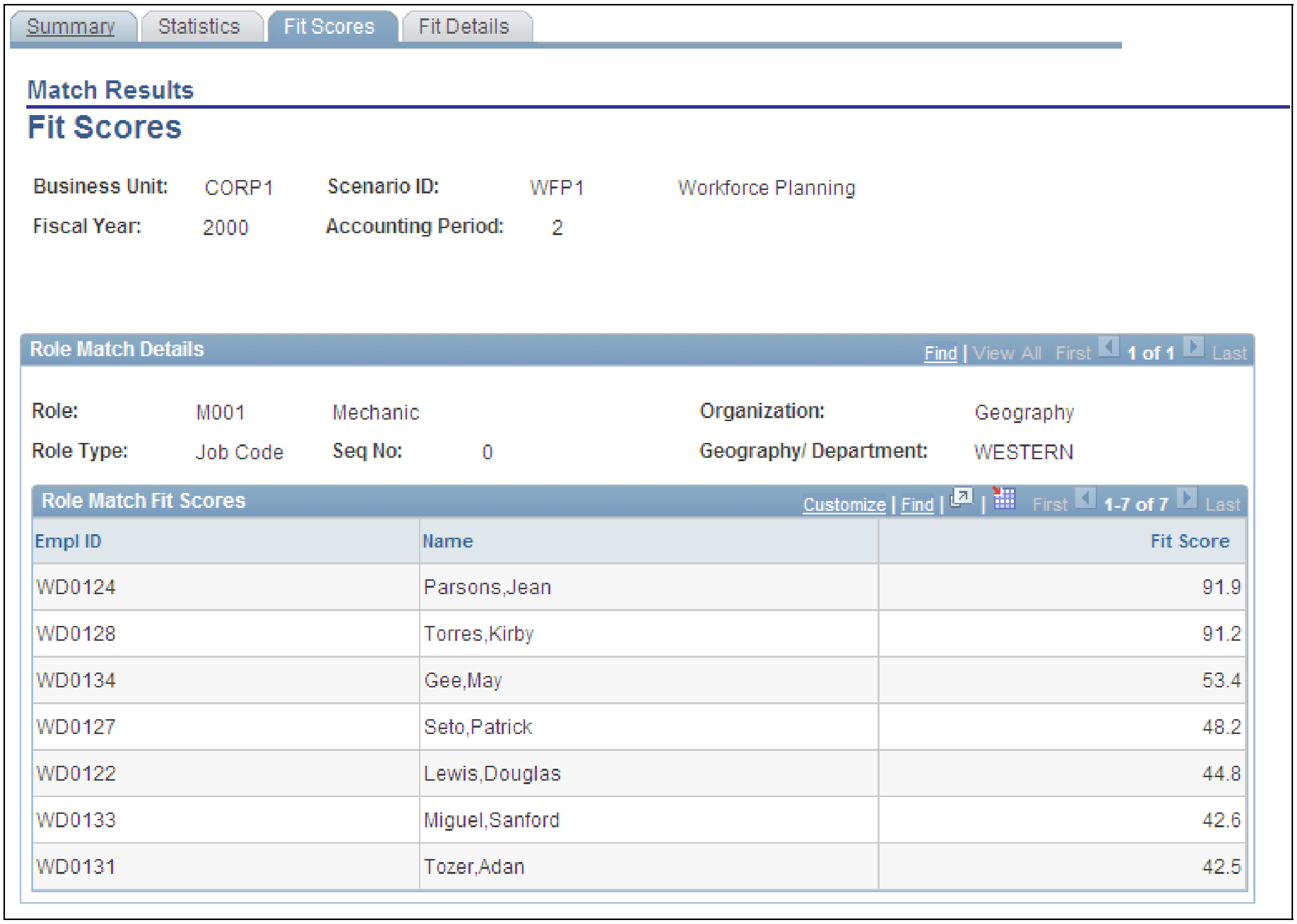
Default Counts

Workers with Competency Data The count of workers in the competency inventory who have competency data.

Workers with Accomplishment Data	The count of workers in the competency inventory who have accomplishment data.
Workers whose Competencies were Defaulted	The count of workers in the competency inventory who have no competency data, and whose competencies for this scenario were supplied by default from either the job code or position.
(Workers whose Competencies were Defaulted) from Job Code	Of the workers whose competencies were defaulted, this is the count of those whose competencies were defaulted from their job code, as defined on the role table.
(Workers whose Competencies were Defaulted) from Position	Of the workers whose competencies were defaulted, this is the count of those whose competencies were defaulted from their position definition, as defined on the role table.

