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PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles

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PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles
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Appendix A

PeopleSoft Enterprise Human Resources PeopleBook Manage Profiles Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Manage Profiles.

PeopleSoft Enterprise HRMS Application Fundamentals

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

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 Manage Profiles

This chapter discusses:

- Manage Profiles overview.
- Manage Profiles business processes.
- Manage Profiles integrations.
- Manage Profiles implementation.

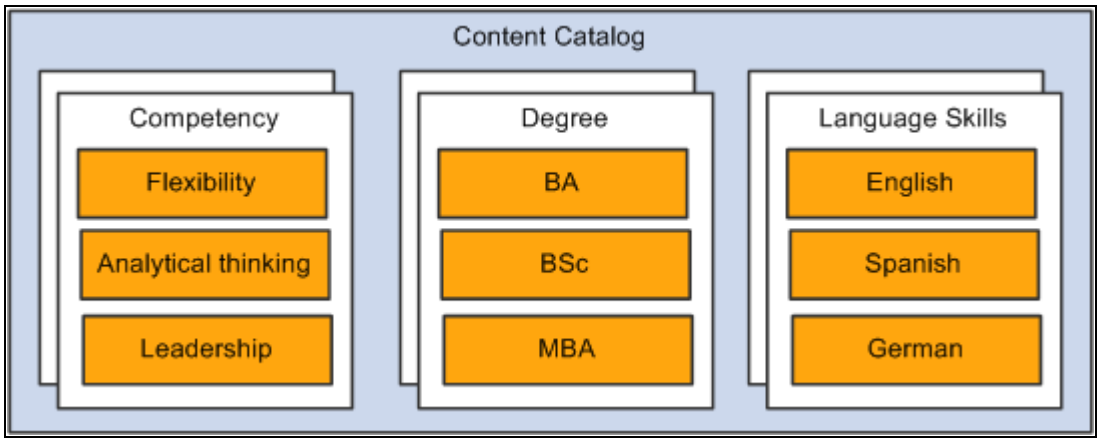
Manage Profiles Overview

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

Content Catalog

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

The following diagram illustrates a content catalog that contains lists of competencies, degrees, and language skills:



Content catalog example with competencies, degrees, and language skills

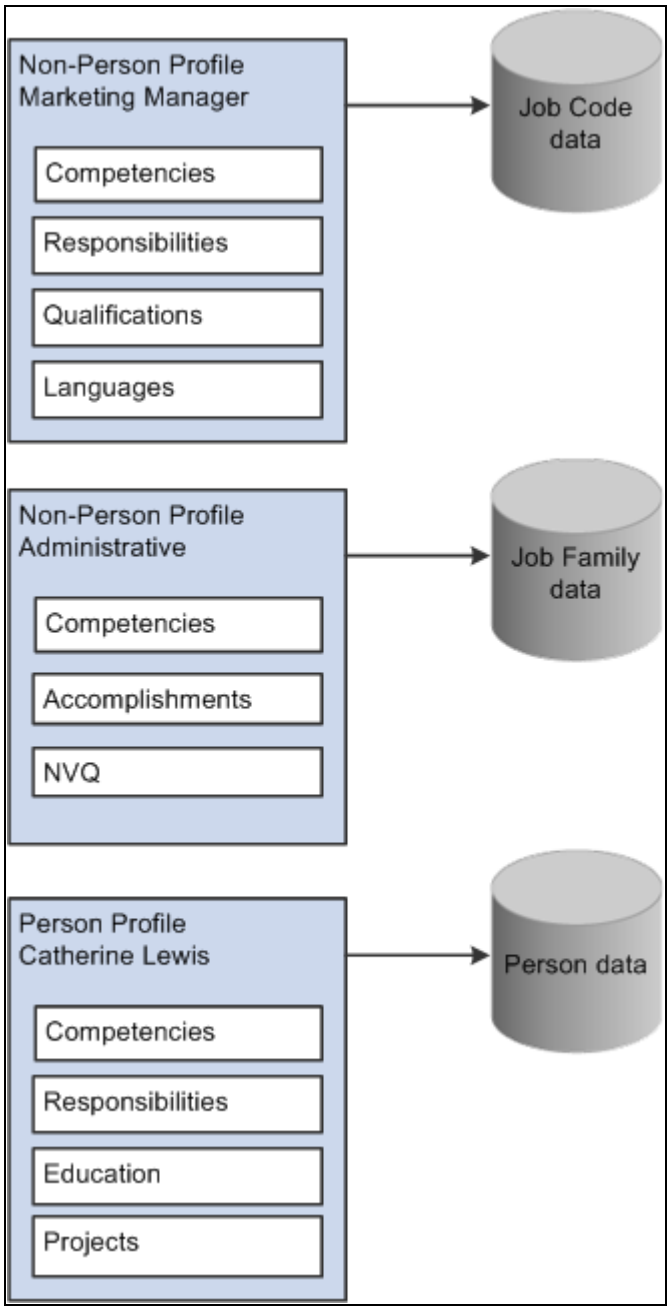
Information in the content catalog is organized by content type. A set of content types is delivered for the common content types such as competencies, language skills, degrees, licenses and certificates. Profile administrators add items for the delivered content types.

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

Person and Non-Person Profiles

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

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



Profile examples for a job code, a job family, and a person

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

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

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

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

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

Search and Compare Profiles

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

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

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

Search and Compare Profiles uses the Verity search engine to perform the search of profile data based on the search criteria. This returns a list of matching profiles ranked according to how well they match that criteria.

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

Manage Profiles Business Processes

PeopleSoft Enterprise Human Resources Manage Profiles provides these business processes:

- Manage person and non-person profiles.

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

- Manage interest lists.

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

- Manage profile approvals.

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

- Search and compare profiles.

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

- Match competencies and accomplishments to roles.

  The role matching options enable profile administrators to compare a person's competencies and accomplishments with those required by a role, or compare the competencies and accomplishments of a team with those required by a role.

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

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

We discuss these business processes in the business process chapters in this PeopleBook.

Manage Profiles Integrations

Manage Profiles integrates with other business processes within PeopleSoft Enterprise Human Resources, including:

- Plan Careers and Successions.
- Administer Training.
- Administer Workforce.

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

- Manage French Public Sector.

It also integrates with other PeopleSoft Enterprise HRMS applications, including

- eDevelopment

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

- ePerformance
- Talent Acquisition Manager
- Candidate Gateway

- Campus Self Service

Manage Profiles also integrates with:

- PeopleSoft Enterprise Learning Management, Financials, CRM, and Enterprise Performance Management.
- Third-party applications.

  You can integrate Manage Profiles with third-party content providers to load competency content into the content catalog.

We discuss integration considerations in the implementation chapters in this PeopleBook.

Manage Profiles Implementation

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

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

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

Component	*Component Interface*	*References*
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_COMP	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_CRITERIA	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_ELEMENT	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_GOAL	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_HON	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_LIC	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_RESP	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_SUBCOMP	See Chapter 2, "Setting Up the Content Catalog," page 9.

Other Sources of Information

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Chapter 2

Setting Up the Content Catalog

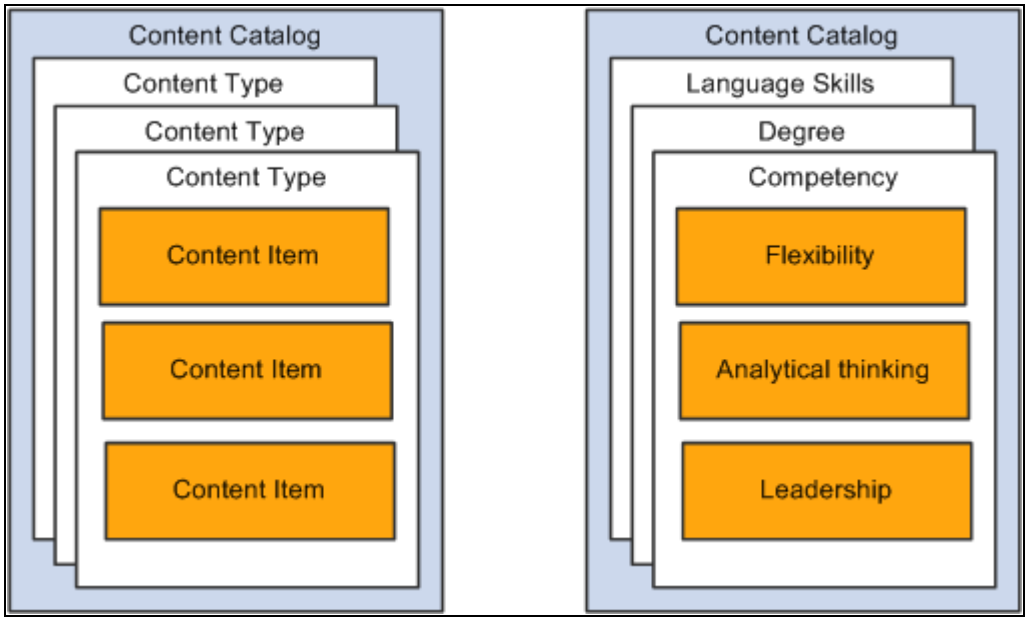
This chapter provides an overview of the content catalog and discusses how to:

- Set up content types and properties.
- Define content items.
- Define content groups.
- Define rating models.

Understanding the Content Catalog`

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

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



PeopleSoft HRMS generic content catalog structure

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

The structure of the content catalog enables you to easily extend the content types that are available to add to your organization's profiles.

Content Catalog System Data

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

Note. PeopleSoft delivers content items as sample data only.

The following content types are delivered as system data:

Content Type	*Description*
AREA STUDY	Areas of Study
COMPETENCY	Competencies
DEG	Degrees
EDLVLACHV	Education Level
EG SPCL PROJ	(E&G) Special Projects
ELEMENT	Competency Elements
GEOG_PREF	Geography Preferences
GOAL	Goals and objectives
HON	Honors and awards
INITIATIVE	Initiatives
INTL_PREF	International Preferences
LIC	Licenses and certifications
LNG	Language skills
LOCATION	Current Location
LOCATN_PREF	Location Preferences
MEM	Memberships
MISSION	Mission Statements

Content Type	*Description*
NVQ	NVQs
NVQ UNIT	NVQ Units
NVQ ELEMENT	NVQ Elements
RANK	Military Rank.
RESP	Responsibilities
SPECL PROJ	Special Projects
SUB COMP	Sub-Competencies
SUCCESS	Success Criteria
TRAVEL	Travel Preferences
TST	Tests/Examinations

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Salary Plan Information.

See *Events and Notifications Framework PeopleBook*, "Setting Up Events."

Understanding Content Catalog Setup

To set up the content catalog you define the following:

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

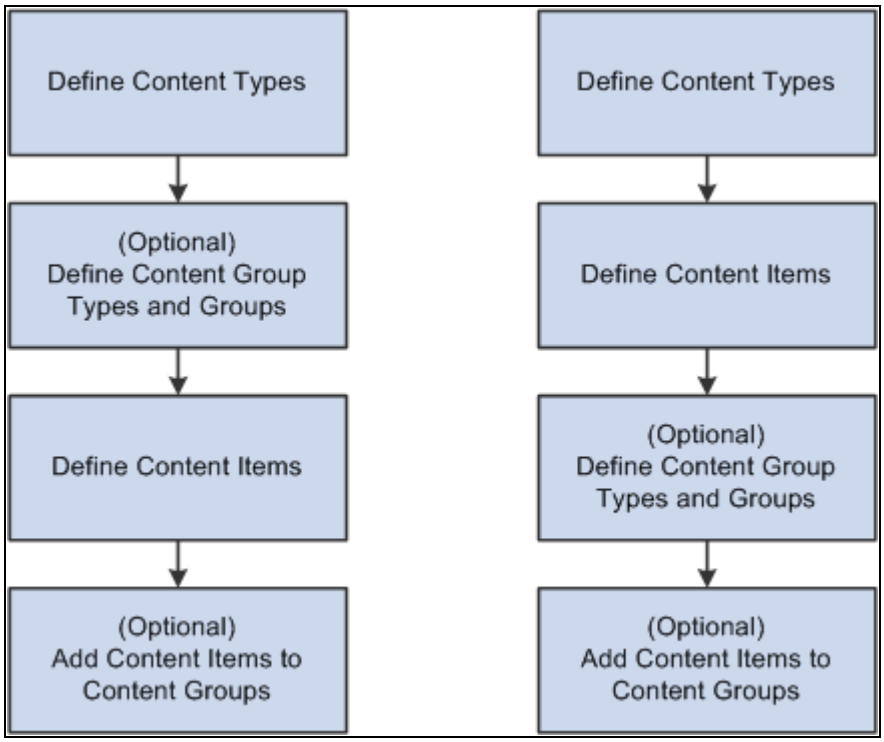
  Content groups enable you to categorize content items within a content type.

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

See Chapter 2, "Setting Up the Content Catalog," Defining Rating Models, page 31.

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

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



Setting up the content groups before content items or setting up content items first

Content Types and Content Items

The Content Type component (JPM_CAT_TYPES) has two pages:

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

  For each property, you define the attributes of the field as it appears on the Item Details page.

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

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

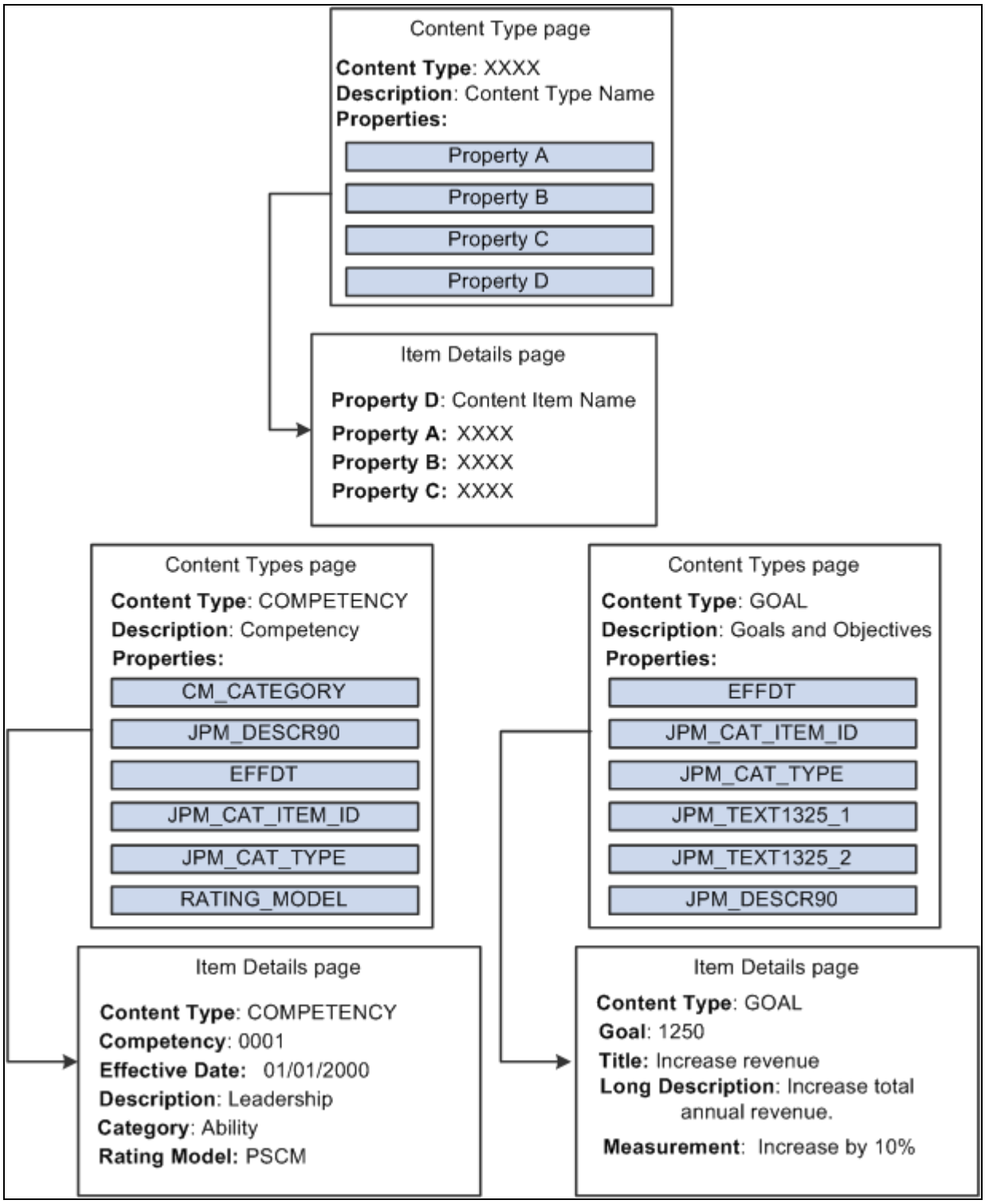
- The Item Details page is where you set up the main details for the content item.
- The Relationships page defines relationships between content items.

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

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

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

The fields on the Item Details page are entirely dependent on the properties selected on the Content Types page. The following diagram shows property selections on the Content Type page flowing though to become fields on the Item Details page. The diagram includes a generic content type and two example content types (competencies and goals):



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

Note. For a limited set of profile type properties, the Verity indexes that you use for the search and compare profile feature store only code-based data. These indexes support search word matching only on data containing alphanumeric, underscore ("_"), hyphen ("-"), or period (".") characters. The underscore, hyphen, and period characters must not be positioned at the beginning or the end of a word. When defining new content items or any data tied to the prompt list for profile item properties, you should assign identifiers that follow these requirements.

Setting Up Content Types and Properties

To set up content types and properties, use the Custom List Values (JPM_C_LIST_VALUES) and Content Types (JPM_CAT_TYPES) components.

This section provides overviews of content type properties, custom list values, free form content types, and discusses how to:

- Define custom list values.
- Define content type properties.
- Define content type relationship rules.

Understanding Content Type Properties

A content type is a broad definition of a group of items that can be added to the content catalog. Within a content type, specify the properties that all items of this type can or must have. The system displays the properties you define for a content type as fields on the Item Details page. You can override the default label text, select default values, and indicate if the field should be available for entry, unavailable for entry, or hidden on the Item Details page.

See Also

Appendix A, "Content Type and Profile Type Properties," Content Type Properties, page 231

Understanding Custom List Values

The fields displayed on the Content Item - Item Details page are determined on the Content Types page as properties. Many of these fields are associated with a list of values defined on the Translate Table, however, the PeopleSoft application enables administrators the ability to define a customer list of values for the EP_SUB_LEVEL and EP_ITEM_STATUS fields. This means that the same field, such as the Level field, may have different prompt values in content items of different content types. For example, in one content item a person may have the choice of selecting a level of difficulty *Advanced,Basic,* or *Intermediate,* while in another content item a person may have the choice of selecting from the values *Minimum,Basic,* or *Stretch.* The Custom List Values page enables organizations to change or add prompt values for these fields. On the Content Types page: Property Attributes tab you select which custom list to use for the EP_SUB_LEVEL content item property.

Note. Manage Profiles uses the EP_SUB_LEVEL field only. ePerformance uses the EP_SUB_LEVEL and EP_ITEM_STATUS fields.

The ePerformance business process also uses the Content Catalog to obtain content items. Through this integration, administrators can create custom lists for the EP_ITEM_STATUS and the Level of Difficulty (EP_SUB_LEVEL) fields on the ePerformance template and document.

This tables shows the custom lists delivered as system data:

Field Name	*Prompt List Name*	*Description*	*List Values*
EP_SUB_LEVEL	EP_SUB_LEVEL	Level of Difficulty	• A - Advanced • B - Basic • I - Intermediate
EP_ITEM_STATUS	EP_ITEM_STATUS	ePerformance Item Status	• A - Not Applicable • C - Complete • I - In Progress

Note. The EP_SUB_LEVEL field is delivered in the Content Catalog in the SUB_COMP (Sub-Competencies) content type only. You can create or update other content types to include this property, or field, if necessary.

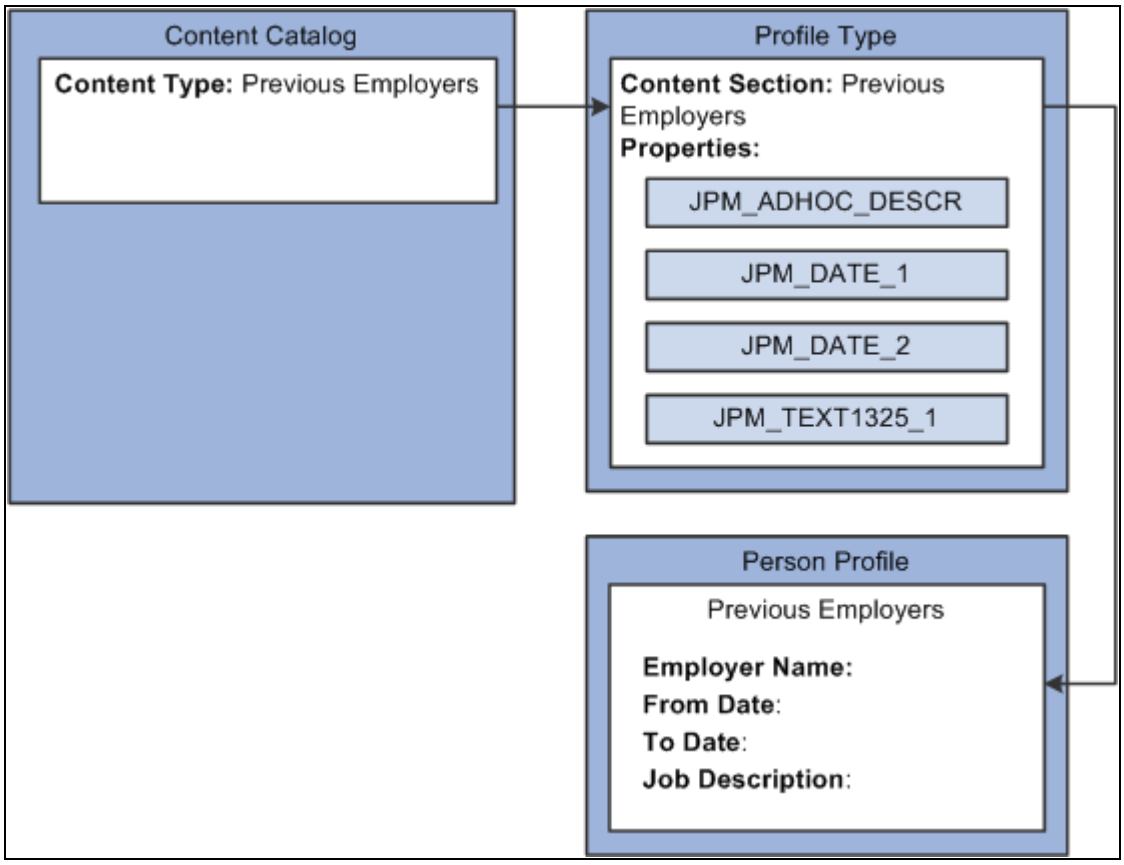
See Also

PeopleSoft Enterprise ePerformance 9.1 PeopleBook, "Setting Up Document Templates," Defining Sections

Understanding Free Form Content Types

Depending on your organization's requirements, you may find that certain types of profile content are not suitable for storing in the content catalog due to the quantity or maintainability of the data. For example, you may want to include a section in person profiles for recording an employee's previous employers. However, employers are not stored in the database and the information is applicable to person profiles only. For this type of information, you can define free form content types that are basically empty placeholders. Free form content types do not include fields and you cannot create content items for them.

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



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

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

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

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

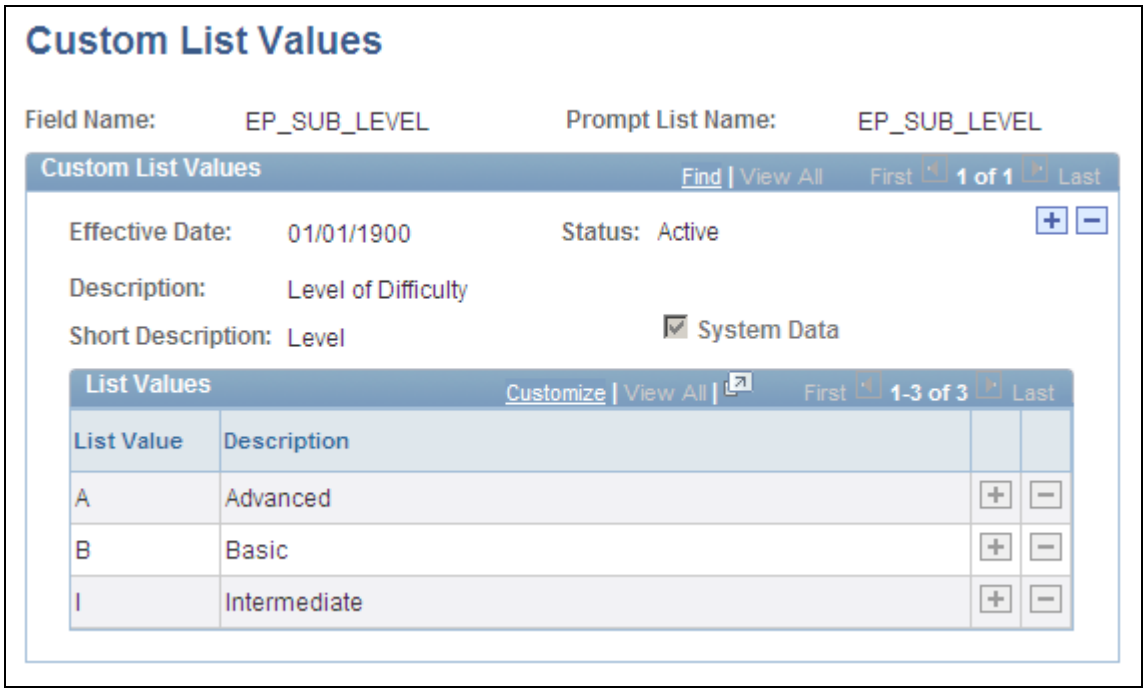
Pages Used to Set Up Content Types and Properties

Page Name	*Definition Name*	*Navigation*	*Usage*
Content List Values	JPM_C_LIST_VALUES	Set Up HRMS, Product Related, Profile Management, Content Catalog, Custom List Values, Custom List Values	Define custom list values that will be used to define valid values for level of difficulty and ePerformance item statuses.

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

Defining Custom List Values

Access the Custom List Values page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Custom List Values, Custom List Values).



Custom List Values page

Field Name Select a field that will serve as a field property of a content type where a person can select from the list of values that you define on this page. Valid fields are *EP_SUB_LEVEL* and *EP_ITEM_STATUS.*

Prompt List Name Enter the code that identifies this custom list. This list is associated with the List field of a content type property and determines which list of values are available to the user.

Description Enter the description of the custom prompt list. This value will display in the List field under the Properties tab on the Content Types page.

See Chapter 2, "Setting Up the Content Catalog," Property Attributes Tab, page 21.

System Data List values with this check box selected are delivered with the system.

List Values

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

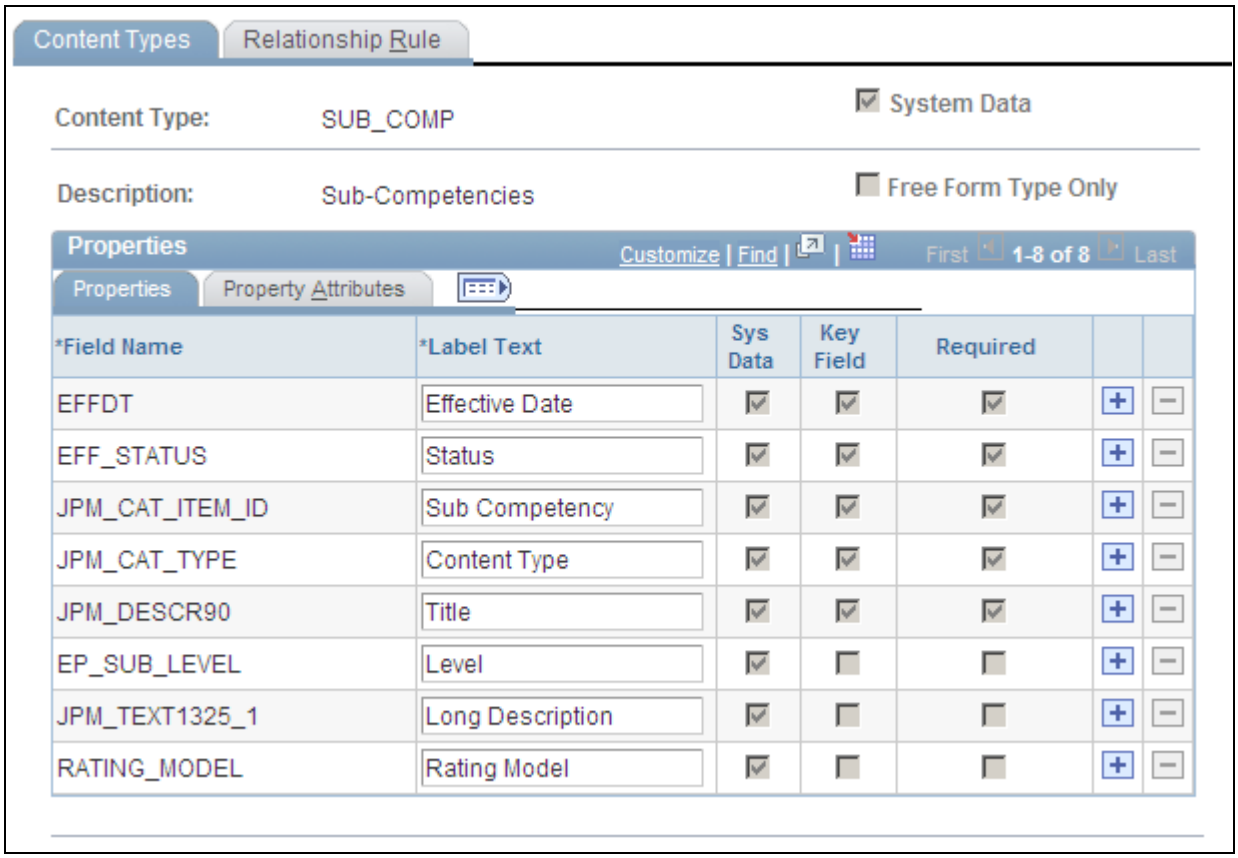
List Value Enter code values that will be stored in the field.

Description Enter the name of the value that the system will display. This text appears in the drop down list of the Level field on the Content Item field.

Note. The Level field label name is based on the default value that appears in the Label Text field for the EP_SUB_LEVEL row on the Content Types page.

Defining Content Type Properties

Access the Content Types page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Types, Content Types).



Content Types page: Properties tab

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

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

See Chapter 2, "Setting Up the Content Catalog," Understanding Free Form Content Types, page 16.

Properties Tab

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

All content types must have the following five properties:

- Content Type (JPM_CAT_TYPE)
- Content Item ID (JPM_CAT_ITEM_ID)
- Effective Date (EFFDT)
- Status as of Effective Date (EFF_STATUS)
- Description (JPM_DESCR90)

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

Add other properties to the content type that are required to track items of this type. For example, you can add a rating model to types whose items must be rated (such as competencies or language skills) or a duration property to types whose items are tracked by duration.

Property

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

See Appendix A, "Content Type and Profile Type Properties," Content Type Properties, page 231.

Label Text

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

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

Sys Data (system data)

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

Key Field

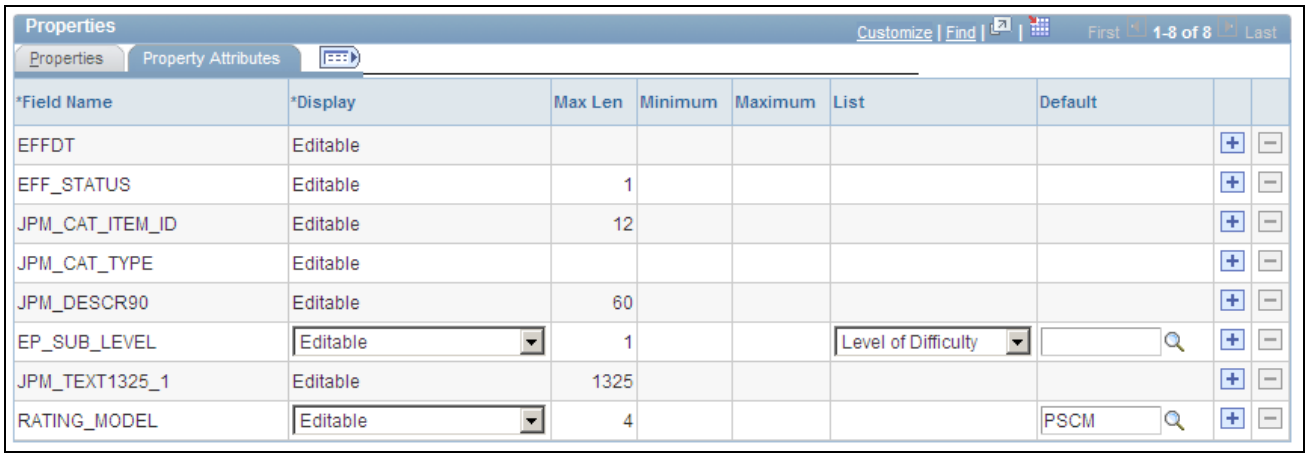
This field is display-only. The system selects it if the property is a key field for the record.

Required

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

Property Attributes Tab

Access the Property Attributes tab on the Content Types page.



Properties — Customize | Find | First 1-8 of 8 Last

Properties | Property Attributes

*Field Name	*Display	Max Len	Minimum	Maximum	List	Default
EFFDT	Editable					
EFF_STATUS	Editable	1				
JPM_CAT_ITEM_ID	Editable	12				
JPM_CAT_TYPE	Editable					
JPM_DESCR90	Editable	60				
EP_SUB_LEVEL	Editable	1			Level of Difficulty	
JPM_TEXT1325_1	Editable	1325				
RATING_MODEL	Editable	4				PSCM

Content Types page: Property Attributes tab

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

Max Len (maximum length) Enter the field length of this property.

Minimum and **Maximum** For numeric properties, enter the minimum and maximum values.

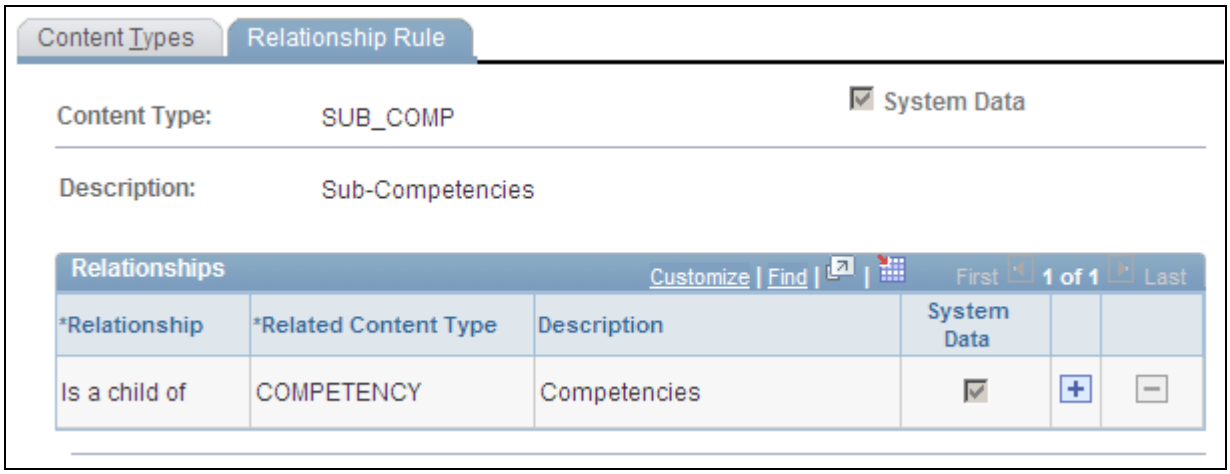
List Select a custom list defined in the Custom List Values table. This field appears only when there is a custom list defined for the field (as delivered, EP_SUB_LEVEL). When a list value is selected, the Default field values are dynamically built from the list values associated with the custom list value assigned.

See Chapter 2, "Setting Up the Content Catalog," Defining Custom List Values, page 18.

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

Defining Content Type Relationship Rules

Access the Relationship Rule page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Types, Relationship Rule).



Relationship Rule page

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

Relationship

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

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

Related Content Type

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

System Data

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

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

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

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

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

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

Defining Content Items

To set up content items, use the Content Items (JPM_CAT_ITEMS) component.

This section discusses how to:

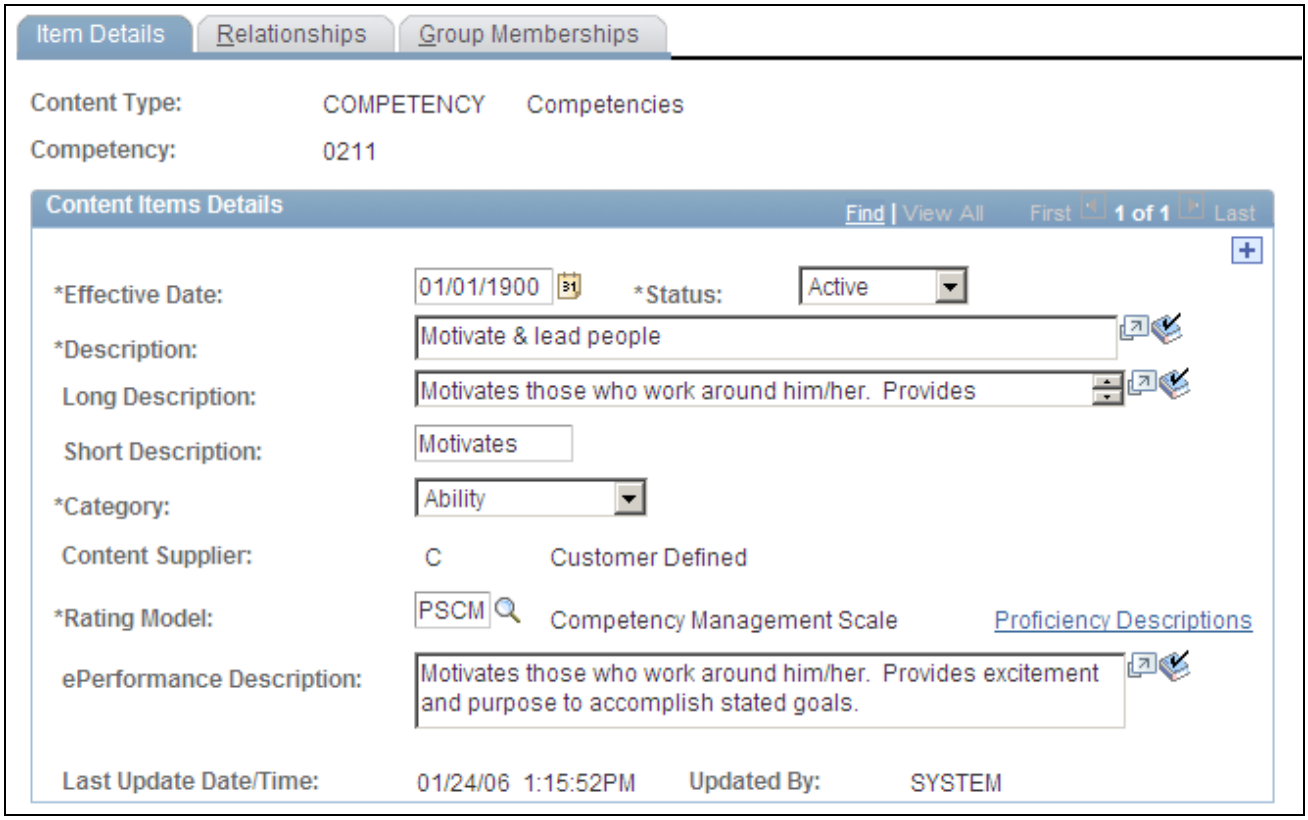
- Define content item details.
- Define proficiency descriptions.
- Set up and review content item relationships.
- Add content items to groups.

Pages Used to Define Content Items

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

Defining Content Item Details

Access the Item Details page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Item Details).



Item Details page

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

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

Proficiency descriptions are optional and are used by ePerformance only. They enable you to set up a rating description for a specific item. However, employees and managers can evaluate content items without proficiency descriptions.

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

Rating models are defined on the Rating Model page.

See Chapter 2, "Setting Up the Content Catalog," Defining Rating Models, page 31.

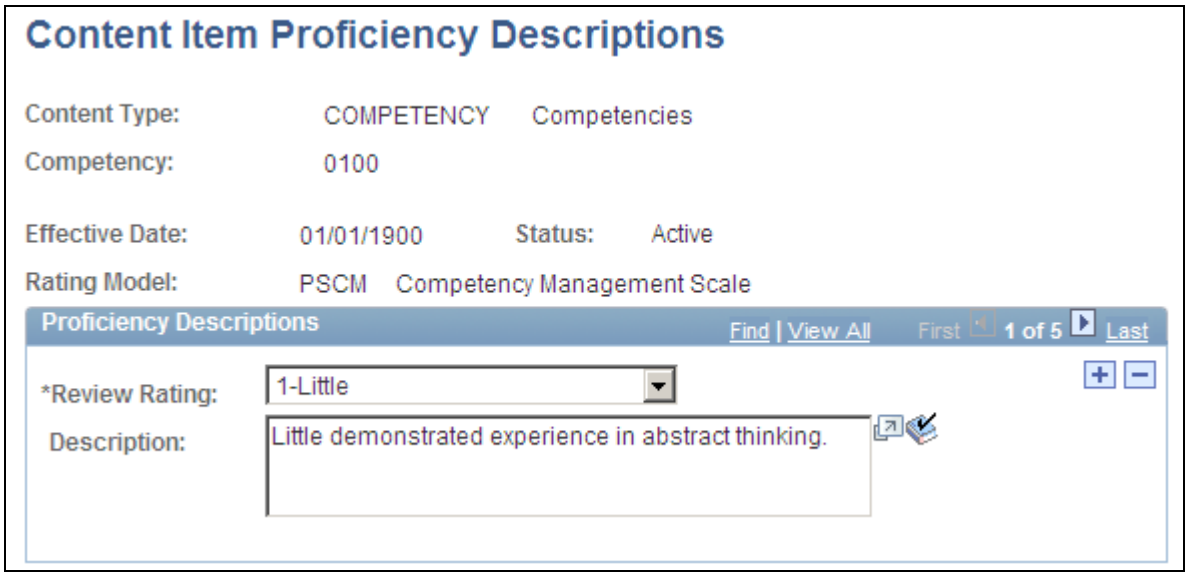
See Also

Appendix A, "Content Type and Profile Type Properties," Content Type Properties, page 231

Chapter 2, "Setting Up the Content Catalog," Understanding Content Catalog Setup, page 11

Defining Proficiency Descriptions

Access the Content Item Proficiency Descriptions page (click the Proficiency Descriptions link on the Item Details page).

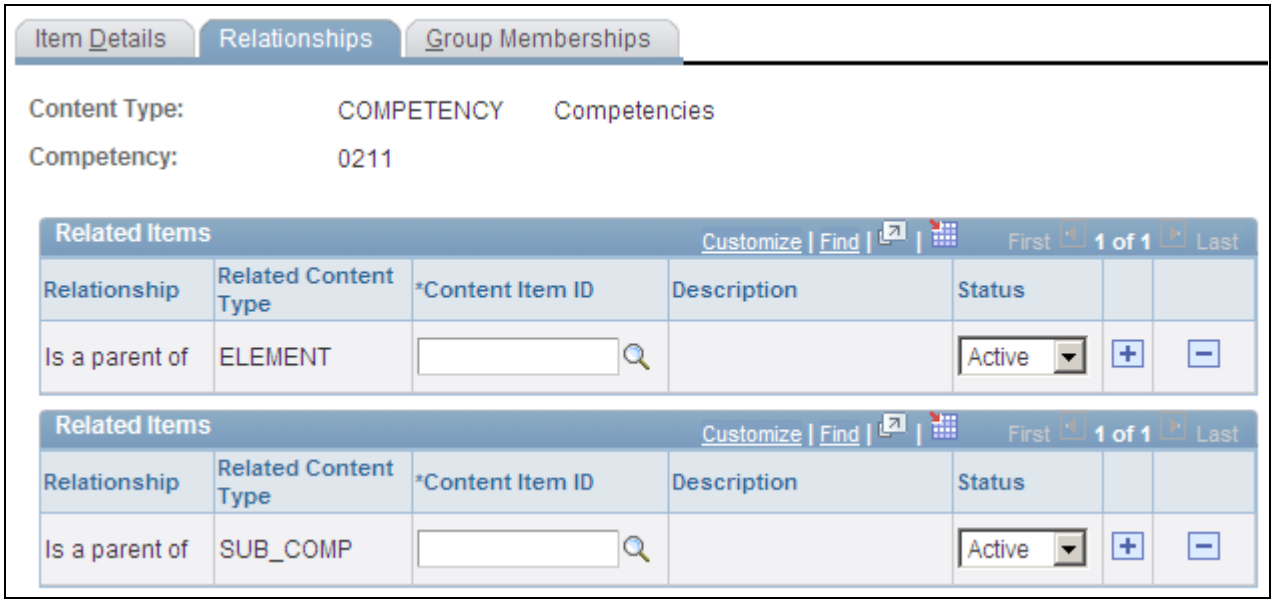


Content Item Proficiency Descriptions page

Review Rating Select a review rating. The system prompts against the rating model that you assigned on the Item Details page. For example, you can define what it means to be an *Expert* in conflict management (a 5 rating), or *Very Good* in conflict management (a 4 rating). This helps ensure that everyone in the organization knows what each rating means.

Setting Up and Reviewing Content Item Relationships

Access the Relationships page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Relationships).



Relationships page

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

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

Related Items

Relationship Displays the relationship rule defined for the content type.

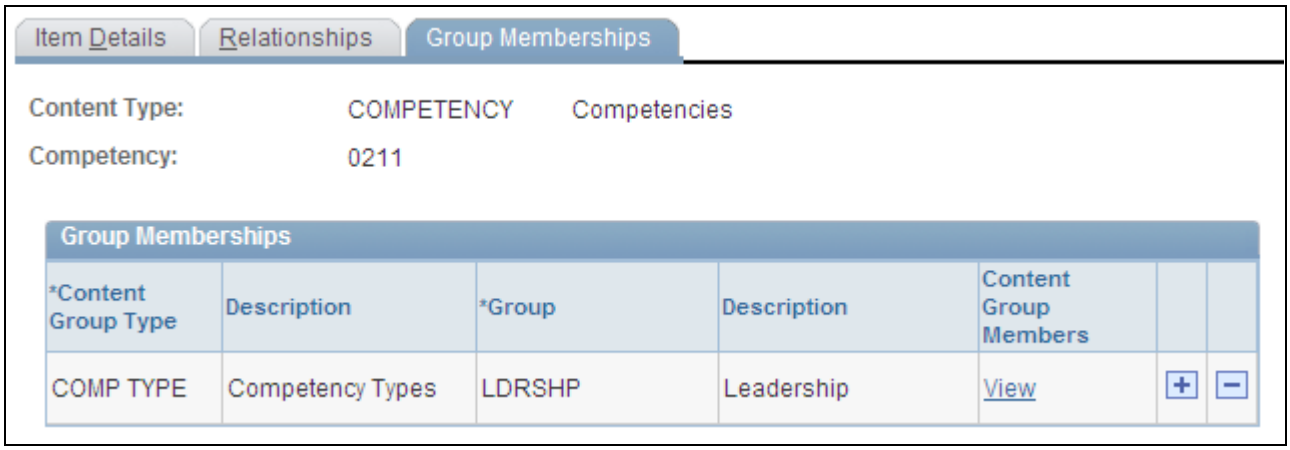
You can't define relationships between content items that differ from the relationship rules for the content types. For example, the COMPETENCY type has a parent relationship with the SUB_COMP type. Therefore you can't set up a child relationship between a competency and a sub-competency when defining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

Related Content Type Displays the content type of the related item.

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

Adding Content Items to Groups

Access the Group Memberships page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Group Memberships).



Group Memberships page

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

Content Group Type Select the content group type.

Group Select a group from the list of groups.

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

Defining Content Groups

To set up content groups, use the Content Groups (JPM_CAT_GROUPS) and the Content Group Members (JPM_CAT_GMEMB) components.

This sections discusses how to:

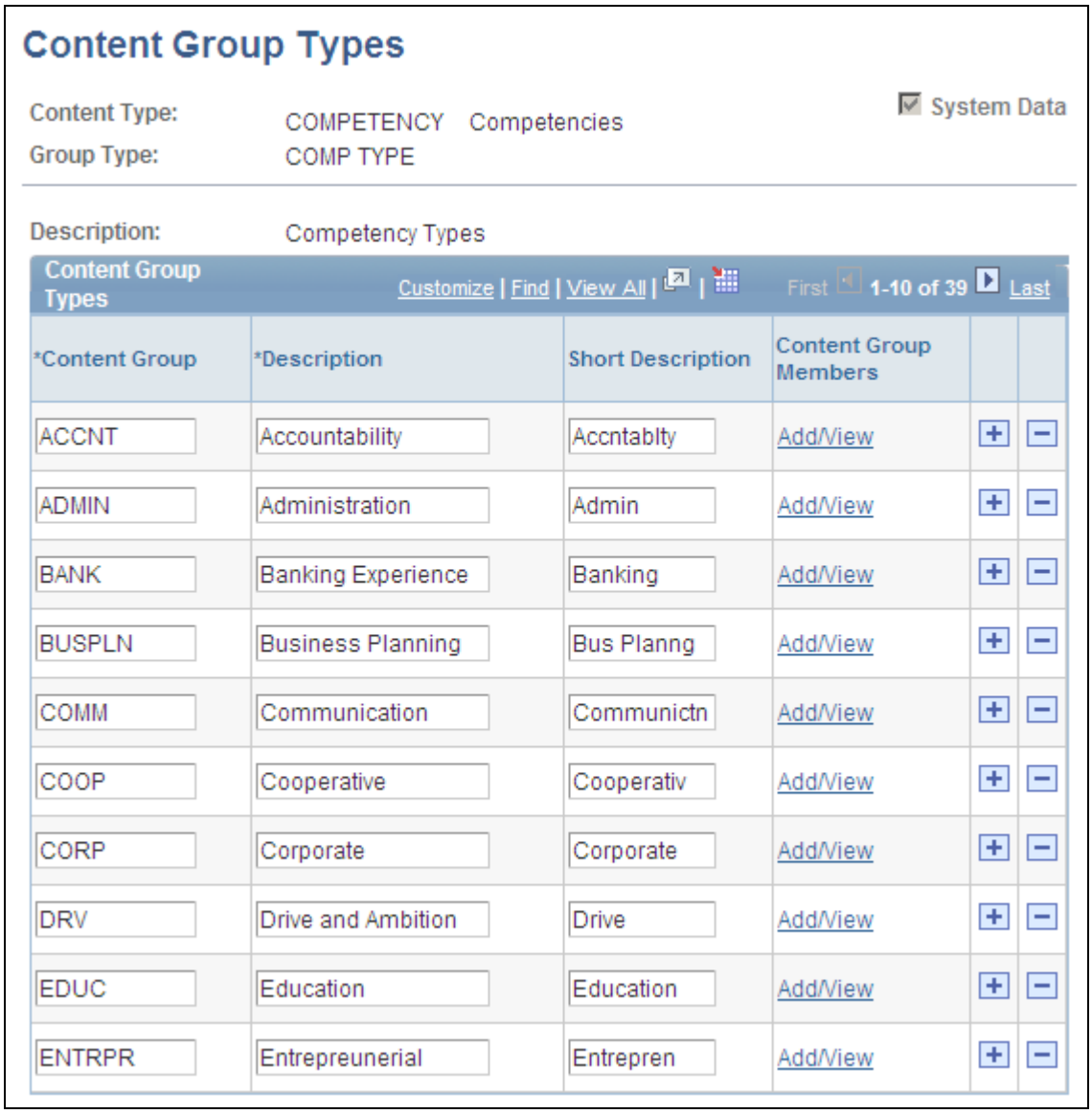
- Define content group types.
- Define content group members.

Pages Used to Define Content Groups and Members

Page Name	*Definition Name*	*Navigation*	*Usage*
Content Group Types	JPM_CAT_GROUPS	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Groups Types, Content Group Types	Define content group types and the groups within each content group type.
Content Group Members	JPM_CAT_GMEMB	• Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Group Members, Content Group Members • Click the Add/View link on the Content Group Types page. • Click the View link on the Content Item - Group Memberships page.	Define content group members. Add content items to the content groups that you have created on the Content Group Types page or view existing item members for a content group.

Defining Content Group Types

Access the Content Group Type page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Groups Types, Content Group Types).



Content Group Types

Content Type: COMPETENCY Competencies

Group Type: COMP TYPE

System Data

Description: Competency Types

Content Group Types — Customize | Find | View All | First 1-10 of 39 Last

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

Content Group Types page

Content Group Types

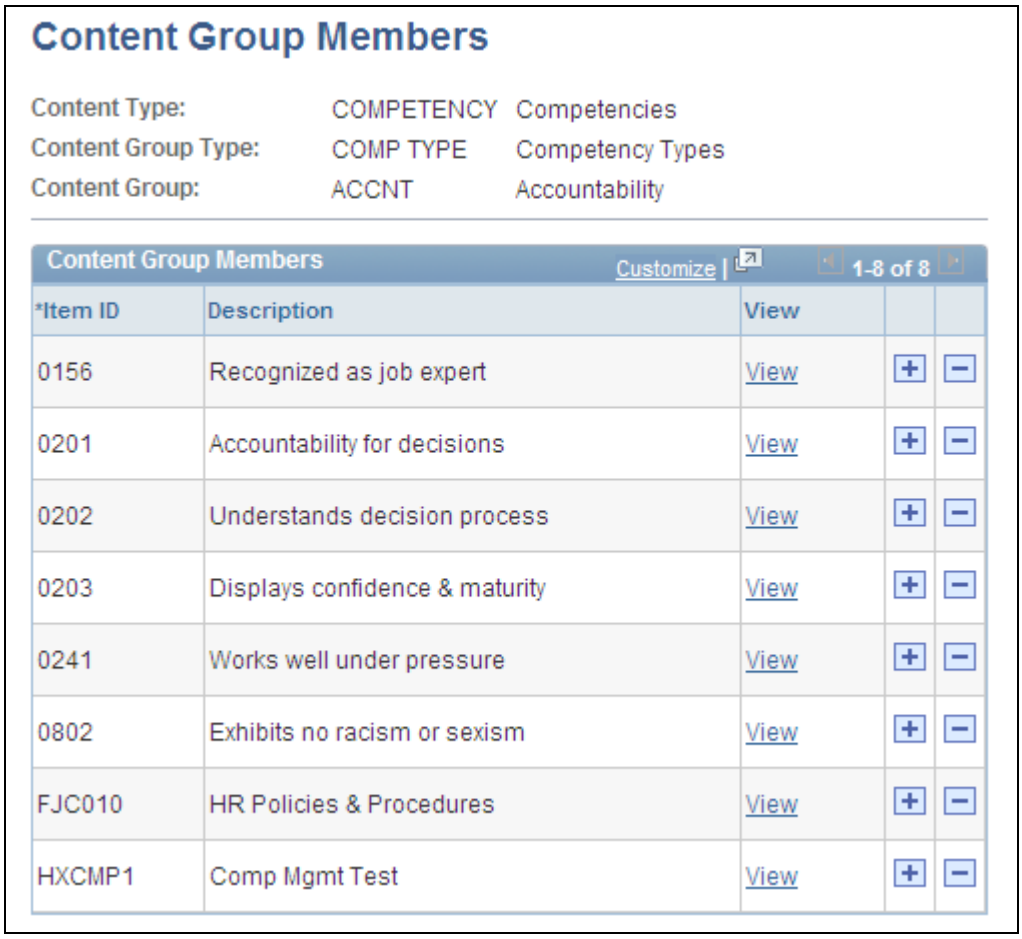
This group box lists all the content groups defined for the selected content group type.

Content Group Enter the name of the content group.

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

Defining Content Group Members

Access the Content Group Members page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Group Members, Content Group Members).



Content Group Members page

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

View Click this link to view the item definition. When you click the link, the system displays the Content Item - Group Memberships page.

Defining Rating Models

To set up rating models, use the Rating Model (RATING_MDL_TBL) component.

This section provides overviews of rating models, (USF) rating models, and discusses how to:

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

Understanding Rating Models

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

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

- Manage Profiles business process.

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

- PeopleSoft Enterprise ePerformance.

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

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

See Also

PeopleSoft Enterprise ePerformance 9.1 PeopleBook, "Setting Up ePerformance," Working with Manage Profiles

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Employee Reviews, "Setting Up Employee Reviews"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Plan Careers and Successions, "Planning Careers," Evaluating Employee Strengths and Developmental Areas

(USF) Understanding Rating Models

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

- GUSF (goal status for USF).

- PIP (performance improvement plans).

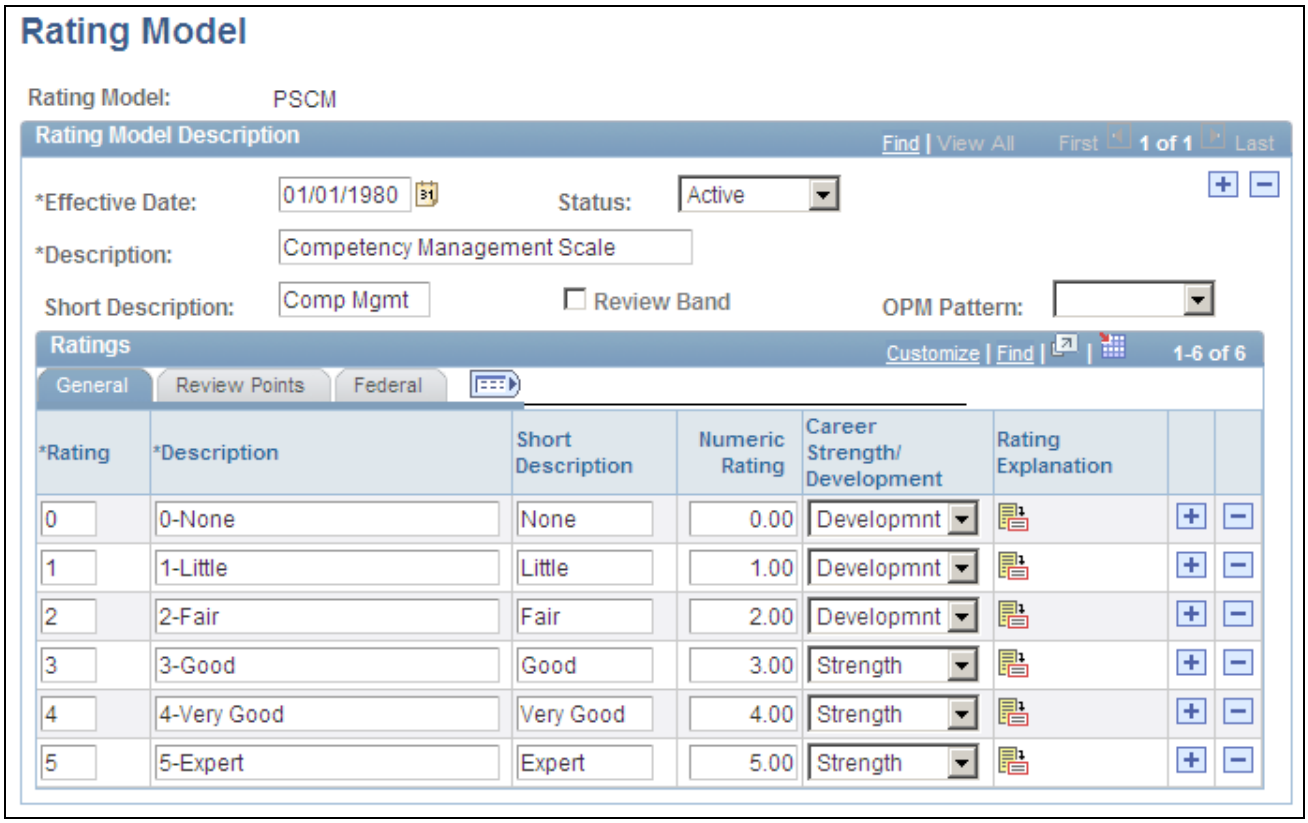
These rating models define statuses, rather than ratings, that you can assign to goals and performance improvement plans in performance evaluations. GUSF values are *Not Met*, *Met*, and *Exceeded*. PIP values are *In Progress*, *Satisfactory*, and *Unsatisfactory*.

Pages Used to Define Rating Models

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

Setting Up Rating Models

Access the Rating Model page (Set Up HRMS, Product Related, Profile Management, Content Catalog Rating Model, Rating Model).



Rating Model page: General tab

Rating Model Description

Review Band

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

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "(JPN) Updating Salaries for Japan."

OPM Pattern (Office of Personnel Management pattern)

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

General Tab

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

Rating

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

Numeric Rating

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

- For sections of a performance document that use the average calculation method, the system uses this value to calculate the section's average or weighted average. It also uses this value to calculate the average rating for each item in the section (when sub-items exist).
- If you select the Show Numeric Ratings/Points check box on the Rules/Roles page (EP_TMPL_DEFN3) of the Template Definition component, the value you enter here displays next to the rating on the performance document. This feature is useful when ratings are alphabetic.

Career Strength/Development

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

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

Strength if the rating indicates an area of strength.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Plan Careers and Successions*, "Planning Careers," Evaluating Employee Strengths and Developmental Areas.

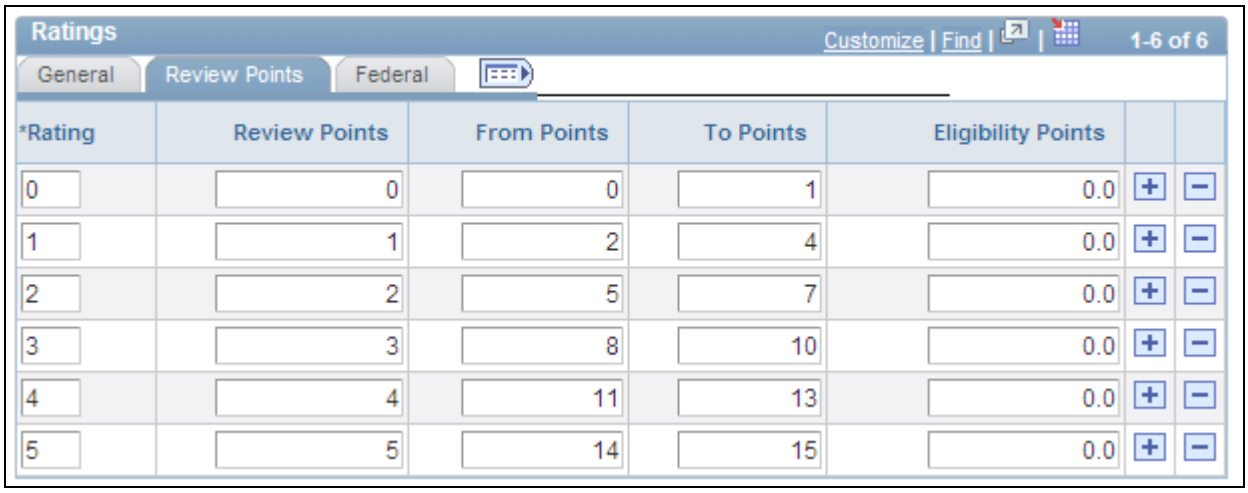
(rating explanation)

Click to display the Review Rating Explanation page.

See Chapter 2, "Setting Up the Content Catalog," Adding Review Rating Explanations, page 37.

Review Points Tab

Access the Rating Model page: Review Points tab.



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

Rating Model page: Review Points tab

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

Rating

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

Review Points

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

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

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

- Manage Profiles uses the matching function to determine how well an employee matches the competencies for a given role. The matching function uses the review points that you enter here. However, the review points are not used in the Search and Compare profiles feature.

  See Chapter 6, "Matching Competencies to Roles," page 181.

  See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Administering Salary Plans, Grades, and Steps."

From Points and **To Points**

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

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

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

Eligibility Points

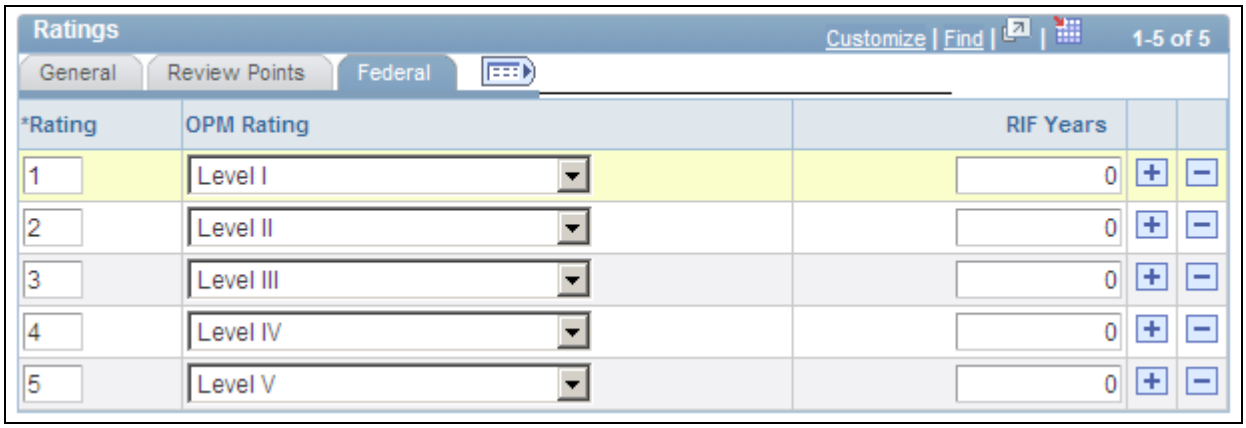
If applicable, enter the number of points used by the *Shohkaku* (JPN), or Grade Advance, eligibility feature of the Plan Salaries business process. This is used only if the Appl for Grade Advance Prc check box is selected on the JPN Review Definition.

See *PeopleSoft Enterprise ePerformance 9.1 PeopleBook*, "Setting Up Document Templates," (JPN) Creating Review Identifiers.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "(JPN) Updating Salaries for Japan."

(USF) Federal Tab

Access the Rating Model page: Federal tab.



Rating Model page: Federal tab

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting PeopleSoft Applications for Your Installation.

OPM Rating (Office of Personnel Management rating)	Select the OPM rating that correlates with the rating level. This field is used for reporting to the Central Personnel Data File (CPDF)
RIF Years (Reduction in Force years)	Enter the number of RIF Years associated with this rating level.

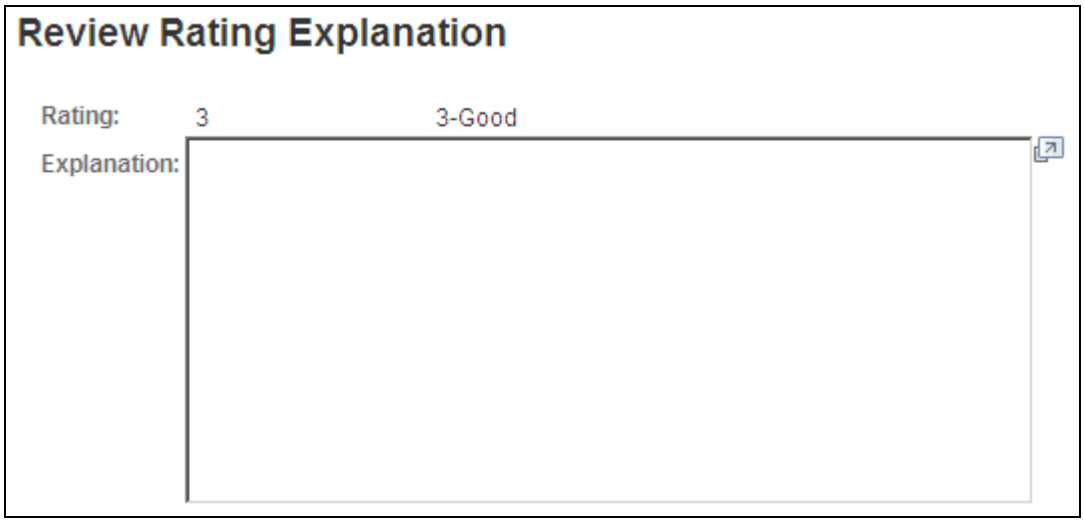
See Also

Chapter 6, "Matching Competencies to Roles," page 181

Chapter 5, "Managing Profiles," Maintaining Profiles, page 109

Adding Review Rating Explanations

Access the Review Rating Explanation page (click the Rating Explanation icon on the Rating Model page).



Review Rating Explanation page

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

Chapter 3

Setting Up Profile Management

This chapter provides an overview of profile management, lists common elements, and discusses how to:

- Configure Manage Profiles.
- Define education-related information.
- Define instance qualifiers.
- Set up profile identity and association options.
- Set up profile types.
- Create profile group types and profile groups.
- Set up to use XML Publisher reports and profiles.

Understanding Profile Management

Organizations typically use two types of profile:

- Non-person profiles.

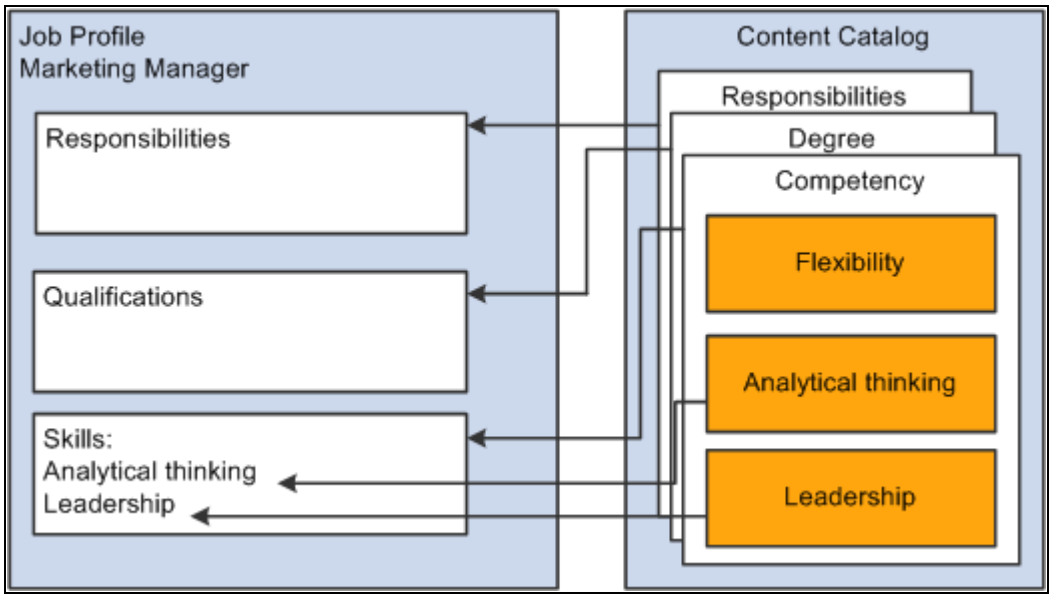
  These describe the competencies, qualifications, and responsibilities of a certain job code, position, job family, or salary grade, or other entities in the system.

- Person profiles.

  These describe people's skills, competencies, accomplishments, and performance. Manage Profiles enables you to create profiles for employees and contingent workers.

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

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



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

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

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

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

Entity Types

Profiles fall into two categories:

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

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

- Person profiles.

  A person profile is created for a specific person ID.

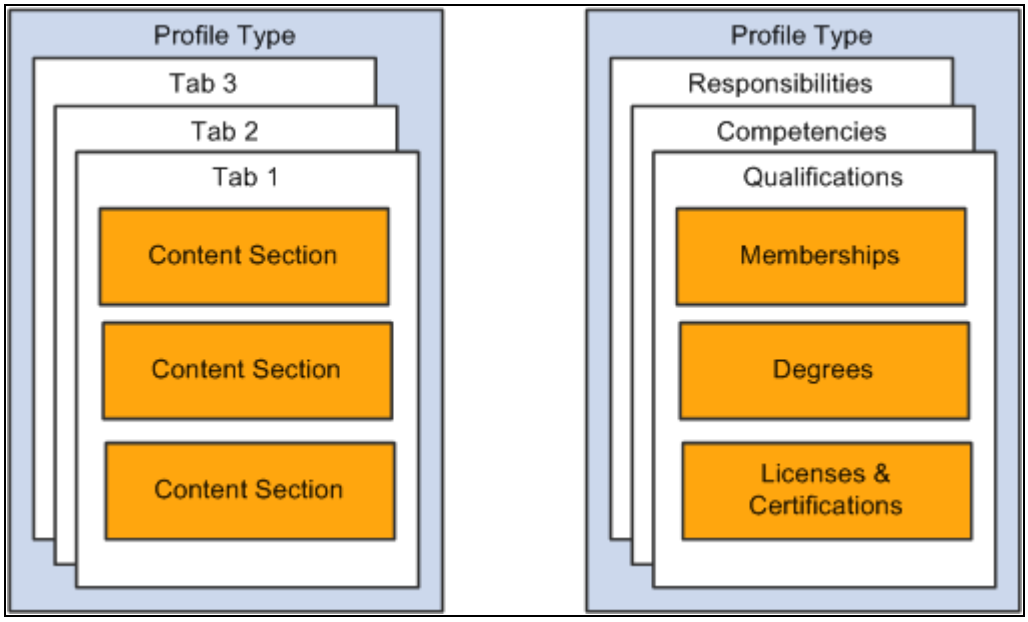
When you define a profile type, you specify the type of entities that the user can select when creating a profile. For example, suppose that you create a profile type and specify that it can be linked to job codes and salary grades. When users create a profile based on that profile type, they can only select job codes, salary grades, or both job codes and salary grades for the new profile. A profile type cannot be linked to both business entities and people.

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

In addition to profile identities, you can also link a profile type to entities outside the Manage Profiles business process. These entities are known as *profile association options.* ePerformance templates are linked to profile types in this way. The Profile Association Options page defines all the entity types that can be associated to profile types.

Profile Content

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



Content for profile types is divided into tabs and content sections

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

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

Note. The profile type definition does not include content items. The purpose of the profile type is to provide the structure for the new profile and not the detailed content. Users add content items when they create a profile.

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

Property Category	*Usage*
Career Properties	Properties tied to the delivered Mobility content types: Location Preference, Geographic Preference, International Preference, and Travel Preference (properties cannot be used in any custom content).
Common Properties	Properties used for multiple content sections. A specific set of translate values or a prompt table is tied to each property.
Country Properties	Properties tied to the delivered education content sections: School Education, Degrees, and Area of Study.
Education Properties	Properties tied to the delivered education content sections: School Education, Degrees, and Area of Study.
Key Properties	Properties that are part of the record key structure and special process indicator properties.
Use Defined Properties	Properties can be used for extending delivered content sections or defining new content sections. The following types are provided: Integer Decimal Percent Checkbox Date Text (254) Text (1325)

Profile Security

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

- Administrator

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

- Manager

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

- Employee

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

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

See *PeopleSoft Enterprise eDevelopment 9.1 PeopleBook*, "Maintaining My Profiles."

Profile Approvals

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

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

   On the Profile Type - Attributes page, you define one approvals workflow transaction and one approvals definition for the profile type.
3. Specify whether identities require approval (non-person profile types only).

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

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

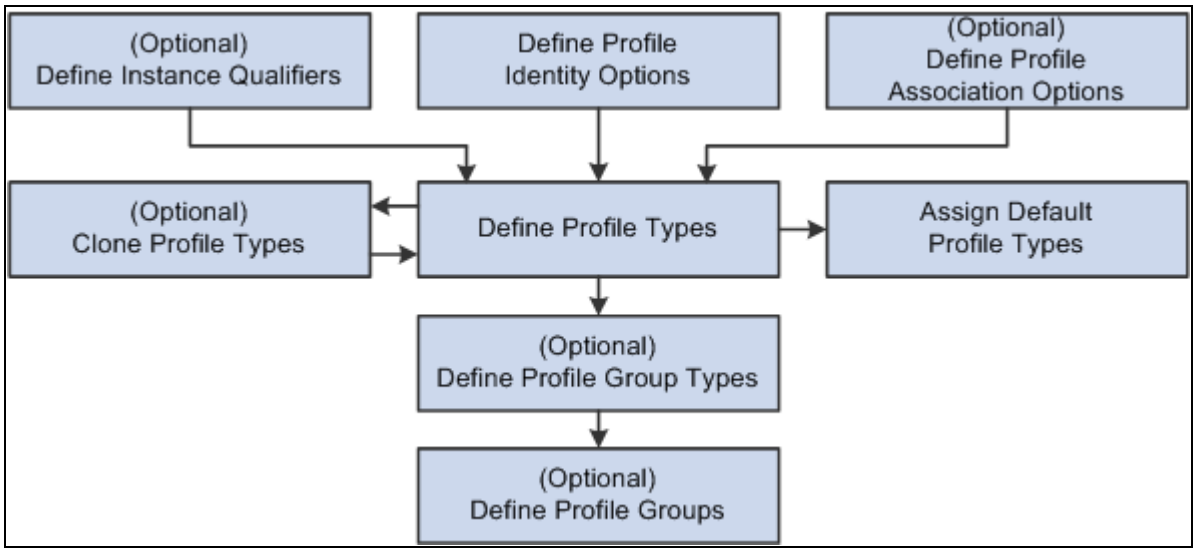
   You should add the workflow status property (JPM_WF_STATUS) to content sections that require approval to enable users to view the status of profile items as they are processed by the Approvals Framework. Other useful properties for tracking approval are the last updated date and time property (LASTUPDDTTM),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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

See Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 69.

Manage Profiles Setup

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



Steps for setting up profile management

To set up profile management you define the following:

- (Optional) Instance qualifiers.

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

- Profile Identity Options.

- (Optional) Profile Association Options.

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

- Profile Types and Clone Profile Types.

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

- Assign Default Profile Types.

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

- (Optional) Profile Group Types and Profile Groups.

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

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

See Also

Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 150

Common Elements Used in This Chapter

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

Configuring Manage Profiles

To configure Manage Profiles, use the Profile Management Installatn (JPM_INSTALLATION) component.

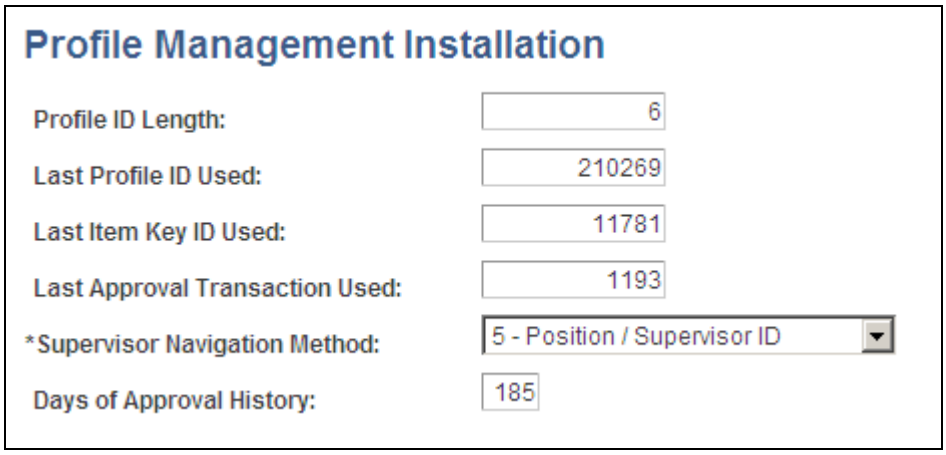
This section discusses how to configure Manage Profiles installation settings:

Page Used to Configure Manage Profiles

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

Configuring Manage Profiles Installation Settings

Access the Profile Management Installation page (Set Up HRMS, Install, Product and Country Specific, Profile Management Installatn, Profile Management Installation).



Profile Management Installation page

Profile ID Length

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

Last Profile ID Used

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

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

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

Last Item Key ID Used

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

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

Last Approval Transaction Used

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

Supervisor Navigation Method

Select the method that is used by the Build Manager List process to determine supervisor relationships. Select from these options: *2 - Supervisor Id,3 - Department Manager ID,4 - Reports To Position,5 - Position / Supervisor ID,* or *6 - Position / Dept Manager.*

See Chapter 4, "Setting Up Search and Compare Profiles," page 89.

Days of Approval History

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

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

See Also

Chapter 5, "Managing Profiles," page 107

Defining Education-Related Information

To set up information about educational establishments and areas of study use the School Types (SCHOOL_TYPE_TABLE), Schools (SCHOOL_TABLE), Majors (MAJOR_TABLE), and Faculty Table JPN (FACULTY_TABLE_JPN) components.

This section provides an overview of education-related information and discusses how to:

- Track schools.
- (JPN) Define faculty information for Japan.

Understanding Education-Related Information

If you want to include school type, school, major, minor, or Japanese faculty or sub-faculty codes in profiles, add the appropriate property to content sections in your profile types. These are the properties that are associated with the education tables:

- SCHOOL_TYPE
- SCHOOL_CODE
- SCHOOL_DESCR
- MAJOR_CODE
- MAJOR_DESCR
- JPM_MINOR_CD
- MINOR_DESCR
- FACULTY_CODE (for Japan)

- FACULTY_DESCR (for Japan)
- SUBFACULTY_CODE (for Japan)
- SUBFACULTY_DESCR (for Japan)

The delivered PERSON profile type is configured to enable you to record employees' education information. The Education tab in this profile type has content sections for School Education, Degrees, and Areas of Study that use the information in the education tables.

The descriptions you enter in the education tables will appear in the education-related profile pages as display only when you enter the school, major, minor, faculty, or sub-faculty codes on the page.

See Also

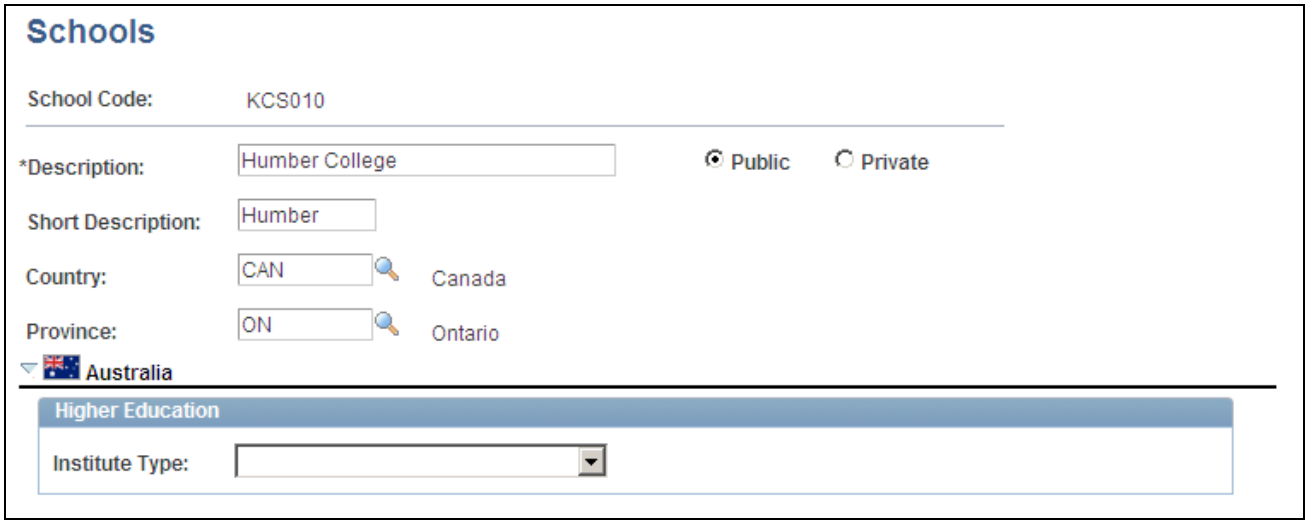
Appendix A, "Content Type and Profile Type Properties," Profile Type Properties, page 235

Pages Used to Define School Information

Page Name	*Definition Name*	*Navigation*	*Usage*
School Types	SCHOOL_TYPE_TBL	Set Up HRMS, Common Definitions, School Information, School Types, School Types	Set up codes for the types of schools that employees might have attended, for example, high schools, universities, or professional schools.
Schools	SCHOOL_TABLE	Set Up HRMS, Common Definitions, School Information, Schools, Schools	Define codes for specific schools. The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.
Majors	MAJOR_TABLE	Set Up HRMS, Common Definitions, School Information, Majors, Majors	Define codes for areas of study most commonly associated with school degrees or certificates. These values will be used for major and minor degrees.
Faculty Table JPN	FACULTY_TABLE_JPN	Set Up HRMS, Common Definitions, School Information, Faculty Table JPN, Faculty Table JPN	(JPN) Define faculties and associate sub-faculties and a major category with them.

Tracking Schools

Access the Schools page (Set Up HRMS, Common Definitions, School Information, Schools, Schools).



Schools page

Description Enter a description of the school. When you enter a school code in the profile pages, the system enters this text in the Description field as display only.

Country Select the country code for the school. The country codes are stored in the Country Table. Depending on the country that you select, the system displays an associated field for defining the area of the country in which the school is located, such as State,Province, Community,Department, or Country.

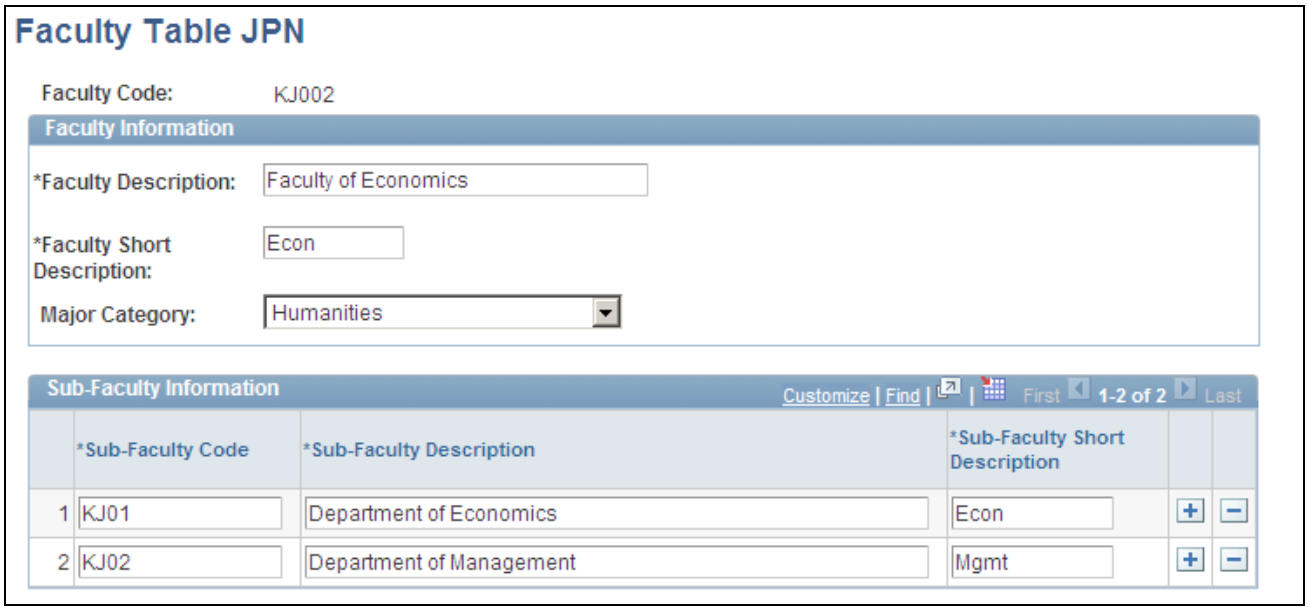
Public and **Private** Select to indicate whether the school is a public school or privately-funded.

(AUS) Australia

Institute Type Select an institute type for an Australian school.

(JPN) Defining Faculty Information for Japan

Access the Faculty Table JPN page (Set Up HRMS, Common Definitions, School Information, Faculty Table JPN, Faculty Table JPN).



Faculty Table JPN page

Faculty Description Enter a description of the faculty. When you enter a faculty or sub-faculty code in the profile pages, the system enters this text in the Description field as display only.

Major Category Select a major category value.

The value that you select here is the default major category wherever you select this faculty on a profile. You can also override the default.

Sub-Faculty Code Enter a code for the sub-faculty. You can enter multiple sub-faculties. Only sub-faculties that you enter for this faculty can be selected wherever you select the faculty on a profile.

Defining Instance Qualifiers

To define your instance qualifier sets, use the Instance Qualifiers (JPM_JP_INST_QUAL) component.

This section provides an overview of instance qualifiers, instance qualifier integration, and discusses how to set up instance qualifiers.

Understanding Instance Qualifiers

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

Define instance qualifiers in one of two ways:

- By selecting a record in the database.

  For example, if you specify the PERSON_NAME record, the person ID is the instance qualifier.

- By entering the values of each instance qualifier.

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

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

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

These are the properties for instance qualifiers:

- JPM_CAT_ITEM_QUAL (instance qualifier 1).

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

- JPM_CAT_ITEM_QUAL2 (instance qualifier 2).

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

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

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

Field	***Field Label***	***Instance Qualifier Set***
JPM_CAT_ITEM_QUAL	Evaluation Type	EVAL_TYPE
JPM_CAT_ITEM_QUAL2	Reviewer ID	REVIEWER_ID

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

Field	***Field Label***	***Instance Qualifier Set***
JPM_CAT_ITEM_QUAL2	Major Code	MAJOR

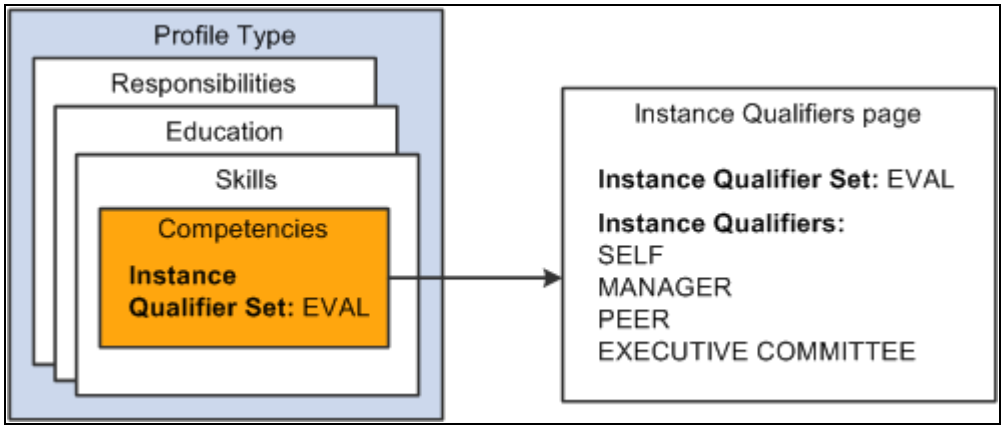
This lists the instance qualifier fields, the field name, and the instance qualifier sets for the NVQ section:

Field	***Field Label***	***Instance Qualifier Set***
JPM_CAT_ITEM_QUAL	Review Type	REVIEW_TYPE

Field	Field Label	Instance Qualifier Set
JPM_CAT_ITEM_QUAL2	Reviewer ID	NVQ_REVIEWER

Example: Using Instance Qualifiers

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



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

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

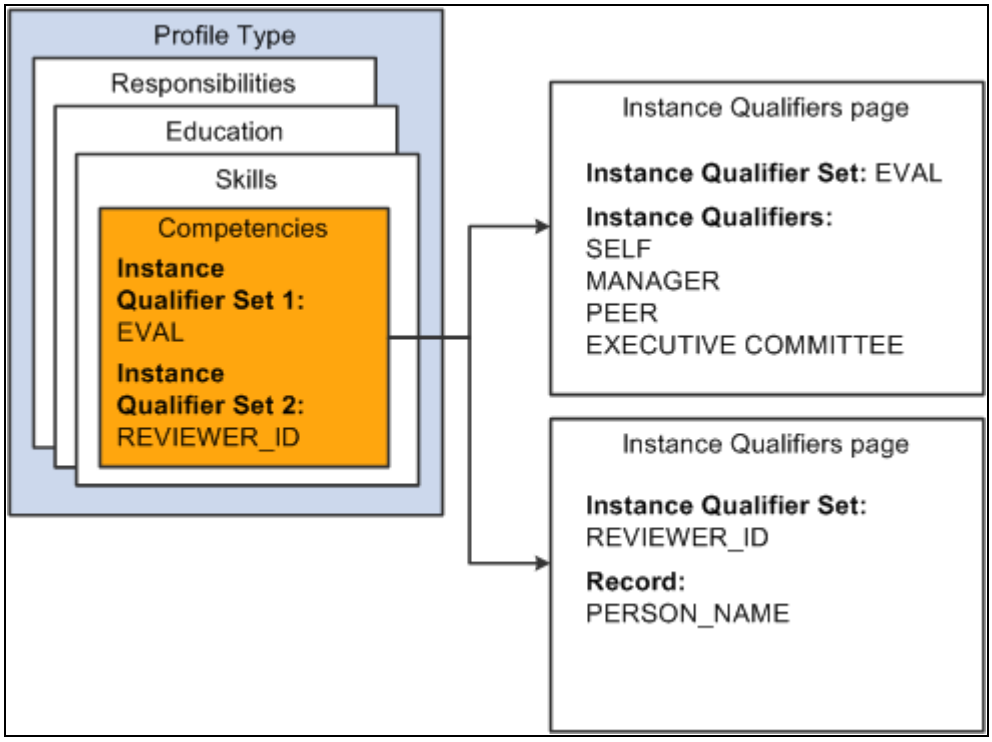
Profile Item	Effective Date	Rating	Instance Qualifier
Abstract Thinking	April 16, 2009	3 (Good)	SELF
Analytical Thinking	April 16, 2009	5 (Expert)	SELF

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

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

Example: Using Two Instance Qualifier Sets

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



Example of two instance qualifier sets qualifying the same content section

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

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

Understanding Instance Qualifier Integration

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

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

See Also

PeopleSoft Enterprise ePerformance 9.1 PeopleBook, "Setting Up Document Templates," Defining Sections

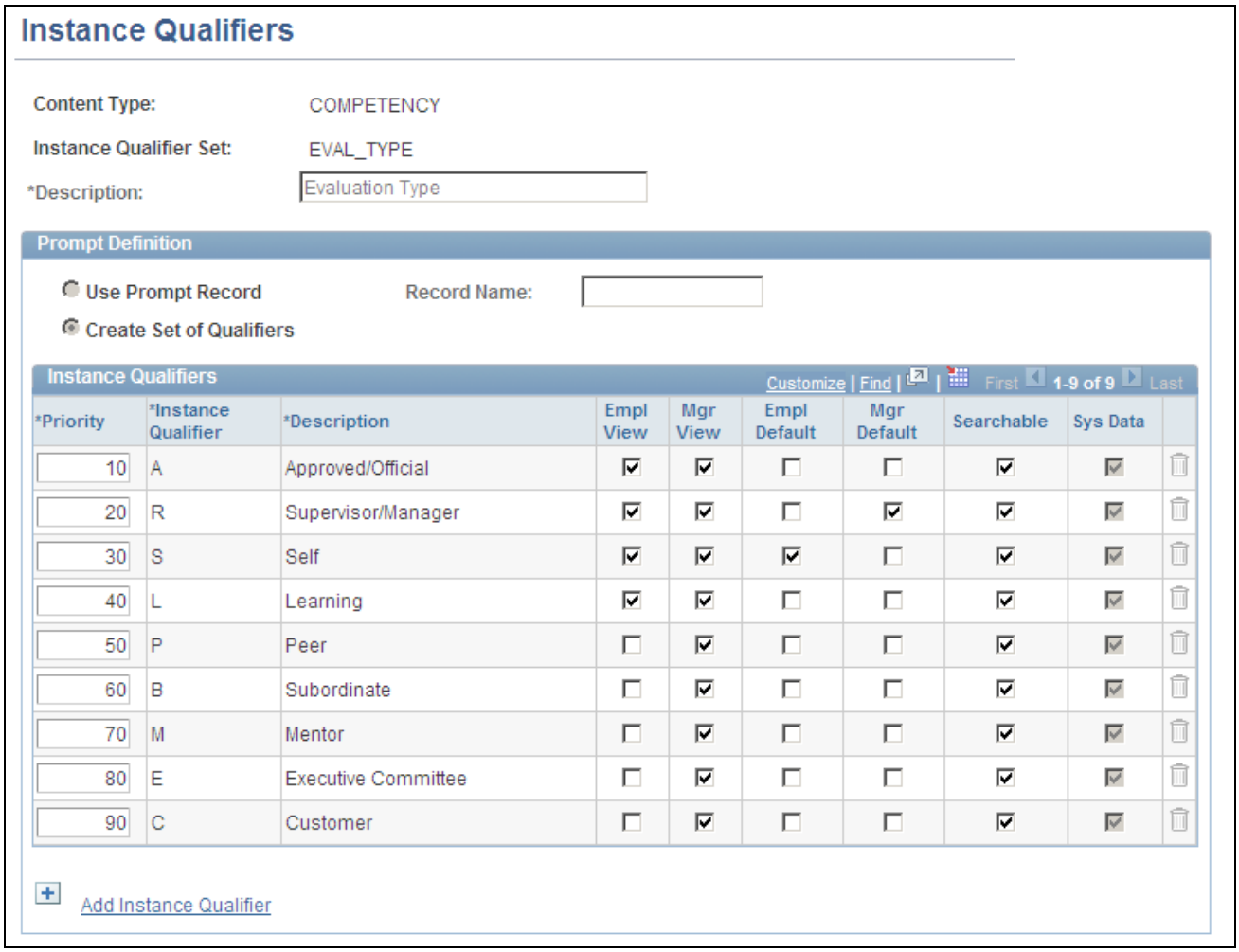
PeopleSoft Enterprise Learning Management 9.1 PeopleBook

Page Used to Define Instance Qualifiers

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

Setting Up Instance Qualifiers

Access the Instance Qualifiers page (Set Up HRMS, Product Related, Profile Management, Profiles, Instance Qualifiers, Instance Qualifiers).



Instance Qualifiers page

Use Prompt Record

Select to use a record in the database as the instance qualifiers. For example, you might use the PERSON_NAME record as the instance qualifier. The system makes the Record Name field available and hides the Instance Qualifiers grid area.

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

Record Name

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

Create Set of Qualifiers

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

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

Instance Qualifiers

Priority	Enter a number that indicates the priority of the instance qualifier. The priority increases as the number decreases, so that the instance qualifier with the lowest number is considered the highest priority. The priority value determines the order in which the system displays instance qualifiers. The Maintain Profile Indexes process (JPM_BLD_INDX) that builds the Verity indexes also uses this field in the Search and Compare Profiles feature. The process uses the priority value to determine which profile item row is included in the index. The process includes the row that has the instance qualifier with the highest priority. See Chapter 4, "Setting Up Search and Compare Profiles," Building the Search Indexes, page 96.
Instance Qualifier	Enter the instance qualifier code and enter a description in the Description field.
Empl View (employee view)	Select this check box to enable employees to view rows in a profile that are assigned the selected instance qualifier.
Mgr View (manager view)	Select this check box to enable managers to view rows in a profile that are assigned the selected instance qualifier.
Empl Default (employee default)	Select this check box to specify the instance qualifier that is automatically used in the employee self-service transactions. If you select a check box in this column, when employees add or update rows in self-service, the system inserts the selected instance qualifier and employees cannot change the instance qualifier.
Mgr Default (manager default)	Select this check box to specify the instance qualifier that is automatically used in the manager self-service transactions. If you select a check box in this column, when managers add or update rows in self-service, the system inserts the selected instance qualifier and managers cannot change the instance qualifier.
Searchable	Select this check box if you want profile items with the selected instance qualifier to be included in the Verity indexes. The Maintain Profile Indexes process (JPM_BLD_INDX) uses this field to determine which profile item rows are included in the Verity indexes that are used by the Search and Compare Profiles feature. If the Searchable check box is not selected, any profile item rows that are assigned the selected instance qualifier are always excluded from the Verity index.

Setting Up Profile Identity and Association Options

To set up profile identity options and profile association options for your organization, use the Profile Identity Options (JPM_RLAT_SETUP) and the Profile Association Options (JPM_RLAT_ASC_SETUP) components.