Reviewing the Match Fit Scores

Access the Match Results - Fit Scores page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Fit Scores).



Match Results - Fit Scores page

Role Match Details

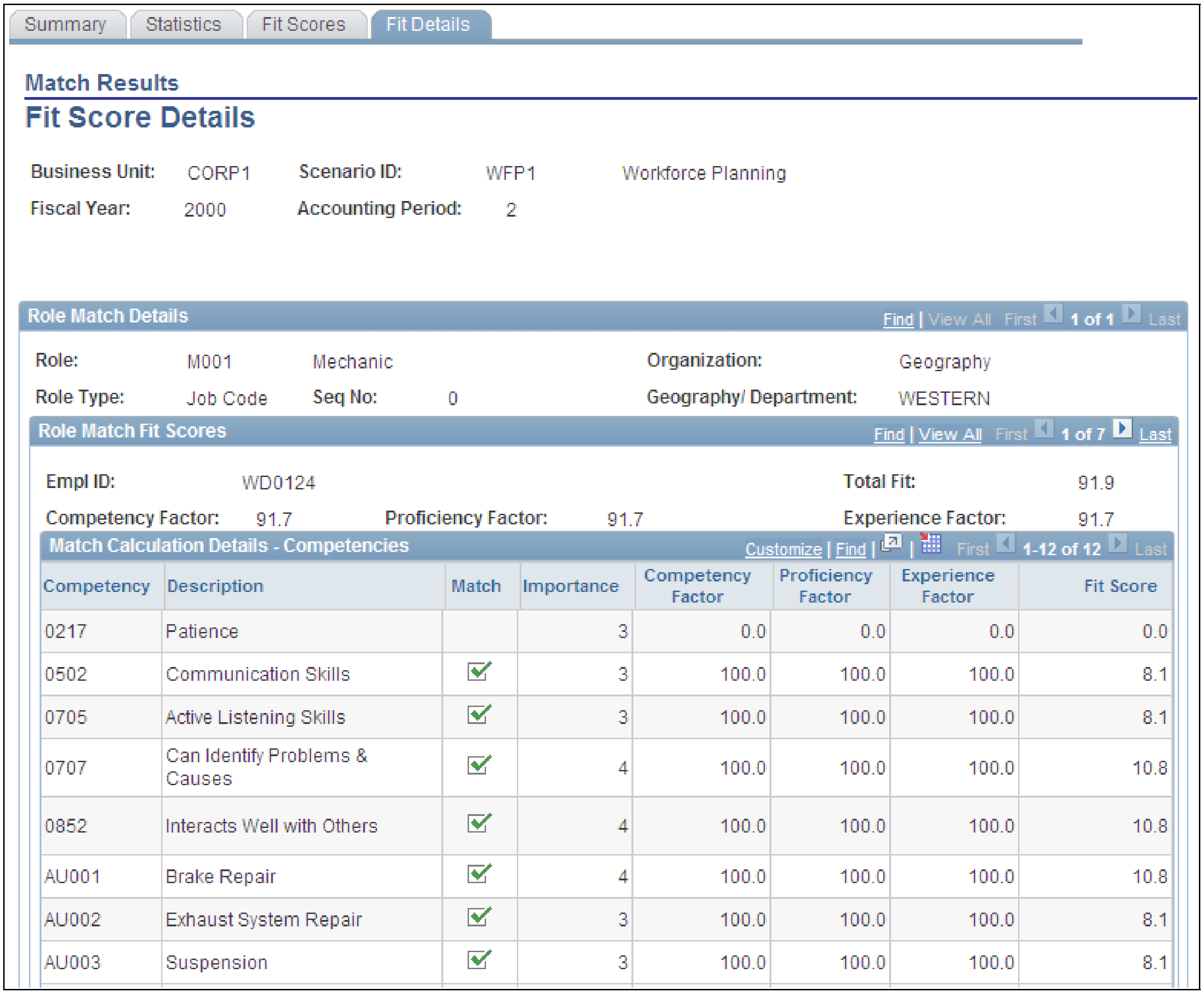
The system displays the roles for the competency strategy in this group box. For each unique role, the system displays the role ID, description, role type, sequence number, organization, and geography or department identifier.

Role Match Fit Scores

EmplID(employee identification number)	For each role, the system displays a list of the workers who are included in the role match process, including each worker's employee identification number.
Fit Score	For each role, the system displays a list of the workers who are included in the role match process, including each worker's fit score. The list is sorted from best fit to worst fit.

Reviewing the Fit Score Details

Access the Match Results - Fit Details page (Workforce Analytics, Workforce Planning, Review and Analyze, Review Match Results, Fit Details).



Summary | Statistics | Fit Scores | Fit Details

Match Results

Fit Score Details

Business Unit: CORP1 Scenario ID: WFP1 Workforce Planning

Fiscal Year: 2000 Accounting Period: 2

Role Match Details — Find | View All First 1 of 1 Last

Role: M001 Mechanic Organization: Geography

Role Type: Job Code Seq No: 0 Geography/ Department: WESTERN

Role Match Fit Scores — Find | View All First 1 of 7 Last

Empl ID: WD0124 Total Fit: 91.9

Competency Factor: 91.7 Proficiency Factor: 91.7 Experience Factor: 91.7

Match Calculation Details - Competencies — Customize | Find | First 1-12 of 12 Last

Competency	Description	Match	Importance	Competency Factor	Proficiency Factor	Experience Factor	Fit Score
0217	Patience		3	0.0	0.0	0.0	0.0
0502	Communication Skills	✓	3	100.0	100.0	100.0	8.1
0705	Active Listening Skills	✓	3	100.0	100.0	100.0	8.1
0707	Can Identify Problems & Causes	✓	4	100.0	100.0	100.0	10.8
0852	Interacts Well with Others	✓	4	100.0	100.0	100.0	10.8
AU001	Brake Repair	✓	4	100.0	100.0	100.0	10.8
AU002	Exhaust System Repair	✓	3	100.0	100.0	100.0	8.1
AU003	Suspension	✓	3	100.0	100.0	100.0	8.1

Match Results - Fit Details page 1 of 2

AU004	Alignment	☑	3	100.0	100.0	100.0	8.1
AU005	Air-Conditioning repair (auto)	☑	2	100.0	100.0	100.0	5.4
AU006	Oil/Lube/Filter	☑	2	100.0	100.0	100.0	5.4
AU007	Rack & Pinion	☑	3	100.0	100.0	100.0	8.1

Match Calculation Details - Accomplishments   Customize | Find | | First 1 of 1 Last

Accomplishment	Description	Match	Importance	Accomplishment Factor	Fit Score
				0.0	0.0

Match Results - Fit Details page 2 of 2

Role Match Details

The system displays the roles for the competency strategy in this group box.

Role	For each unique role, the system displays the role ID.
Role Type	For each unique role, the system displays the role type.
Seq No (sequence number)	For each unique role, the system displays the sequence number.
Organization	For each unique role, the system displays the organization.
Geography/Department	For each unique role, the system displays the geography/department identifier.

Role Match Fit Scores

For each role, the system displays the workers who are included in the role match process.

EmplID(employee identification number)	For each worker, the system displays the worker's employee identification number.
Name	For each worker, the system displays the worker's name.
Total Fit	For each worker, the system displays the worker's total fit score.
Competency Factor	For each worker, the system displays the worker's competency factor.
Proficiency Factor	For each worker, the system displays the worker's proficiency factor.
Experience Factor	For each worker, the system displays the worker's experience factor.

Match Calculation Details - Competencies

For each worker, the system displays a list of the worker's role competencies.

Competency	For each competency, the system displays the competency ID.
Importance	For each competency, the system displays the importance.
Competency Factor	For each competency, the system displays the competency factor.
Proficiency Factor	For each competency, the system displays the proficiency factor.
Experience Factor	For each competency, the system displays the experience factor.
Fit Score	For each competency, the system displays the fit score.
Match	A check mark in this field indicates that the worker is a competency match for this role competency.

Match Calculation Details - Accomplishments

For each worker, the system displays a list of the worker's role accomplishments.

Accomplishment	For each accomplishment, the system displays the accomplishment ID.
Accomplishment Factor	For each accomplishment, the system displays the accomplishment factor.
Fit Score	For each accomplishment, the system displays the fit score.
Match	A check mark in this field indicates that the worker is an accomplishment match for this role accomplishment.

Index

R

S

T

V

W