This section discusses how to:

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

Common Elements Used in This Section

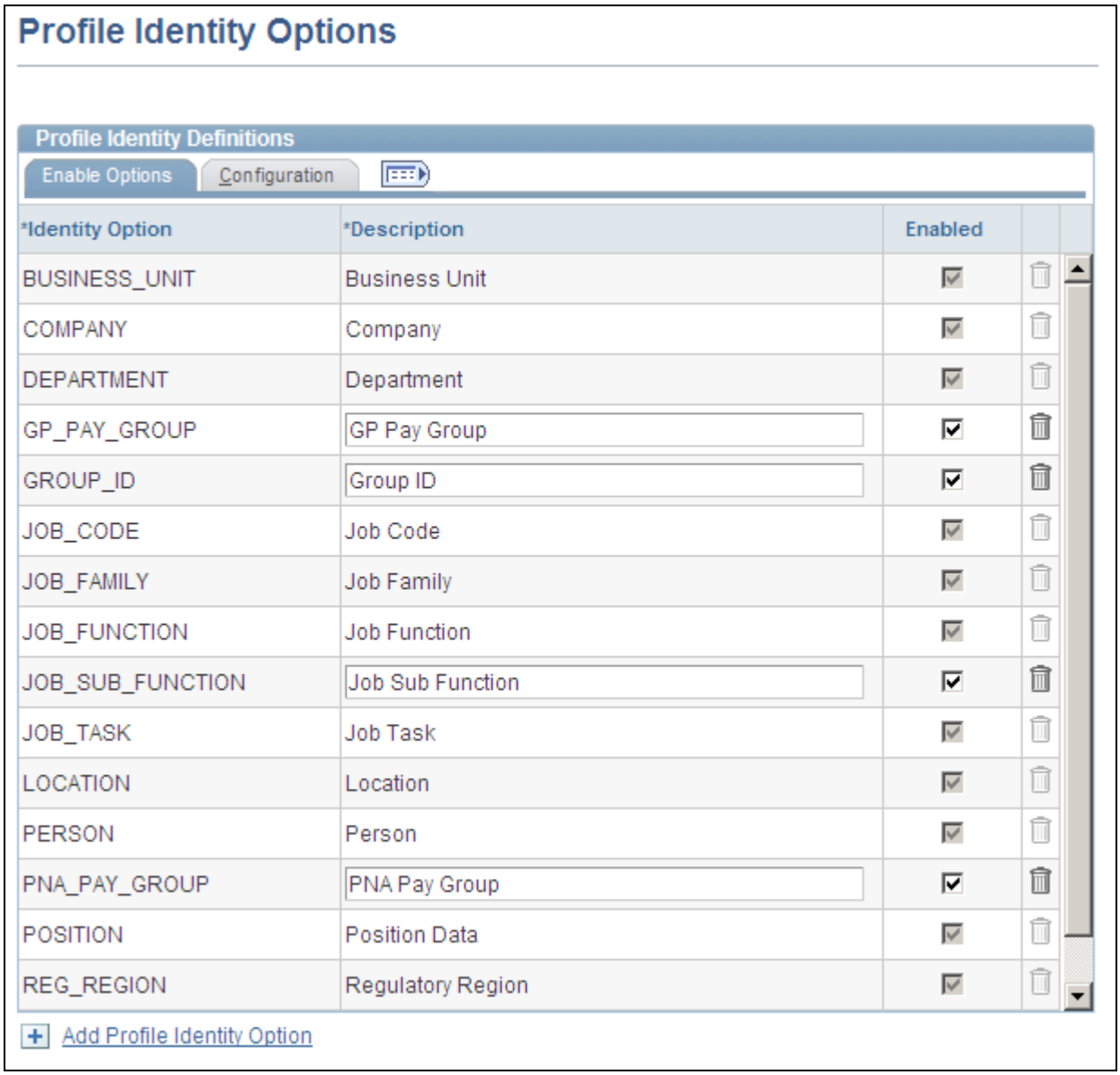
Identity Option	Enter the name of the entity to which you can link a profile. For the delivered identity and association options, this field is display-only. Identity options are entities within the Profile Management business process, such as job code or position, whereas association options are entities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

Pages Used to Define Profile Identity and Association Options

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

Defining Profile Identity Options

Access the Profile Identity Options page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Identity Options, Profile Identity Options).



Profile Identity Options page: Enable Options tab

Add Profile Identity Option Click this link to add a new profile identity option.

Enable Options Tab

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

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

Configuration Tab

Access the Configuration tab on the Profile Identity Options page.

Profile Identity Options

Profile Identity Definitions

Enable Options | Configuration

*Identity Option	*Record Name	*Key 1 Field Name	Key 2 Field Name	Set ID	Eff Date	Sequence	Sys Data
BUSINESS_UNIT	BUS_UNIT_TBL_HR	BUSINESS_UNIT		☐	☐	150	☑
COMPANY	COMPANY_TBL	COMPANY		☐	☑	140	☑
DEPARTMENT	DEPT_TBL	DEPTID		☑	☑	100	☑
GP_PAY_GROUP	GP_PYGRP	GP_PAYGROUP		☐	☐	120	☐
GROUP_ID	GB_GROUP_TBL	GB_GROUP_ID		☐	☑	80	☐
JOB_CODE	JOBCODE_TBL	JOBCODE		☑	☑	30	☑
JOB_FAMILY	JOB_FAMILY_TBL	JOB_FAMILY		☐	☑	40	☑
JOB_FUNCTION	JOBFUNCTION_TBL	JOB_FUNCTION		☐	☑	50	☑
JOB_SUB_FUNCTION	JOB_SUBFUNC_TBL	JOB_SUB_FUNC		☐	☑	60	☐
JOB_TASK	JOB_TASK_TBL	JOB_TASK		☑	☑	70	☑
LOCATION	LOCATION_TBL	LOCATION		☑	☑	110	☑
PERSON	PERSON	EMPLID		☐	☐	10	☑
PNA_PAY_GROUP	PAYGROUP_TBL	COMPANY	PAYGROUP	☐	☑	130	☐
POSITION	POSITION_DATA	POSITION_NBR		☐	☑	20	☑
REG_REGION	REG_REGION_TBL	REG_REGION		☐	☐	160	☑

Add Profile Identity Option

Profile Identity Options page: Configuration tab

Sequence

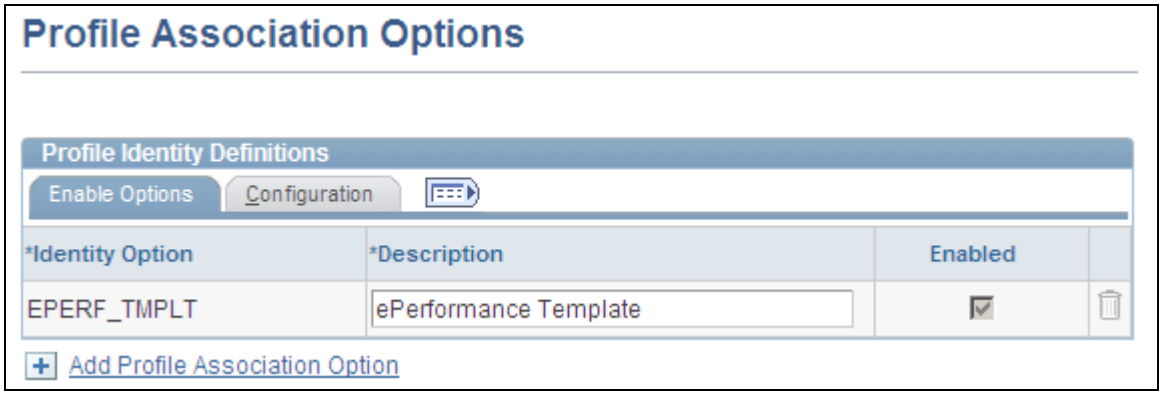
Enter the number that determines the order in which non-person profiles related to a person's job are listed. The system uses the sequence value as follows:

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

See Chapter 3, "Setting Up Profile Management," Common Elements Used in This Section, page 57.

Enabling Profile Association Options

Access the Profile Association Options page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Association Options, Profile Association Options).



Profile Association Options page: Enable Options tab

Use this page to define the entities external to the Manage Profiles business process to which you can link profile types. ePerformance Template is a delivered profile association option but you can add other associations according to your requirements. Enter the identity option on the Enable Options tab. Enter the record name and key field information on the Configuration tab,

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

See Chapter 3, "Setting Up Profile Management," Common Elements Used in This Section, page 57.

Setting Up Profile Types

To set up profile types and establish the default person and non-person profile types for other business modules, use the Profile Types (JPM_JP_TYPES), Clone Profile Types (RUNCTL_JPM_CLONE), and Assign Default Profile Types (JPM_DFLT_JP_TYPES) components.

This section discusses how to:

- Set up profile type attributes.
- Define profile type identities.
- Define profile type content.
- Select content types.
- Define content sections.
- Set up profile type associations.
- Clone profile types.

- Assign profile type defaults.

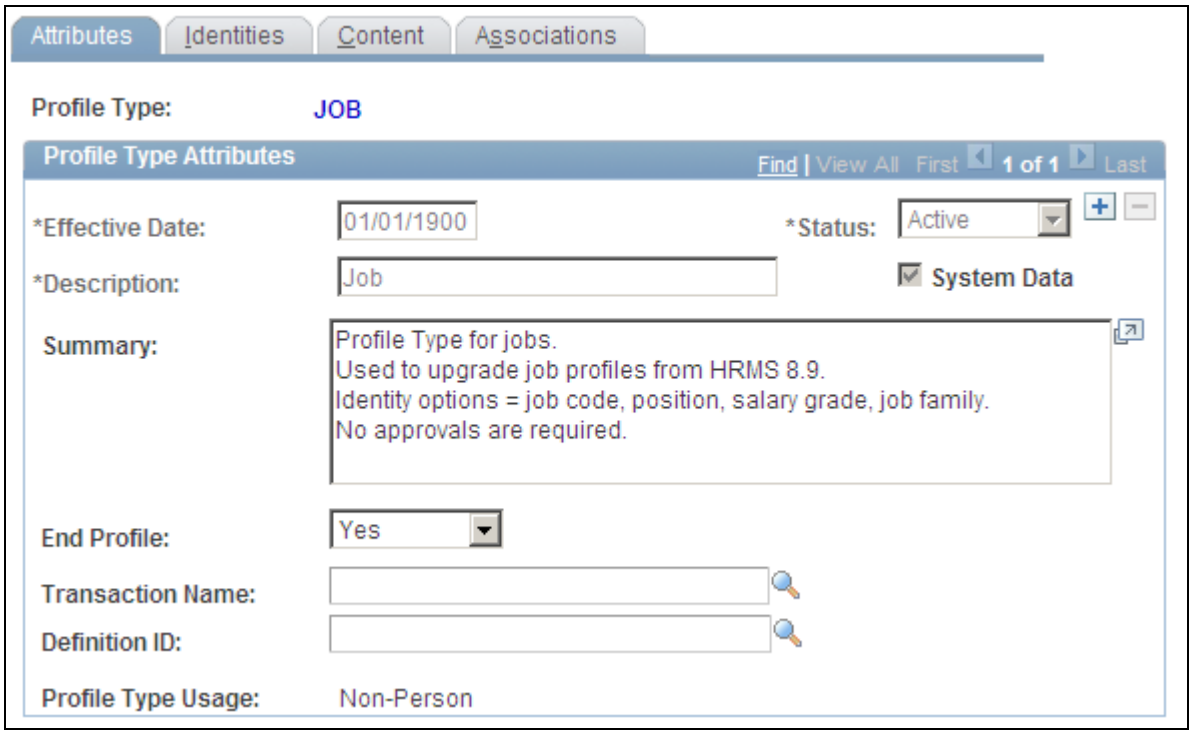
Pages Used to Set Up Profile Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Profile Types - Attributes	JPM_JP_TYPE_ATTRIB	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Attributes	Set up profile type attributes. Define basic details of the profile type. If the profile type is associated with approvals workflow, specify the transaction and the approval definition on this page.
Profile Types - Identities	JPM_JP_TYPE_IDENT	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Identities	Define profile type identities by selecting the identity options to which the profile type is linked. Identity options are entities such as a job code, position number, or person. When users create profiles based on a profile type, they can only create profiles for the entities that are defined on this page. Active profile types must be have at least one identity option. Define the identity options available on the Profile Identity Options page.
Profile Types - Content	JPM_JP_TYPE_CONT	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Content	Define profile type content. The content of a profile is divided into tabs and each tab comprises one or more sections. Use the Content page to set up the tabs in the profile, and add content types to each tab.
Add Content Section	JPM_JP_ADD_CNT_SEC	• Click the Add Content Section link on the Profile Types - Content page. • Click the Add Sub-section link on the Profile Types - Content page.	Select content types. This page lists the content types available to add to the profile type. Select the content type you want to add and the system displays the Content Section page.

Page Name	*Definition Name*	*Navigation*	*Usage*
Content Section	JPM_JP_CONTENT_SEC	• Select a content type on the Add Content Section page. • Click the section name link on the Content page.	Define content section properties (fields) and the attributes of those properties. You also use this page to define the users that can access the content section when creating or updating profiles.
Profile Content Visualization	JPM_VISUAL_DTL_SEC	Click the Visualize Profile Detail icon on the Content Section page.	View the configuration of how the content section will render on the Add <content type> or Update <content type> pages.
Copy Content from another Profile Type	JPM_JP_CPY_CNT_SEC	Click the Copy from another Profile Type icon on the Content Section page.	Copy content properties of the content type for the section in which you are working from an existing profile type into the current profile.
Profile Type - Associations	JPM_JP_TYPE_ASSOC	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Associations	Set up profile type associations. Select the associations to which the profile type is linked. Associations are entities external to the Profile Management business process. Define the association options available on the Profile Association Options page.
Clone Profile Types	RUNCTL_JPM_CLONE	Set Up HRMS, Product Related, Profile Management, Profiles, Clone Profile Types, Clone Profile Types	Clone profile types. Create a new profile type by copying an existing profile type by running the Clone Profile Type process.
Assign Profile Type Defaults	JPM_DFLT_JP_TYPES	Set Up HRMS, Product Related, Profile Management, Profiles, Assign Default Profile Types, Assign Profile Type Defaults	Assign profile type default person and non-person profile types available to other product features and services.

Setting Up Profile Type Attributes

Access the Profile Types - Attributes page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Attributes).



Profile Types - Attributes page

Summary Enter a brief description of the profile type.

End Profile Select *Yes* if the profile type is an end profile. The system displays end profiles in employee and manager self service and uses the end profiles in search, match, and browse.

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

See Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 69.

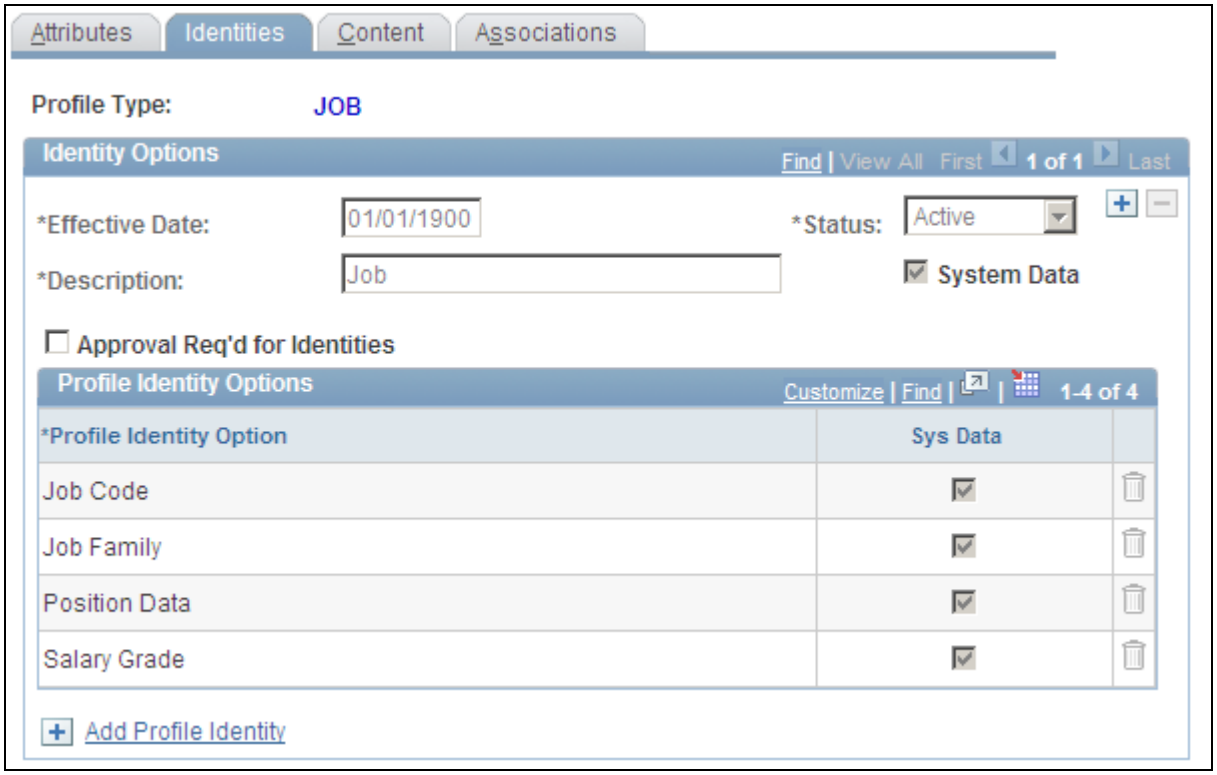
Definition ID Select the approvals definition for the profile type. If you leave this field blank, the system uses the default approval definition ID for the approval process ID specified in the Transaction Name field.

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

Profile Type Usage Displays the usage value: *Person* or *Non-Person.* The usage is determined by the Profile Identity Options values selected on the Profile Types - Identities page. If the profile type is linked to a record that has EMPLID as a key field, the Profile Type Usage field is *Person.* Otherwise, the usage is *Non-Person.*

Defining Profile Type Identities

Access the Profile Types - Identities page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Identities).



Profile Types - Identities page

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

Select this check box if approval is required for changes to the profile identities associated with profiles of this profile type. This check box is enabled when you select a non-person profile identity option.

Profile Identity Option

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

Profile types must be linked to either person or non-person identity options. You cannot add both person and non-person identity options to a profile type. The system validates that there is only one active profile per identity within a given profile type.

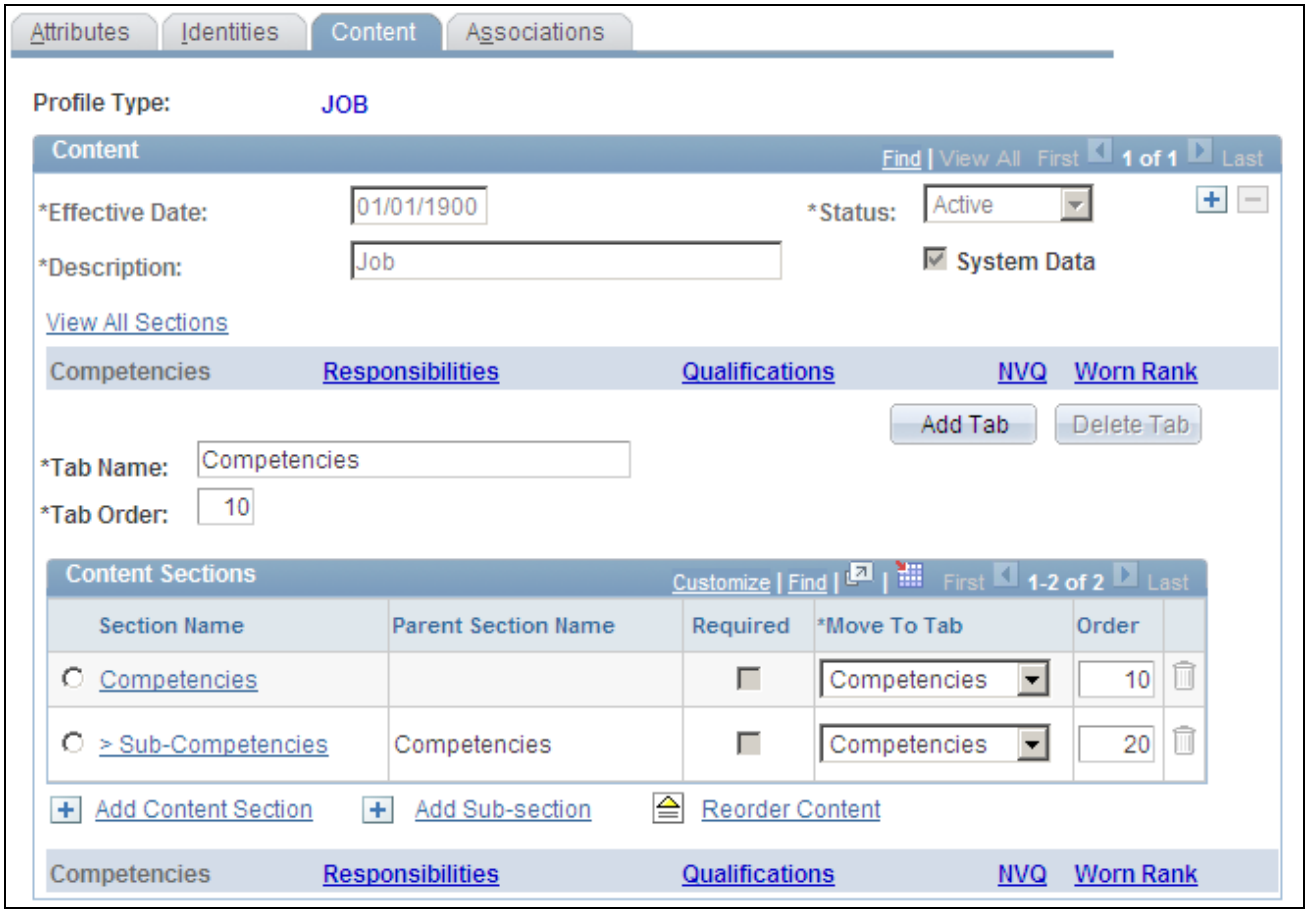
See Chapter 3, "Setting Up Profile Management," Defining Profile Identity Options, page 58.

Add Profile Identity

Click to add another profile identity option to the page.

Defining Profile Type Content

Access the Profile Types - Content page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Content).



Profile Types - Content page

Use this page to define the content of a profile type. The content is divided into tabs that appear as links on the page as shown in the following example:

Example of how tabs will appear on the Profile Types - Content page

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

The order in which the tabs are displayed is determined by the Tab Order field. Within each tab, you specify the content types in the Content Sections grid area.

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

Add Tab Click this button to add a new tab to the profile type.

Delete Tab Click this button to delete the selected tab.

Tab Name Enter a name for the tab. When users create a profile using this profile type, the tab name appears as a link in the profile. Therefore, it is important to use meaningful names and not leave the default name of *Tab 1,Tab 2,* and so on.

Tab Order Enter a value to specify the order in which the system should display the tab links.

Content Sections

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

Section Name Click the section name to access the Content Section page and view and update details of the section or sub-section.

Note. A ">" symbol preceding a section name indicates that the section is a child of the section above it.

Parent Section Name Displays the name of the parent section for child sections.

Required Select this check box if the section is a required section of the profile. When users create a profile, the system uses this check box to validate that required sections have at least one profile item.

Move To Tab Displays the current tab name where this content section is located.

Select the tab from the list and click the Reorder Content link to move a section to a different tab.

Order Enter a value to specify the order in which the content sections are displayed within the tab in the profile.

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

See Chapter 2, "Setting Up the Content Catalog," Setting Up Content Types and Properties, page 15.

Add Sub-section

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

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

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

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

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

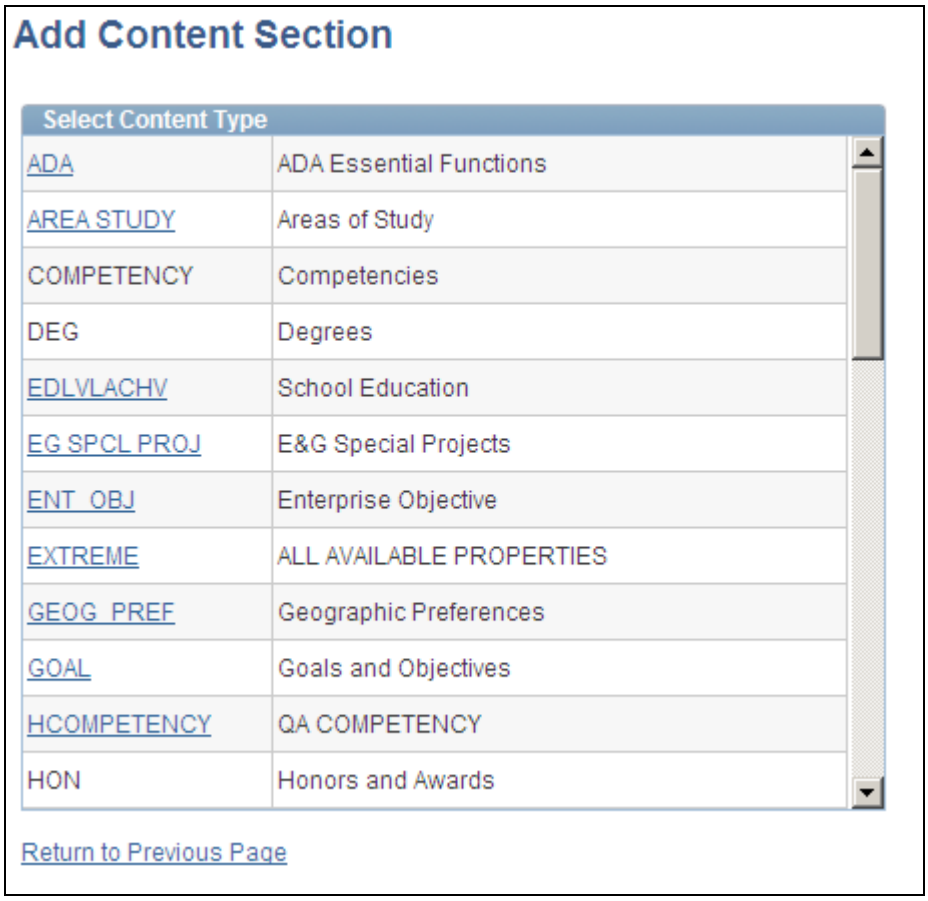
See Chapter 2, "Setting Up the Content Catalog," Defining Content Type Relationship Rules, page 22.

Reorder Content

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

Selecting Content Types

Access the Add Content Section page (click the Add Content Section link or the Add Sub-section link on the Profile Types - Content page).



Add Content Section page

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

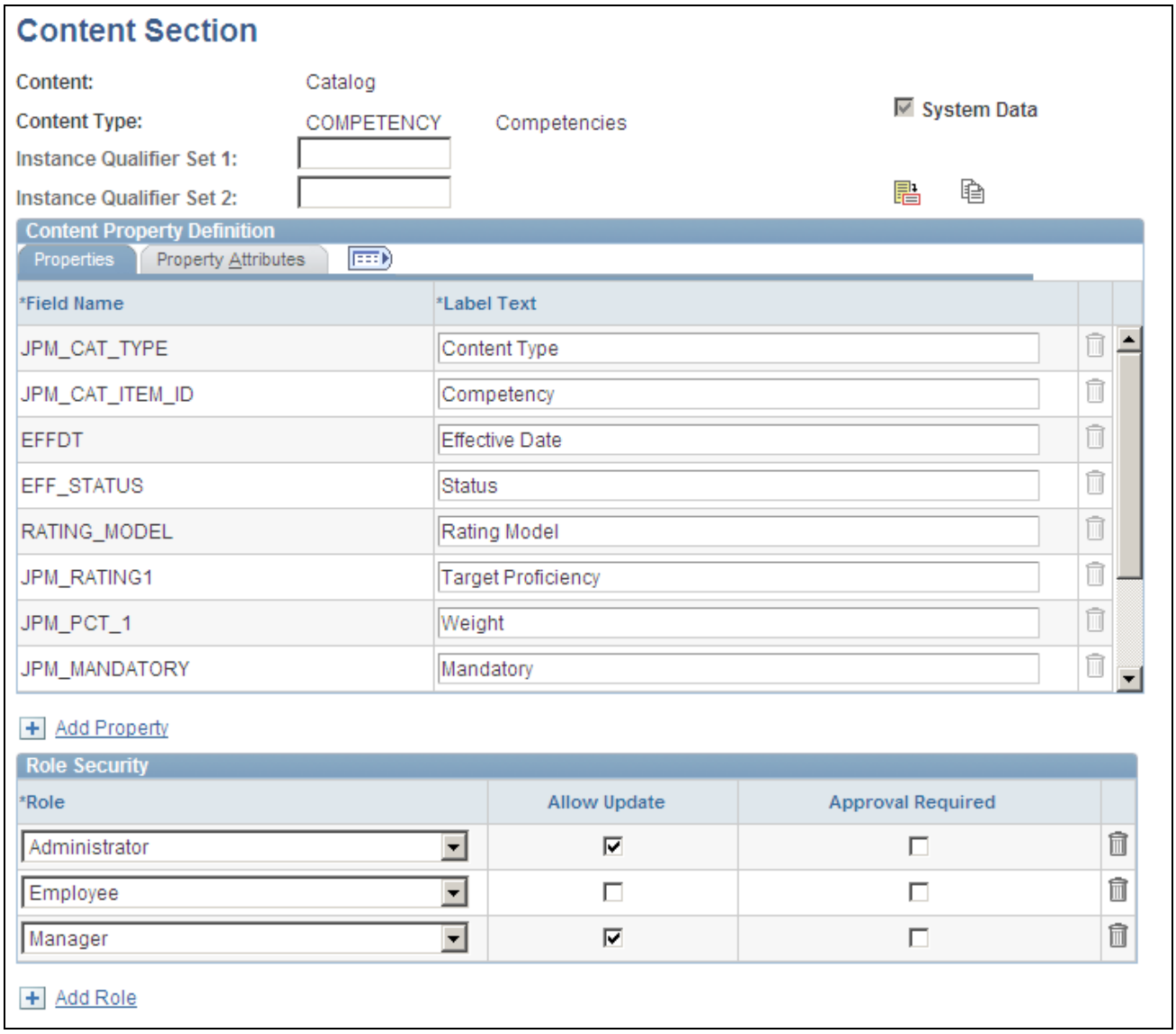
If you are adding a sub-section, the system displays the content types that have a subordinate relationship with the content type of the parent section.

See Chapter 3, "Setting Up Profile Management," Content Sections, page 67.

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

Defining Content Sections

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



Content Section page showing the Properties tab

Instance Qualifier Set 1 (Optional) Select the instance qualifier set that you want to use with this section. You can only select instance qualifiers that are associated with the content type of the section and are defined as sets of values. You cannot select instance qualifier sets that are based on prompt records for this field. Define instance qualifiers using the Instance Qualifiers page.

You will be required to add the property JPM_CAT_ITEM_QUAL.

See Chapter 3, "Setting Up Profile Management," Defining Instance Qualifiers, page 50.

Instance Qualifier Set 2 (Optional) If you want to define an instance qualifier that is based on a prompt record, then select an Instance Qualifier Set that has a prompt definition.

You will be required to add the property JPM_CAT_ITEM_QUAL2.

Allow Copy From Job

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

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

Visualize Profile Detail

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

Copy from another Profile Type

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

Content Property Definition Group Box: Properties Tab

If you are setting up a content section, the Content Property Definition group box lists the key properties defined for the content type in the content catalog. The RATING_MODEL property is the only non-key property that is always automatically included in the content section if it has been defined for that content type. You can add other properties as required.

Note. If the content type is a free form content type, a description field, JPM_ADHOC_DESCR, is included. You need to add all other properties that are required.

See Chapter 2, "Setting Up the Content Catalog," Understanding Content Type Properties, page 15.

See Appendix A, "Content Type and Profile Type Properties," Profile Type Properties, page 235.

Field Name

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

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

Label Text

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

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

Add Property

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

See Chapter 3, "Setting Up Profile Management," Profile Content, page 41.

See Appendix A, "Content Type and Profile Type Properties," Profile Type Properties, page 235.

Content Properties Group Box: Property Attributes Tab

Access the Property Attributes tab on the Content Section page.

Content Property Definition

Properties | Property Attributes

*Field Name	Required	*Display	Max Len	Minimum	Maximum	Default	Detail	Summary	Searchable	Sys Data
JPM_CAT_TYPE	☑	Display	12				☑	☐	☐	☑
JPM_CAT_ITEM_ID	☑	Editable	8				☑	☑	☑	☑
EFFDT	☑	Editable					☑	☐	☐	☑
EFF_STATUS	☑	Editable					☑	☐	☐	☑
RATING_MODEL	☑	Editable	4			PSCM	☑	☐	☐	☑
JPM_RATING1	☐	Editable					☑	☐	☑	☑
JPM_PCT_1	☐	Editable					☑	☐	☐	☑
JPM_MANDATORY	☐	Editable					☑	☐	☐	☑

Content Section page: Property Attributes tab

Required

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

Display

Select whether the property should be available for entry *(Editable)*, unavailable for entry *(Display)*, or hidden *(Hidden)* on the profile pages. The system populates the property with the value you enter in the Default Value field. If you select *Editable*, the system populates the default value at the profile, but users can override that value.

Max Len (maximum length)

This field applies to character properties only. If you added the property to the profile type, enter a value that is less than or equal to the field length of this property.

Minimum and **Maximum**

These fields apply to numeric properties only. If you added the property to the profile type, enter the minimum and maximum values allowed when a user adds a profile item.

Default

If you added the property to the profile type, enter the default value that will be assigned to this property when a user adds a profile item.

When creating a profile item, the system attempts to populate the RATING_MODEL property default first from the content catalog. If that does not exist, the default is assigned from this profile type default.

Detail Select this check box if you want the field to appear on the details page for the content section.

Summary Select this check box to display the field on the summary page when creating or viewing a profile. Fields that are marked as summary automatically appear on the details page.

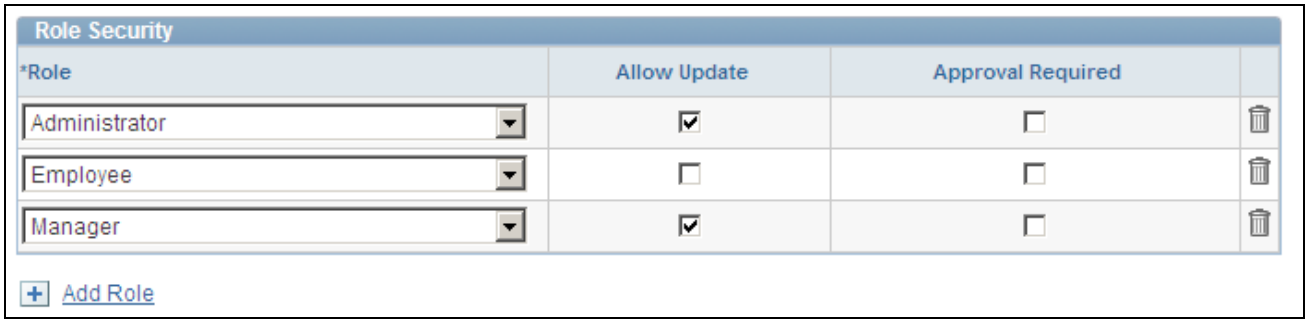
See Chapter 5, "Managing Profiles," page 107.

Searchable Select this check box if you want to include the property in the search index that is used by the search and compare profiles feature. The check box is display-only if the property is not searchable.

Note. The item ID (JPM_CAT_ITEM_ID) is automatically set to searchable if you make other properties in the content section searchable.

Role Security

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



Role Security section of the Content Section page

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

Note. If you don't select a role, users can't create profiles using this profile type.

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

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

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

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

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

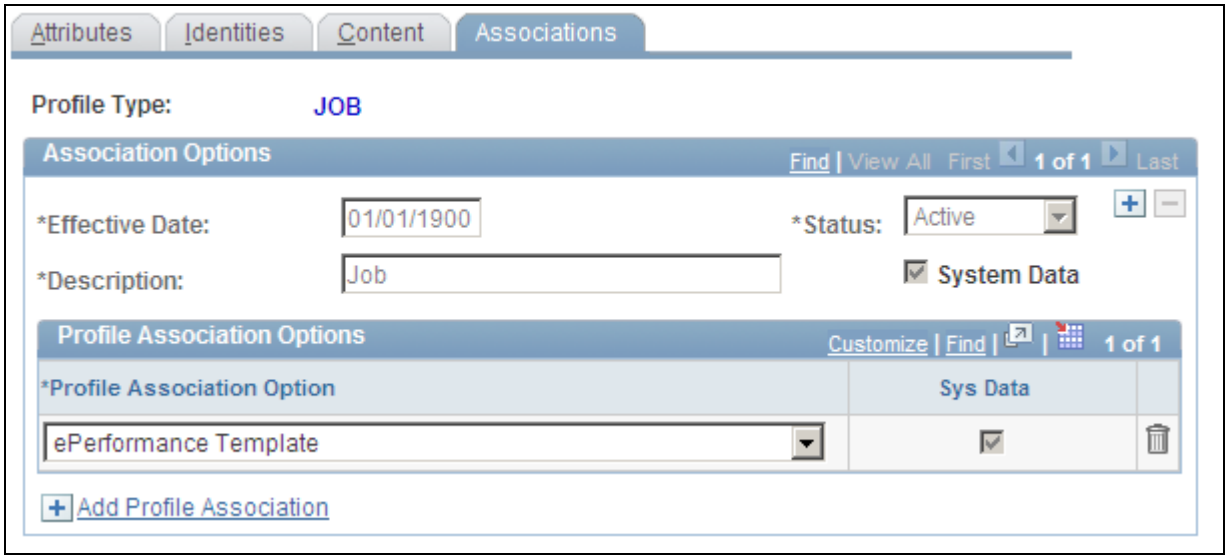
Note. This check box is not available for the NVQ, NVQ Units, or NVQ Elements content sections because it is not possible to update them within a profile.

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

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

Setting Up Profile Type Associations

Access the Profile Types - Associations page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Associations).



Profile Types - Associations page

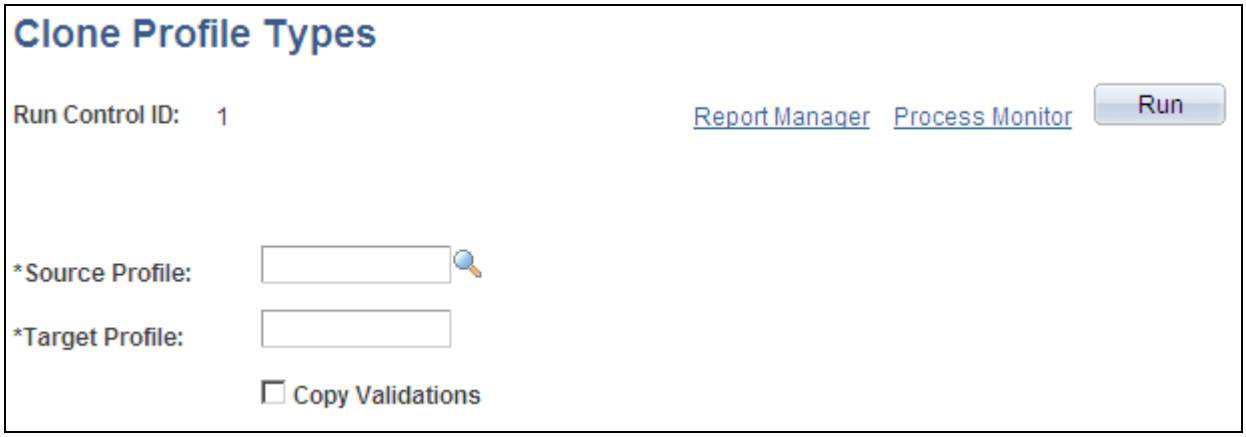
Profile Association Option Select the object you want to link to the profile type. The objects available are determined by the profile association options enabled on the Profile Association Options page. The system allows multiple active profiles per association within a given profile type.

See Chapter 3, "Setting Up Profile Management," Enabling Profile Association Options, page 61.

Add Profile Association Click this link to add another association to the profile type.

Cloning Profile Types

Access the Clone Profile Type page (Set Up HRMS, Product Related, Profile Management, Profiles, Clone Profile Types, Clone Profile Types).



Clone Profile Types page

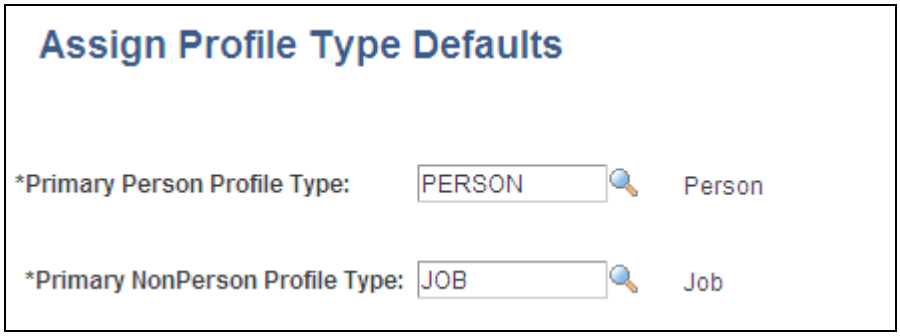
Source Profile Enter the profile ID that you want to copy.

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

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

Assigning Profile Type Defaults

Access the Assign Profile Type Defaults page (Set Up HRMS, Product Related, Profile Management, Profiles, Assign Default Profile Types, Assign Profile Type Defaults).



Assign Profile Type Defaults page

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

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

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

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

Creating Profile Group Types and Profile Groups

To set up profile groups, use the Profile Group Types (JPM_JP_GTYPE_GRP) and Profile Groups (JPM_JP_GROUPS) components.

This section provides and overview of profile groups and group types, list prerequisites, and discusses how to:

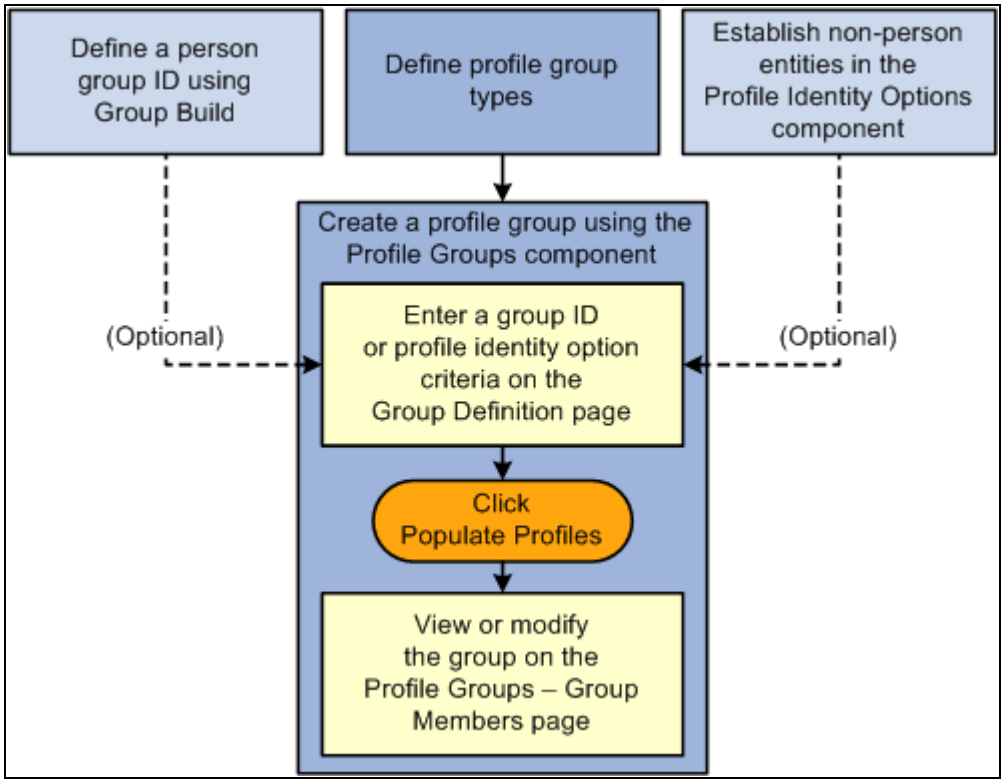
- Create profile group types.
- Create profile group definitions.
- Define profile group members.
- Build profile groups.

Understanding Profile Groups and Group Types

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

The system uses profile group types of either *Person* or *Non-person* to drive the behavior of the criteria that is entered for each of the groups tied to the group type. It also controls the profile types that can be selected for the group type. The Profile Groups component enables you to include criteria to build a list of profile members for a person profile group, through the use of the Group Build feature, or for a non-person profile group, which uses criteria from the Profile Identity Options page.

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



Steps for creating a profile group

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

Since person and job attributes are frequently changing, person profile groups are a lot more volatile. You can schedule person profile group builds to run on a regular basis. As the profile group member list changes, triggers are created for the Verity Collection maintenance process (JPM_BLD_INDX) to rebuild the profile. Only those profiles with group changes are rebuilt.

Note. You should ensure that the Build Profile Groups process completes prior to the Verity Collection Maintenance process being runs.

Prerequisites

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

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Identity and Association Options, page 56.

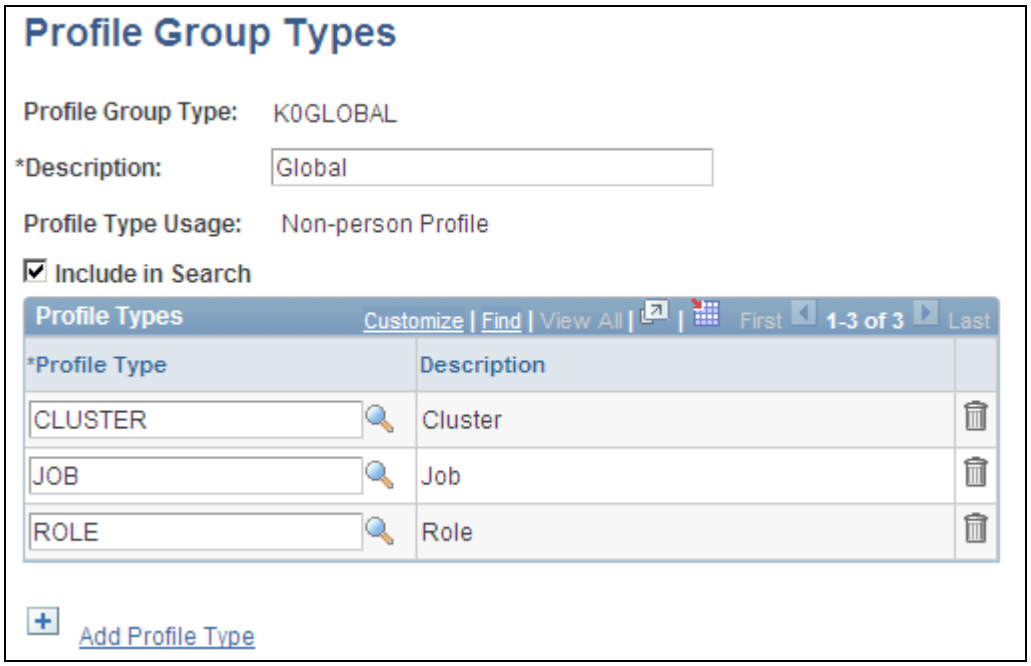
See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions."

Pages Used to Create Profile Group Types and Groups

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

Creating Profile Group Types

Access the Profile Group Types page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Group Types, Profile Group Types).



Profile Group Types page

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

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

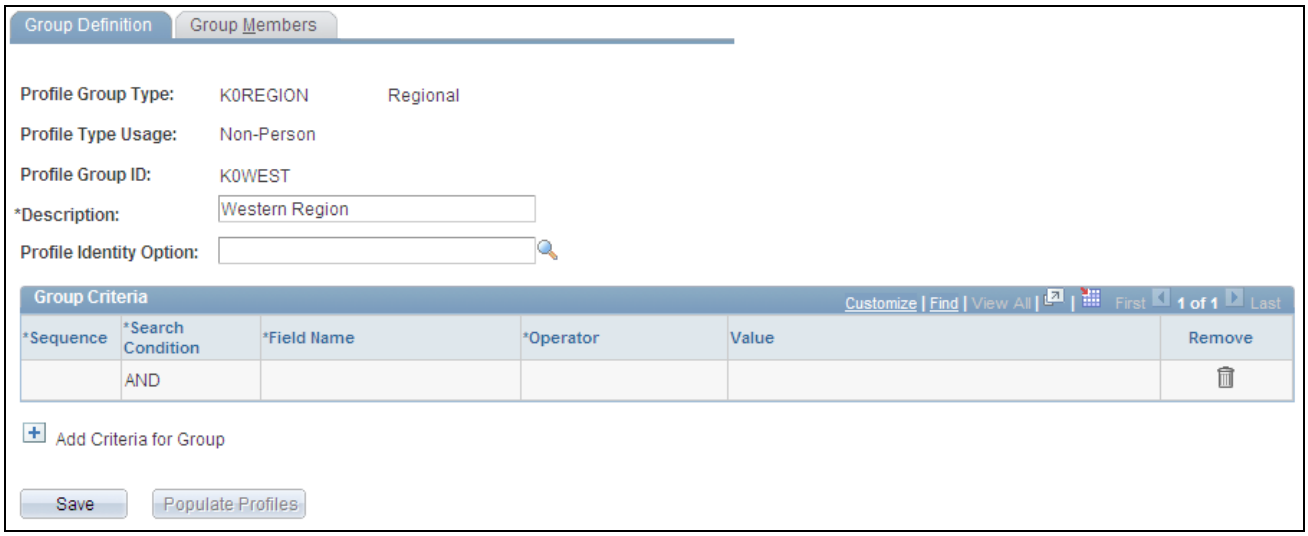
Profile Type Select the profile type to add to the profile group type. The profiles of the profile types defined for this group type are the only ones that can be assigned to the groups of this group type. Set up profile types using the Profile Types component. A profile can be tied to zero or many profile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

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61.

Add Profile Type Click this link to add another profile type to the profile group type.

Creating Profile Group Definitions

Access the Profile Groups - Group Definition page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Groups, Group Definition).



Profile Groups - Group Definition page

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

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

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

Profile Type Usage

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

Group ID

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

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

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions," Setting Up Group Definitions.

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

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

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

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

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

Group Criteria

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

Sequence Specify the sequence order of the criteria.

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

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

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

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

Add Criteria for Group Click this link to add another criteria row.

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

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

Managing Profile Group Members

Access the Profile Groups - Group Members page (Set Up HRMS, Product Related, Profile Management, Profiles, Profile Groups, Group Members).

Profile Groups - Group Members page

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

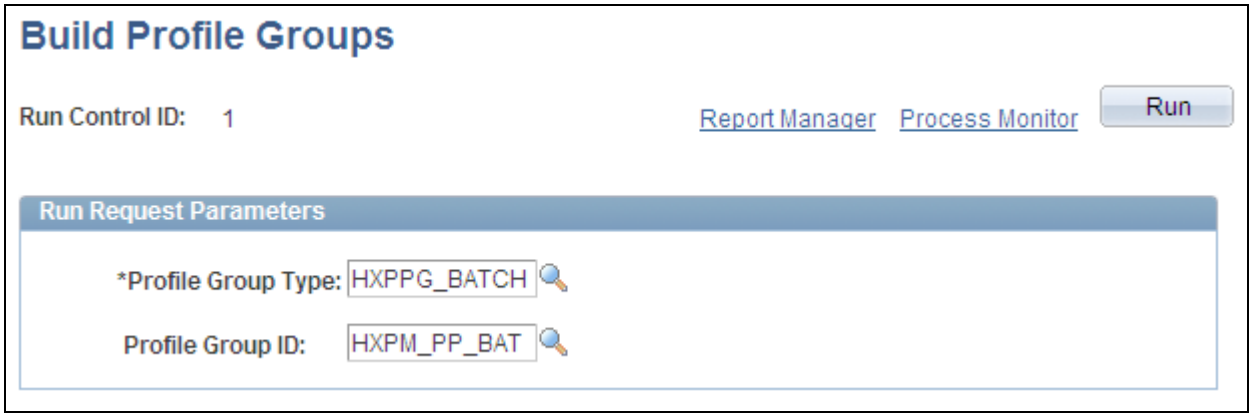
When the Profile Group component is saved, the JPMProfileUpdated event is raised in Event Manager only if a profile has been manually added or deleted from a group. The event handler adds a trigger for the Verity collection update process. All profiles added to the group via the Build Profile Group App Engine process are automatically committed in JPM_JP_GMEMB and the process creates the Verity collection update triggers when necessary.

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

Search On: Descr and **Search On: Profile ID**	Enter the description or profile ID of the profile you wish to locate.
Search	Click this button to search for the profile ID based upon the description or ID you entered in the search fields.
Profile ID	Select the profile that you want to add to the profile group. The system displays the profile description and type, as well at the employee name and ID, if applicable.
Add Profile to Group	Click this link to add another profile to the group.

Building Profile Groups

Access the Build Profile Groups page (Set Up HRMS, Product Related, Profile Management, Profiles, Build Profile Group, Build Profile Groups).



Build Profile Group page

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

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

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

Setting Up to Use XML Publisher Reports and Profiles

This section provides an overview of XML Publisher reports and templates, lists prerequisites, and discusses how to:

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

Understanding XML Publisher Reports and Templates

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

Delivered Report Definitions

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

Report Name	Description	Data Source Type	Data Source ID
JPM_CATI_RPT	Content Items Reports	PS Query	JPM_CONTENT_ITEMS
JPM_JPNP_RPT	Non Person Profile Batch	XMLDoc	JPM_PROFILE
JPM_JPPP_RPT	Person Profile Batch	XMLDoc	JPM_PROFILE
JPM_NP_PROF	Non Person Profile Online	XMLDoc	JPM_PROFILE
JPM_PP_PROF	Person Profile Online	XMLDoc	JPM_PROFILE

Delivered Data Sources

This table describes each of the delivered data sources:

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

Delivered Templates

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

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

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

See Chapter 3, "Setting Up Profile Management," Viewing Delivered Report Templates, page 86.

See Chapter 3, "Setting Up Profile Management," Modifying an Existing Template, page 87.

Profile Report Nodes

This table describes the report nodes for profile reports:

Node	Data Elements Summary
JPM_PROFILE	High level data elements related to the profile.
JPM_IDENTITY_WK	Profile identities and associations.
JPM_JP_SECTION	Sections defined in the profile type.
JPM_JP_CRITM_VW	Profile content items in the sections in the profile. All properties are included whether the content type uses them or not.
JPM_CATITMAXD_VW	Definitions of the content items in the content catalog. All properties are included whether the content type uses them or not.
RUN_PARAMETERS	Criteria used to generate the report.

See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Chapter 7, "Running Content Catalog and Profile Reports," page 207

Chapter 5, "Managing Profiles," page 107

Chapter 2, "Setting Up the Content Catalog," page 9

Prerequisites

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

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Pages Used to View and Modify XML Publisher Reports and Templates

Page Name	Definition Name	Navigation	Usage
Definition	PSXPRPTDEFN	Reporting Tools, XML Publisher, Report Definition, Definition	View the report properties and download or view the data schema and data source.

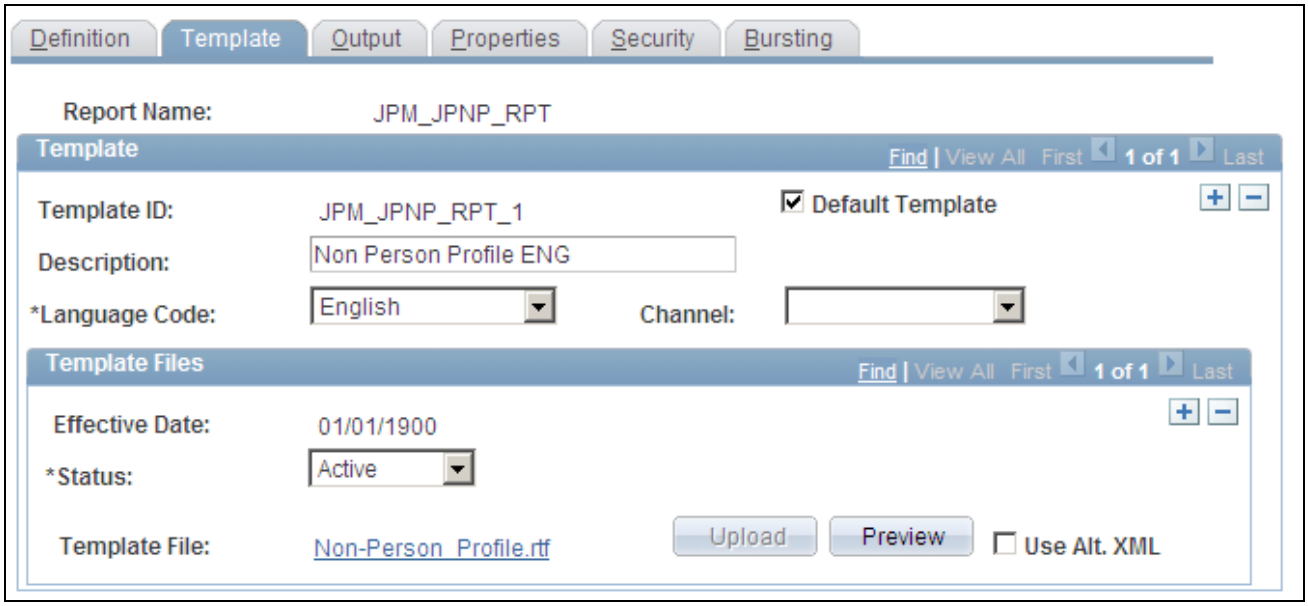
Page Name	Definition Name	Navigation	Usage
Template	PSXPRPTTMPL	Reporting Tools, XML Publisher, Report Definition, Template	View or update the existing template.
Design Helper	PSXPSETUPDWNLD	Reporting Tools, XML Publisher, Setup, Design Helper, Design Helper	Download plug-ins to facilitate template design and modification.

See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Viewing Delivered Report Templates

Access the Template page (ReportingTools, XML Publisher, Report Definition, Template).



Report Definition - Template page

Viewing the Existing Template

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

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

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

See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Modifying an Existing Template

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

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

Note. Become familiar with XML Publisher before modifying either of the delivered templates.

Setting Up to Modify a Template

To prepare to modify an existing template:

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

Creating a New Section in a Template

To create a new section:

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

Uploading the Revised Template

To upload the revised template:

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

   Update these options:

Effective Date	Enter the date that the system should begin to print and display reports and profiles with this template.
Status	Select the *Active* status for the new template.

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

See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise, "Setting Up XML Publisher," Working with Template Design Helpers

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise, "Creating Report Templates"

Chapter 4

Setting Up Search and Compare Profiles

This chapter provides an overview of search and compare profiles and discusses how to:

- Set up searches.
- Build the search indexes.

Understanding Search and Compare Profiles

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

- Employees can search for jobs that match their own personal profile.
- Managers can select an employee who reports to them and search for other direct or indirect reports with similar skills.
- Managers can search for direct or indirect reports who match the profile for a job opening that they want to fill.
- Administrators can select a job profile and search for similar job profiles.
- Administrators can search for employees to be automatically included in the succession plan candidate list or a talent pool member list.

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

For each search, you define:

- Who can run the search.

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

- Source and target profile types.

  The source and the target profile types are the two profile types that are being compared in the search. The source is the profile type that forms the basis for the search criteria and the target is the profile type being searched for matching profiles. For example, if an employee searches for jobs that match their personal profile, the source is the employee's person profile type and the target is the job profile type.

- Criteria rule.

  The Criteria Rule field defines two aspects of the search:

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

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

  - Whether users can view and adjust the search criteria.

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

- The maximum number of profiles listed in the search results at a time.

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

Object Owner Identifier	***Sub Application ID***	***Search ID***
HCM Profile Management (JPM)	NA	PERSON1 - Find people having certain qualifications
HCM Profile Management (JPM)	NA	PERSON2 - Find people that fit this job
HCM Profile Management (JPM)	NA	ADHOC3 - Adhoc search
HCM Profile Management (JPM)	NA	JOB4 - Find jobs that fit my qualifications
HCM Profile Management (JPM)	NA	JOB5 - Find jobs for a team member
HCM Profile Management (JPM)	NA	PERSON6- Find similar people on team
HCM Profile Management (JPM)	NA	PERSON7- Find team member for a specific job profile
HCM Profile Management (JPM)	NA	JOB8 - Find jobs
HCM Profile Management (JPM)	NA	JOB16 - Find jobs like my job
HCM Profile Management (JPM)	NA	JOB17 - Find jobs for this person

Object Owner Identifier	*Sub Application ID*	*Search ID*
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANINC – For people with profile matches to plan incumbent
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANJOB – For people with profile matches to plan/pool job code
Human Resources (Human Res)	Success Planning (Succ Plan)	PLANPOS – For people with profile matches to plan/pool position

Note. NA is not applicable.

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

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

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

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

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

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61.

Example Search Criteria

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

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

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

Content Section	*Searchable Properties*
Competencies	JPM_CAT_ITEM_ID (Competency) JPM_RATING1 (Target Proficiency)
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country)
Test/Examinations	JPM_CAT_ITEM_ID (Test)

Content Section	***Searchable Properties***
Responsibilities	JPM_CAT_ITEM_ID (Responsibility) JPM_YN_2 (Critical)

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

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

In this example, the search criteria are:

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

Notice that:

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

- The labels displayed on the Search Criteria page are those defined in the source profile type for those properties that are defined in both the source and the target profile type.

  In the example, the label for the property JPM_RATING1 is Target Proficiency in the source profile type and Proficiency in the target profile type. When users run the search, the JPM_RATING1 field is labelled Target Proficiency on the Search Criteria page.

Importance and Mandatory Properties

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

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

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

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

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

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

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

See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 150.

Search Filters

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

To illustrate how this works, consider the following example:

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

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

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

See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 150.

See Chapter 3, "Setting Up Profile Management," Creating Profile Group Types and Profile Groups, page 76.

Setting Up Searches

Use the Define Search Configuration component (JPM_SRCH_CFG) to define the search types for your users.

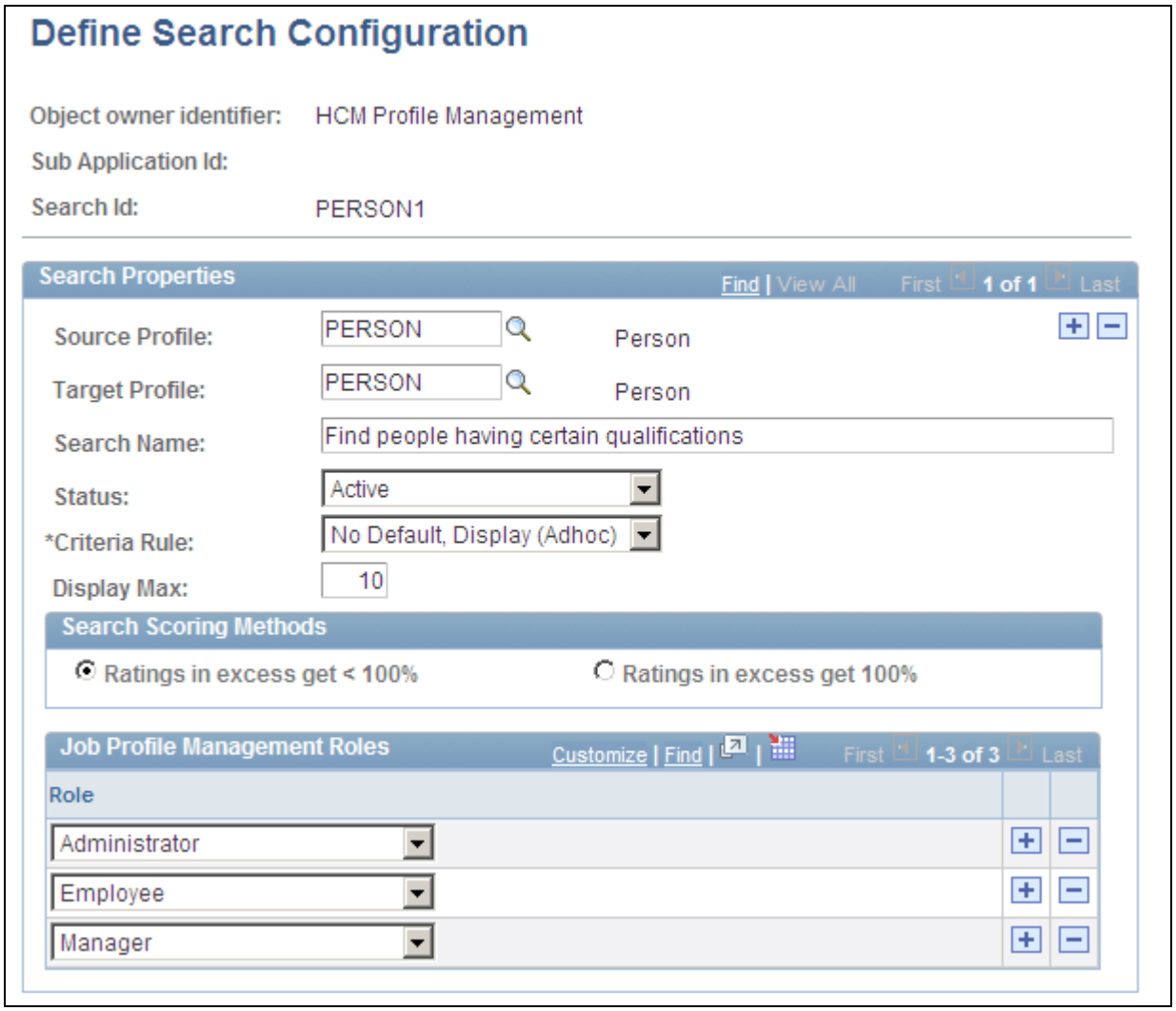
This section discusses how to set up profile search types.

Page Used to Set Up Search Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Search Configuration	JPM_SRCH_CFG	Set Up HRMS, Product Related, Profile Management, Profiles, Define Search Configuration, Define Search Configuration	Set up profile search types or employees, managers, and administrators.

Setting Up Profile Search Types

Access the Define Search Configuration page (Set Up HRMS, Product Related, Profile Management, Profiles, Define Search Configuration, Define Search Configuration).



Define Search Configuration page

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

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

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

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

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

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

Criteria Rule	Select one of these options: *Default and Display:* The system populates the search criteria using data from the profile that the user selects and displays the Search Criteria page. This option enables users to adjust the search criteria before running the search. *Default, No Display:* The system generates the search criteria using data from the profile that the user selects and immediately runs the search. Use this option if you don't want users to adjust the search criteria. *No Default, Display (Adhoc):* The system displays the Search Criteria page without populating the search criteria. The user has to set up the search criteria from scratch for this type of search, which requires knowledge of the profile types. Typically, you use this option to enable administrators to run adhoc searches.
Display Max (display maximum)	Enter the maximum number of profiles to display in the search results at a time. For example, if you specify a maximum of ten, the system lists ten profiles at a time. Users click the Next and Previous links to navigate through the profiles in the search results.
Search Scoring Methods	Select whether the system scores profiles with ratings higher than those designated in the search criteria as 100% or less than 100%. If you select the Ratings in excess get < 100% option, the Compare Results page displays overqualified profiles with a yellow triangle preceding their score of less than 100%. If you select the Ratings in excess get 100% option, the Compare Results page displays overqualified profiles with a blue diamond preceding their score of > *100%*.
Job Profile Management Roles	Add the roles that have access to the search. The options are: *Administrator, Manager,* and *Employee.*

Building the Search Indexes

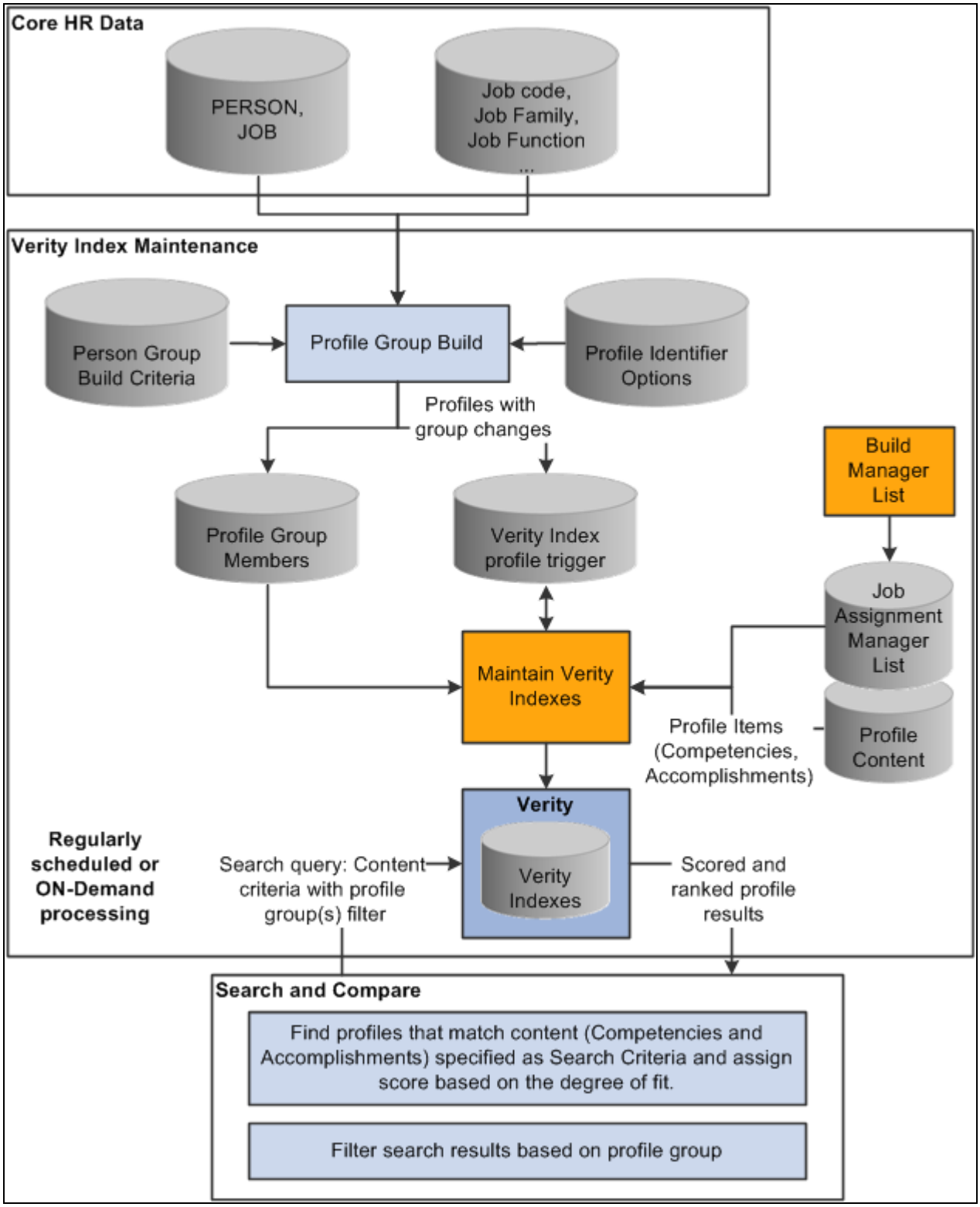
This section provides overviews of the search indexes and Verity index maintenance, lists prerequisites, and discusses how to:

- Run the Build Manager List process.
- Run the Maintain Profile Indexes process.

Understanding the Search Indexes

Search and Compare Profiles uses the Verity search engine to generate search results and perform comparisons between matching profiles. In order to complete searches, the Verity search engine uses a set of Verity indexes that contain data about the profiles in your system; it does not search the database tables directly.

This diagram shows how to create the Verity indexes using the Build Manager List, which processes job, position, and department data to create the manager list, and the Maintain Profile Indexes processes, which processes the manager list, person profiles, and non-person profiles to produce the complete set of Verity indexes:



Processes for maintaining Verity indexes for search and compare profiles

Build Manager List Process

The Build Manager List Application Engine process (JPM_DR_UNLD) creates the manager list which is a record of the manager for each job held by a person. The Supervisor Navigation Method field on the Profile Management Installation page determines how the process retrieves reporting information for your organization. Select from these options: *2 - Supervisor Id,3 - Department Manager ID,4 - Reports To Position,5 - Position / Supervisor ID,* or *6 - Position / Dept Manager*.

See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles, page 45.

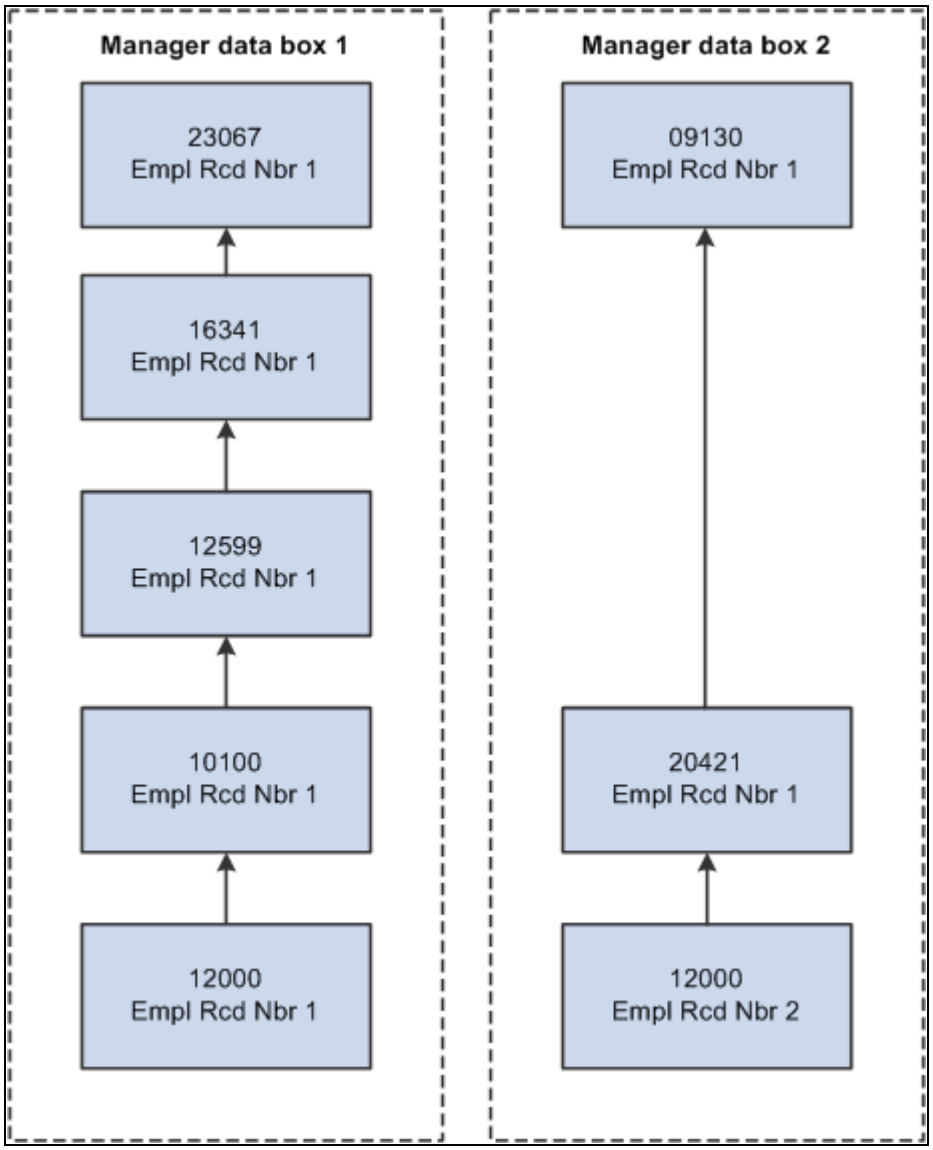
See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Direct Reports Functionality.

You can run the Build Manager List process in two modes:

- *Full - Complete Rebuild* creates the full manager list, overwriting any existing data.
- *Incremental - 1 Assignment* updates the manager information for a selected assignment (job) that is identified by a person ID and employee record number.

When you run the process in incremental mode, the process updates the manager information for the selected assignment and the associated reporting structure.

To illustrate how the Build Manager List process works in incremental mode, consider the following example of employee 12000 who has two assignments (empl rcd nbr 1 and 2) with different reporting structures. The following diagram shows the reporting structures for each of the two jobs:



Two separate reporting structures for an employee with two job records

As shows in this table, running the Build Manager List process in incremental mode updates only the manager list information for the relevant job record.

Person ID	***Employee Record Number***	***Manager Data Updated***
12000	1	Manager data for the reporting structure for record 1
12000	2	Manager data for the reporting structure for record 2

Maintain Profile Indexes Process

The Maintain Profile Indexes Application Engine process (JPM_BLD_INDX) builds a Verity index for one or all profile types. Create a Verity index for each profile type that you want to include in Search and Compare Profiles. You cannot create a Verity index for a profile type if it:

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

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

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

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

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

The Application Server and Process Scheduler must have access to the same file server directory because the Verity collection is in the directory <Tools writable home directory>\data\search*database*.

The Maintain Profile Indexes process extracts information from the database and loads it into Verity-formatted files in a file directory that the Process Scheduler is configured to write to. The process looks for a writable directory in the following order:

- $PS_VAR_HOME
- $PS_CFG_HOME
- $PS_HOME

The Verity indexing application transforms the files into an index that is used for searching. The Maintain Profile Indexes process indexes codes only, not the associated descriptions. Searching is therefore language-independent. For example, if a user searches for the competency *Forecasting* whose content item ID is *1000*, then the search query will look for item ID *1000* and not for the word *Forecasting*.

The Maintain Profile Indexes process creates two files:

- INPUT_ENG.BIF
- INPUT_ENG.DAT

The BIF file defines the Verity document and includes all information for the Verity fields in the index and pointers to the .DAT file (in the form of offset and size). The DAT file contains the Verity zones. The Verity application creates the index from these two files using the utility mkvdk.

Understanding Verity Index Maintenance

The manager list and Verity indexes represent a "snapshot" of the manager and profile data as of the date that you last ran the Build Manager List and Maintain Profile Indexes processes. To ensure that your Search and Compare Profiles results are accurate, run these processes periodically to update the manager list and Verity indexes.

You can run the Maintain Profile Indexes process in two modes:

- *Create New Index:* creates or recreates the Verity Index for the selected profile type.
- *Update Existing Index:* updates profile documents for an existing Verity index based on triggers that are generated when a profile is added or updated.

  Run the process in this mode regularly to incorporate changes to profiles or add new profiles to the Verity index. You can select this process to run immediately or schedule it to run at intervals using Process Scheduler when the system usage is low.

Run the Maintain Profile Indexes process using the *Create New Index* mode when any of the following changes are made:

- A new profile type is defined that has searchable properties.
- The Searchable check box for a property is selected.

  When you select the Searchable check box for a property that previously was not searchable, the Verity index must be recreated to include the property in the index for profiles of that type.
- The Priority field for an Instance Qualifier is changed.

  The Maintain Profile Indexes process uses the priority field to determine which profile item row is included in the Verity index when instance qualifiers are associated with a content section of a profile type. The row with the highest priority and highest effective date for that priority is selected for indexing only.
- A large reorganization has occurred that impacts the manager reports or administrator row level security.

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

Instance Qualifier	***Description***	***Priority***	***Searchable***
A	Approved	10	Y
R	Supervisor/Manager	20	Y
S	Self	30	Y

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

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

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

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

Competency	*Date*	*Proficiency*	*Evaluation Type*
0010	May 1, 2009	3 - Good	A
0200	June 21, 2009	5 - Expert	R
0120	May 1, 2009	2 - Fair	A

Notice that:

- For competency 0010, the row with the highest priority (lowest sequence number) instance qualifier *(A)* is selected even though the effective date for this row is earlier than the row dated June 21, 2009.
- For competency 0200, the two rows have the same effective date. In this case the system selects the row that is assigned the instance qualifier with the highest priority *(R*-Supervisor/Manager).
- For competency 0120, the system selects the row with the highest effective date.

Note. Instance qualifiers that are defined by a prompt record are not searchable and not included in Verity indexes.

See Chapter 3, "Setting Up Profile Management," Defining Instance Qualifiers, page 50.

Using the Event Manager to Track Profile Changes

The Event Manager is used to track changes to searchable profiles (and therefore the Verity index). When an employee, manager or administrator creates or updates a profile one of these events is triggered depending on the type of change made:

- JPMProfileAdded

  This event is triggered when users creates a new profile.

- JPMProfileUpdated

  This event is triggered when a user adds a new profile item, updates an existing profile item, or deletes a profile item. For example if an employee updates their profile by adding a new evaluation for a competency, this triggers the JPMProfileUpdated event. This event is also triggered when you run the Build Manager List process in incremental mode to update the manager information for a selected assignment.

- AssignmentTerminated

  This event is triggered when a job assignment is terminated. The handler InactivatePersonProfile determines if all assignments are inactive and subsequently changes the profile status to inactive. Indirectly, this triggers the JPMProfileUpdated event to remove the profile from the index.

The Event Handler UpdateVerityIndex adds a trigger to the trigger table JPM_IDX_UPDCTL for the profile that has been created or updated. The Maintain Profile Indexes process accesses this trigger table to determine which profiles to select for indexing when you run the process in *Update Existing Index* mode.

See *Events and Notifications Framework PeopleBook*, "Setting Up Events."

Prerequisites

Before you run the Build Manager List process, you must define the Supervisor Navigation Method field on the Profile Management Installation page. The Supervisor Navigation Method field value specifies the reporting structure for your organization.

Before you run the Maintain Profile Indexes process, you must set up the content catalog, define your profile types, and set up the Event Manager and Integration Broker. Set the event status for the JPMProfileAdded and JPMProfileUpdated events to *Active* in the Event Registry.

See Also

Chapter 2, "Setting Up the Content Catalog," page 9

Chapter 3, "Setting Up Profile Management," page 39

Events and Notifications Framework PeopleBook, "Setting Up Events"

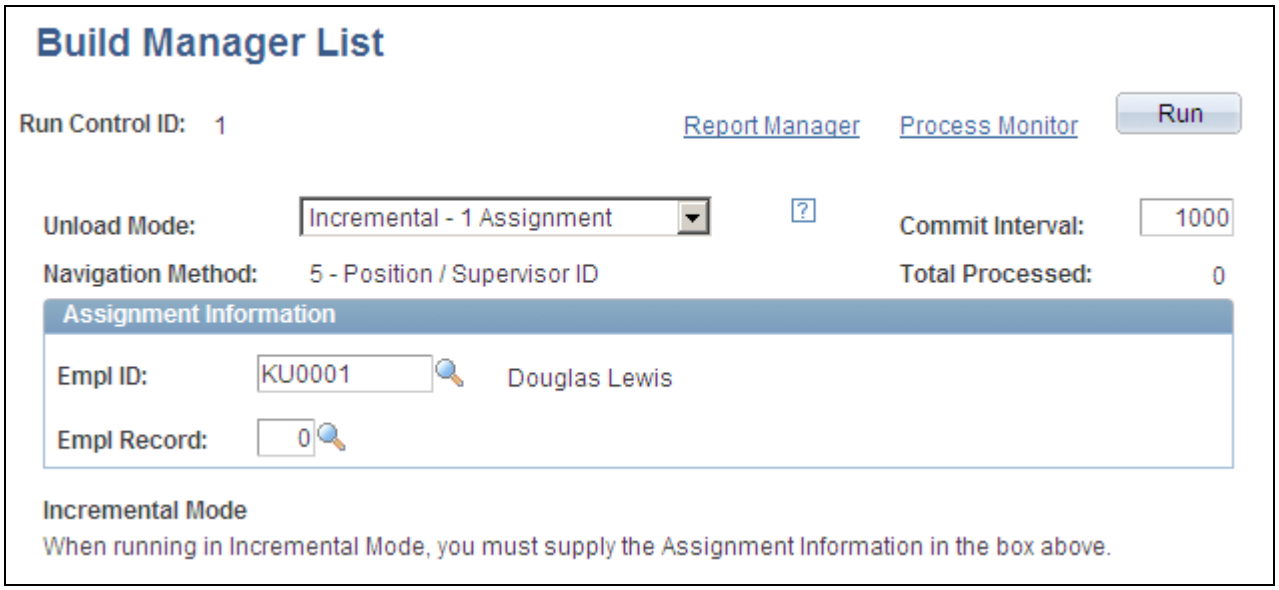
Pages Used to Build the Search Indexes

Page Name	*Definition Name*	*Navigation*	*Usage*
Build Manager List	RUNCTL_JPM_DR	Set Up HRMS, Product Related, Profile Management, Profiles, Build Manager List, Build Manager List	Run the Build Manager List process to create or update the manager list information.

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Profile Indexes	RUNCTL_JPM_INDX	Set Up HRMS, Product Related, Profile Management, Profiles, Maintain Profile Indexes, Maintain Profile Indexes	Run the Maintain Profile Indexes process that creates or updates the Verity indexes required for Search and Compare Profiles.

Running the Build Manager List Process

Access the Build Manager List page (Set Up HRMS, Product Related, Profile Management, Profiles, Build Manager List, Build Manager List).



Build Manager List page

Unload Mode

Select one of these modes:

Full - Complete Rebuild: Creates the full manager list. Any existing data is overwritten by this process.

Incremental - 1 Assignment: Updates the assignment data for one employee. The system displays the Assignment Information group box when you select this option. When you run the process for one assignment, the system updates the manager information for that assignment and then checks and updates the reporting structure for each of the identified managers. This iterative process is continued until the top of the reporting structure is reached.

The Unload Mode field is display-only if the process failed the last time it was run using the selected run control ID. The Restart Information group box is displayed.

Commit Interval Enter the number of assignments that are processed before the Build Manager List process saves the changes to the database. An assignment is a person's job, as defined by each combination of person ID and employee record number.

The default for this field is *1000* assignments. Typically you do not need to change this value. However, if your system has resource problems you can use this field to adjust the frequency at which the database is updated during processing.

Navigation Method Displays the navigation method that was selected for your installation on the Profile Management Installation page.

See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles, page 45.

Total Processed If the Build Manager List process is in progress, this field displays the number of assignments that have been processed and saved to the database. If the process did not successfully complete the last time it was run, this field shows the number of assignments that were saved before the process ended in error.

If the process completed successfully, this field is not displayed.

Assignment Information

Select the employee whose data will be updated by the Build Manager List process. This group box is hidden if you select *Full - Complete Rebuild* in the Unload Mode field.

Restart Information

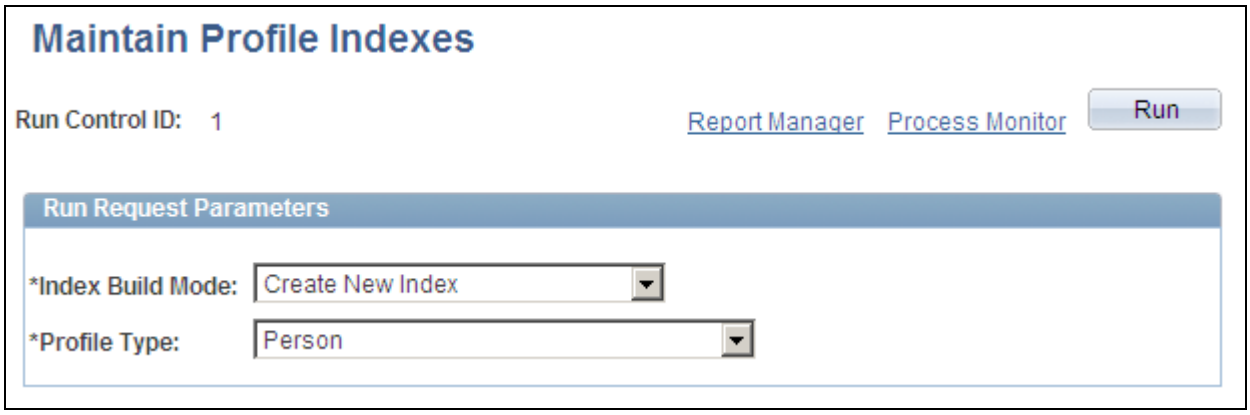
This group box is displayed if the Build Manager List process did not successfully complete the last time it was run. It shows the EmplID (employee ID) and Empl Rcd Nbr (employee record number) that will be processed when you rerun the process using the selected run control ID. You cannot change the details in this group box; the process automatically restarts processing with this assignment.

Process Information

This group box is displayed if the Build Manager List process is in progress. It shows the EmplID (employee ID) and Empl Rcd Nbr (employee record number) last processed and saved to the database.

Running the Maintain Profile Indexes Process

Access the Maintain Profile Indexes page (Set Up HRMS, Product Related, Profile Management, Profiles, Maintain Profile Indexes, Maintain Profile Indexes).



Maintain Profile Indexes page

Index Build Mode Select one of these values:

Create New Index: Builds a new index.

Update Existing Index: Updates the existing index for the selected profile type.

Profile Type Select the profile type for which you want to run the process or select *All Profile Types* to run the process for all profile types. The system only includes profiles with profile types defined as end profiles

Chapter 5

Managing Profiles

This chapter provides an overview of profile management and discusses how to:

- Maintain profiles.
- Approve profile changes.
- Search and compare profiles.
- Manage interest lists.
- Track training.

Understanding Profile Management

This chapter discusses the profile management options available to profile administrators that enable them to:

- Create and maintain person and non-person profiles.

  Person profiles are those profiles that are linked to a person ID, while non-person profiles describe business entities such as job codes, positions, and salary grades.

- Review and approve changes to profiles.

  Depending on the configuration of your profile types, approvals workflow is triggered when employees update their personal profiles and managers make changes to non-person profiles. Typically, managers approve changes to their employees' person profiles and administrators approve non-person profile changes.

- Complete searches for profiles that match certain criteria.

  Administrators, managers, and employees use Search and Compare Profiles to run any of the search types that have been configured for them.

- Compare profiles.

  Administrators can compare the content of a source profile with one or more target profiles. The Compare Profiles option provides a summary of the common content sections in a simple readable format along with a score for each content item indicating the degree of fit.

- Manage interest lists.

  An interest list is a collection of non-person profiles that is associated with an employee. Any profile can be added to an interest list, but it is typically used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile. Employees maintain their own interest list using a self-service transaction. However, an employee's manager and administrators can also add profiles to an interest list or remove profiles from them.

- Track training.

  Manage Profiles provides profile administrators access to employees' training history for training that is managed by the Administer Training business process. In addition, Manage Profiles enables you to track external training that is not managed using Administer Training.

For information about the employee and manager self-service transactions, refer to the *PeopleSoft Enterprise eDevelopment PeopleBook*

See Also

PeopleSoft Enterprise eDevelopment 9.1 PeopleBook, "Maintaining My Profiles"

Prerequisites

Before administrators can create profiles, approve changes to profiles, or run searches for profiles you must:

- Define the content catalog.
- Define your profile types.
- (Optional). Define and configure approvals for profiles.

  The use of approval processing for profiles is optional. You associate approvals workflow to profile types.

- Define search types and run the Build Manager List and Maintain Profile Indexes processes required by the Search and Compare Profiles feature.

See Also

Chapter 2, "Setting Up the Content Catalog," page 9

Chapter 3, "Setting Up Profile Management," page 39

Chapter 4, "Setting Up Search and Compare Profiles," page 89

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

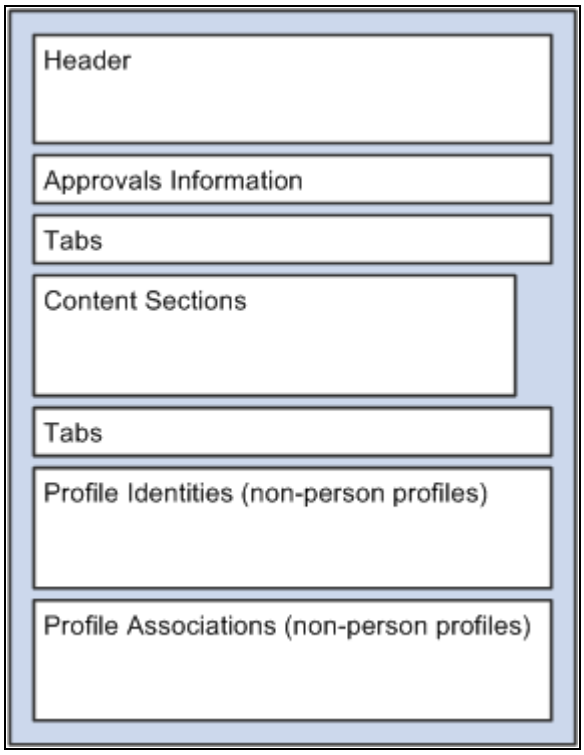
Maintaining Profiles

This section provides overviews of profiles and profile types, profile copy, import, and syndication, lists prerequisites and common elements, and discusses how to:

- Create and update person profiles.
- Create and update non-person profiles.
- Add and update profile groups for a profile.
- Enter additional profile information.
- Add, update, and view profile item details.
- Add related profile items.
- View profile item rows.
- View syndication sources and targets.
- Select profiles for import or syndication.
- Add and update profile identities.
- Add and update profile associations.
- Submit changes to person profiles.
- Submit changes to non-person profiles.
- Review syndication exceptions.
- Review syndication exception details.

Understanding Profiles and Profile Types

Administrators use the Person Profile page and the Non-person Profile page to create and maintain profiles. Both pages have a similar format. This diagram and the following text identify the elements in these pages:



Format of a profile

Here is a description of the parts of a profile:

- Header.

  The header includes general information such as the profile ID, profile type, profile status, and effective date. For a person profile, the header includes the person ID.

- Approvals Information.

  This section includes links that indicate how many profile items are saved (but not submitted for approval), pending approval, approved, or were denied approval.

  Note. The profile pages displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear in the content sections. Use the links in this area of the profile to view the changes that are unapproved.

- Tabs.

  Profile content sections are grouped together by tabs that appear as links in navigation bars. When you select a tab, the system displays the content sections defined for that tab. The navigation bar appears above and below the content sections for the tab. The naming and order of the tabs in a profile are determined by the profile type.

- Content sections.

  Tabs consist of one or more content sections. The content sections are defined by the profile type. Users add profile items to the content sections.

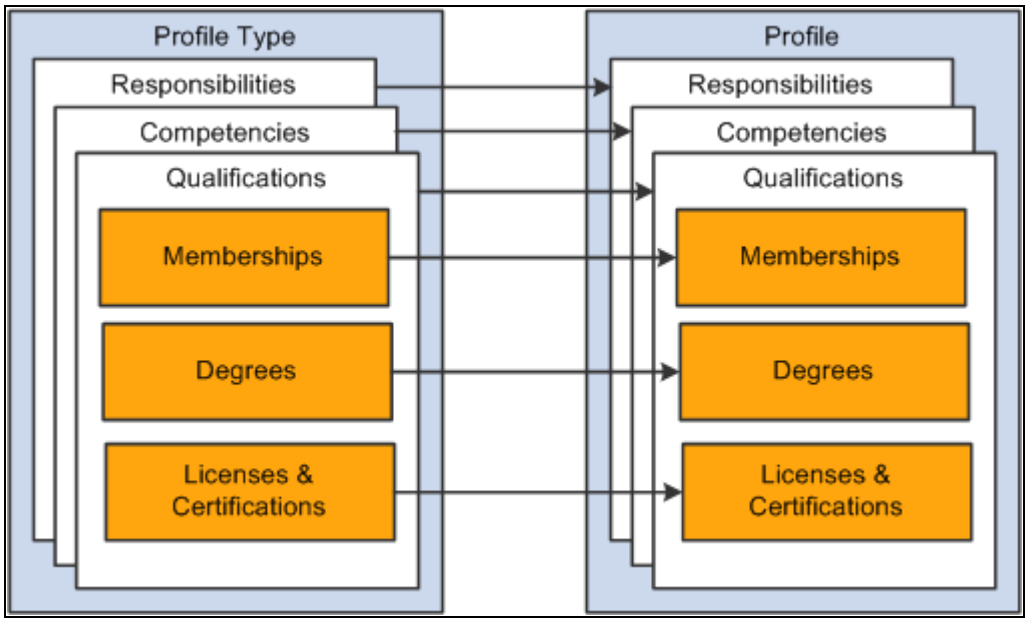
- Profile identities (non-person profiles only).

  On the Non-person Profile page, the Profile Identities scroll area lists the entities to which the profile is linked. The type of profile identities available are controlled by the profile type selected. For example, if the profile type allows job codes to be linked to the profile, users can insert a row for a job code for the profile, but they cannot link the profile to a position number. An active profile must be linked to at least one profile identity.

- Profile Associations (non-person profiles only).

  On the Non-person Profile page, the Profile Associations scroll area lists any entities to which the profile is associated. Profile associations are entities, such as ePerformance templates, that are outside of the Manage Profiles business process. The profile type defines the profile associations available.

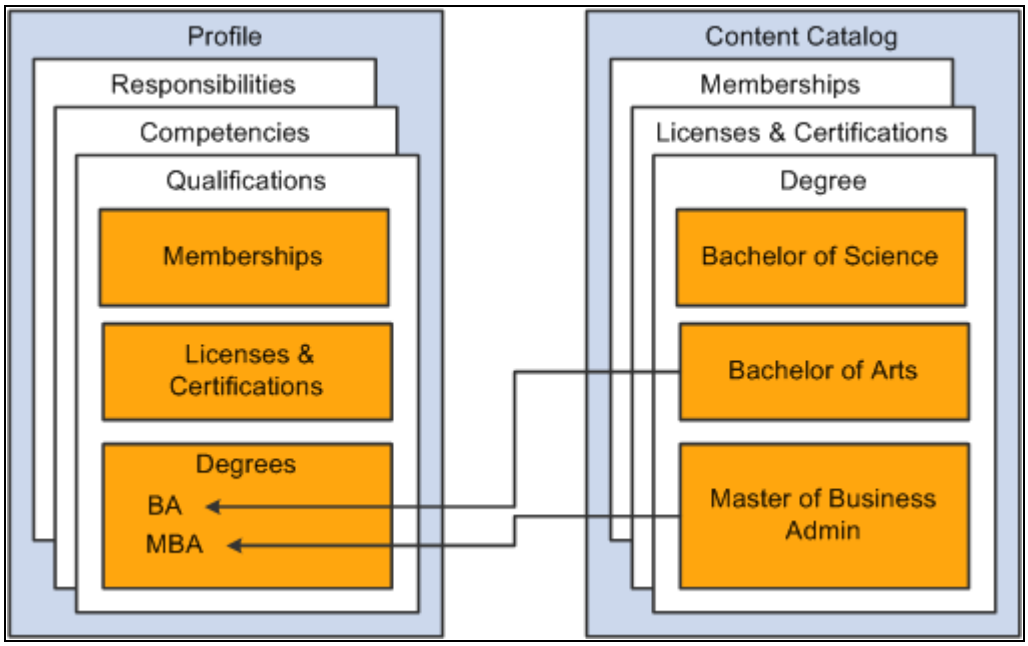
This diagram shows how the tabs and content sections of a profile are determined by the tabs and content sections of the profile type; in this example, the three tabs in the profile type automatically exist in the related profile, as do the content sections within the tabs:



The profile type serves as a template for the tabs and content sections in a profile

The profile type provides the structure for a profile, it does not provide the actual content. To complete the profile, users add profile items, such as competencies or education information, by selecting from the content items available in the content catalog.

This diagram illustrates how you complete the Degrees content section by selecting from degrees such as Bachelor of Science, Bachelor of Arts, and Master of Business Administration, all of which are defined in the content catalog:



Adding items to profiles by selecting from the content catalog

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Note. The profile type controls whether approvals workflow is triggered when the profile is updated, and the user roles that can view and update each section of the profile.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61.

Understanding Profile Copy, Import, and Syndication

Often the same profile items appear in related profiles. For example, employees' profiles may contain profile items that also appear in the profiles for their job code or position. Non-person profiles for similar or related jobs may have common profile items. To streamline the process of creating and maintaining profiles, Manage Profiles provides three ways to copy profile items. You can:

- Load profile items into a person profile from a related non-person profile.

  The Profile Actions field on the Person Profile page has an option, *Copy from Job Profile*, that enables you to select a non-person profile from a list of related profiles. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. For example, the system checks for active profiles that match the employee's job codes, positions, and salary grades.

- Import content into a non-person profile from another profile or from the content catalog.

  When you import content, the system copies the profile items from the source profile into the target profile. Any changes made to the source profile or content items after the import do not affect the target profile. Use the Import Content link on the Non-person Profile page to import content.

- Syndicate content into a non-person profile from another profile.

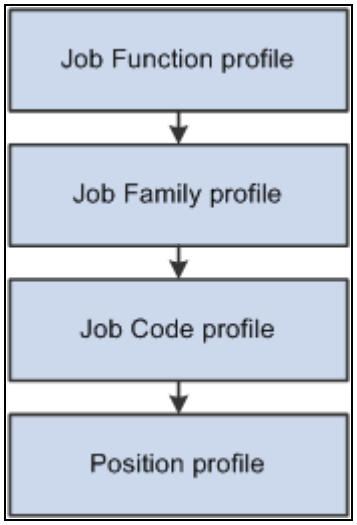
  When you syndicate content, the system copies profile items from the source profile into the target profile. However, it also sets up a relationship between the source profile and the target profile that contains the syndicated content. Whenever syndicated content is updated, the changes are incorporated into the target profiles automatically. Use the Profile Syndications link on the Non-person Profile page to syndicate content.

Note. The copy from job profile, import, and syndicate actions copy identifiers. Import and syndicate copy the properties that are defined in the target profile type definition. Additional properties in the non-person (source) profile type are not copied. If the target profile has additional properties that are not used in the source profile, the system uses the default values defined for these properties. The default values can be defined by the profile type, or in the record in Application Designer.

Setting Up Syndication

Syndication reduces maintenance by enabling administrators to set up common content once in a source profile and copy it to multiple target profiles. You can also syndicate content through a series of related profiles.

This diagram shows how you could set up a job function profile and syndicate the content through the hierarchy to job family, job code, and position number profiles:



Syndication propagates a job function profile through the job family, job code, and position number profiles

If you set up cascading syndication, we recommend that you use it in a similar hierarchical method.

When setting up syndication, you should consider what happens when the target profile already includes an item that is in the syndicate source profile. For example, if you syndicate content from more than one source profile into a target profile, it is possible for the same item to occur in the source profiles but with different values. These are known as syndication exceptions. In this situation, the system updates the target profile with the values from the source profile, effectively overriding the existing values.

View syndication exceptions using the Syndication Exceptions page.

Prerequisites

Before you can syndicate content:

- Configure the application server for publish/subscribe.
- Configure the integration broker and make it active.

  Ensure that the:

  - The EOEN_MSG_CHNL queue is running.
  - The service operation OEN_MSG is active.
  - The associated routing definitions are active.
- Set up the Event Manager.

  Make the event JPMProfileItemsUpdated and the associated event handlers active. We also recommend that you enable logging for the event and handler.

See Also

Events and Notifications Framework PeopleBook, "Setting Up Events"

Enterprise PeopleTools PeopleBook: Integration Broker

Enterprise PeopleTools PeopleBook: System and Server Administration

Common Elements Used in this Section

Status

Select one of these values:

Active: If the profile type does not require approval, update the status to *Active* to make the profile available to other users.

Inactive: Profiles that are inactive are not available to employees and managers in self-service. When you update the status to *Inactive,* the system removes the profile from the profile groups to which it belongs.

When you create a non-person profile, the default status is *Inactive.* You can only update the status to *Active* when the profile is linked to one or more profile identities and approved. Employees can view active non-person profiles only. Managers can view both active and inactive non-person profiles.

Profile Type

Select the profile type for the new profile. When you update an existing profile, the Profile Type field is display-only. The profile type determines the tabs that appear in the profile.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61.

Profile Actions

This field appears on the Non-person Profile and Person Profile pages. Select an action and click the Go icon if you want to do one of the following:

Express Interest for Employee: To add the profile to a person's interest list. This profile action is available from the Non-person Profile page only. The system displays the Person Search - Simple page, which you use to search for the employee whose interest list you want to update.

Copy From Job Profile: To copy items from a non-person profile to the employee's profile. This profile action is available from the Person Profile page only. The system displays the Copy Items from Job Profile page, which lists the profiles related to the employee's active jobs.

Search and Compare Profiles: To run a search. This profile action is available from the Non-person Profile page and the Person Profile page. The system displays the Search for Profiles page.

Update Profile Groups: To categorize your profiles by profile groups. This profile action is available from the Non-person Profile page and the Person Profile page when the profile is active and the page is not display only. The system displays the Update Profile Groups page, which you use to list the profile group types and profile groups to which you want to add the profile. This action is not available if the profile status is inactive

See Chapter 5, "Managing Profiles," Adding and Updating Profile Groups for a Profile, page 129.

View Related Job Profiles: Displays a list of non-person profiles that are related to the employee's job data. This profile action is available from the Person Profile page only. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles.

Pages Used to Maintain Profiles

Page Name	*Definition Name*	*Navigation*	*Usage*
Person Profile	JPM_PROFILE_PERS	• Workforce Development, Profile Management, Profiles, Person Profiles, Person Profile • Workforce Administration, Global Assignments, Assignee Qualifications, Person Profiles, Person Profile	Create and update person profiles.
Non-person Profile	JPM_PROFILE1	Workforce Development, Profile Management, Profiles, Non-person Profiles, Non-person Profile	Create and update non-person profiles.

Page Name	Definition Name	Navigation	Usage
Search for Profiles	JPM_SRCH_TRANSFER	Select *Search and Compare Profiles* from the Profile Actions field on the Person Profile page or the Non-person Profile page and click Go.	Lists the profile search types that are defined for administrators. Select the type of search that you want to run. See Chapter 5, "Managing Profiles," Understanding Search and Compare Profiles, page 150.
Update Profile Groups	JPM_UPD_GROUP_SEC	Select *Update Profile Groups* from the Profile Actions field on the Person Profile page or the Non-person Profile page and click Go.	Add and update profile groups for a profile.
Person Profile - Profile Information Non-person Profile - Profile Information	JPM_PROF_INFO_SEC	Select the Profile Information icon on the Person Profile page or the Non-person Profile page.	Enter additional profile information such as comments or the owner ID for non-person profiles.
Add New <content type> Update <content type> View <content type>	JPM_PROF_DTL_SEC	Click the Add New <content type> link for a profile content item ID on the Person Profile page or the Non-person Profile page. (When you click the profile content item ID link for an item that is from another source profile, the View or Update <content type> page appears.)	Add, update, and view profile item details.
Related Items	JPM_PROF_DETAIL	Click the related content link on the Add New <content type> or Update <content type> page.	Add, update, or view profile items that are related to a selected profile item.
View Historical Items	JPM_PROF_HIST_SEC	Click the View History icon on the Person Profile page or Non-person Profile page.	View profile item rows for different effective-dates. Click the content type item to update historical information on the Update <content type> page.

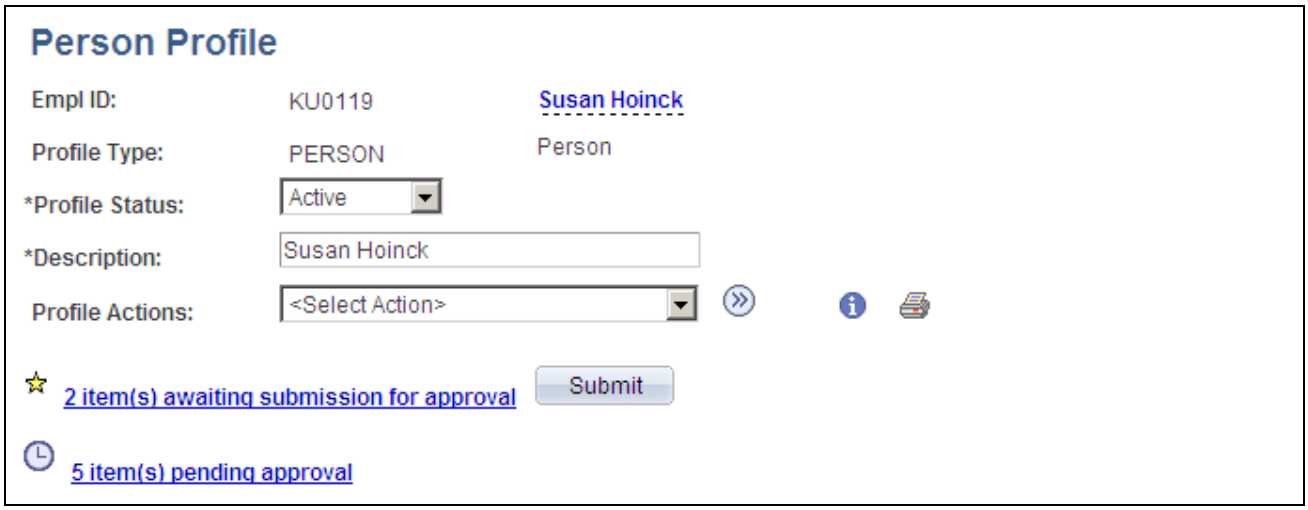
Page Name	Definition Name	Navigation	Usage
Items Awaiting Submission Pending Items Denied Items	JPM_JP_PRF_VW_CHGS	• Click the <number> item(s) awaiting submission for approval link on the Person Profile page or the Non-person Profile page. • Click the <number> item(s) pending approval link on the Person Profile page or the Non-person Profile page. • Click the <number> item(s) denied (since <date>) link on the Person Profile page or the Non-person Profile page.	Lists the profile items that are awaiting submission for approval, pending approval, or have been denied approval. Items that have been submitted for approval can't be changed until they have been approved. Items awaiting submission can be deleted but not updated.
View <content type>	JPM_APR_DTL_SEC	Click a content item ID on the Items Awaiting Submission page, Pending Items page, or Denied Items page to view the item details.	View details of a profile item.
Copy Items from Job Profile	JPM_COPY_PROFL_SEC	Select *Copy From Job Profile* in the Profile Action field on the Person Profile page and click the Go icon.	View a list of job profiles from which you can copy profile items. Select the profile from which you want to copy profile items and click the Select button. The system adds the profile items to the employee's profile. If only one job profile exists, the system automatically copies the items to the profile and displays a message saying how many items were copied.
Select Profile	JPM_JP_REL_PRF_EMP	Select *View Related Job Profiles* in the Profile Action field on the Person Profile page and click the Go icon.	View a list of the job profiles that are related to an employee's job data. Select the profile that you want to view and click the Continue button. The Non-person Profile page appears.

Page Name	*Definition Name*	*Navigation*	*Usage*
Person Search - Simple	HR_PSS_SEARCH	Select *Express Interest for Employee* in the Profile Actions field on the Non-person Profile page and click the Go icon.	Search for and select a person.
Profile Syndication	JPM_PROF_SYND_SEC	Click the Profile Syndications link on the Non-person Profile page.	View the syndication source and target profiles. You can also add and remove syndicated content on this page.
Syndicate Profiles Import Content	JPM_PROF_SRCH_SEC	• Click the Syndicate Profiles link on the Non-person Profile - Profile Syndication page. • Click the Import Content link on the Non-person Profile page.	Select the profiles from which content will be imported or syndicated.
Add New Profile Identity Update Profile Identity	JPM_JP_PID_SEC	Click the Add Profile Identity link or the Edit Identity icon in the Profile Identities grid area on the Non-person Profile page.	Add or edit profile identities associated with the profile.
Add New Profile Association Update Profile Association	JPM_JP_ASSC_SEC	Click the Add Profile Association link or the Profile Association Option value link in the Profile Associations grid area on the Non-person Profile page.	Add or update profile associations for the profile.
Person Profile - Summary of Changes	JPM_JP_PERSUMM_SEC	Click the Save button or the Submit button on the Person Profile page when there are items that need to be submitted for approval.	View a list of changes that have been made to the person profile that require approval. You can also entered comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Person Profile page and not submit the items for approval. These items will not be available to other processes until they have been submitted for approval and approved.

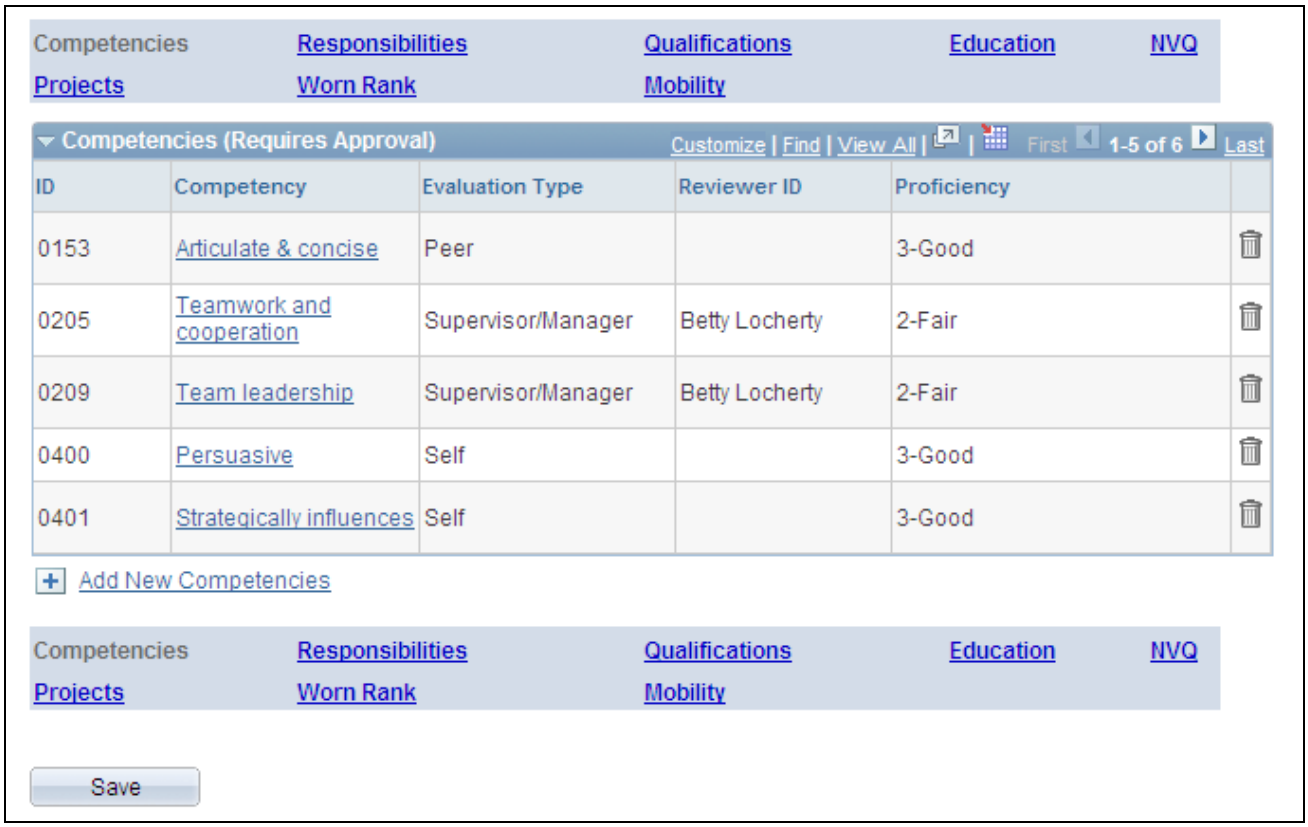
Page Name	Definition Name	Navigation	Usage
Non-person Profile - Summary of Changes	JPM_JP_NPSUMM_SEC	Click the Save button or the Submit button on the Non-person Profile page when there are items that need to be submitted for approval.	View a list of changes that have been made to the non-person profile that require approval. You can also entered comments for the approver. Click the Submit button to submit the changes for approval or click Cancel to return to the Non-person Profile page not submit the items for approval.
Submit Confirmation	JPM_JP_PROFL_APPR	Click the Submit button on the Person Profile - Summary of Changes page or the Non-person Profile - Summary of Changes page.	View confirmation messages of changes have been submitted. The Approval Routing group box provides a summary of the approval path. It shows the number of approvers and the sequence of approvals.
Syndication Exceptions	JPM_JP_SYND_EXC1	Workforce Development, Profile Management, Profiles, Syndication Exceptions, Syndication Exceptions	Display the syndication exceptions for a profile. Syndication exceptions occur when an content item is syndicated from multiple source profiles but has different property values from each source profile.
Exception Details	JPM_JP_SYND_EX_SEC	Click the View Details link on the Syndication Exceptions page.	Display details of profile items with exceptions.

Creating and Updating Person Profiles

Access the Person Profile page (Workforce Development, Profile Management, Profiles, Person Profiles, Person Profile).



Person Profile page (1 of 2)



Person Profile page (2 of 2)

Status

Select the status of the profile. Options are *Active* or *Inactive.*

When a worker's job is terminated, the Event Manager event InactivatePersonProfile event is raised to determine if all the worker's job assignments are inactive. If all job assignments are inactive, then all person profiles for that employee ID are also changed to *Inactive.*

Note. Since this service uses a component interface to perform the update, the event JPMProfileUpdated is automatically raised. This will cause the inactive profiles to be removed from the appropriate Verity collections and not be used in the search process.

See *Events and Notifications Framework PeopleBook,* "Setting Up Events."

Profile Actions

Select an action you want to perform and click Go. Values on the Person Profile page may include *Copy From Job Profile, Search and Compare Profiles, Update Profile Groups,* and *View Related Job Profiles.* Each of these actions opens a corresponding page where you can view or update information related to the action.

See Chapter 5, "Managing Profiles," Common Elements Used in this Section, page 114.

See Chapter 5, "Managing Profiles," Adding and Updating Profile Groups for a Profile, page 129.

Click the Profile Information icon to display the Person Profile - Profile Information page and enter additional comments about the profile.

Click the Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. XML Publisher technology generates the printable file using the same template and layout as the Person Profile batch report.

See Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 83.

Note. The Person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear on the profile content sections. Instead links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or denied approval. Use these links to view the changes.

<number> item(s) awaiting submission for approval

Click this link to access the Items Awaiting Submission page and view the profile items that have been saved but not submitted for approval. This includes profile items that have been added, amended, or deleted.

When a profile item has been saved but not submitted, the Submit button appears after the <number> item(s) awaiting submission for approval link. When you click the Submit button, the system displays the Summary of Changes page, where newly added items can be submitted for approval. The system will also display the Summary of Changes page upon saving the profile page when there are items awaiting submission. If approval is not required, the system automatically changes the status of the items approved.

Submit

Click this button if there are any items awaiting to be submitted for approval. The Person Profile - Summary of Changes page appears and lists the new, deleted, and changed items requiring approval. This button appears only when there are items awaiting submission for approval.

<number> item(s) pending approval

Click this link to access the Pending Items page and view the profile items that have been submitted for approval but are pending approval.

<number> item(s) approved (since <date>)

Displays the number of items that have been approved.

The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles Installation Settings, page 45.

<number> items denied (since <date>)

Click this link to access the Denied Items page and view the profile items that have been submitted for approval but the approver denied.

The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

Profiles are divided into tabs that appear as links as shown in this example:

Competencies	Responsibilities	Qualifications	Education	NVQ
Projects	Worn Rank	Mobility		

Example of tabs on the profile pages

When you click the tab name, the content sections for that tab appear.

Note. The tabs that appear on the profile and content section within each tab are determined by the profile type selected. Define the tabs and content sections for profile types using the Profile Type - Content page.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61.

Add New <content type> and **<content item>**

Click these links to add or update profile items. The Add <content type> page or Update <content type> page appears. The fields on this page are determined by the profile type associated with the profile.

See Chapter 5, "Managing Profiles," Adding, Updating, and Viewing Profile Item Details, page 131.

Click the View History icon to display the View Historical Items page. This icon appears only when a profile item has more than one effective-dated row.

Save

Click this button to save the changes you have made. The system updates the Person Profile page to display approved items or items not requiring approval within the profile content sections. Pending items and items awaiting to be submitted do not appear in the profile content sections. If you are creating a new profile that requires approval of all it's items, no profile items will appear in the content sections upon saving. However, the system displays the item(s) awaiting submission for approval or item(s) pending approval links to enable you to view the changes you have saved but not submitted or that are pending approval. Once these items have been approved, then they will appear in the content sections.

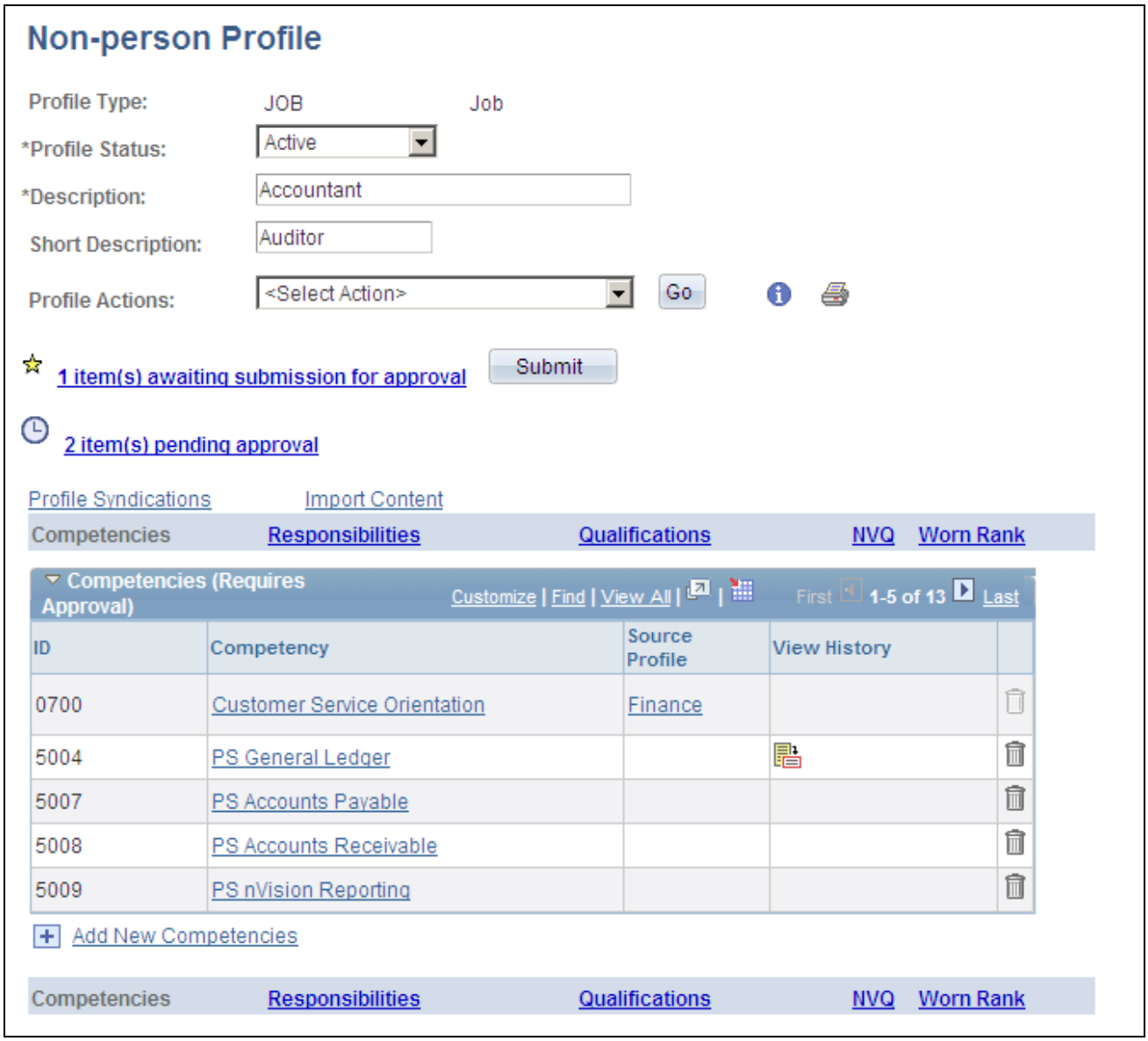
Upon saving, the system does the following:

- For items that do not require approval, the system saves them to the page and a message appears saying you have successfully saved those profile changes that do not require approval. These items will appear in the profile tab item list.
- For items that require approval, the system displays the Person Profile - Summary of Changes page, which provides a list of the items requiring approval.
  - Click Submit to route items to an approver. The system will then display the <number> item(s) pending approval link on the Person Profile page, which you can click to view pending items.
  - Click Cancel to save your items without submitting them for approval. The system will then display the <number> item(s) awaiting submission for approval link and the Submit button on the Person Profile page, where you can view the items awaiting submission or submit items for approval at a later time.

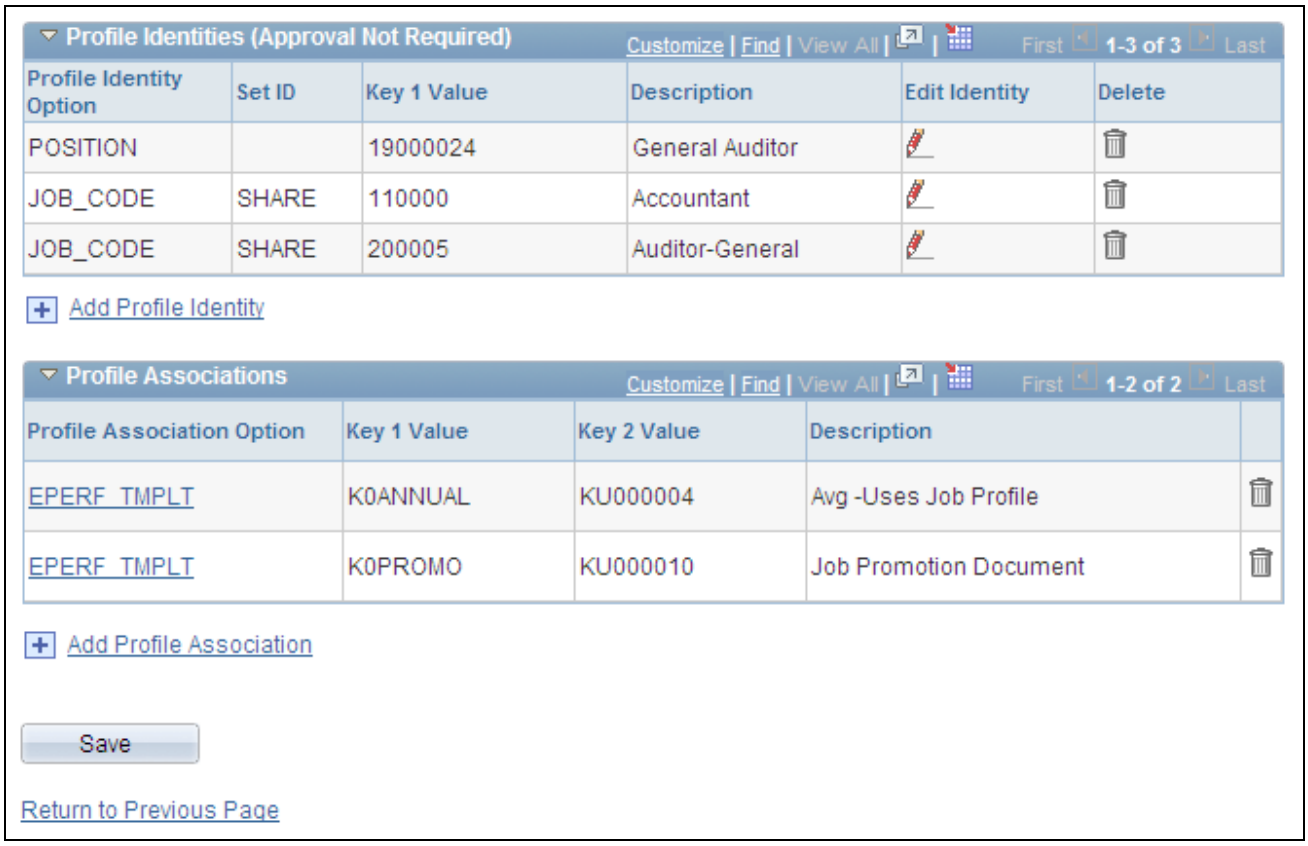
Note. The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks Submit, the system display a message that no approvals are required, and changes will be immediately reflected in the profile.

Creating and Updating Non-Person Profiles

Access the Non-person Profile page (Workforce Development, Profile Management, Profiles, Non-person Profiles, Non-person Profile).



Non-person Profile page (1 of 2)



Non-person Profile page (2 of 2)

Profile Actions

Select an action you want to perform and click Go. Values on the Non-person Profile page may include *Express Interest for Employee:Search and Compare Profiles*, and *Update Profile Groups*. Each of these actions opens a corresponding page where you can view or update information related to the action.

See Chapter 5, "Managing Profiles," Common Elements Used in this Section, page 114.

See Chapter 5, "Managing Profiles," Adding and Updating Profile Groups for a Profile, page 129.

Click the Profile Information icon to display the Non-person Profile- Profile Information page and enter the employee owner ID as well as additional comments about the profile.

Click the Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. XML Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report.

See Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 83.

Note. The Non-person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear within the profile content sections. Instead, links appear on the page that indicate how many items are awaiting submission, are pending approval, or have been denied approval. Use these links to view the changes.

<number> item(s) awaiting submission for approval	Click this link to access the Items Awaiting Submission page and view the profile items that have been saved but not submitted for approval. This includes profile items that have been added, amended, or deleted. When a profile item has been saved but not submitted, the Submit button appears after the <number> item(s) awaiting submission for approval link. When you click the Submit button, the system displays the Non-person Profile - Summary of Changes page, where changes to items requiring approval can be submitted. The system will also display the Non-person Profile - Summary of Changes page upon saving the profile page when there are items awaiting submission for approval.
Submit	Click this button if there are any items awaiting to be submitted for approval. The Non-person Profile - Summary of Changes page appears and lists the new, deleted, and changed items requiring approval. This button appears only when there are saved items awaiting submission for approval.
<number> item(s) pending approval	Click this link to access the Pending Items page and view the profile items that have been submitted for approval but are pending approval.
<number> item(s) approved (since <date>)	Displays the number of items that have been approved. The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page. See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles Installation Settings, page 45.
<number> items denied (since <date>)	Click this link to access the Denied Items page and view the profile items that have been submitted for approval but the approver denied. The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

Profiles are divided into tabs that appear as links as shown in this example:

Competencies	Responsibilities	Qualifications	Education	NVQ
Projects	Worn Rank	Mobility		

Example of tabs on the profile pages

When you click the tab name, the content sections for that tab appear.

Note. The tabs that appear on the profile and content sections within each tab are determined by the profile type selected. Define the tabs and content sections for profile types using the Profile Type - Content page.

See Chapter 3, "Setting Up Profile Management," Defining Profile Type Content, page 66.

Profile Syndications

Click this link to display the Profile Syndication page that lists:

- The source profiles that provide syndicated content for the profile.
- The target profiles that contain content syndicated from the profile.

See Chapter 5, "Managing Profiles," Viewing Syndication Sources and Targets, page 134.

Import Content

Click this link to import content from another profile.

See Chapter 5, "Managing Profiles," Selecting Profiles for Import or Syndication, page 135.

Add New <content type> and **<content item>**

Click these links to add or update profile items. The Add <content type> page or Update <content type> page appears. If the origin of the content item is from another source profile or another product such as ePerformance, the system displays the View <content type> page. The fields on this page are determined by the profile type associated with the profile.

See Chapter 5, "Managing Profiles," Adding, Updating, and Viewing Profile Item Details, page 131.

Source Profile

Click the source profile link to view details about the source profile from which this item was syndicated. The system displays this field only when items have been syndicated into the profile.

Click the View All Rows icon to display the View All Rows page. The system displays this icon when a profile item has more than one effective-dated row only.

Save

Click this button to save the changes you have made. The system updates the Non-person Profile page to display approved items or items not requiring approval within the profile content sections. Pending items and items awaiting to be submitted do not appear in the profile content sections. If you are creating a new profile that requires approval of all it's items, no profile items will appear in the content sections upon saving until they have been approved.

Upon saving, the system does the following:

- For items that do not require approval, the system saves them to the page and a message appears saying you have successfully saved those profile changes that do not require approval. These items will appear in the profile content section.
- For items that require approval, the system displays the Non-person Profile - Summary of Changes page, which provides a list of the items requiring approval.
  - Click Submit to route to the approver. The system will then display the <number> item(s) pending approval link on the non-person Profile page, which you can click to view pending items.
  - Click Cancel to save your items without submitting them for approval. The system will then display the <number> item(s) awaiting submission for approval link and the Submit button on the Non-person Profile page, where you can view the items awaiting submission or submit items for approval at a later time.

Note. The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks Submit, the system display a message that no approvals are required, and changes will be immediately reflected in the profile.

Profile Identities

Expand this section to view a lists of the profile identities information to which the profile is linked.

Click the Edit Identity icon to open the Update Profile Identity page and update an existing identity.

Add Profile Identity

Click this link to add a profile identity to this profile. The system displays the Add New Profile Identity page.

See Chapter 5, "Managing Profiles," Adding and Updating Profile Identities, page 137.

Profile Associations

Expand this group box to view a list of the associations for the profile. Profile associations are entities outside the Manage Profiles business process. PeopleSoft Enterprise ePerformance templates are linked to profiles in this way.

Note. Many of the non-person profiles types do not have an association specified in their configuration. Therefore, the Profile Associations grid will not display in all non-person profiles, such as role.

Profile Association Option Select the profile association ID link to view association details or update the effective date or status. The options available are determined by the profile type definition.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Type Associations, page 74.

Add Profile Association Click to add a new profile association to this profile. The system displays the Add New Profile Association page.

See Chapter 5, "Managing Profiles," Adding and Updating Profile Associations, page 138.

Adding and Updating Profile Groups for a Profile

Access the Update Profile Groups page (select the *Update Profile Groups* value from the Profile Actions field on the Person Profile page or the Non-person Profile page and click Go.)

Update Profile Groups page

This page lists the profile groups to which the profile belongs.

Profile Group Type Select the profile group type.

Profile Group ID Select the profile group you want to add to the profile.

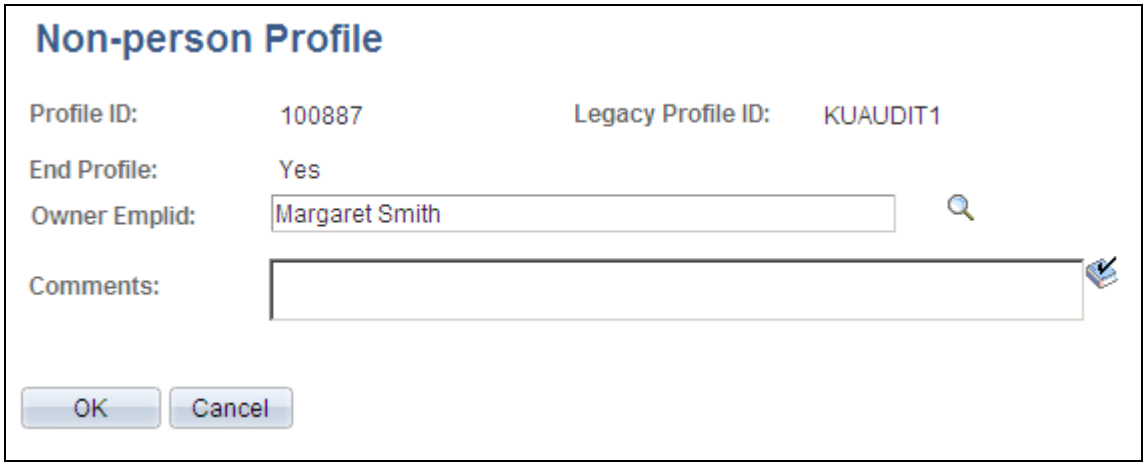
Add Profile to Group Click this link to add another profile group to this profile.

See Chapter 3, "Setting Up Profile Management," Creating Profile Group Types and Profile Groups, page 76.

Note. Manually entered profiles may be deleted when this group is repopulated. This group is populated using preset group criteria. When the group is rebuilt the manually entered profiles will be deleted if they do not fit the criteria.

Entering Additional Profile Information

Access the Person Profile - Profile Information or Non-person Profile - Profile Information page (click the Profile Information icon on the Person Profile page or the Non-person Profile page).



Non-person Profile - Profile Information page

Note. The fields on the Profile Information page for a Person Profile and a Non-person Profile vary slightly.

End Profile This field is available on the Non-Person Profile - Profile Information page.

Displays whether the profile type is used for end profiles or not. End profiles can be viewed from self service and must have a profile identity before they can be set to a status of active.

Legacy Profile ID This field is available on the Non-Person Profile - Profile Information page.

Displays the legacy profile ID assigned to the profile during upgrade. This field is displayed for some types of profiles that existed in earlier versions of PeopleSoft Enterprise Human Resources.

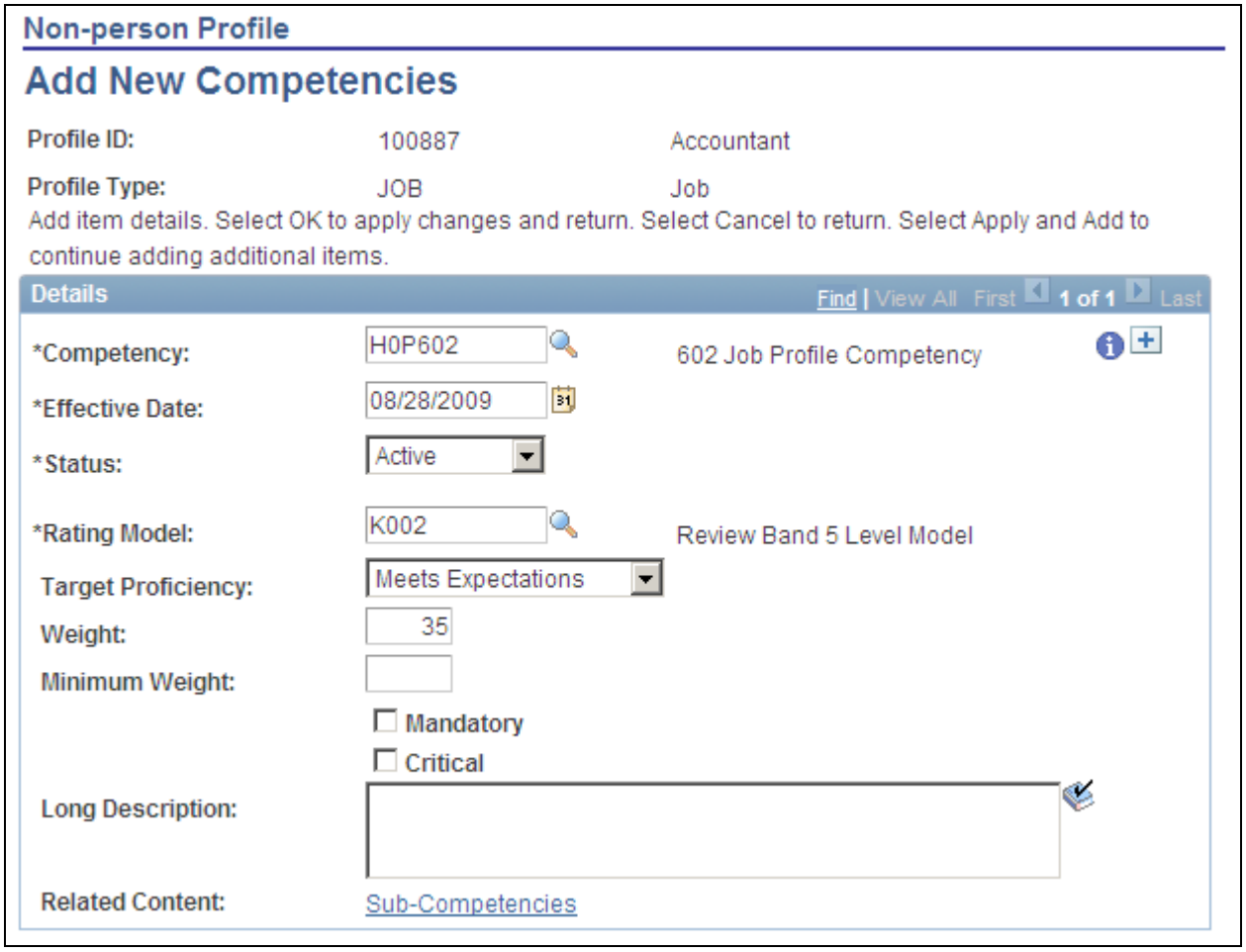
Owner ID This field is available on the Non-Person Profile - Profile Information page.

Select the employee ID of the profile owner. Use this field if you want to assign owners to profiles for reporting or other purposes.

Comment Enter additional comments about the profile.

Adding, Updating, and Viewing Profile Item Details

Access the Add New <content type> or Update <content type> page (click a content item or click the Add New <content type> link on the Non-person Profile page or Person Profile page).



Update <content type> page

Note. The fields and field labels that appear on this page vary according to the item's content type and the content section definition in the profile type. Define content sections using the Profile Type - Content page.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61.

In the administer profile pages, when you look up a content item ID, the system enables you to use these items as part of the search criteria:

- Content item ID
- Content group type
- Content group

- Description

Related Content

Click this link to access the Related Items page where you can add, update, and view items that are related to the selected profile item. This link appears only for items with a child relationship in the Content Catalog where the child content section is included in the profile type definition.

Note. If you are adding a parent item, the system does not automatically add related items for it unless you click the Related Content link.

OK

Click to keep any updates that you make on the profile detail page or on the related items page. If you deleted a parent item row, the system deletes all of its related items.

See Also

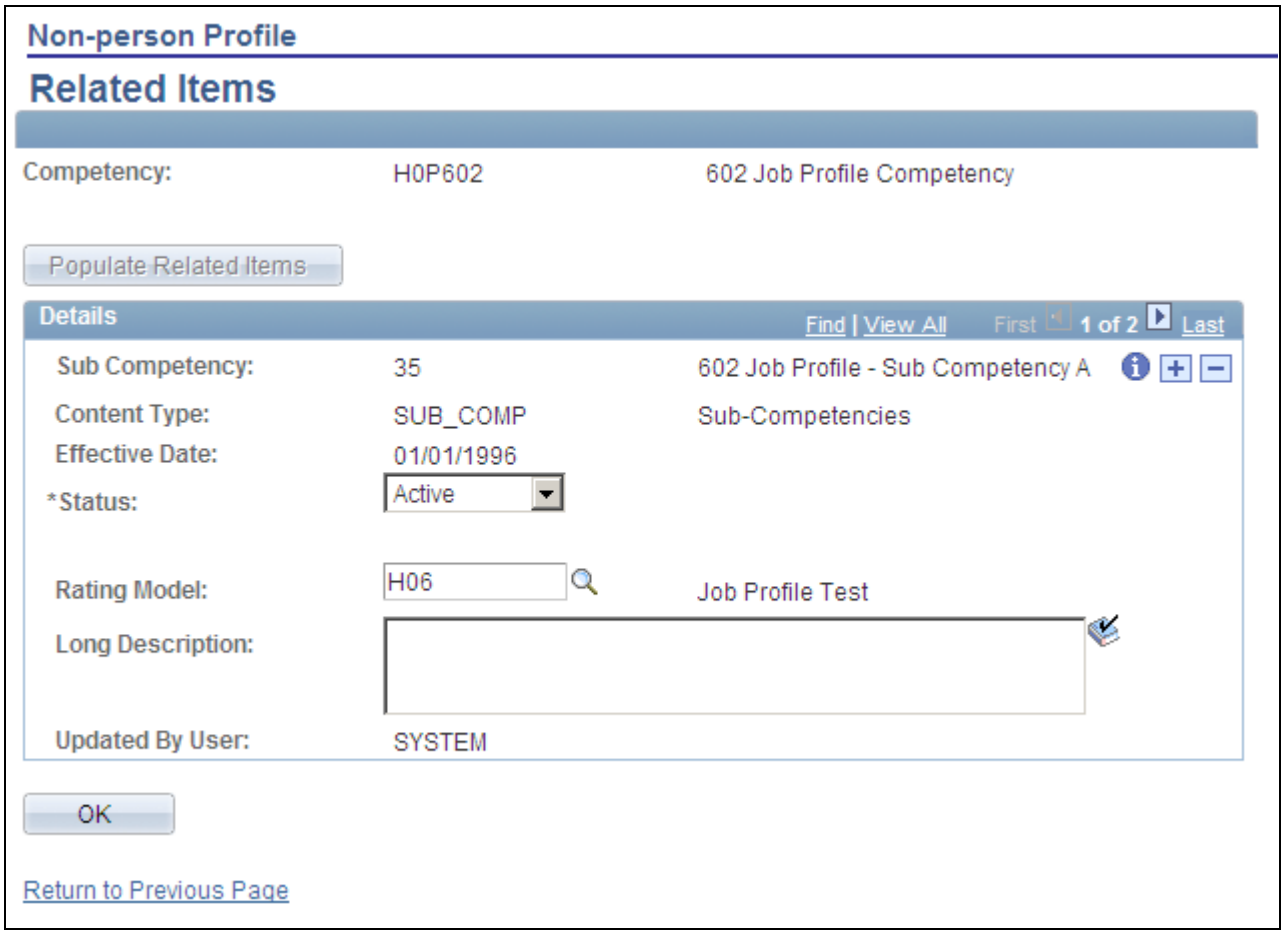
Chapter 2, "Setting Up the Content Catalog," Defining Content Type Relationship Rules, page 22

Chapter 2, "Setting Up the Content Catalog," Setting Up and Reviewing Content Item Relationships, page 27

Chapter 3, "Setting Up Profile Management," Defining Profile Type Content, page 66

Adding Related Profile Items

Access the Related Items page (click the related content link on the Add <content type> or Update <content type> page).



Related Items page

Use this page to add profile items to a profile that are related to an existing profile item. The related items that you can add to a profile are determined by the content section definitions in the profile type and the relationships defined in the content catalog.

Note. The fields and field labels that appear on this page vary according to the related item's content type and the content section definition in the profile type.

Populate Related Items Clicked to have the system automatically insert all related items defined in the Content Catalog. It is also possible to manually select individual items from those defined in the Content Catalog.

Content Type Displays the content type that is related to the profile item as defined in the content item definition.

OK Click to save the updates made on this page. The system does not merge the updates with the profile items, however, until you click the OK button on the parent item page (Update <content type>or Add New <content type>).

See Also

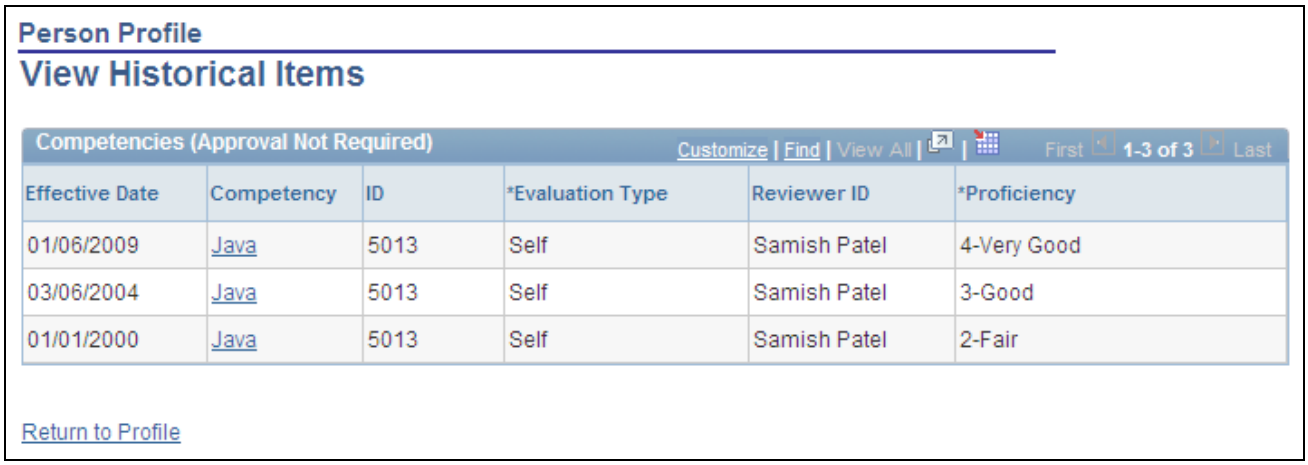
Chapter 2, "Setting Up the Content Catalog," Defining Content Type Relationship Rules, page 22

Chapter 2, "Setting Up the Content Catalog," Setting Up and Reviewing Content Item Relationships, page 27

Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 69

Viewing Profile Item Rows

Access the View Historical Items page (click the View History icon on the Person Profile page or Non-person Profile page).



Person Profile

View Historical Items

Competencies (Approval Not Required) Customize | Find | View All | First 1-3 of 3 Last

Effective Date	Competency	ID	*Evaluation Type	Reviewer ID	*Proficiency
01/06/2009	Java	5013	Self	Samish Patel	4-Very Good
03/06/2004	Java	5013	Self	Samish Patel	3-Good
01/01/2000	Java	5013	Self	Samish Patel	2-Fair

Return to Profile

View Historical Items page

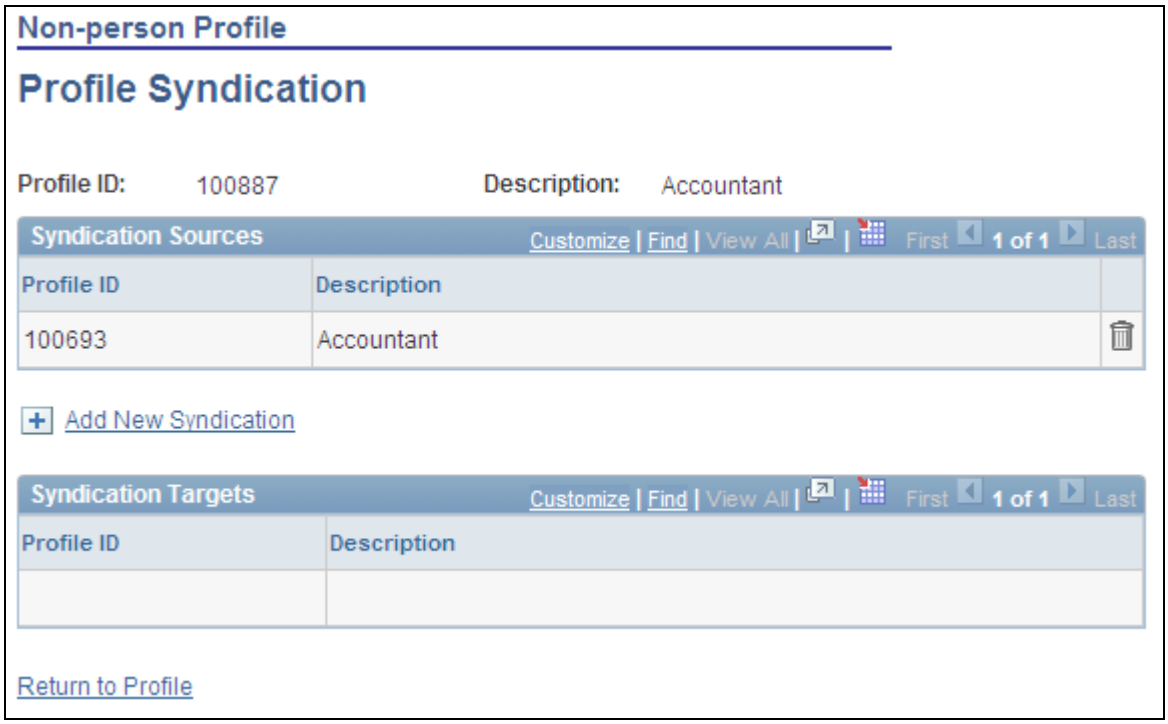
Note. The fields that appear on this page are configured in the Profile Type definition and are indicated as Summary.

This page lists the current, future, and historical rows for an item in a person or non-person profile, enabling you to track the history of a profile item. For example, you can use this page to review the changes to an employee's rating for a profile item, or the desired rating of an item in a job profile. Click the profile item link to view details of the profile item for the selected effective date.

Click Return to Profile to return to the Person Profile page or the Non-person Profile page, depending on the profile type.

Viewing Syndication Sources and Targets

Access the Profile Syndication page (click the Profile Syndications link on the Non-person Profile page).



Profile Syndication page

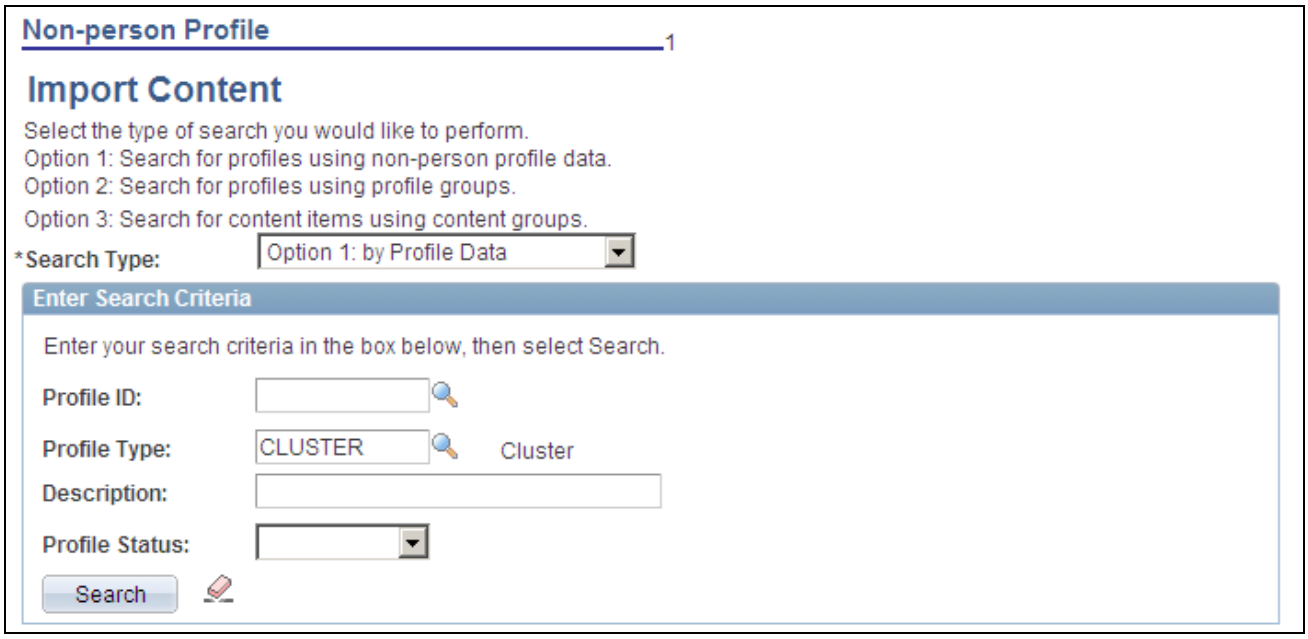
Syndication Sources Lists the profiles that provide content for the selected profile. If you want to remove syndicated content, select the trash can icon.

Add New Syndication Click this link to open the Syndicate Profiles page to select the profiles from which content will be syndicated.

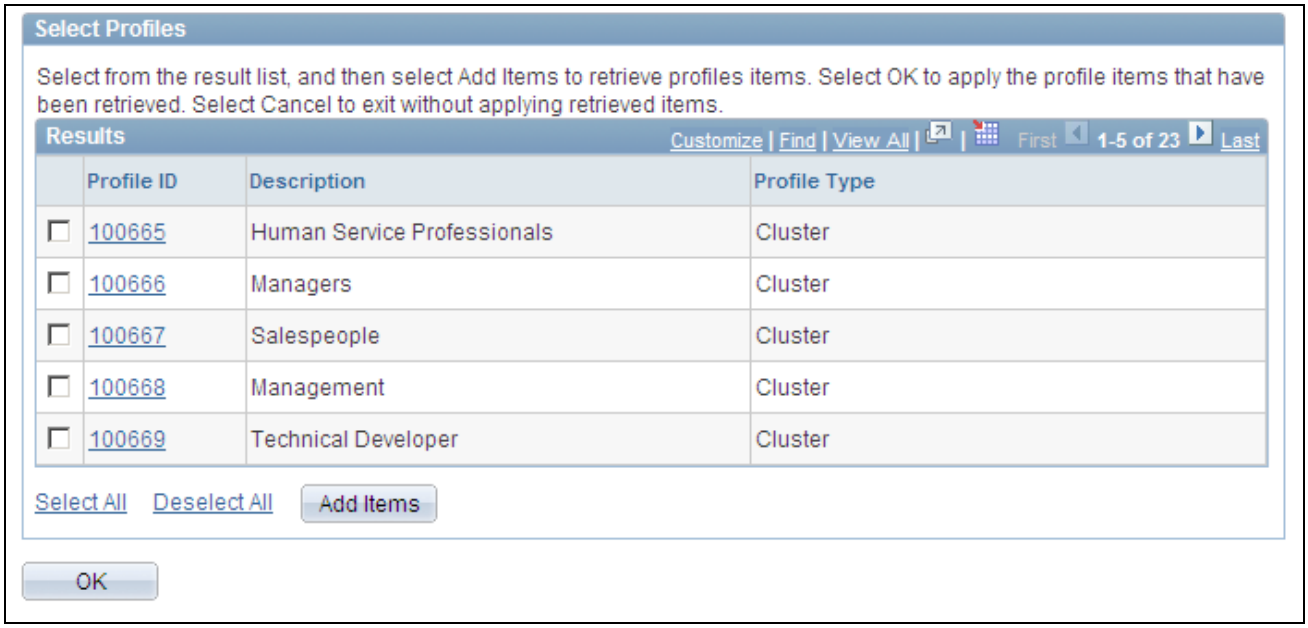
Syndication Targets Displays the profiles that are targets for syndication. These profiles contain content from the selected profile. If you make changes to the selected profile, the syndicated profiles are automatically updated.

Selecting Profiles for Import or Syndication

Access the Import Content page (click the Import Content link on the Non-person Profile page) or access the Syndicate Profiles page (click the Syndicate Profiles link on the Non-person Profile - Profile Syndication page).



Import Content page (1 of 2)



Import Content page (2 of 2)

Note. The Syndicate Profiles page works the same as the Import Content page where you select a search type and enter your search criteria. However, the search types for the Syndicate Profiles page are limited to *Option 1: by Profile Data* and *Option 2: by Profile Groups.*

When you import content, the system does not establish a link between the source profile or content item and the target profile. This means that changes to the content of the source profile or item made after the import action do not affect the target profile.

When you syndicate content, you establish a relationship between the source profile and the target profile, such that changes to the source profile result in the same changes in the target profiles. View syndication relationships on the Profile Syndication page.

Selecting a Search Type

When you first enter the page, it lists the search types available:

Option 1: by Profile Data	Select to search for a non-person profile by profile ID, profile type, description, and status. This option is available on the Import Content page and the Syndicate Profiles page.
Option 2: by Profile Groups	Select to search for a profile by limiting the search to a profile group type or profile group. This option is available on the Import Content page and the Syndicate Profiles page.
Option 3: by Content Groups	Select to search for content items within a content group. This enables you to import multiple items within a content group in one step. This option is available on the Import Content page.

When you select the search type the Enter Search Criteria group box appears. When you enter search criteria and click Search, the Select Profiles and Results group boxes appear.

Enter Search Criteria

Select the search criteria and click the Search button to search for profiles that you want to use for the import or syndication. The fields in this group box vary depending on the search type you select.

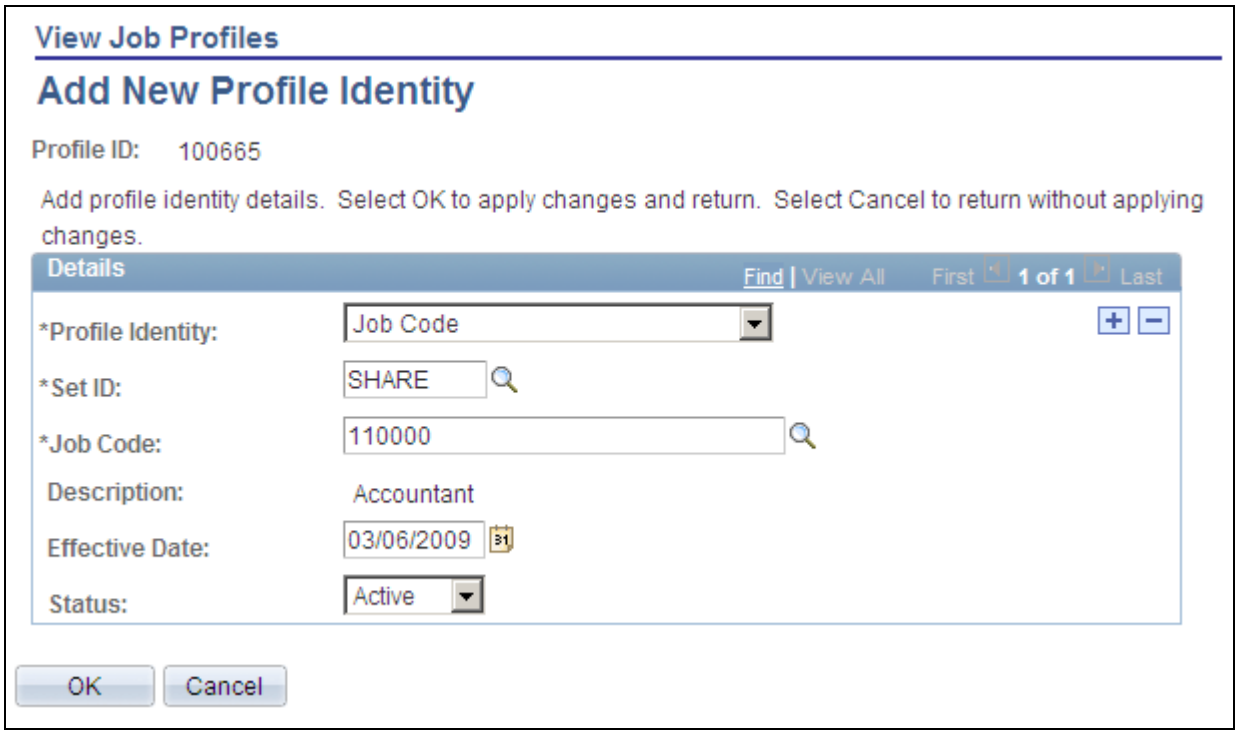
Select Profiles and Results Group Boxes

The Results group box lists the profiles or items that meet your search criteria. Select the profiles from which you want to import or syndicate content by selecting the check box next to the profile ID, profile group type, or catalog item.

Profile ID or **Content Item ID**	Click the profile ID or content item ID to view the profile or item.
Add Items	Click to import or syndicate content from the profiles or content items you selected. A message will appear indicating how many profile items will be imported. Click OK to merge imported items in content sections of profile. The Cancel button returns to the profile without merging items.

Adding and Updating Profile Identities

Access the Add New Profile Identity page or the Update Profile Identities page (click the Add Profile Identity link or the Edit Identity icon in the Profile Identities grid area on the Non-person Profile page.



Add New Profile Identity page

Profile Identity Select the profile identity. The options available are determined by the profile type definition.

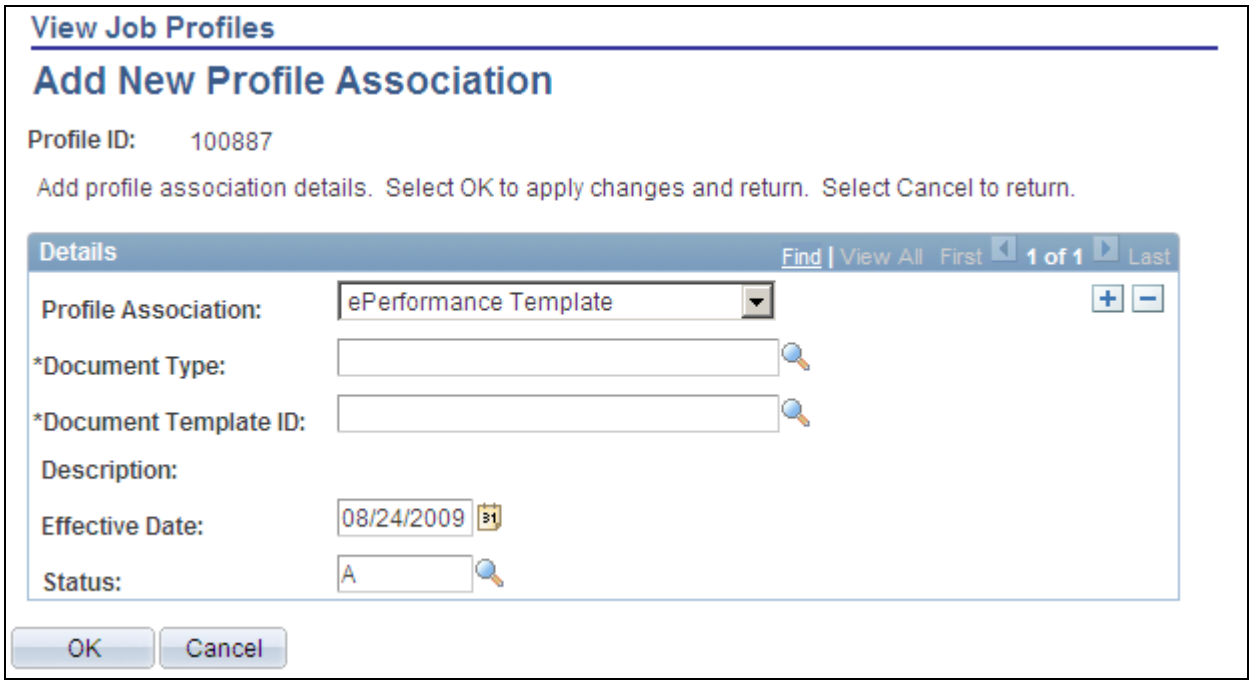
See Chapter 3, "Setting Up Profile Management," Defining Profile Type Identities, page 65.

SetID Select the setID for the profile identity you want to link to this profile. This field appears if the profile identity selected has setID as a key field. SetID is a key field for job codes and salary grades.

Job Data, Job Family, Position Number, Salary Administration Plan, and **Salary Grade** Select the profile identity you want to link to the profile. The number of fields that appear depends upon whether the profile identity has one or up to four key fields. For example, if you select *Salary Grade* in the Profile Identity field, you can enter a salary administration plan and grade. The system displays the Key 1 Value and Key 2 Value fields for the salary administration plan and salary grade on the Non-person Profile page.

Adding and Updating Profile Associations

Access the Add New Profile Association page or the Update Profile Association page (click the Add Profile Association link or the Profile Association Option ID link in the Profile Associations grid area on the Non-person Profile page).



Add New Profile Association page

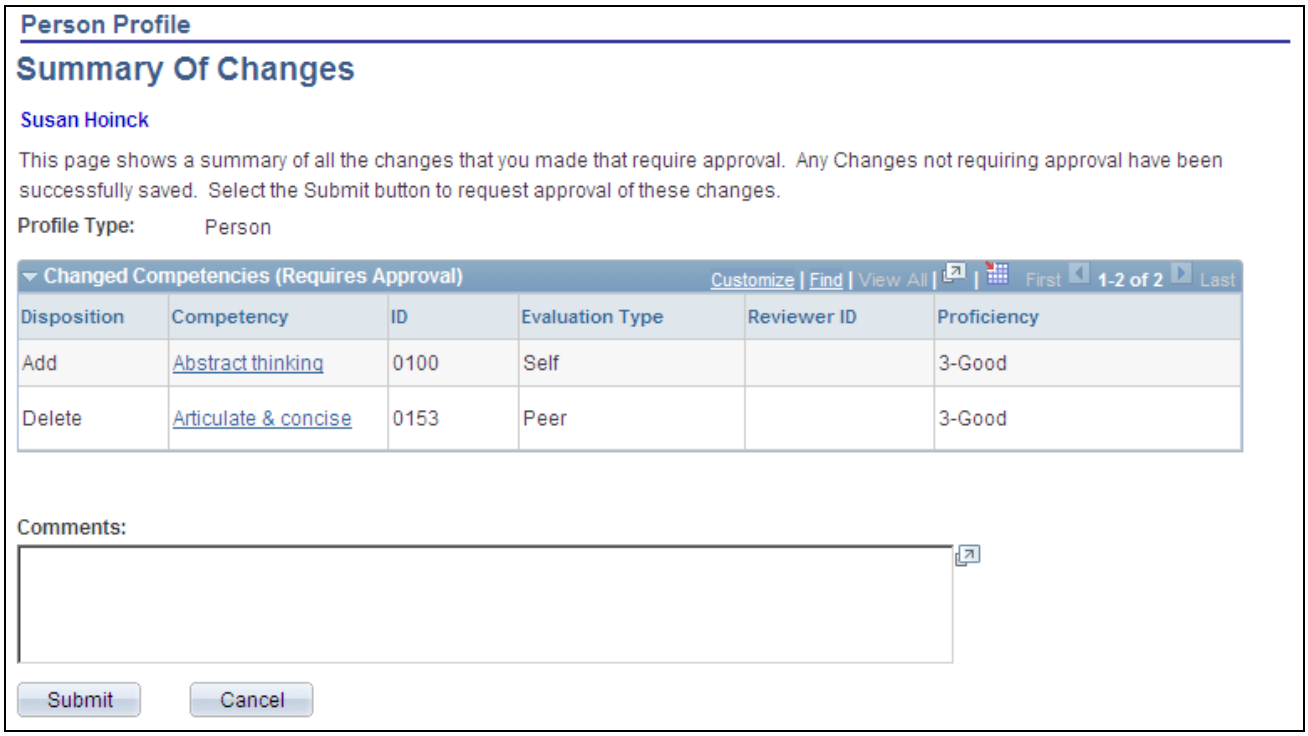
Profile associations are entities outside the Manage Profiles business process. PeopleSoft Enterprise ePerformance templates are linked to profiles in this way.

Profile Association Select the profile association that you want to link to the profile.

Document Type and **Document Template ID** Enter the document type and template ID that you want to link to the profile. The system displays these fields as the Key <number> Value fields on the Non-person Profile page. You can have up to four key fields. For example, if you select ePerformance in the field, the Key 1 Value field is for the Document Type and the Key 2 Value field is for document template ID.

Submitting Changes to Person Profiles

Access the Person Profile - Summary of Changes page (click the Submit button on the Person Profile page).



Person Profile - Summary of Changes page

This page lists the changes that have been made to the person profile that require approval. The title of the scroll areas indicate that content sections that require approval. The fields displayed on this page are determined by the definition of the content section in the profile type. The properties in the content section with the Approval Required check box selected are displayed on this page only.

See Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 69.

Profile Type Displays the profile type for the profile.

Disposition Displays the type of change made:

Add: If it is a new profile item

Change: If you have made any changes to the item properties.

Delete: If you have deleted a profile item.

Comments Enter comments for the approver, if applicable.

Submit

Click this button to submit the changes for approval. The system then displays the Submit Confirmation page.

The Submit Confirmation page displays the approval routing. When the system needs to route items to an approver, the item's status is changed to pending. If the items do not require approval, the approval routing specifies that no approvals are required.

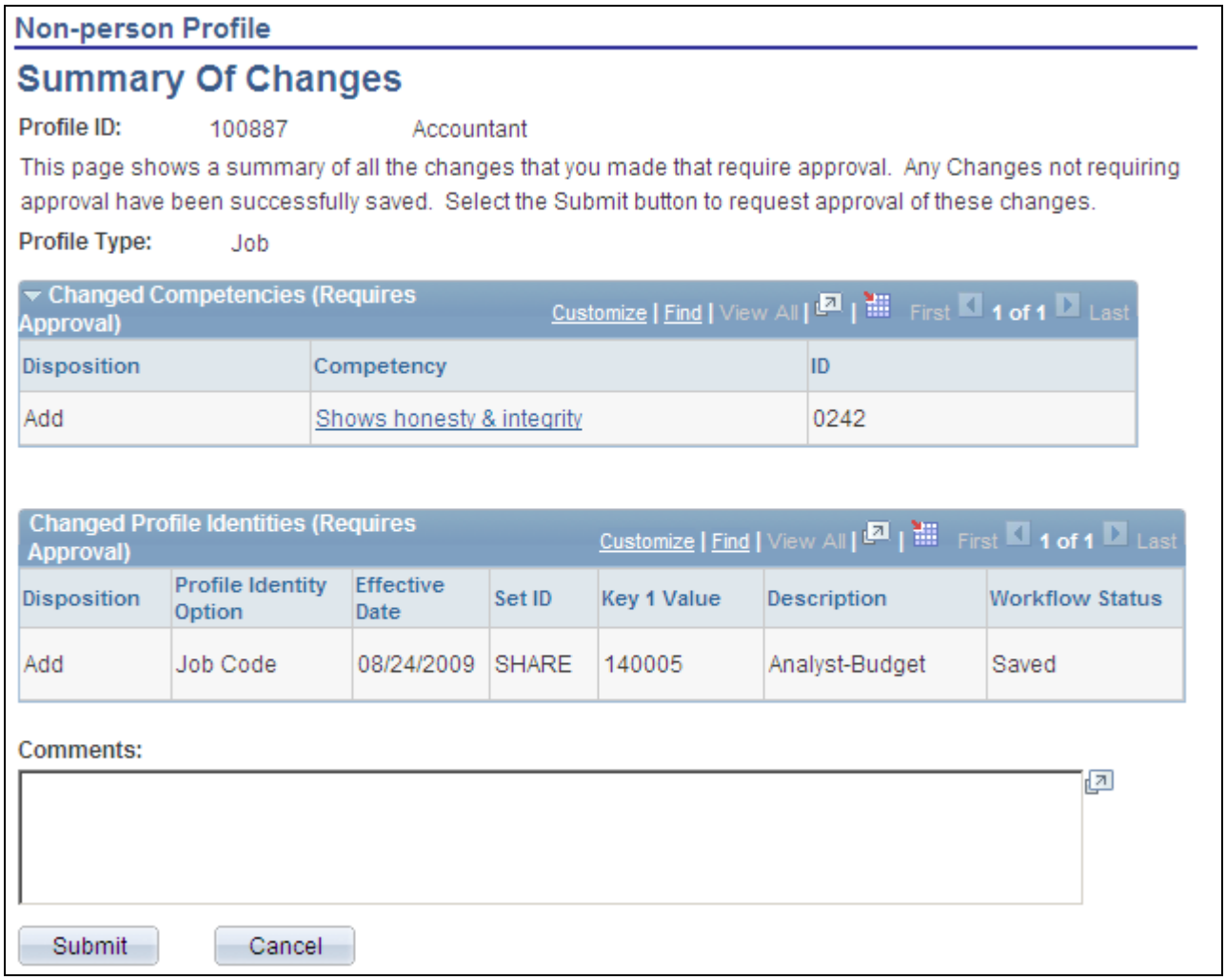
Note. The Approval Framework is configured for automatic approval of administrators. Even if a content section is defined in the profile type configuration as requiring approval for the administrator, when you save you will see the change displayed on the Summary of Changes page; however, when the administrator clicks Submit, the system display a message that no approvals are required, and changes will be immediately reflected in the profile.

Cancel

Click this button to return to the Person Profile page without submitting the items for approval.

Submitting Changes to Non-Person Profiles

Access the Non-person Profile - Summary of Changes page (click the Submit button on the Non-person Profile page).



Non-person Profile - Summary of Changes page

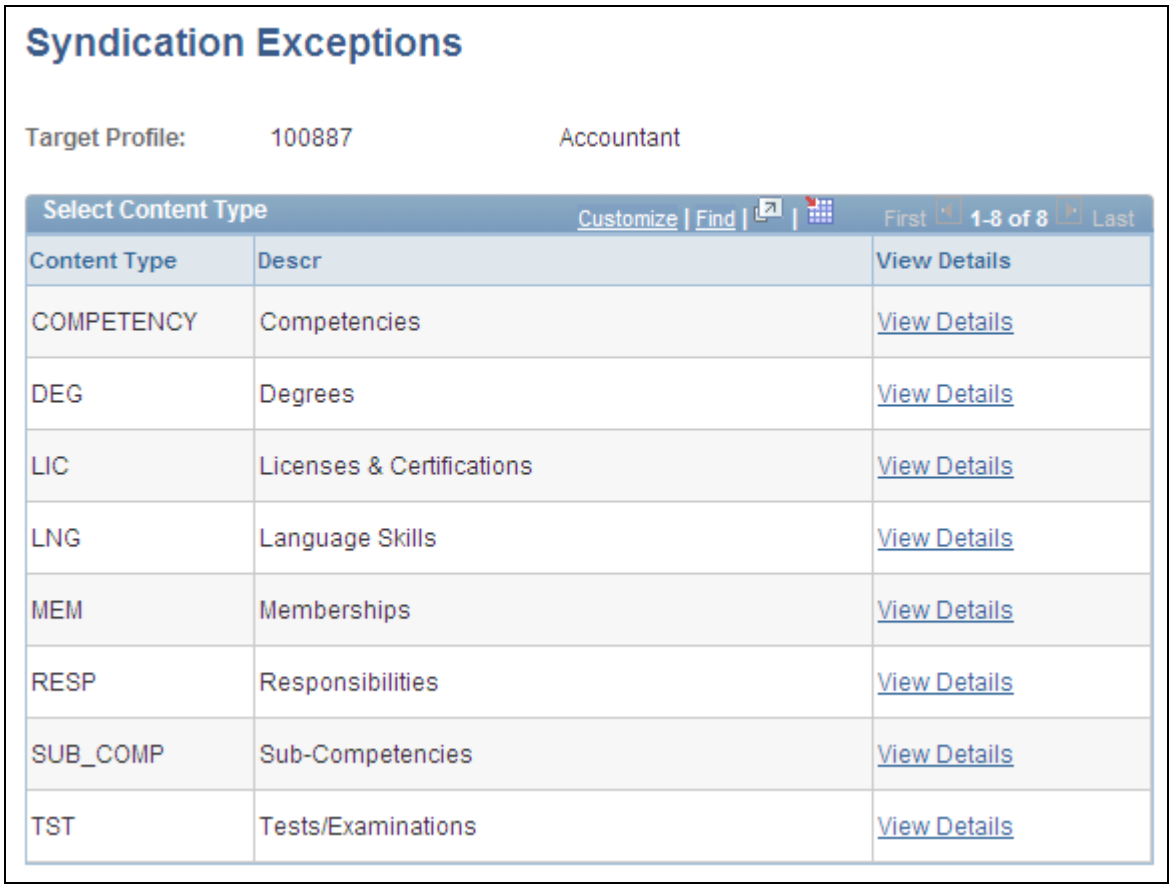
This page lists the changes to the non-person profile shown in the Profile ID field. The fields on this page are similar to the Person Profile - Summary of Changes page.

See Also

Chapter 5, "Managing Profiles," Submitting Changes to Person Profiles, page 139

Reviewing Syndication Exceptions

Access the Syndication Exceptions page (Workforce Development, Profile Management, Profiles, Syndication Exceptions, Syndication Exceptions).



Syndication Exceptions

Target Profile: 100887 Accountant

Select Content Type Customize | Find | First 1-8 of 8 Last

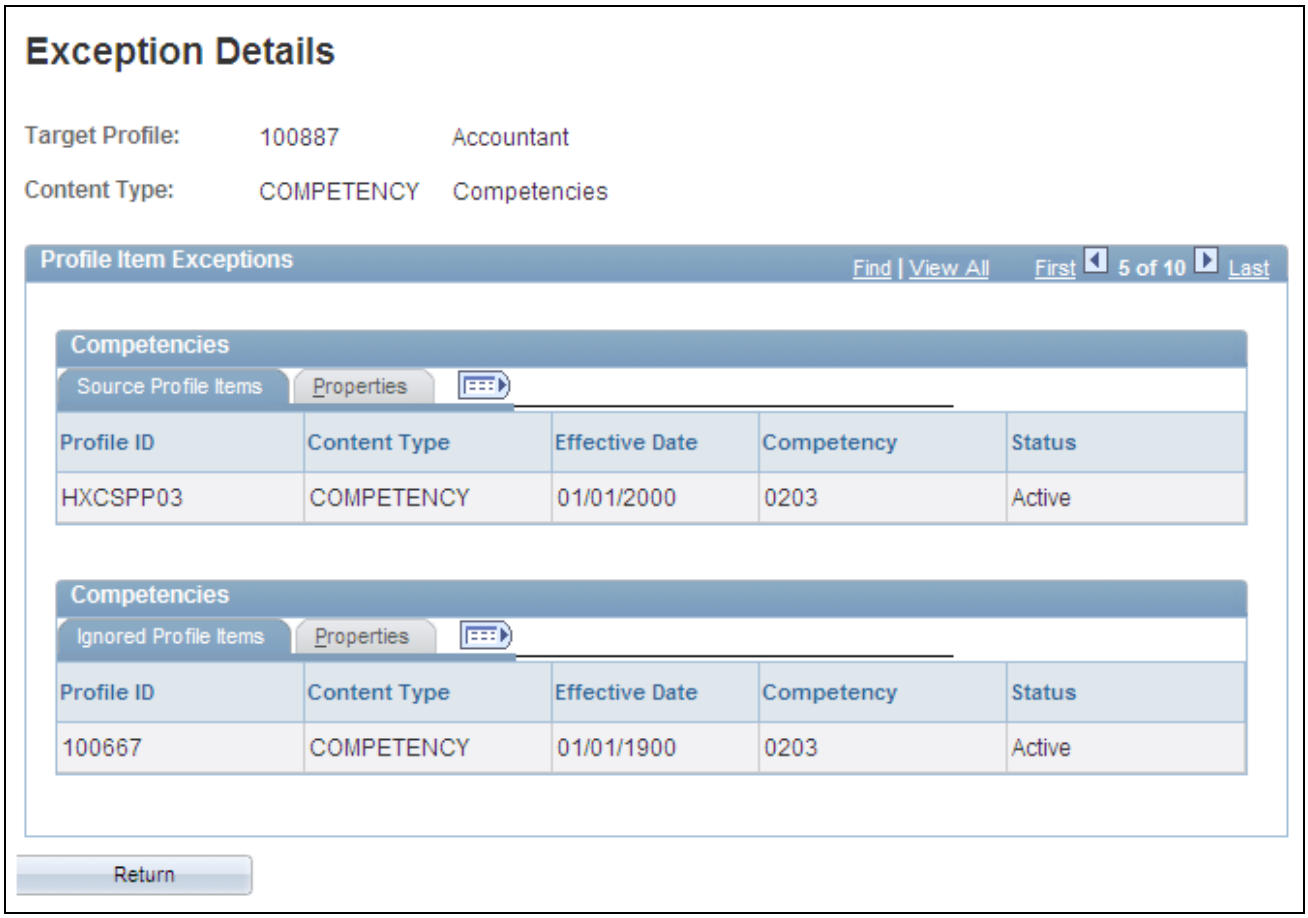
Content Type	Descr	View Details
COMPETENCY	Competencies	View Details
DEG	Degrees	View Details
LIC	Licenses & Certifications	View Details
LNG	Language Skills	View Details
MEM	Memberships	View Details
RESP	Responsibilities	View Details
SUB_COMP	Sub-Competencies	View Details
TST	Tests/Examinations	View Details

Review Syndication Exceptions page

This page lists the content types that include syndication exceptions. Click the View Details link to access the Exception Details page that lists the profile items with syndication exceptions.

Reviewing Syndication Exception Details

Access the Exception Details page (click the View Details link on the Review Syndication Exceptions page).



Exception Details page

Source Profile Items

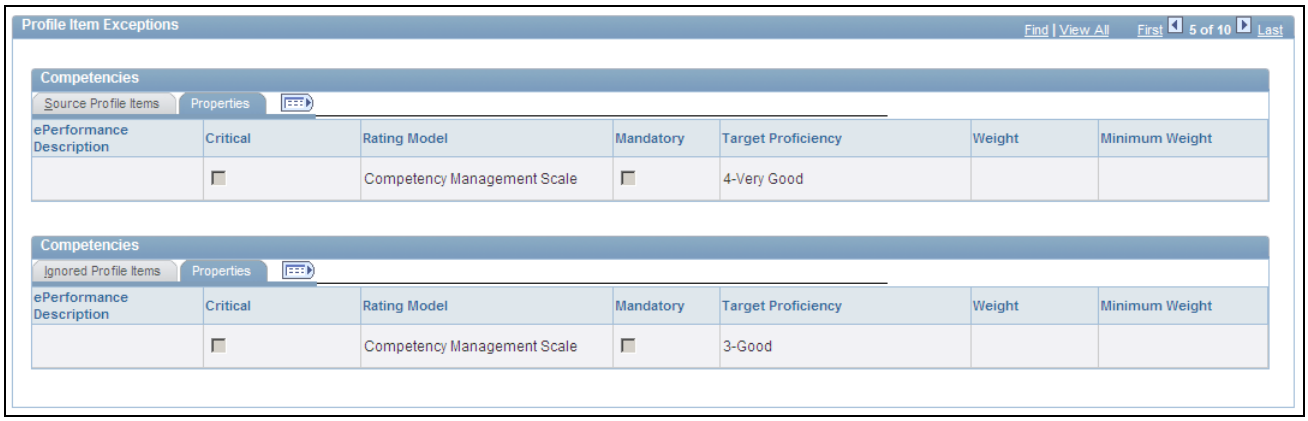
This tab displays the details of the source profile and profile items that have been syndicated into the target profile.

Ignored Profile Items

This tab displays the details of the source profile that conflicts with the syndicated profile items specified in the Source Profile Items tab.

Properties

Access the Properties tab.



Exception Details: Properties tab

The Properties tabs display the field values in the syndicate source profiles. In the example shown, the Target Proficiency field has different values in the two source profiles. The values shown for the Source Profile Items are those inserted into the target profile.

Approving Profile Changes

This section provides an overview of profile approval processing and discusses how to:

- View profile approval transactions.
- View, approve, and deny profile changes.

Understanding Profile Approval Processing

You can use approval processing to control:

- Updates to profile items on person profiles.

  If approval processing is configured for a content section, when profiles items are added, deleted, or updated, it triggers approval processing.

- Updates to profile items and profile identities associated with non-person profiles.

  If approval is required for profile identities, any changes to the list of profile identities associated with the profile triggers approval processing.

Configure profile approvals at the profile type level. You associate an approval definition with the profile type and then specify which content sections in the profile type require approval. For non-person profiles, you can also specify whether profile identities require approval.

Profile approvals uses the Approval Framework for managing approval of person and non-person profiles. The delivered approvals definitions provide the following profile approval processing:

- When employees make changes to their person profiles, the changes are routed to their manager for approval.

  When managers or administrators update person profiles, these changes do not require approval.

- When managers create or update non-person profiles, the changes are routed to the profile administrator for approval.

  When administrators update non-person profiles, the changes do not require approval.

You can use the delivered definitions or set up new approval definitions for managing profiles, according to your business needs.

See Also

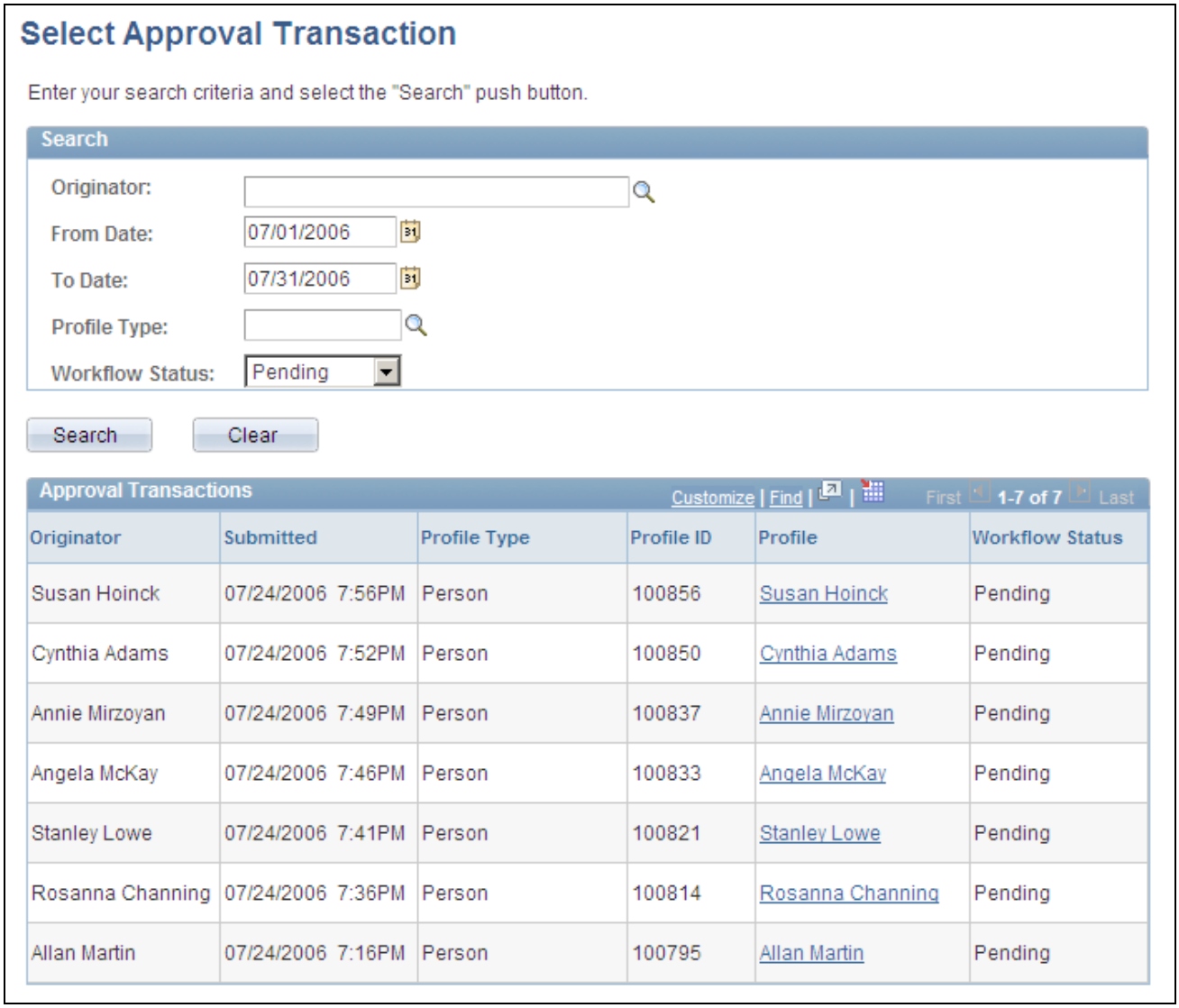
PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Pages Used to Approve Profiles

Page Name	***Definition Name***	***Navigation***	***Usage***
Select Approval Transaction	JPM_JP_MNG_APPRVL	Workforce Development, Profile Management, Profiles, Approve Profiles, Select Approval Transaction	View a list of profiles waiting approval, with approved changes, or with changes that have been denied.
Approve Profiles	JPM_JP_PERS_APPR	Click a person profile ID on the Select Approval Transaction page.	View a list of the changes to a selected person profile. If the profile changes are pending approval, you can either approve or reject the changes.
Non-person Profile - Approval	JPM_JP_NONPER_APPR	Click a non-person profile ID on the Select Approval Transaction page.	View a list of the changes to a selected non-person profile. If the profile changes are pending approval, you can either approve or reject the changes.
View <content type>	JPM_APR_DTL_SEC	Click a profile item link on the Approval Profiles page or the Non-person Profile - Approval page.	View details of a profile item that has changed.
Approval Confirmation Deny Confirmation	JPM_JP_PER_APR_CNF	Click the Approve button or Deny button on the Approve Profiles page.	Displays a confirmation message. When you click OK, you return to the Select Approval Transaction page.

Viewing Profile Approval Transactions

Access the Select Approval Transaction page (Workforce Development, Profile Management, Profiles, Approve Profiles, Select Approval Transaction).



Select Approval Transaction page

Originator Select an employee ID to search for profile changes submitted by that employee.

From Date, To Date Enter period begin and end dates to search for approvals that were submitted between the selected dates.

Profile Type Select a profile type to search for approvals for a specific profile type.

Workflow Status Select the status of the approvals you want to view:

Pending: To view profile changes that have been routed to you for approval.

Approved: To view profile changes that you have previously approved.

Denied: To view profile changes that you rejected.

Search Click to populate the Approval Transaction scroll area with profiles that match your search criteria.

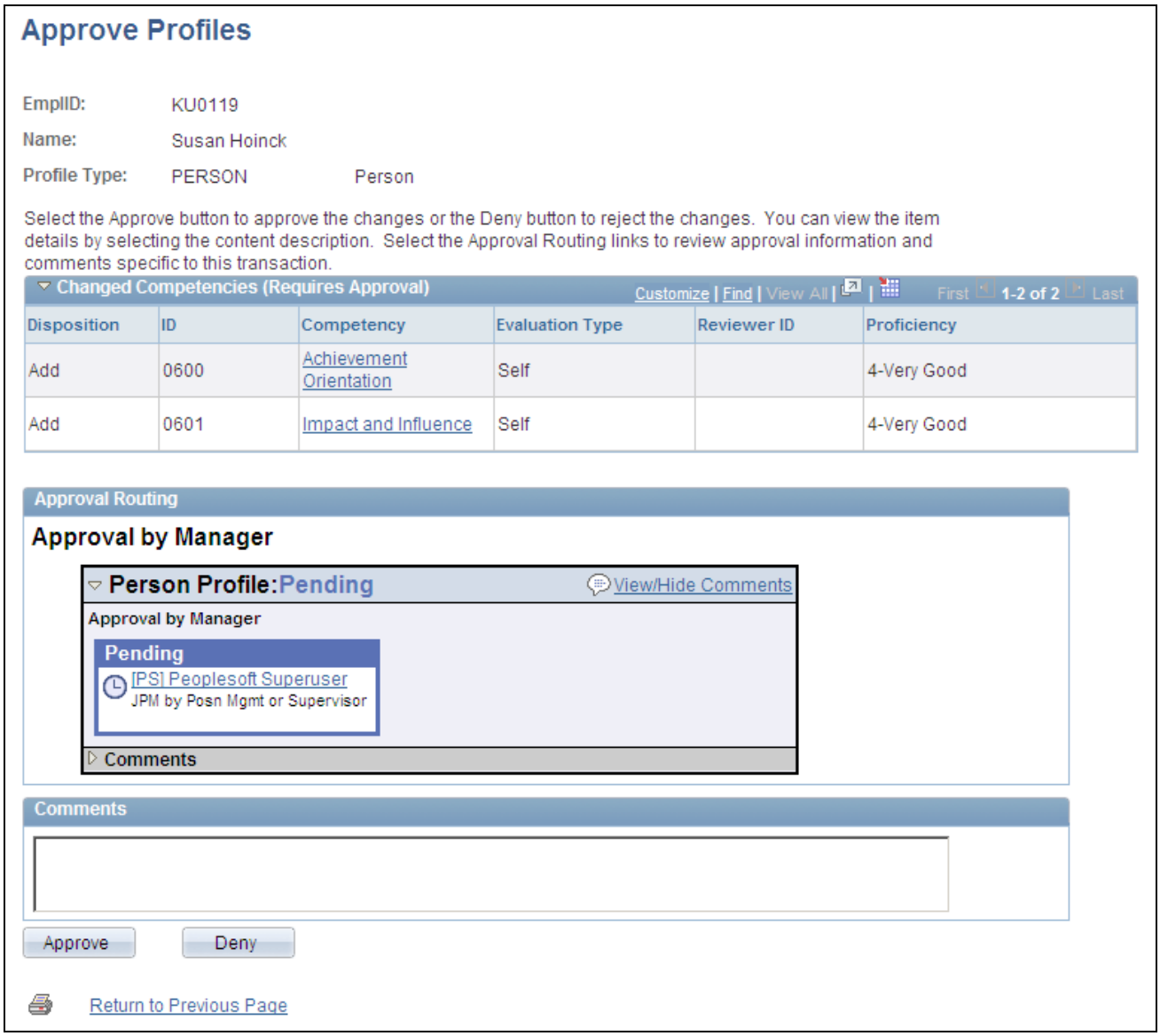
Approval Transactions

Submitted Displays the date that the profile changes were submitted for approval.

Profile Click the profile link to view the changes to the profile that require approval. The system displays the Approve Profiles page.

Viewing, Approving, and Denying Profile Changes

Access the Approve Profiles page (click a person profile ID on the Select Approval Transaction page).



Approve Profiles page

Disposition Displays one of these values to indicate the type of change:

Add: Indicates a new profile item.

Change: Indicates that the originator changed one or more properties for the profile item.

Delete: The originator has deleted the profile item.

<content item> Click a content item link to view details of the changes to the profile item. The item properties are determined by the profile type definition.

Comments Enter any comments for the originator relating to this approval transaction. The comments field is available only if the profile changes require approval. For profile items that have been denied or approved, an expandable Comments section appears in the Approval Routing group box where you can view comments that may have been entered by the originator.

Approve Click this button to approve the profile changes. This button appears only for profile changes with a *Pending* workflow status.

Deny Click this button to reject the profile changes. This button appears only for profile changes with a *Pending* workflow status.

 Click the View Profile as Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. XML Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report. The printable file displays approved items only.

See Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 83.

Approval Routing

This group box displays the routing information from the Approval Framework.

View/Hide Comments Click to view or hide the comments entered by the originator when he or she submitted the profile changes for approval.

Searching and Comparing Profiles

This section provides overviews of search and compare profiles and scores, and discusses how to:

- Select a source profile.
- Set up search criteria.
- View search results.
- Select profiles to compare.
- View comparison results.

Understanding Search and Compare Profiles

The search and compare profiles feature enables employees, managers, and administrators to search for profiles that match selected search criteria and compare profiles. Before users can run any searches, you must build the Verity indexes and define the search types available on the Search Configuration page.

Note. For a limited set of profile type properties, the Verity indexes store only code-based data. These indexes support search word matching only on data containing alphanumeric, underscore ("_"), hyphen ("-"), or period (".") characters. The underscore, hyphen, and period characters must not be positioned at the beginning or the end of a word. When defining new content items or any data tied to the prompt list for profile item properties, you should assign identifiers that follow these requirements.

For each search type you define:

- Source and target profile types.

  The source and the target profile types are the two profile types that are compared in the search. The source is the profile type that forms the basis for the search criteria and the target is the profile type being searched for matching profiles.

- Criteria rule.

  The Criteria Rule field controls how the search works. There are three types of criteria rules:

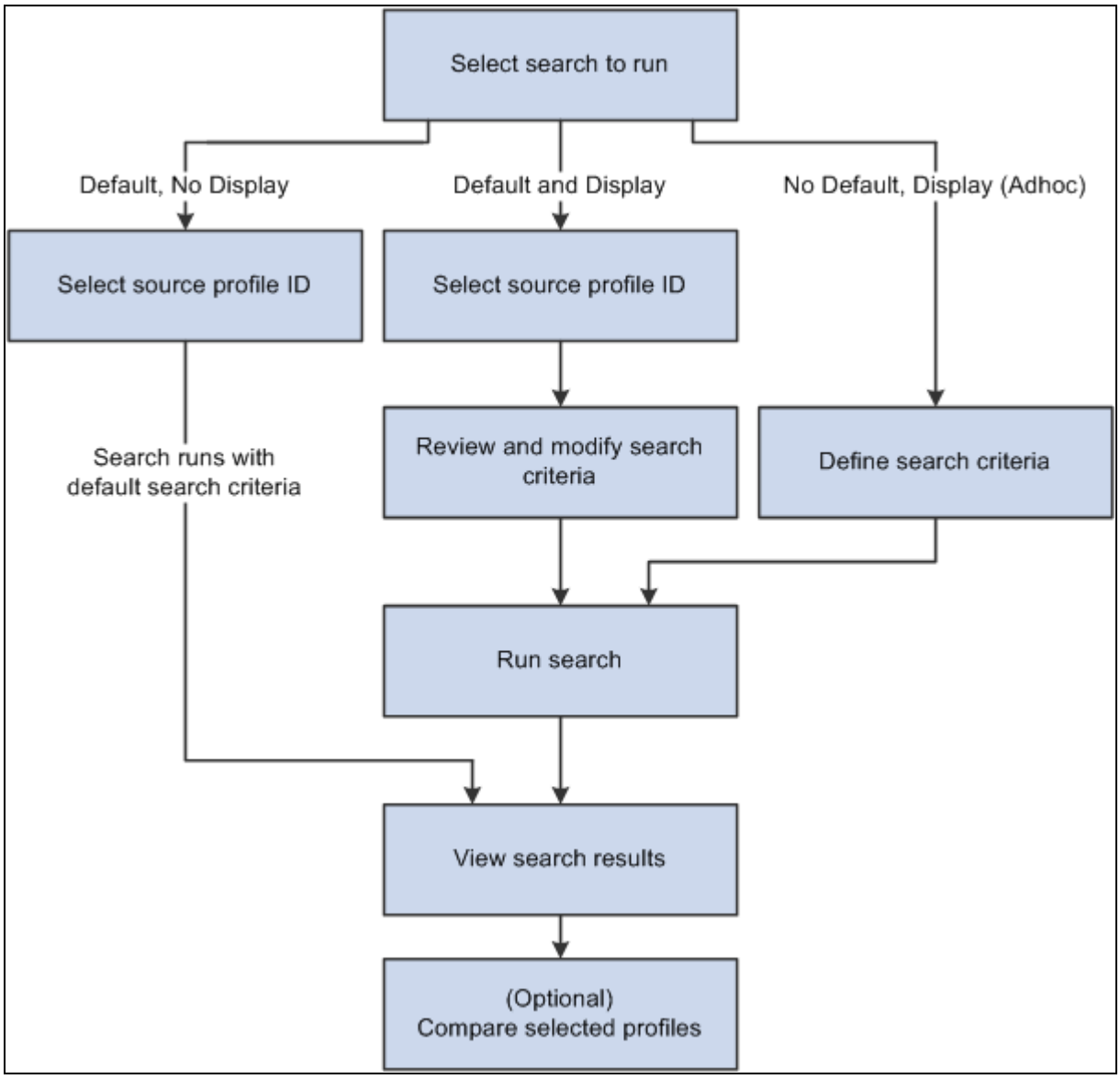
  - *Default, No Display:* The search has default search criteria based on a source profile and the search criteria are not displayed.
  - *Default and Display:* The search has default search criteria based on a source profile and users can view and adjust the search criteria before running the search.
  - *No Default, Display (Adhoc):* The search does not have default search criteria and users define the search criteria manually. For this type of search, the source and target profile types are not mandatory in the configuration. However, if these fields are blank, users must select source and target profile types before they define the search criteria.

- Roles associated with the search.

  Users can only run the searches that are defined for their role.

See Chapter 4, "Setting Up Search and Compare Profiles," page 89.

This diagram illustrates the steps for Search and Compare Profiles for each type of search. The steps are discussed in detail in the sections that follow:



Search criteria selection during the search and compare profiles process

Selecting a Search

Administrators can run search and compare profiles in two ways:

- By selecting the Search and Compare Profiles component from the Profiles menu.
- By selecting *Search and Compare Profiles* in the Profile Actions field on the Person Profile or Non-person Profile page.

Whichever navigation you use, the system displays only those searches that are configured for the administrator role. Roles are associated with searches on the Search Configuration page. In addition, if you run search and compare profiles from the Person Profile or Non-person Profile page, the list of searches is restricted to those that have a source profile type that matches the profile you are viewing.

The *PeopleSoft Enterprise eDevelopment PeopleBook* discusses the employee and manager self-service options for search and compare profiles.

See *PeopleSoft Enterprise eDevelopment 9.1 PeopleBook*, "Maintaining My Profiles," Searching and Comparing Profiles.

Selecting a Source Profile ID

If you select a search with a criteria rule of *Default, No Display* or *Default and Display,* you must select a source profile ID that provides the default search criteria for the search and compare. The Source Profile field on the Define Search Configuration page defines the profile type that you can select for the search.

Note. If you run the search from the profile pages, the system automatically uses the profile that you were viewing as the source profile ID and therefore you are not prompted for a source profile ID.

If the search has the criteria rule of *Default, No Display,* the system automatically runs the search after you select the source profile ID. For this type of search, the search criteria is based on the profile items that default from the source profile and you can't adjust the criteria before running the search.

Defining Search Criteria

When you run a search with a criteria rule of *Default and Display* or *No Default, Display (Adhoc),* you define or modify the search criteria using the Search Criteria page.

If you are running a search with a criteria rule of *Default and Display,* the page has default criteria based on the source profile type defined in the configuration. You can modify the default search criteria and add other criteria before you run the search.

If the search has a criteria rule of *No Default, Display (Adhoc),* there are no default criteria; use the Search Criteria page to define the items you want to search for in the target profiles. You are prompted for the source and target profile types if these are not defined for the search. The system then refreshes the Search Criteria page with the content sections and search filters that you can use for the search.

The Search Criteria page includes a Search Filters group box section. Search filters enable you to narrow the search to specific profile groups, people in a current location, or those with travel preferences. If Current Location and Travel Preferences are defined as content sections in the target profile type, then these sections automatically appear as additional filters.

When you have defined the search criteria, click the Search button to run the search.

Viewing Search Results

The Search Results page lists the profiles that match the search criteria. Matching profiles are ranked according to the profile scores calculated by the system. Profile scores are in the range 0 to 100, where a score of 100 means that the profile meets all the search criteria. Profile scores are discussed later in this chapter. The travel and current location filters are used to filter the target profile candidates but do not contribute to the overall search score.

Note. Only profiles that you are authorized to access are listed among the search results.

See Chapter 5, "Managing Profiles," Understanding Search and Compare Profile Scores, page 154.

If you want to adjust the search criteria and rerun the search, click the Modify Search Criteria link to return to the Search Criteria page. You can also run a new search by clicking the Search for Profiles link.

Comparing Profiles

The profile scores shown on the Search Results page give an overall indication of how closely each profile matches the search criteria. However, you can also view a breakdown of the score at the item level. From the Search Results page you can:

- Compare the item scores for one profile in the search results with the search criteria by clicking the score.
- Compare up to ten profiles listed in the search results with the search criteria. Select profiles, click the Select for Compare button to add it to the Profile Comparisons section, and then click the Compare Profiles button after you have identified all the profiles you wish to compare.

Note. The Compare Profiles component is also available from the Profiles menu.

Interfacing with Profile Management Search and Compare

PeopleSoft Profile Management delivers these interfaces to perform Search and Compare for other business processes:

- Employee Self Service Career Progression Chart

  compare the person's profile to their job profile.
- Administer Succession Planning - Succession 360 Degree

  Compares the person's profile to their job profile.

Understanding Search and Compare Profile Scores

This section discusses:

- The scoring calculation.
- Calculating property and item scores.
- Calculating item weighting based on the Importance field.
- Calculating the rating property score.
- Calculating the interest level property score.
- Calculating item scores for mandatory items.

Overview of the Scoring Calculation

This section discusses how the system calculates scores for target profiles to determine the profiles that best match the search criteria. Search and compare profiles uses the Verity search engine to determine which profiles most closely meet the specified criteria. The Verity search query is constructed of search elements generated from each profile item property in the search criteria. A full text search is performed to return matching profiles with a score which represents the match percentage. The scores are displayed in descending order with the profile having the best fit listed first.

To calculate the score for a target profile, the system calculates:

- Property scores for each property associated with an item.

  The search criteria comprises a set of profile items that you want to search for in the target profile. However, items in the search criteria can have multiple properties. For example, if you add a competency to the search criteria you can also specify the desired rating for the competency, or if you add a language skill you can specify the desired writing proficiency for that language. The competency rating and the writing proficiency are properties of the competency and language skill profile items. The system calculates a property score for each property that you specify in the search criteria and these contribute to the item scores.

- Item scores for each item in the search criteria.

  The item score is an average of the property scores for the properties associated with an item.

- Weighted item scores based on the Importance field.

  The Importance field is used to denote the relative importance of each item in the search criteria. The system applies a weighting to item scores that reflect the Importance values assigned to the items. The default for the Importance field is *3 - Average*, but this can be changed.

- The sum of the weighted item scores.

  The overall profile score is the sum of the weighted item scores. This is the value that you see on the Search Results page.

Profile scores are also determined by the setting of the Mandatory check box. This is discussed later in this section.

See Chapter 5, "Managing Profiles," Calculating Item Scores for Mandatory Items, page 162.

Calculating Property and Item Scores

The property score varies according to the property. For most properties, profiles with matching properties score 100 and those that don't score 0. However, properties with a rating scale such as the rating property and the interest level property have scores that are in the range 0–100 according to how closely the source and the target match. This is discussed later in this section.

See Chapter 5, "Managing Profiles," Calculating the Rating Property Score, page 158.

To calculate the item score the system calculates the average of the property scores as follows:

Total Property Score/ Property Count

In this example, the source profile contains three profile items for these content types:

Content Type	***Item ID***	***Other Properties***
Degree	BA (Bachelor of Arts)	Country: USA
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

For the degree item BA (Bachelor of Arts), the system searches for two properties, the item ID and the country. Therefore, the score for the degree item is calculated as follows:

(Property score item ID + Property score Country) / 2

This means that only profiles with the degree *BA* and country *USA* have an item score of *100.*

To show how the system calculates the property scores, this example compares the source profile with three person profiles, for Nicola Edwards, Rachel Norris, and Helen Scott.

This table lists the items in the person profile for Nicola Edwards:

Content Type	***Item ID***	***Other Properties***
Degree	BA (Bachelor of Arts)	Country: USA
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Rachel Norris:

Content Type	***Item ID***	***Other Properties***
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Helen Scott:

Content Type	***Item ID***	***Other Properties***
Degree	BA (Bachelor of Arts)	Country: GBR
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the item scores for each person profile:

Item ID	***Country Property***	***Person Profile***		
		Nicola Edwards	Rachel Norris	Helen Scott
BA	USA	100 = (100+100)/2	0	50 = (100+0)/2
DU (Dutch)		0	100	0
1006		100	100	100

Calculating Item Weighting Based on the Importance Field

The system automatically includes the Importance field for each item in the search criteria and assigns the default value of *3-Average*, which means that each item is of equal importance. Depending on the search type, you can override the default importance to specify the relative importance of each profile item. When you run the search, the system applies a weighting to each item score according to the importance that you assigned to that item. The result is that profiles that include the most important items are assigned a higher score than profiles that only include the least important items.

The system calculates the weighting for each item as follows:

Importance % = (Item Importance / Total Importance) × 100

To show how this works, suppose you specify the following Importance values to items in the search criteria:

Content Type	***Item ID***	***Importance***
Degree	BA (Bachelor of Arts)	4-Above Average
Language	DU (Dutch)	3-Average
Tests/Examinations	1006 (Accounting Aptitude Test)	1-Low

In this example, the total importance points is 8 = 4 + 3 + 1

This table shows how the weighting is calculated for each item in the search criteria:

Item ID	***Importance***	***Weighting***
BA (Bachelor of Arts)	4-Above Average	4/8 × 100 = 50%
DU (Dutch)	3-Average	3/8 × 100 = 37.5% = 38 rounded
1006 (Accounting Aptitude Test)	1-Low	1/8 × 100 = 12.5% = 13 rounded

The system uses the item weighting value to calculate the weighted item score using this formula:

Item Score (weighted) = Item score × Importance %

Using the person profiles from the earlier examples you can see how the weighting affects the overall score. This table lists the item scores and the weighted scores for Nicola Edwards:

Item	***Item Score***	***Item Score (weighted)***
BA (Bachelor of Arts) /USA	100	50 = 100 × 50%
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	12.5 = 100 × 12.5% = 13 rounded

Nicola's overall score is the sum of the weighted item scores:

Total score = 50 + 12.5 = 62.5 (63 rounded)

Note. The system rounds the score to the nearest integer value.

This table lists the item scores and the weighted scores for Rachel Norris:

Item	***Item Score***	***Item Score (weighted)***
BA (Bachelor of Arts) / USA	0	0

Item	*Item Score*	*Item Score (weighted)*
DU (Dutch)	100	37.5 = 100 ×37.5% = 38 rounded
1006 (Accounting Aptitude Test)	100	12.5 = 100 ×12.5% = 13 rounded

Total score = 37.5 + 12.5 = 50

This table lists the item scores and the weighted scores for Helen Scott:

Item	*Item Score*	*Item Score (weighted)*
BA (Bachelor of Arts) / USA	50	25 = 50 × 50%
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	12.5 = 100 × 12.5% = 13 rounded

Total score = 25 + 12.5 = 37.5 = 38 rounded

Calculating the Rating Property Score

If the search criteria includes items with the rating or interest level property (JPM_RATING1, JPM_RATING2, JPM_RATING3, or JPM_INTEREST_LEVEL), the system calculates property score differently than other properties. Instead of scoring 100 or 0, the system assigns a score that depends on how closely the rating or interest level in the target profile matches the rating or interest level specified in the search criteria.

The interest level property is discussed in the next section.

See Chapter 5, "Managing Profiles," Calculating the Interest Level Property Score, page 162.

The system calculates the rating property score based on the number of levels in the rating model defined for that item.

Important! When running a search and compare, the rating models used for the profile items in the source and target profiles must have the same number of rating levels. If the rating models are not consistent, the scores will not be accurate.

This table shows an example of a rating model and the rating levels that are assigned by the system for the search and compare:

Rating	*Description*	*Rating Level*
A	Excellent	5
B	Very Good	4
C	Good	3
D	Fair	2

Rating	Description	Rating Level
E	Poor	1

When you assign a rating to a profile item, the system compares the level of the requested rating to the target rating level in the search and compare. For this example, the source profile has the following item and associated rating:

Item ID	Rating	Rating Level
0102 (Conceptual thinking)	B (Very Good)	4

This table lists target profiles that include the same item and the ratings for that item:

Profile	Item ID	Rating	Rating Level
01000	0102 (Conceptual thinking)	B (Very Good)	4
02000	0102 (Conceptual thinking)	A (Excellent)	5
03000	0102 (Conceptual thinking)	C (Good)	3

The system calculates the difference between the desired rating level (in the source) and the actual rating level in the target profiles as follows:

ABS (Desired Rating Level – Actual Rating Level)

ABS (absolute value) means that the system ignores the sign of the number that results from the calculation of Desired Rating Level – Actual Rating Level. By calculating the difference in this way, if the actual rating has a higher value than the desired rating the system doesn't use a negative number in the calculation of the rating score.

This table lists the difference between the desired rating and the actual rating in the example profiles:

Profile	Item ID	Desired Rating Level	Actual Rating Level	ABS (Desired – Actual Rating)
01000	0102	4	4	0
02000	0102	4	5	1
03000	0102	4	3	1

This difference value is used in the calculation of the rating score, which the system calculates using the following formula:

Rating Score = 100 – ABS (Desired Rating Level – Actual Rating Level) × Rating Weight

The Rating Weight is calculated as follows:

Rating Weight = 100 / (total number of rating levels in rating model)

In the example rating model, the total number of rating levels is 5 and the rating weight is therefore 20 = 100/5.

This table lists the rating score for the example profiles:

Profile	Item ID	ABS (Desired – Actual Rating Level)	Rating Score
01000	0102	0	100
02000	0102	1	80
03000	0102	1	80

The highest rating score is 100 and this is assigned only if the item has the same rating in both the source and the target. If the actual rating in the target is lower or higher than the desired rating, the rating score is less than 100. In the example, you can see that profile 02000 and 03000 have the same rating score even though the ratings are different. This is because the difference between the desired and actual rating is the same for these profiles.

The system applies weightings to items with the rating model property in the same way that it applies weightings to items without the rating model property.

To illustrate how this works, the next example shows how the system calculates scores for items with the rating model property. In this example, the search criteria includes three competency items and desired rating, with importance values as listed in this table:

Item ID	Rating	Rating Level	Importance
0102 (Conceptual thinking)	C (Good)	3	2-Below Average
0110 (Time management)	A (Excellent)	5	4-Above Average
0203 (Confidence & maturity)	B (Very Good)	4	3-Average

The target profiles for the search and compare are person profiles. This table summarizes the competency ratings for Nicola Richardson:

Item ID	Rating	Rating Level
0102 (Conceptual thinking)	B (Very Good)	4
0110 (Time management)	A (Excellent)	5
0203 (Confidence & maturity)	D (Fair)	2

In this search and compare, the system calculates two property scores for each item:

- Item ID.

  The profiles that have the same competency item score 100. If the competency is missing, the item score is 0.

- Rating score for the Rating property.

The first step in the search and compare is to calculate the property scores for each competency item. This table lists the property scores for Nicola Richardson:

Item ID	***Rating Level***	***Item ID Score***	***Rating Score***
0102	4	100	80 = 100 – ABS(3–4) × 20
0110	5	100	100 = 100 – ABS(5–5) × 20
0203	2	100	60 = 100 – ABS(4–2) × 20

Next the system calculates these values:

- Total property scores.

  The total property score for each item is the sum of the property scores for item ID and rating.

- Average item score.

  This is calculated as follows:

  Total property score/Property Count

  In this example, the property count is 2 (item ID and rating).

This table lists the item scores for Nicola:

	Property Scores			
Item ID	***Item ID Score***	***Rating Score***	***Total Property Score***	***Average Item Score***
0102	100	80	180 = 100 + 80	90 = 180/2
0110	100	100	200 = 100 + 100	100 = 200/2
0203	100	60	160 = 100 + 60	80 = 160/2

Next the system calculates applies the weighting to the average item scores. To do this, the system calculates the weighting for each item based on the Importance assigned to the item using this formula:

Importance % = (Item Importance / Total Importance) × 100

In this example, the total importance is 9 = 2 + 4 + 3.

This table lists the weightings for the competency items:

Item ID	***Importance***	***Importance %***
0102	2	22.22% = 2/9 × 100
0110	4	44.44% = 4/9 × 100

Item ID	*Importance*	*Importance %*
0203	3	33.33% = 3/9 × 100

The system calculates the weighted item score as follows:

Item Score (weighted) = Item score × Importance %

This table lists the weighted item scores for Nicola:

Item ID	*Average Item Score*	*Item score (weighted)*
0102	90	20 = 90 × 22.22%
0110	100	44 = 100 × 44.44%
0203	80	27 = 80 × 33.33%

Finally, the system calculates the overall profile score by summing all the weighted item scores:

Total Profile Score = 91 = 20+ 44 + 27

Calculating the Interest Level Property Score

If the search criteria include items with the interest level property (JPM_INTEREST_LEVEL), the system calculates the property score in the same way as the rating property. The interest level property score depends on how closely the interest level in the target profile matches the interest level specified in the search criteria:

Interest Level Score = 100 – ABS (Desired Interest Level – Actual Interest Level) × Rating Weight

The Rating Weight is calculated as follows:

Rating Weight = 100 / (total number of rating levels in rating model)

The delivered interest level model (which is delivered as a rating model) has 5 levels and the rating weight is therefore 20 (100/5).

Calculating Item Scores for Mandatory Items

The system automatically includes the Mandatory check box for each item in the search criteria. If you select this check box for an item, the system searches for profiles that include the item and all the properties specified for that item. Profiles must include the item and an exact match for the requested item properties for the profile to be included in the search results. Profiles that have different item properties are not included.

For this example, the search criteria includes two competency items and a degree as shown in the table:

Item ID	*Rating*	*Country*	*Mandatory*
0110 (Time management)	3		Y
0203 (Confidence & maturity)	4		N

Item ID	Rating	Country	Mandatory
BA (Bachelor of Arts)		USA	N

This table lists the items in the target profile and the item scores:

Item ID	Rating	Country	Item Score (unweighted)
0110 (Time management)	2		0
0203 (Confidence & maturity)	4		100
BA (Bachelor of Arts)		USA	50

Note. The target profile scores 0 for item 0110 because the rating does not match the search criteria and the item is specified as mandatory. If the mandatory item receives a score of 0, then the profile will not be returned as a search result.

Pages Used to Search and Compare Profiles

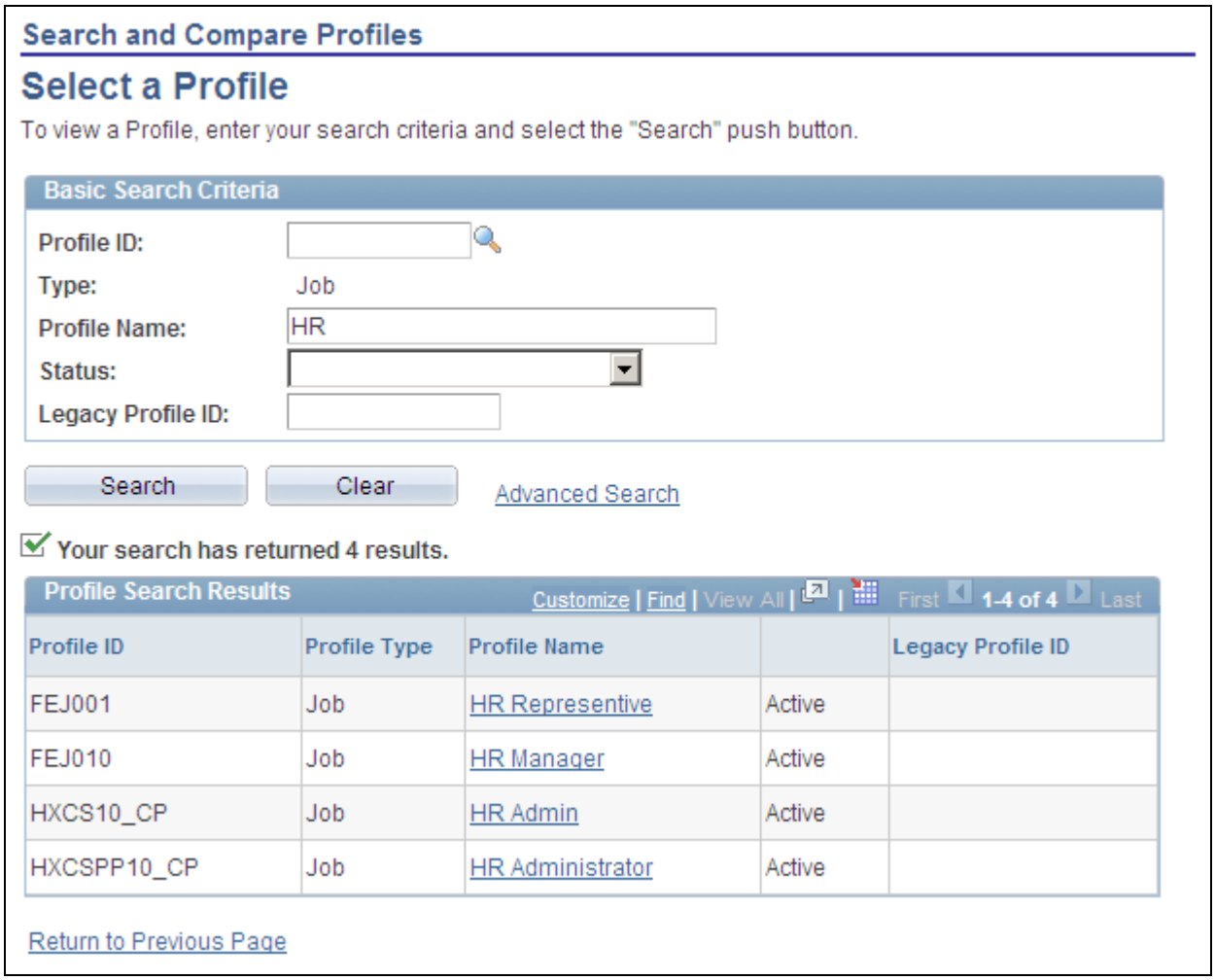
Page Name	Definition Name	Navigation	Usage
Search for Profiles	JPM_SRCH_TRANSFER	• Workforce Development, Profile Management, Profiles, Search and Compare Profiles, Search for Profiles • Select *Search and Compare Profiles* in the Profile Actions field on the Non-person Profile page or the Person Profile page.	Select a source profile that you want to run from the list of search types that are defined for administrators. Use the Search Configuration page to set up searches for administrators, employees, and managers.

Page Name	Definition Name	Navigation	Usage
Select a Profile	JPM_COM_PROF_SRCH	Select a search link on the Search for Profiles page.	Select the profile that you want to use as the source for the search. The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display*, the system doesn't display this page because there are no default search criteria. Instead you enter the search criteria manually on the Search Criteria page.
Person Search - Simple	HR_PSS_SEARCH	• Select a search that uses a person profile as the source on the Search for Profiles page. • Select *Express Interest for Employee* in the Profile Actions field on the Non-person Profile page and click the Go icon.	Select the person profile that you want to use as the source for the search. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default, Display* and the source profile type is for a person profile.
Search Criteria	JPM_SRCH_CRITERIA	• Select a search link on the Search for Profiles page. • Click the Modify Search Criteria link on the Search Results page.	View and modify the search criteria for the search and compare. If the search selected on the Search for Profiles page has a criteria rule of *Default and Display* or *No Default, Display (Adhoc)*, this page is displayed before you run the search. If the criteria rule is *Default, No Display*, the system runs the search without first displaying the Search Criteria page.
Search Results	JPM_SRCH_RESULT	• Click the Search button on the Search Criteria page. • Select a profile on the Select a Profile page.	Displays the results of the search.

Page Name	*Definition Name*	*Navigation*	*Usage*
Add to Interest List - Confirmation	JPM_INT_CONFIRM	• Select profiles on the Search Results page and click the Add to Interest List button. • Enter search criteria on the Person Search - Simple page, select a person, and click the OK button.	Confirms that the non-person profiles that you selected on the Search Results page have been added to the person's interest list. The Add to Interest List button is available only if the search that you ran has a target profile type that is a non-person profile type.
Select Profiles to Compare	JPM_COMPARE_MAIN	Workforce Development, Profile Management, Profiles, Compare Profiles	Select the source and the target profile types that you want to compare.
Compare Results Match Results	JPM_COMPARE_RESULT	• Select source and target profiles on the Compare Profiles - Select Profiles to Compare page and click the Compare Profiles button. • Select profiles on the Search Results page, click the Select for Compare button, and then click the Compare Profiles button. • Click the score link on the Search Results page. • Click the Compare button on the Interest List page.	View a summary of the comparison of the profiles you selected.

Selecting a Source Profile

Access the Select a Profile page (select a search on the Search for Profiles page).



Select a Profile page

Basic Search Criteria

Profile ID Select the profile, or enter part of the profile ID.

Type Displays the profile type defined as the source for the search. The source and target profile types are configured on the Search Configuration page.

Profile Name Enter the profile name, or part of the profile name, to search for profiles with matching names.

Status Select a status to list profiles of one status only, such as *Active*.

Legacy Profile ID Enter the legacy profile ID if you want to search for a profile that existed in earlier versions of Human Resources. The legacy profile ID is assigned to the profile during upgrade.

Search Click this button to list profiles that match the search criteria.

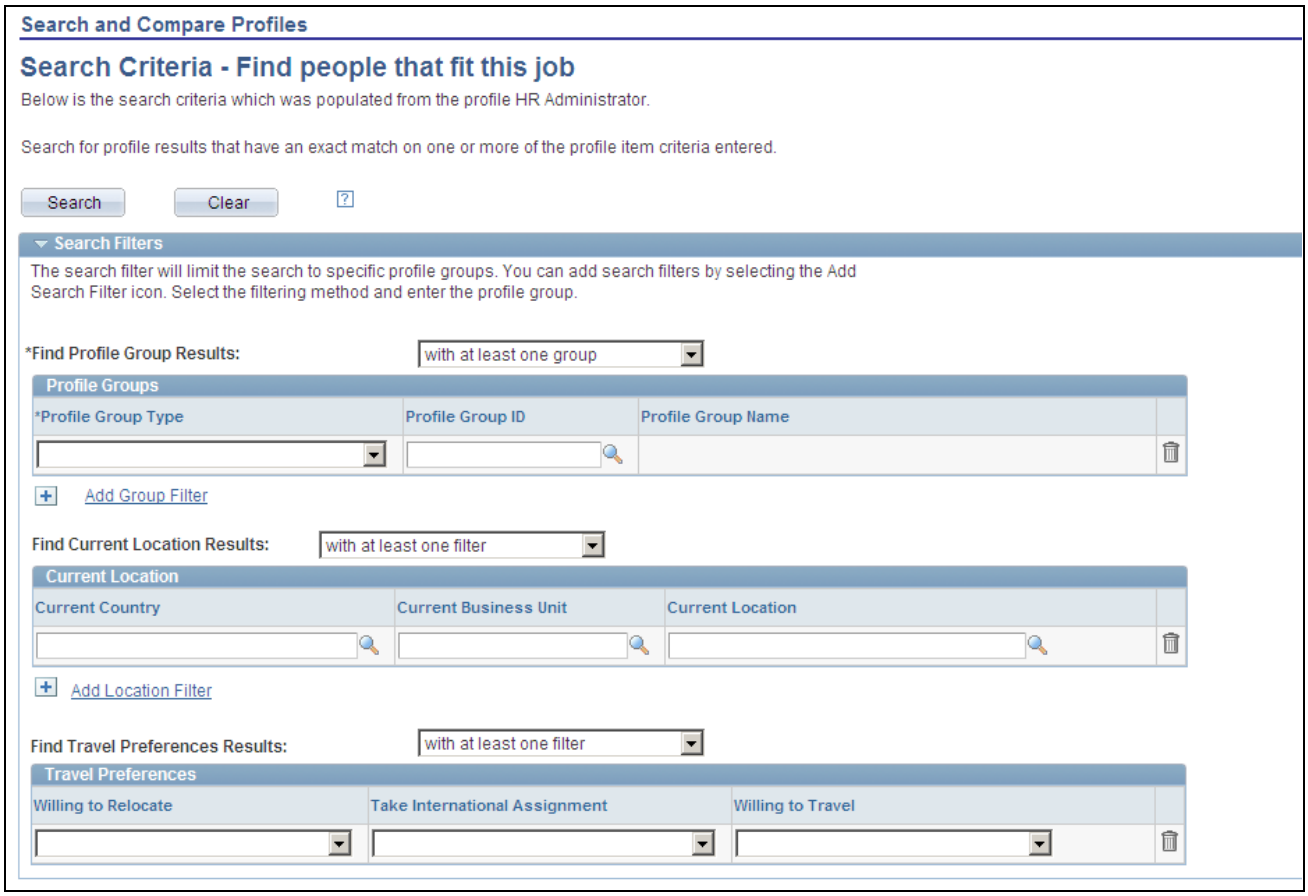
Clear Click this button to clear all search criteria or search results from the page.

Profile Search Results

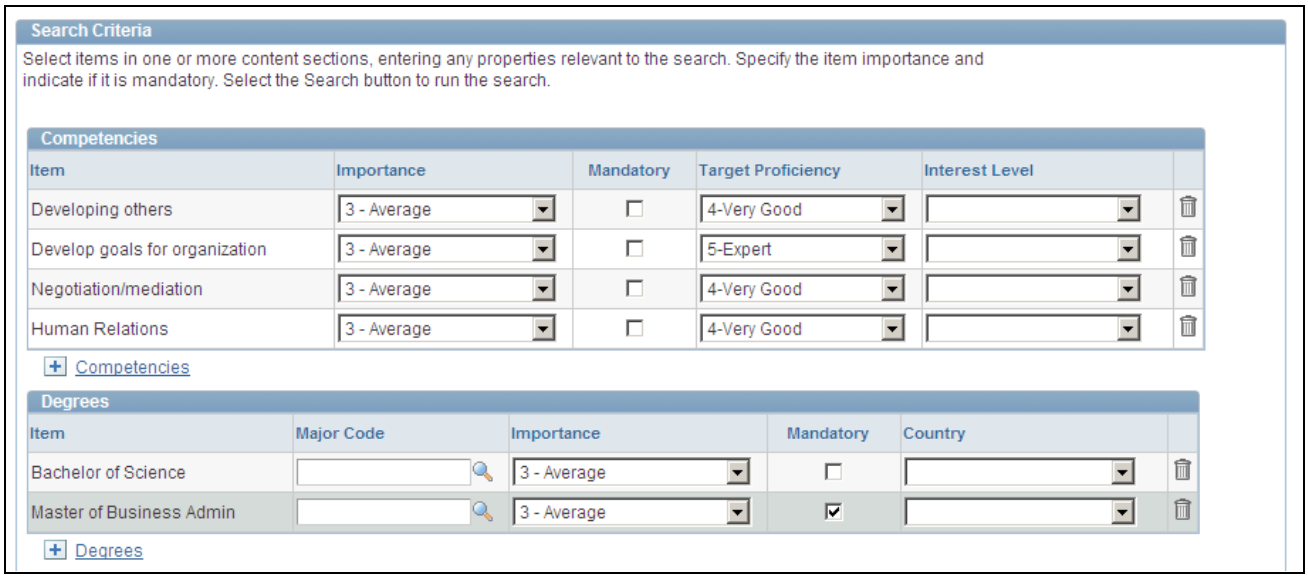
This scroll area lists the profiles that match the search criteria you selected. Click the profile name that you want to use as the source for the search and compare. Depending on the search type, the system either displays the Search Criteria page or runs the search using the selected profile. If the criteria rule for the search is *Default, Display* the system displays the Search Criteria page and you can modify the search criteria before running the search. If the criteria rule for the search is *Default, No Display* the system runs the search and displays the results on the Search Results page.

Setting Up Search Criteria

Access the Search Criteria page (select a search on the Search for Profiles page or click the Modify Search Criteria link on the Search Results page).



Search Criteria page (1 of 2)



Search Criteria page (2 of 2)

Use this page to define the search criteria. If the search that you selected has the criteria rule of *Default, Display*, the system automatically displays the default search criteria based on the source profile you selected on the Select a Profile page or the Person Search page. Review and modify the search criteria as required.

However, if the search you selected doesn't have the profile types defined, you must first specify the source and target profile types to use, and then define the search criteria manually.

Note. The content types listed on this page and the fields for each content type are determined by the search type selected, the profile type definitions, and the content types definitions.

See Chapter 4, "Setting Up Search and Compare Profiles," page 89.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61.

See Chapter 2, "Setting Up the Content Catalog," Setting Up Content Types and Properties, page 15.

Source Profile Type and **Target Profile Type**

Select the profile types that you want to use in the search. The source profile type is used as the basis for the search criteria. The target is the profile type from which the system searches for matching profiles.

These fields appear for adhoc searches that don't have the source and target profile types defined on the Search Configuration page.

When you complete these fields, the system displays the content sections and search filters that you can use in the search.

Search

Click to initiate the search based on the criteria you have specified on this page. The system performs the search and displays the matching profiles on the Search Results page.

Clear

Click this button to clear the search criteria.

Importance

Select a value that indicates the importance of the profile item. The default value is *3 - Average*. The system uses the Importance value to determine how well profiles match the search criteria. If you select a high importance value, those profiles that include the profile item are considered a better match than the profiles without the profile item.

Mandatory

If you want matching profiles to include certain profile items, select this check box for those items. When you run the search, the system searches for target profiles with the mandatory items and the same item properties that are specified in the search criteria. For example, if the search criteria includes a mandatory competency item and you specify a proficiency rating for the competency, the search results include only those profiles with the competency item and the same proficiency rating.

Search Filters

Filters may include profile groups, current location, and travel preferences, depending upon how the profile was set up. Use the Profile Groups group box to limit the search to selected profiles. The Profile Groups group box appears only if the target profile type belongs to searchable profile groups. Filter group boxes for current location and travel preferences may also appear if the target profile type includes this content section in the Profile Type configuration.

Filter data is used to filter the target profile candidates, but does not contribute to the overall search score. For example, you may want to find those person profiles that best match the requirements of the job Manager-Information Systems and are currently located in the Paris office. The Current Location fields filter out those candidate that are not in the Paris office and the score of the candidates is based on how well their profiles match the Manager-Information Systems job profile. If no candidates are found, then the Travel Preferences properties, such as Willing to Relocate and Take International Assignment can be used as filters to find those candidates outside the Paris office. The PERSON profile type comes with the Mobility tab where you can enter these preferences for a person.

See Chapter 3, "Setting Up Profile Management," Creating Profile Group Types, page 78.

Search Criteria

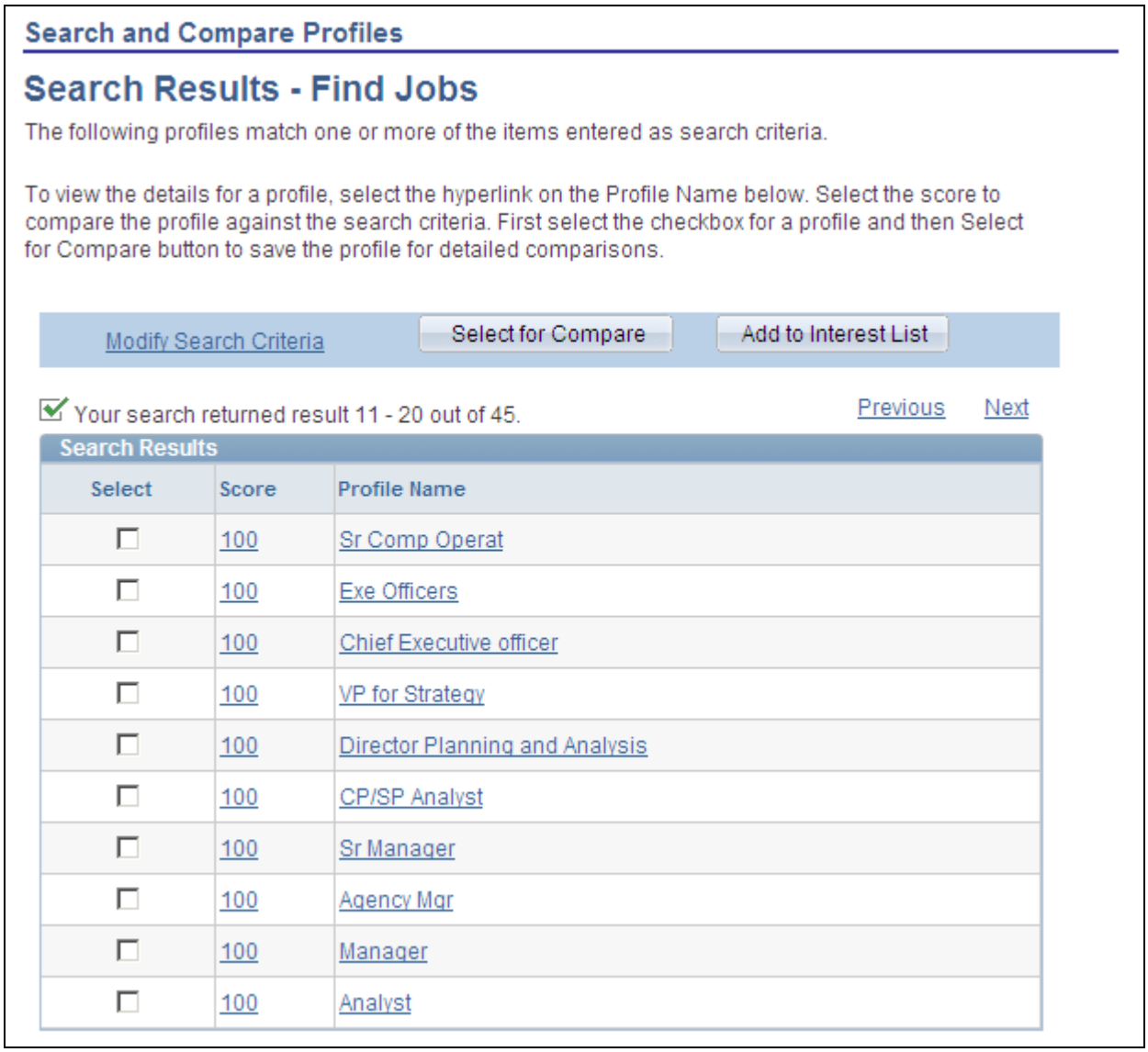
Fields in this section depend upon how the profile type is set up.

Importance Select a value that indicates the importance of the profile item. The default value is *3 - Average*. The system uses the Importance value to determine how well profiles match the search criteria. If you select a high importance value, those profiles that include the profile item are considered a better match than the profiles without the profile item.

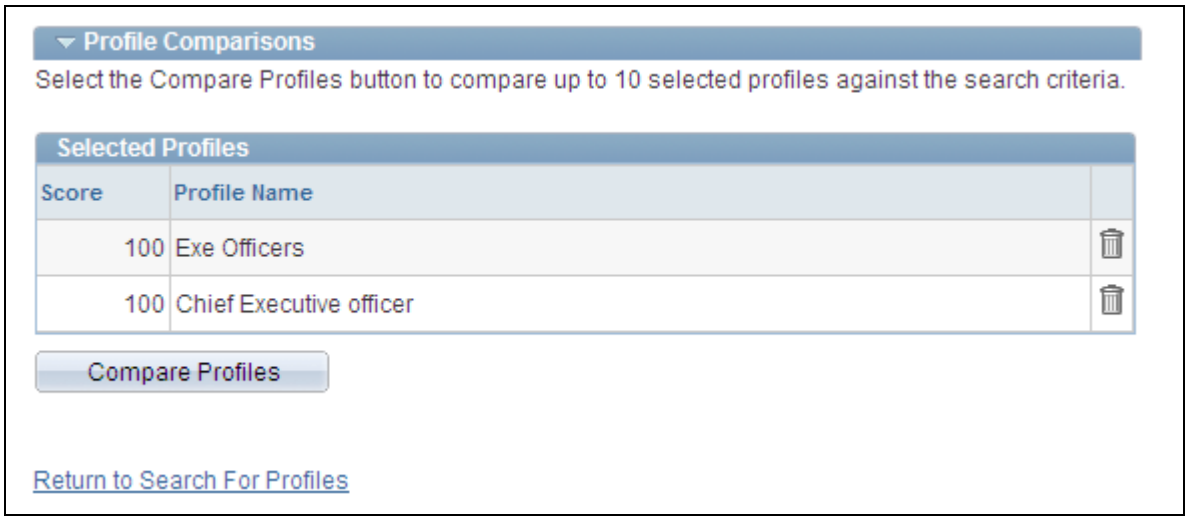
Mandatory If you want matching profiles to include certain profile items, select this check box for those items. When you run the search, the system searches for target profiles with the mandatory items and the same item properties that are specified in the search criteria. For example, if the search criteria includes a mandatory competency item and you specify a proficiency rating for the competency, the search results include only those profiles with the competency item and the same proficiency rating.

Viewing Search Results

Access the Search Results page (click the Search button on the Search Criteria page or select a profile on the Select a Profile page).



Search Results page (1 of 2)



Search Results page (2 of 2)

Important! When running Search and Compare, if the Verity Indexes cannot be located, the system will issue a message stating that the search index could not be found. This means that the process Maintain Profile Indexes has not been run to create the indexes or the environment configuration is preventing the application server from locating the indexes.

When the index has been located, but the search criteria does not find any profile matches, the system will issue a message stating that your search did not return any results.

Modify Search Criteria Click this link to view and modify the search criteria if you want to rerun the search with different search criteria. The system displays the Search Criteria page.

Select for Compare Click this button to add the profiles you have selected to the Profile Comparison section.

Add to Interest List Click this button to add the profiles you have selected to a person's interest list.

This button is displayed when the target profile type for the search is a non-person profile type.

Search Results

Select Select this check box to select the profile. Use this check box in conjunction with the Select for Compare or Add to Interest List buttons. You can select up to ten profiles to compare.

Score Click the score link to view the Match Results page. This page lists the items in the search criteria and the corresponding item score for the profile that you selected.

Profile Name Click the profile name link to view the profile. The system displays the Person Profile page or the Non-person Profile page depending on the profile type.

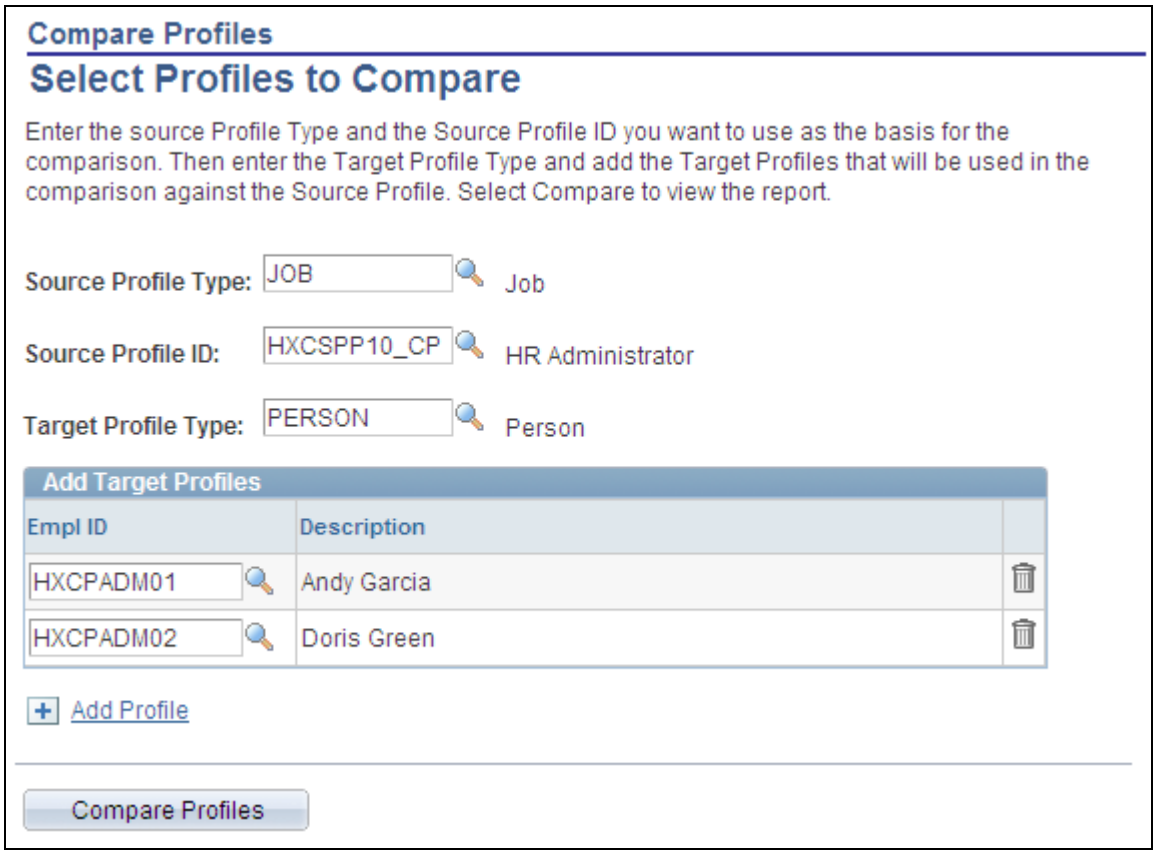
Profile Comparisons - Selected Profiles

Compare Profiles Click this button to run the comparison. The system displays the Compare Results page, which lists the items in the search criteria and the corresponding item scores for the profiles that you selected.

Return to Search for Profiles Click this link to run a new search. The system returns you to the Search for Profiles page that lists all the searches available.

Selecting Profiles to Compare

Access the Select Profiles to Compare page (Workforce Development, Profile Management, Profiles, Compare Profiles).



Select Profiles to Compare page

Source Profile Type Select the profile type that you want to use for the source of the compare.

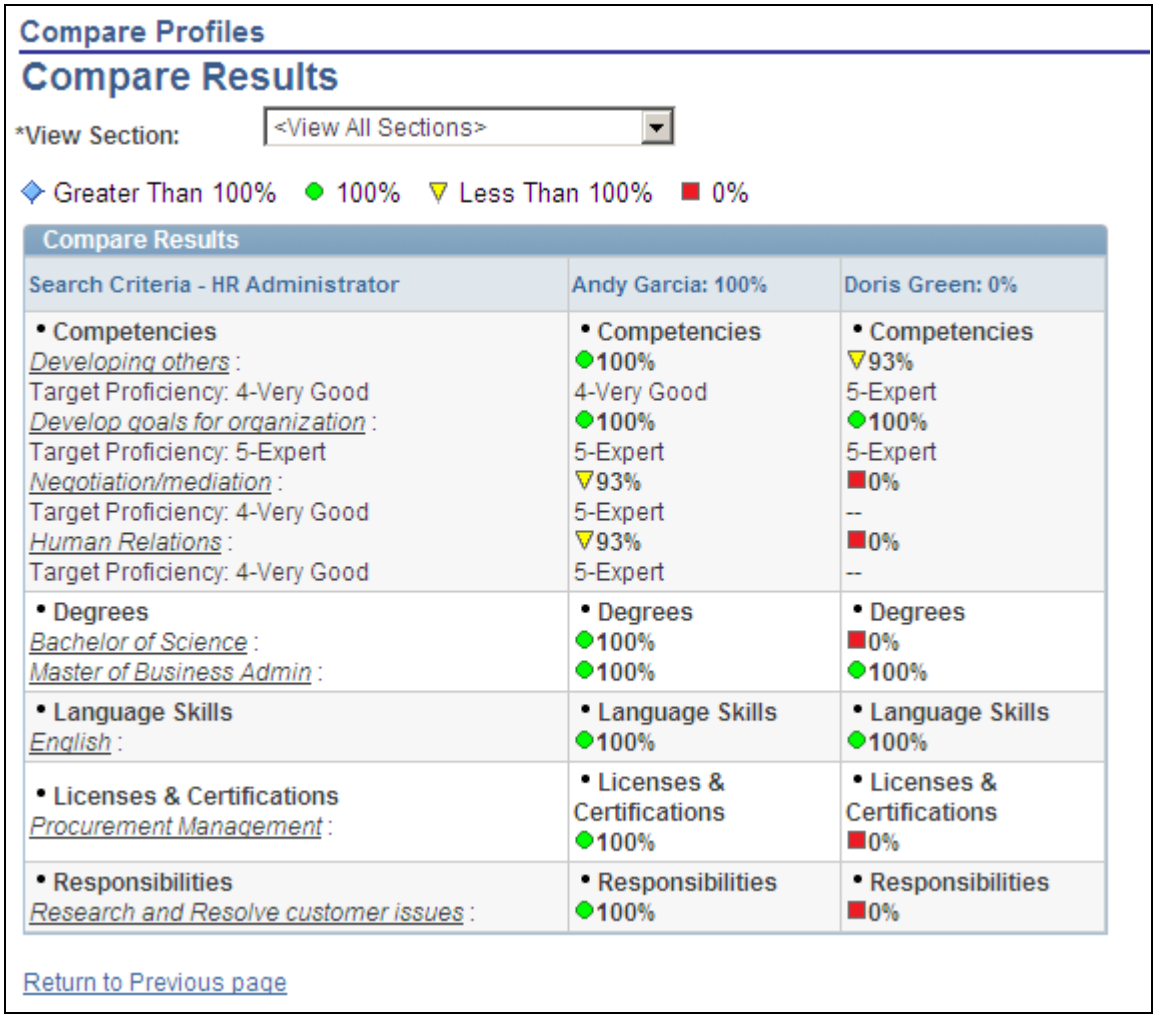
Source Profile ID Select the profile that you want to compare the target profiles against.

Target Profile Type Select the profile type from which the target profiles are selected.

Target Profile ID or **Empl ID** (employee identification)	Select the profile ID. The system compares the target profiles with the profile selected in the Source Profile ID field.
Add Profile	Click to add another target profile.

Viewing Comparison Results

Access the Compare Results page (select source and target profiles on the Compare Profiles - Select Profiles to Compare page and click the Compare Profiles button, or select profiles on the Search Results page, click the Select for Compare button and then click the Compare Profiles button).



Compare Results page

This page displays the results of the compare. You access this page from the Search Results page, Compare Profiles page, or by clicking the Compare button on the Interest List page. In the left hand column the system displays the content sections and content items in the source profile or search criteria. The remaining columns show the corresponding data in the target profiles. The system shows the item scores for each target profile.

View Section Select *<View All Sections>* to list all the sections in the profiles or select a section to view the information for one content section. The default is *<View All Sections>*.

Managing Interest Lists

This section provides an overview of interest lists, lists common elements, and discusses how to:

- Manage employees' interest lists.
- View interest lists by profile.

Understanding Interest Lists

Interest lists enable employees to maintain a list of the non-person profiles that are of interest. They can also compare the added profile to their own profile to determine degree of a fit. The interest list can include any profile. For example, employees could add profiles for jobs that they want to include in their career planning, or job profiles that are similar to their own profile. Each employee has one interest list that can be modified by the employee, the employee's manager, and the profile administrator:

- Employees maintain their own interest list using the self-service options provided in eDevelopment.

  The interest list shows who added each profile to the interest list, and employees can remove any profiles that they added. Employees cannot remove profiles added by their manager or the profile administrator.

- Managers can view and modify interest lists for their direct reports using the manager self-service options in eDevelopment.

  Managers can remove profiles that they added to an interest list only. They cannot remove profiles that are added by the employee or the profile administrator.

- Administrators have access to interest lists based on the row-level security permissions associated with their role.

  Administrator can remove any profile from an interest list, including those added by the employee and manager.

See Also

PeopleSoft Enterprise eDevelopment 9.1 PeopleBook, "Maintaining My Profiles," Maintaining Interest Lists

Common Elements Used in this Section

Profile Click the profile link to view the profile. From the Interest List page, the link takes you to the Non-person Profile page and from the Interest List - View by Profile page, the link takes you to the Person Profile page.

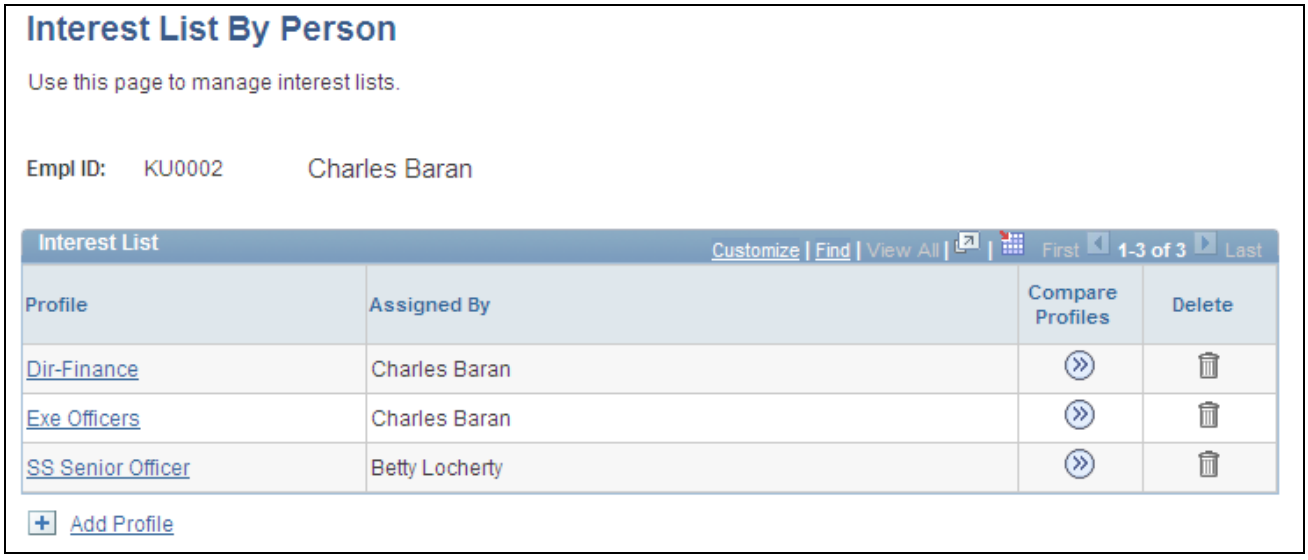
Assigned By Displays the name of the person who added the profile to the interest list. This can be the employee, the employee's manager, or an administrator.

Pages Used to Manage Interest Lists

Page Name	*Definition Name*	*Navigation*	*Usage*
Interest List by Person	JPM_INTEREST_PERS	Workforce Development, Profile Management, Profiles, Interest List by Person, Interest List by Person	View an employee's interest list and add profiles to the list.
Interest List by Profile	JPM_INTEREST_PROF	Workforce Development, Profile Management, Profiles, Interest List by Profile, Interest List by Profile	View a list of employees who have a selected profile on their interest list. You can also add the selected profile to an employee's interest list.

Managing Employees' Interest Lists

Access the Interest List by Person page (Workforce Development, Profile Management, Profiles, Interest List by Person, Interest List by Person).



Interest List by Person page

Add Profile Click this link to add another profile to the employee's interest list.

Compare Profiles Click this icon to access the Compare Results page.

Viewing Interest Lists by Profile

Access the Interest List by Profile page (Workforce Development, Profile Management, Profiles, Interest List by Profile, Interest List by Profile).

Interest List by Profile page

Add Person Click this link to add the profile to another employee's interest list.

Compare Profiles Click this icon to access the Compare Results page.

Tracking Training

This section provides an overview of how to track employee training and discusses how to track employee training.

Understanding How to Track Employee Training

The Administer Training business process enables you to set up training courses and manage course sessions. If you use Administer Training to manage your training courses, the Training page (COURSE_STUDNT_ENRL) gives you a summary of employees' training history.

Use the Professional Training page (EDUCAT_TRAIN_GBL) to track other training that is not managed using Administer Training. You can use this page to track training that an employee is enrolled in, or has completed.

This section discusses how to record employee training.

See Also

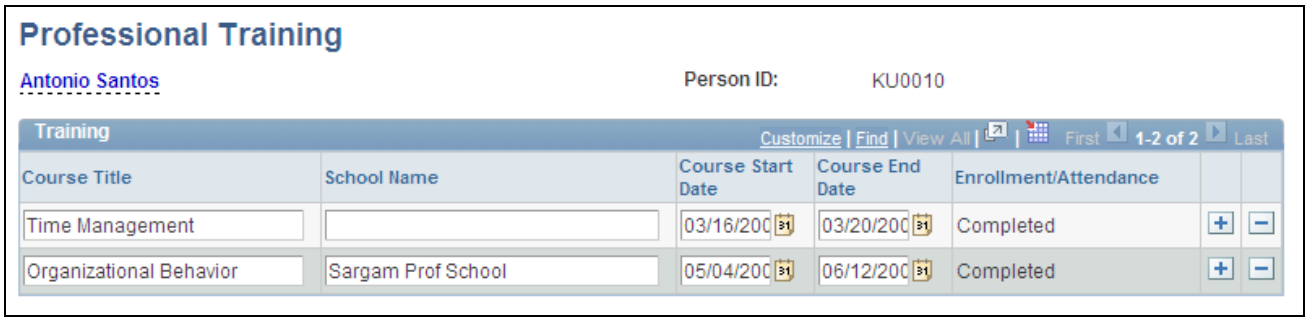
PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Training, "Tracking Student Training," Entering or Reviewing Student and Course Information

Pages Used to Track Employee Training

Page Name	*Definition Name*	*Navigation*	*Usage*
Training	COURSE_STUDNT_ENRL	Workforce Development, Profile Management, Profiles, Training, Training	View details of training courses that the employee has completed, enrolled in, or on the waiting list. This page displays course sessions that you manage using the Administer Training business process.
Professional Training	EDUCAT_TRAIN_GBL	• Workforce Development, Profile Management, Profiles, Professional Training, Professional Training • Enterprise Learning, Result Tracking, Manage Person Profiles, Professional Training, Professional Training Workforce Administration, Global Assignments, Assignee Qualifications, Professional Training, Professional Training	Record employee training that is not maintained using the Administer Training business process.

Recording Employee Training

Access the Professional Training page (Workforce Development, Profile Management, Profiles, Training Summary, Professional Training).



Professional Training page

Course Title	Enter the name of the training course.
School Name	Enter the name of educational establishment or training company that runs the course.
Course Start Date and **Course End Date**	Enter the date on which the course was started and completed.

Chapter 6

Matching Competencies to Roles

This chapter provides overviews of profile comparisons, role matching, and discusses how to:

- Set up match evaluation types.
- Match employees to roles.
- Match roles to employees.
- Match teams to projects.

Understanding Profile Comparisons

The PeopleSoft Manage Profiles business process provides three ways to compare profiles:

- Search and compare profiles.
- Compare profiles.
- Role matching.

Search and Compare Profiles

Using the Search and Compare Profiles option you can configure searches to suit your content catalog, profile types, and users. Users select the search that they want to run and the search returns the profiles that best match the search criteria. Each profile in the search results is assigned a score that indicates how well the profile matches all the item properties specified in the search criteria. You can also compare profiles in the search results with the search criteria. Depending on the search type, users can also modify the search criteria, which makes the Search and Compare Profiles more flexible than role matching.

Use the Search and Compare Profiles option if you have a specific profile or profile item criteria and you want to search for matching profiles within a profile type.

See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 150.

Compare Profiles

The Compare Profiles option provides an online comparison of the profile items in a source profile with one or more target profiles. Unlike the role matching options, you can select any of the profile types in the system; you are not limited to PERSON and ROLE profile types.

See Chapter 5, "Managing Profiles," Viewing Comparison Results, page 174.

Role Matching

The options on the Workforce Development, Profile Management, Matching Competencies to Roles menu enable you to compare the competencies and accomplishments of an employee's PERSON profile against those required by a ROLE profile, or a group of PERSON profiles against a ROLE profile for a job task. The degree of fit is displayed based on item proficiency and importance. The points assigned as a match score are based on the importance points of the matching items.

Role matching is limited to these content types in the ROLE and PERSON profile types:

- Competencies
- Degrees
- School education
- Honors and awards
- Licences and certifications
- Language skills
- Memberships
- Test/examinations
- NVQ units (National Vocational Qualifications units)

Note. Any other content types you have defined in the profiles are not considered in the role match.

The role matching is configured to compare these profile types only:

- PERSON profiles.
- ROLE profiles.

Use Search and Compare Profiles if you want to:

- Include other content types or profile types in your search.

  Search and Compare Profiles enables you to configure searches for any profile type defined in your system and the searches compare all content types that are common to the profiles being compared.

  See Chapter 4, "Setting Up Search and Compare Profiles," page 89.

- Search person or non-person profiles for best matches.

  With role matching you select the person profile and the role profile that you want to compare. With Search and Compare Profiles, you have greater flexibility to set up search criteria and the searches return the profiles that best match those criteria.

  See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 150.

- Make searches available to employees and managers.

  If you have eDevelopment installed you can set up searches for self-service users. The competency and accomplishment matching options are available to administrators only.

  See *PeopleSoft Enterprise eDevelopment 9.1 PeopleBook*, "Maintaining My Profiles," Searching and Comparing Profiles.

Use the role matching options if you want to compare a specific PERSON profile with a specific ROLE profile and you want fit-gap information on each profile item based on proficiency and importance only.

Understanding Role Matching

This section discusses:

- Point awards and importance levels.
- Multiple evaluations.

Point Awards and Importance Levels

You run different inquiries to match:

- Employees to roles.
- Roles to employees.
- Teams to job tasks.

However, all inquiries are performed the same way. The system awards points to employees or teams based on their assigned competencies, competency proficiency ratings, and accomplishments. The system weights the evaluation in favor of the importance values that you assign to each competency and accomplishment.

The system assigns the following point values to importance levels:

Importance Level	***Points***
High	5
Above Average	4
Average	3
Below Average	2
Low	1

Importance Level	*Points*
None	0

This table shows the competency requirements for a human resources (HR) specialist position and the points awarded for each competency:

Competency	*Importance Level*	*Points Assigned*
Communication	High	5
Leadership	Average	3
Interpersonal Effectiveness	Above Average	4
Planning	Low	1
Decision Making	Above Average	4
Adaptability to Change	Below Average	2

The *total match* value for a position represents the maximum number of points available if the employee meets all the requirements. In the preceding example, the total match equals 19 (the sum of the points in the Points Assigned column). Points are assigned differently for accomplishments and competencies.

Employee Points for Accomplishments

Accomplishment points are calculated by the system. If the accomplishment exists in an employee's profile, the system awards points to the employee based on the importance value that you assign to the accomplishment. Accomplishments include the following content types: degrees, school education, honors and awards, licences & certifications, language skills, memberships, and tests/examinations, and NVQs. Other content types are not included in the comparison.

Employee Points for Competencies

Unlike accomplishments, competencies have proficiency ratings associated with them. These ratings indicate a level of expertise. When you assign competencies to a ROLE profile, you also define the rating required for each competency. Similarly, you give employees a rating for each competency that you add to their profile.

The system assigns points to an employee only if the individual has the required proficiency level for the competency. The points assigned are calculated as the average of the points for the most current row for each of the user specified evaluation types. These user evaluation types are assigned in the Match Evaluation Types component.

Here are the match indicator icons:

+ Over Qualified If the employee's rating is more than one level higher than the rating required for the role, the system displays a plus sign (+) beside the circle, indicating the employee is over qualified.

Met A blue filled circle indicates that the employee possesses the required competency and has the required proficiency rating.

Met Some A green half-filled circle indicates that the employee has a rating that is one level lower than that required for the role.

Not Met A red circle outline indicates that the employee's rating in this competency is multiple levels below that required for the role.

Because proficiency ratings vary according to the rating model, the system uses the review points value associated with the rating to perform the match analysis. In some cases, the value in Review Points field on the Rating Model page is the same as the rating. For example, the PSCM rating model uses ratings from 0 (none) to 5 (expert), and these ratings have the associated review points of 0 to 5.

Note. You can change the match indicator icon images using PeopleSoft Application Designer.

The following table shows an example of the ratings required for an HR specialist position, and it shows a hypothetical employee profile. The competencies in the profile are assigned the PSCM rating model. The Match Indicator column shown describes the icon that appears for the particular scenario.

Competency	*Required Rating*	*Employee Rating*	*Match Indicator*
Communication	5	5	Blue filled circle
Leadership	4	3	Green half-filed circle
Interpersonal Effectiveness	3	5	+ Blue filled circle
Planning	3	1	Red circle outline
Decision Making	2	3	Blue filled circle
Adaptability to Change	3	None	None

See Also

Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 61

Chapter 2, "Setting Up the Content Catalog," Defining Rating Models, page 31

Chapter 5, "Managing Profiles," Maintaining Profiles, page 109

Multiple Evaluations

If multiple people evaluate an employee or group of employees, each evaluation might include different competencies, competency ratings, and accomplishments.

To control which evaluations are used in match and gap analyses, you define match evaluation types. For example, you might include only evaluations with the status of Approved/Official.

To understand how the system performs a match analysis with multiple evaluations, consider the following example:

Competency	***Manager Evaluation***	***Peer 1 Evaluation***	***Peer 2 Evaluation***	***Average Rating***
Communication	5	4	5	4.67
Leadership	4	3	3	3.33
Interpersonal Effectiveness	5	5	5	5
Planning	NA	NA	NA	NA
Decision Making	3	2	3	2.67
Adaptability to Change	2	1	2	1.67

If you use manager and peer evaluations for match analysis, the system calculates the average rating based on the three evaluations: manager, peer 1, and peer 2.

The following table shows the results if this employee is compared with the HR specialist position. The Employee Match column describes the icon that appears for the particular scenario.

Competency	***Importance***	***Points Assigned***	***Rating Required***	***Employee Rating***	***Employee Match***	***Employee Points***
Communicatio n	High	5	5	4.67	Green half-filled circle	0
Leadership	Average	3	4	3.33	Green half-filled circle	0
Interpersonal Effectiveness	Above Average	4	3	5	+ Blue filled circle	4

Competency	Importance	Points Assigned	Rating Required	Employee Rating	Employee Match	Employee Points
Planning	Low	1	3		None	0
Decision Making	Above Average	4	2	2.67	Blue filled circle	4
Adaptability to Change	Below Average	2	3	1.67	Red circle outline	0

The total points value for the HR Specialist position is 19 (the sum of the values in the points assigned column). The employee earns the points for a competency when their rating meets or exceeds the required rating for the position being evaluated. In this case, the employee met or exceeded the required rating for two competencies. The combined point value for those two competencies is 8. Therefore, the employee's total points for evaluation against the HR Specialist position is 8.

Setting Up Match Evaluation Types

To set up match evaluation types, use the Match Evaluation Types (MATCH_TYPES) component.

This section discusses how to define match evaluation types.

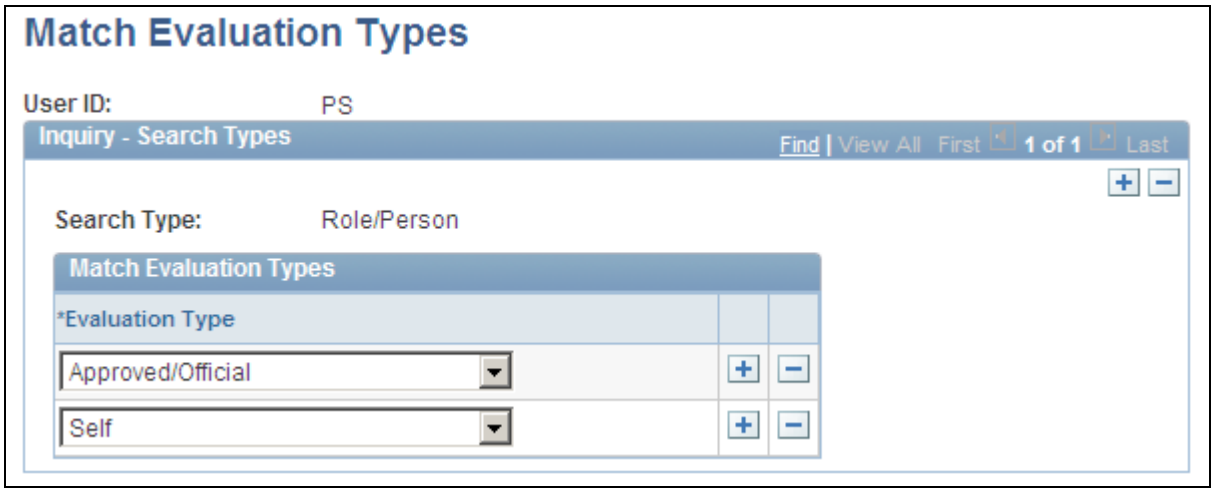
You must set up match evaluation types that correspond to the users for whom you want to run match analyses. Evaluation types determine which evaluations are included in each analysis.

Page Used to Set Up Match Evaluation Types

Page Name	Definition Name	Navigation	Usage
Match Evaluation Types	CM_MATCH_INSTR	Workforce Development, Profile Management, Match Competencies to Roles, Match Evaluation Types, Match Evaluation Types	Define match evaluation types specifying the types of inquiries a user can run and the evaluation types a user can access. To run the match analyses, you must first set up evaluation types and user access.

Defining Match Evaluation Types

Access the Match Evaluation Types page (Workforce Development, Profile Management, Match Competencies to Roles, Match Evaluation Types, Match Evaluation Types).



Match Evaluation Types page

Search Type Displays *Role/Person.* This enables the selected user ID to match roles to employees, employees to roles, and teams to projects.

Evaluation Type Select evaluation types for this user.

These control which competency ratings the system includes when performing the analysis. For example, when performing a gap analysis for an individual (as opposed to a project team), you might include manager and peer evaluations and exclude customer evaluations.

If *Self* is selected as the evaluation type, only self-evaluations that have been approved by the employee's manager are included in the role matching process.

Matching Employees to Roles

This section lists prerequisites and discusses how to:

- Specify a role and analyze cluster matches.
- Analyze competency matches.
- View competency match details.
- Analyze accomplishment matches.
- View a gap analysis of the employee and role.

Prerequisites

Before you use the Person to Role match, set up:

- A profile for the employee using the PERSON profile type.

- A profile for the role using the ROLE profile type.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the role match.

See Also

Chapter 5, "Managing Profiles," page 107

Chapter 6, "Matching Competencies to Roles," Setting Up Match Evaluation Types, page 187

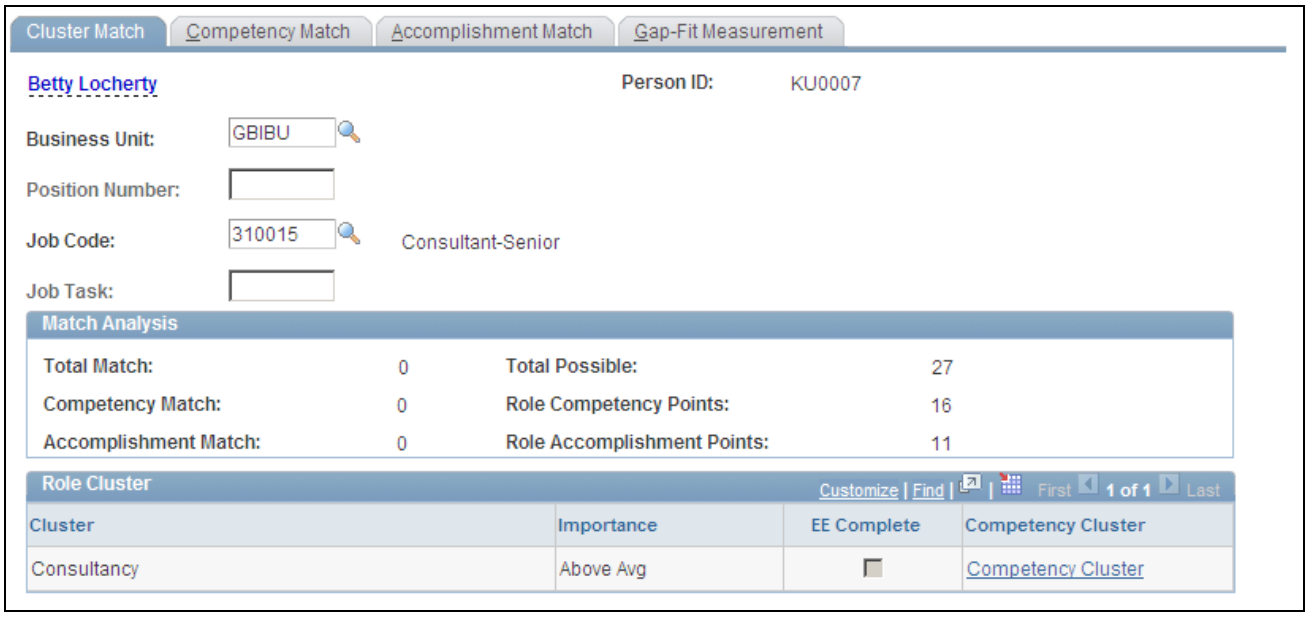
Pages Used to Match Employees to Roles

Page Name	*Definition Name*	*Navigation*	*Usage*
Person to Role - Cluster Match	CM_PERSON_CLUSTER1	Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Cluster Match	Specify the role (position, job code, or job task) with which you want to compare the employee and view an analysis of how the employee matches the clusters assigned to the role.
Cluster Detail	CM_PERSON_CLST_SEC	• Click the Competency Cluster link on the Person to Role - Cluster Match page. • Click the Competency Cluster link on the Role to Person - Cluster Match page.	View details of the employee's ratings for competencies and accomplishments in the selected cluster.
Person to Role - Competency Match	CM_PERSON_ROLE	Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Competency Match	View competency matches that display an analysis of how the employee matches the individual competencies and competency clusters required for a given role.
Person to Role - Competency Match Detail	CM_COMP_MATCH_SEC	Click the Competency Match Detail link on the Competency Match page.	View competency match details of the employee's ratings in each competency assigned to the role.
Competency Training	COMP_TRAINING_SEC	Click the Competency Training link on the Competency Match page.	View training courses that address a selected competency.

Page Name	*Definition Name*	*Navigation*	*Usage*
Person to Role - Accomplishment Match	CM_PERSON_ROLE2	Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Accomplishment Match	Analyze accomplishment matches for a person. Review how well an employee matches individual and cluster accomplishments for a given role.
Person to Role - Gap-Fit Measurement	CM_PERSON_ROLE3	Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Gap-Fit Measurement	Compare an employee's ratings in each required competency with the rating expected for the role, and view the percentage difference. The sum of these percentages provides an overall indication of how well the employee matches the requirements of the role.

Specifying a Role and Analyzing Cluster Matches

Access the Person to Role - Cluster Match page (Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Cluster Match).



Person to Role - Cluster Match page

When you select the role, the system analyzes how well the employee matches the required clusters. If no clusters are assigned to a role, the system still returns results on this page.

Business Unit, Position Number, Job Code, and **Job Task**

Select a business unit then a position, job code, or job task (the Business Unit default value comes from the user preferences). The job code and job task are related to the business unit you enter on this page. When you enter a value in one field, the other fields become unavailable. To open up the other fields for entry, delete the position number, job code, or job task value and tab out of the field.

The system compares the employee's competencies and accomplishments with the role that you selected and displays the results of the analysis.

Match Analysis

Total Match and **Total Possible**

Indicates the employee's points out of the total points possible for the role. This calculation includes points for clusters and individual competencies and accomplishments.

This total is weighted for the importance of each competency or accomplishment assigned to the role. All items are used in this total, including individual competencies and accomplishments as well as those competencies and accomplishments assigned to clusters associated with the role.

Competency Match and **Role Competency Points**

Indicates how many of the points are from the employee's competencies and how many competency points are available. These numbers add to the total match and total possible point values.

Accomplishment Match and **Role Accomplishment Points**

Indicates how many of the employee points are from accomplishments and how many accomplishment points are available. These numbers add to the total match and total possible point values.

Role Cluster

In earlier versions of PeopleSoft Enterprise HRMS, clusters were groups of competencies and accomplishments that were assigned to roles. During the upgrade to HRMS 9.0, clusters were converted to profile items assigned to profiles of type ROLE. The upgrade process assigns these profile items a legacy profile ID. When you run the role matching options, the system searches for profiles of type ROLE with profile items that have a legacy profile ID.

EE Complete (employee complete)

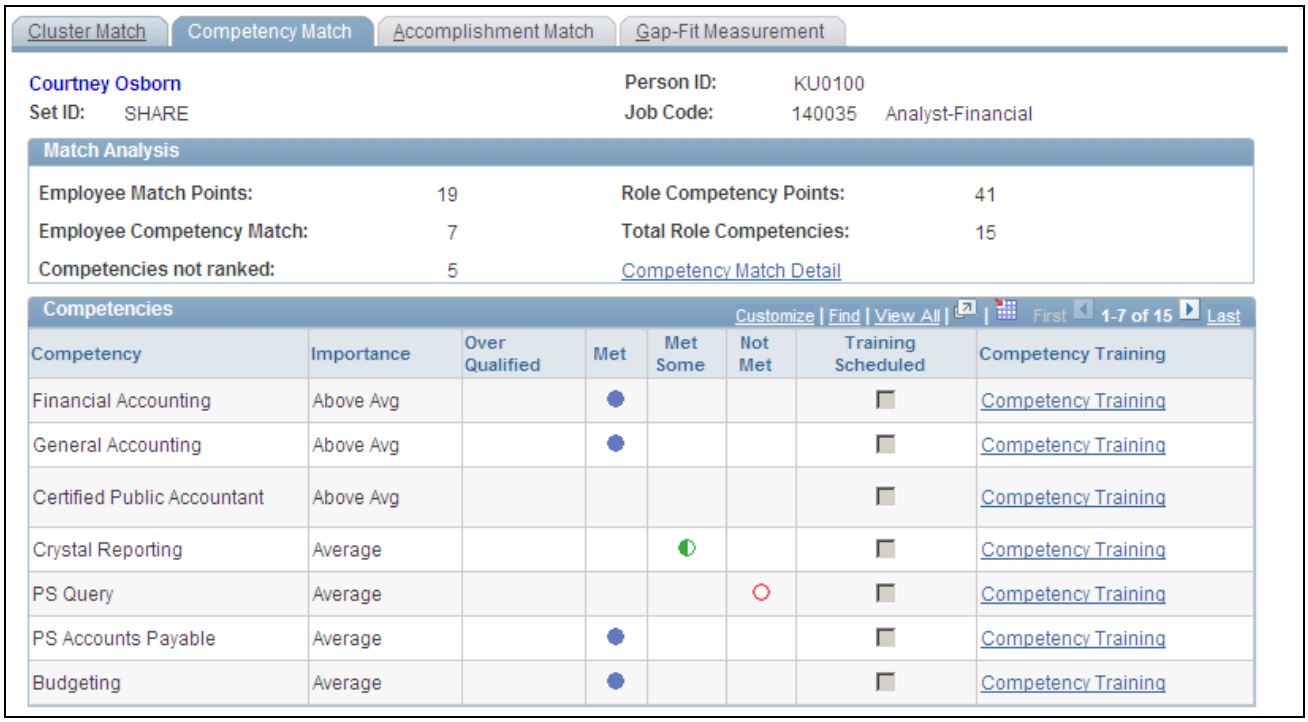
Indicates if the employee has all the required competencies and accomplishments assigned to the cluster.

Competency Cluster

Click to open the Cluster Detail page and view the competencies and accomplishments assigned to the cluster and how the person matches up to these.

Analyzing Competency Matches

Access the Person to Role - Competency Match page (Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Competency Match).



Person to Role - Competency Match page

Match Analysis

Employee Match Points and **Role Competency Points**	Indicates the number of competency points that an employee has out of a total possible number of competency points required by the role.
Employee Competency Match and **Total Role Competencies**	Displays the number of employee competencies that match the competencies required for the role. For example, an employee may only have 7 of the 15 competencies defined for the role.
Competencies not ranked	Displays the number of competencies required by the role that are not included in the employee's evaluations.
Competency Match Detail	Click to open the Competency Match Detail page and view the breakdown of each competency and its match with the person and role.

Competencies

Competency	Lists competencies assigned to the role, from highest to lowest importance.
Importance	Displays the importance levels that are assigned to the competencies in the ROLE profile.

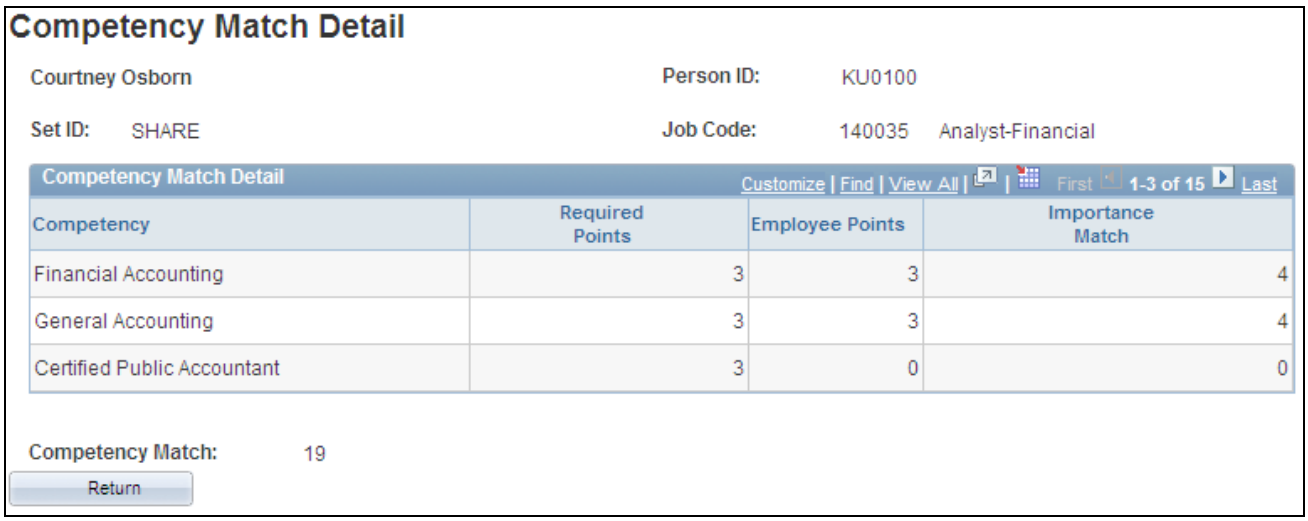
Over Qualified, Met, Met Some, and **Not Met** — Displays the appropriate icon in the field [plus sign (+), blue circle, green half-filled circle, red circle outline] for how the person matches the competency. These columns will appear on the page only if the person has a competency indicator icon in that column.

Training Scheduled — Indicates whether the employee is already scheduled for training in the competency.

Competency Training — Click to open the Competency Training page to see if any available training courses target the competency.

Viewing Competency Match Details

Access the Competency Match Detail page (click Competency Match Detail on the Competency Match page).



Competency Match Detail page

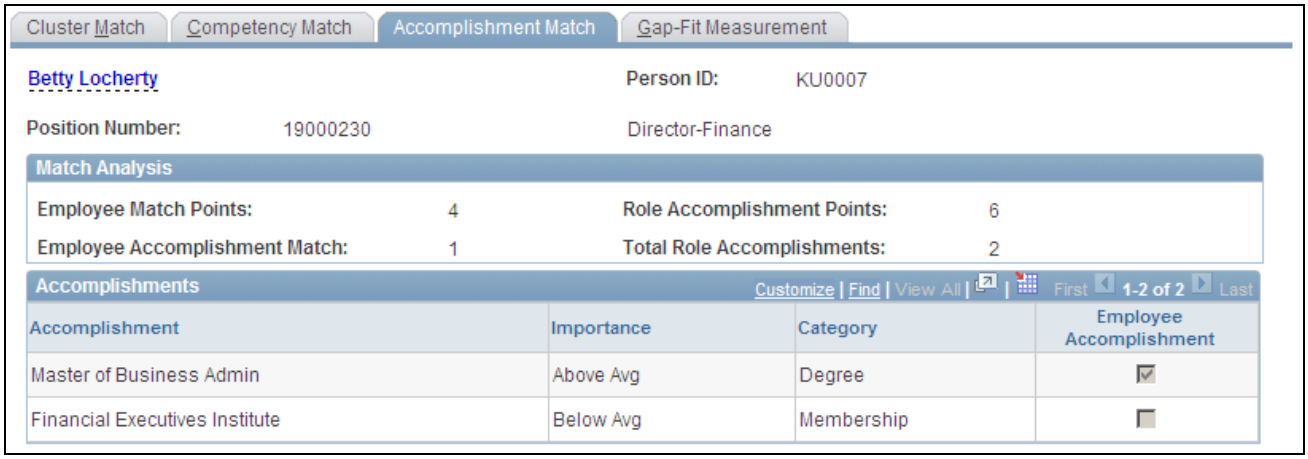
Required Points — Each rating in a rating model has points associated with it. Required points are derived from the rating (or rather a point translation of the rating) this is assigned to the competency for the specified role. You specify the number of points for each rating by using the Review Points field on the Rating Model page.

Employee Points — Displays the employee's point rating for the competency. Employee review points are the point translation of the rating that the employee receives for the competency, and these points are specified for each rating using the Review Points field on the Rating Model page.

Importance Match — If the employee possesses the required competency and has the required rating, the employee is awarded points based on the importance of the competency.

Analyzing Accomplishment Matches

Access the Person to Role - Accomplishment Match page (Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Accomplishment Match).



Person to Role - Accomplishment Match page

Match Analysis

Employee Match Points Indicates the number of employee accomplishment importance points for those accomplishment matches between the employee and the role.

Role Accomplishment Points Indicates the total number of accomplishment importance points available.

Employee Accomplishment Match Displays the number of employee accomplishments that match the accomplishments required for the role.

Total Role Accomplishments Displays the number of total accomplishments that are required for the role.

Accomplishments

Accomplishment Lists each accomplishment assigned to the role, from highest to lowest importance.

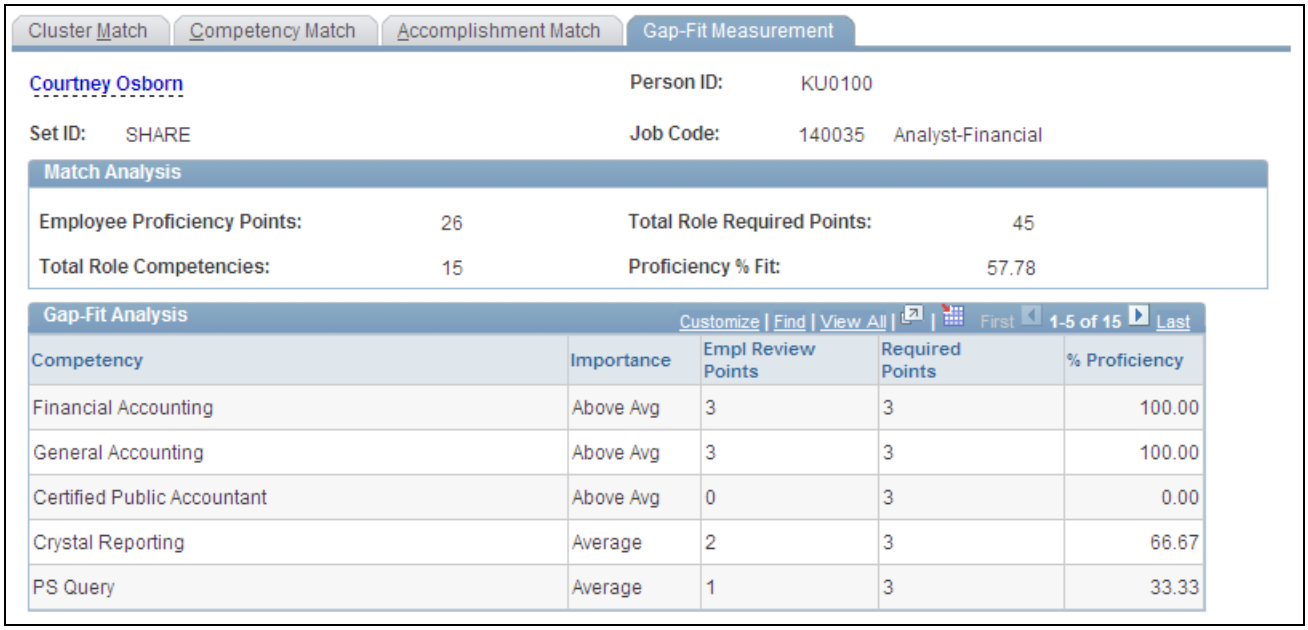
Importance Displays importance levels assigned to the accomplishment in the role profile.

Category Displays the accomplishment category.

Employee Accomplishment Indicates whether the employee possesses the accomplishment.

Viewing a Gap Analysis of the Employee and Role

Access the Person to Role - Gap-Fit Measurement page (Workforce Development, Profile Management, Match Competencies to Roles, Person to Role, Gap-Fit Measurement).



Person to Role - Gap-Fit Measurement page

Match Analysis

Employee Proficiency Points Indicates how many importance points the employee has been awarded for the role. These values do not include points associated with accomplishments.

Total Role Required Points Indicates how many importance points are possible for the role. These values do not include points associated with accomplishments.

Total Role Competencies Displays the number of competencies that are assigned to the role.

Proficiency % Fit (proficiency percentage fit) Displays the employee's points as a percentage of the total possible. The system only includes points associated with competencies in this calculation.

For example, if the employee has 5 points and the total possible for the role is 20 points, then the percentage fit is 25%.

Gap-Fit Analysis

Empl Review Points (employee review points) Displays the employee's proficiency point rating for the competency. For example, if you use the PSCM rating model, a rating of 5 has an associated review point value of 5.

Required Points Each rating in a rating model has points associated with it. Points are derived from the rating (or rather a point translation of the rating) that is assigned to the competency for the specified role. You specify the number of points for each rating by using the Review Points field on the Rating Model page.

% Proficiency (percentage proficiency) Displays the employee's rating percentage compared to the rating required for the role. The system divides the employee review points by the required points and converts the result into a percentage. For example, if the value of the employee review points is 3 but the role requires a point value of 4, then the percentage proficiency is 75%.

If an employee's rating exactly matches the required rating, then the percentage proficiency deficiency is 100%. A percentage less than 100% indicates that the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

Matching Roles to Employees

This section lists prerequisites and discusses how to:

- Specify an employee and analyze cluster matches.
- Analyze competency matches.
- View competency match details.
- Analyze accomplishments.
- View a gap analysis of the role and employee.

Prerequisites

Before you use the Role to Person match, set up:

- A profile for the role using the ROLE profile type.
- A profile for the employee using the PERSON profile type.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the matching.

See Also

Chapter 5, "Managing Profiles," page 107

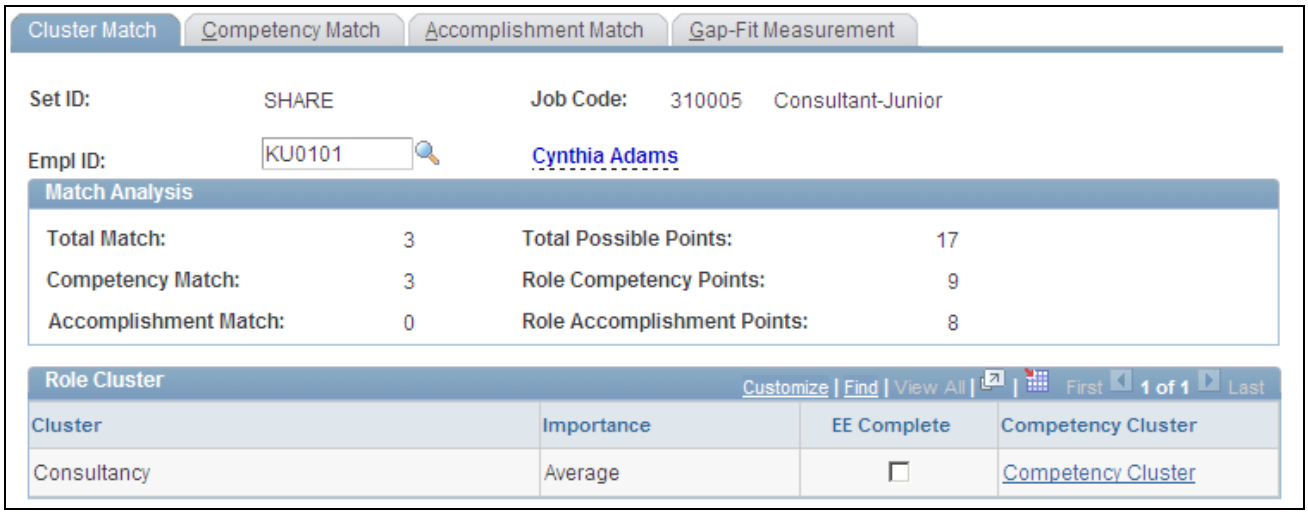
Chapter 6, "Matching Competencies to Roles," Setting Up Match Evaluation Types, page 187

Pages Used to Match Roles to Employees

Page Name	*Definition Name*	*Navigation*	*Usage*
Role to Person - Cluster Match	CM_ROLE_CLUSTER1	Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Cluster Match	Specify an employee with whom to compare the selected role to see how well the employee matches required clusters.
Role to Person - Competency Match	CM_ROLE_PERSON	Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Competency Match	Determine how well an employee's profile matches both the individual competencies and competencies that are part of clusters that are required for the role.
Competency Match Detail	CM_ROLE_PERSON_SEC	Click Competency Match Detail on the Role to Person Match - Competency Match page.	View details of the employee's ratings in each competency assigned to the role.
Role to Person - Accomplishment Match	CM_ROLE_PERSON2	Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Accomplishment Match	Determine how well an employee's profile matches individual accomplishments and accomplishments that are part of clusters that are required for the role.
Role to Person- Gap-Fit Measurement	CM_ROLE_PERSON3	Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Gap-Fit Measurement	Compare an employee's ratings in each required competency with the rating expected for the role, and calculate the percentage difference. The sum of these percentages provides an overall indication of how well the employee matches the requirements of the role.

Specifying an Employee and Analyzing Cluster Matches

Access the Role to Person - Cluster Match page (Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Cluster Match).



Role to Person - Cluster Match page

Empl ID (employee ID) Select an employee.

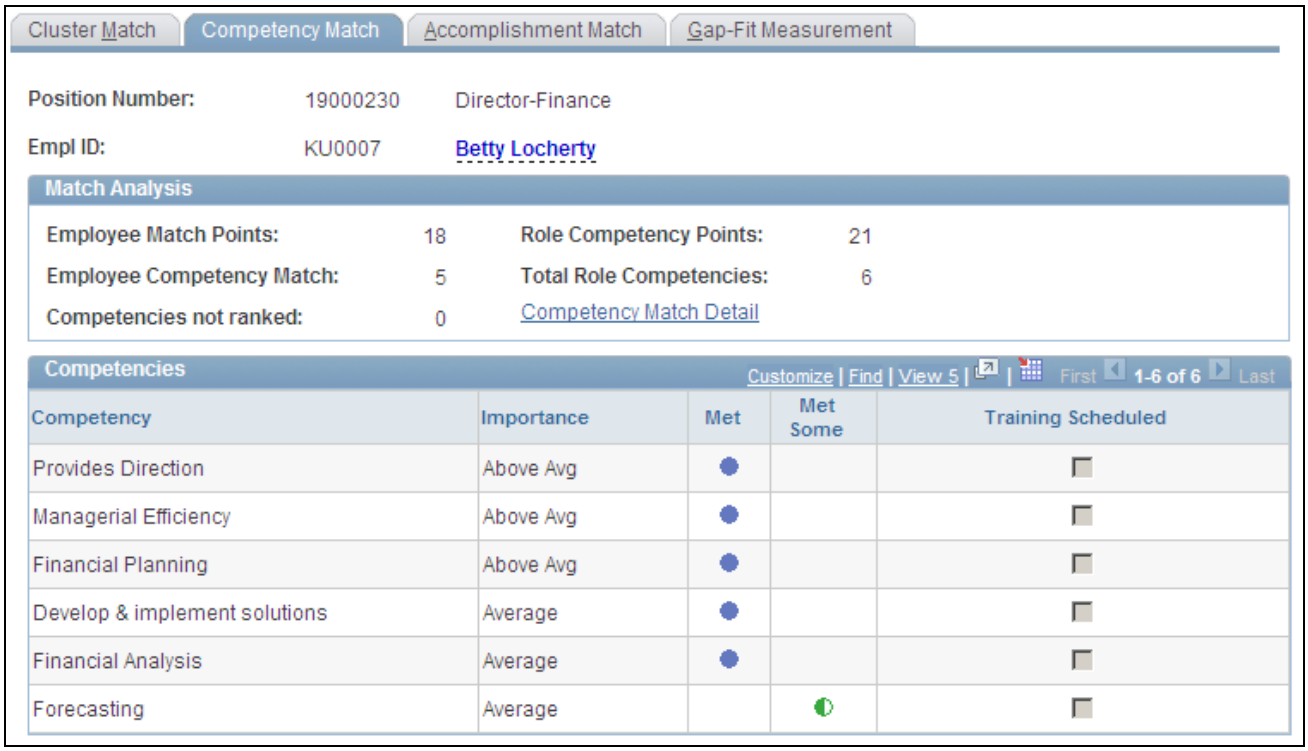
The system compares the employee's competencies and accomplishments with the selected role and displays the results of the analysis.

The rest of the fields on this page are identical to the Person to Role - Cluster Match page.

See Chapter 6, "Matching Competencies to Roles," Specifying a Role and Analyzing Cluster Matches, page 190.

Analyzing Competency Matches

Access the Role to Person - Competency Match page (Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Competency Match).



Role to Person - Competency Match page

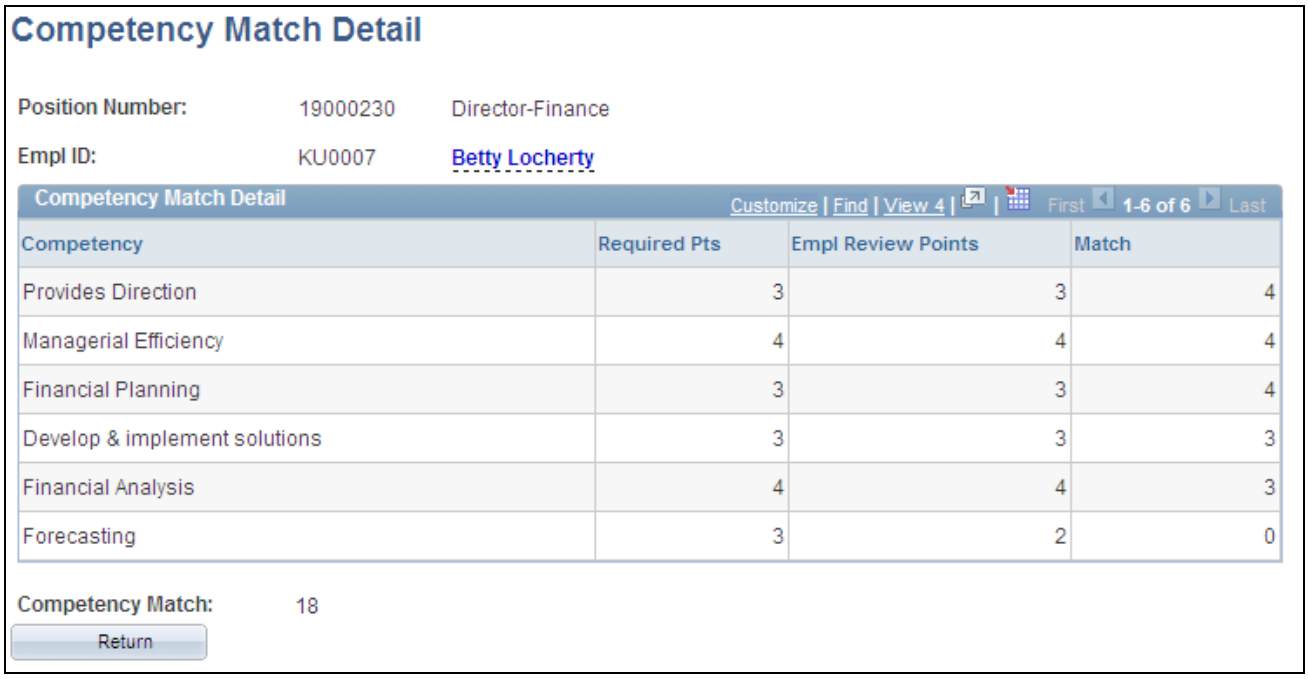
This page displays details of the selected role and employee ID.

The rest of the fields on this page are identical to the Person to Role - Competency Match page.

See Chapter 6, "Matching Competencies to Roles," Analyzing Competency Matches, page 191.

Viewing Competency Match Details

Access the Competency Match Detail page (click Competency Match Detail on the Role to Person - Competency Match page).



Competency Match Detail page

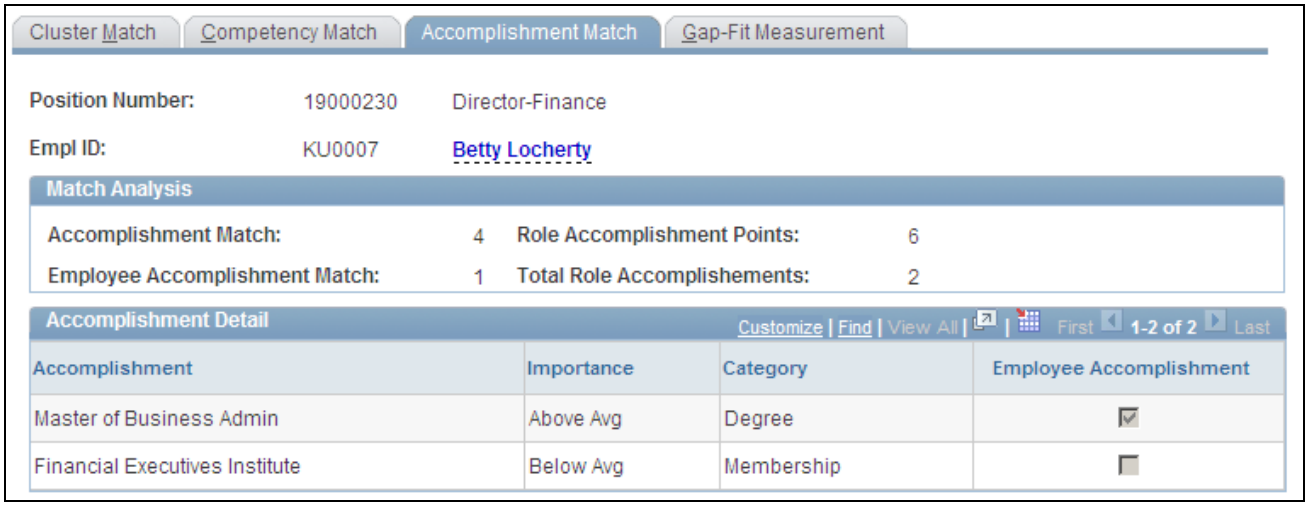
This page displays the selected role and employee ID, along with the role description and the employee's name.

The rest of the fields on this page are identical to the Person to Role - Competency Match Details page.

See Chapter 6, "Matching Competencies to Roles," Matching Roles to Employees, page 196.

Analyzing Accomplishments

Access the Role to Person - Accomplishment Match page (Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Accomplishment Match).



Role to Person - Accomplishment Match page

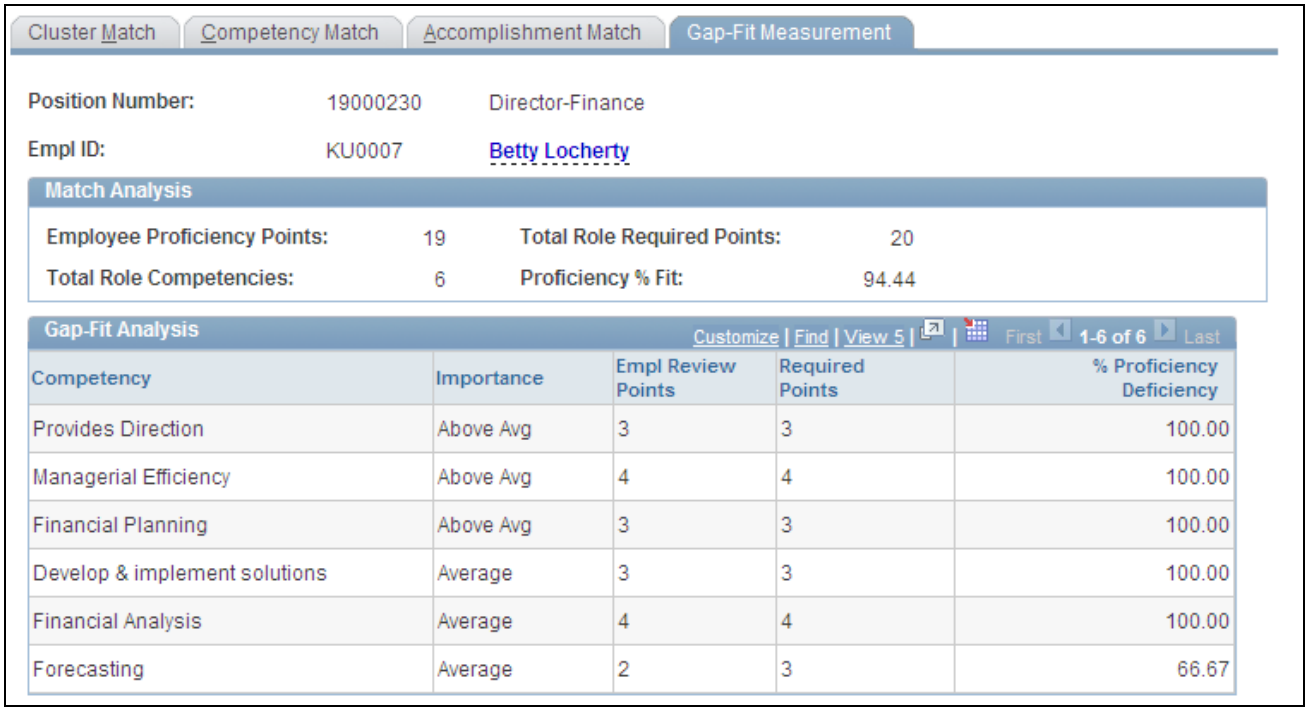
This page displays the selected role and employee ID, along with the role description and the employee's name.

The rest of the fields on this page are identical to the Person to Role - Accomplishment Match page.

See Chapter 6, "Matching Competencies to Roles," Analyzing Competency Matches, page 198.

Viewing a Gap Analysis of the Role and Employee

Access the Role to Person - Gap-Fit Measurement page (Workforce Development, Profile Management, Match Competencies to Roles, Role to Person, Gap-Fit Measurement).



Role to Person - Gap-Fit Measurement page

This page displays details of the selected role and employee ID.

The rest of the fields on this page are identical to the Person to Role - Gap-Fit Measurement page.

See Chapter 6, "Matching Competencies to Roles," Viewing a Gap Analysis of the Role and Employee, page 201.

Matching Teams to Projects

This section lists prerequisites and discusses how to:

- Set up employee teams.
- Analyze team competency matches.

- Analyze team accomplishment matches.

Prerequisites

Before you can use the Compare Team to Job Task option, set up:

- A profile for the job task using the ROLE profile type.
- Profiles for the employees in the team using the PERSON profile type.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the comparison.

See Also

Chapter 5, "Managing Profiles," page 107

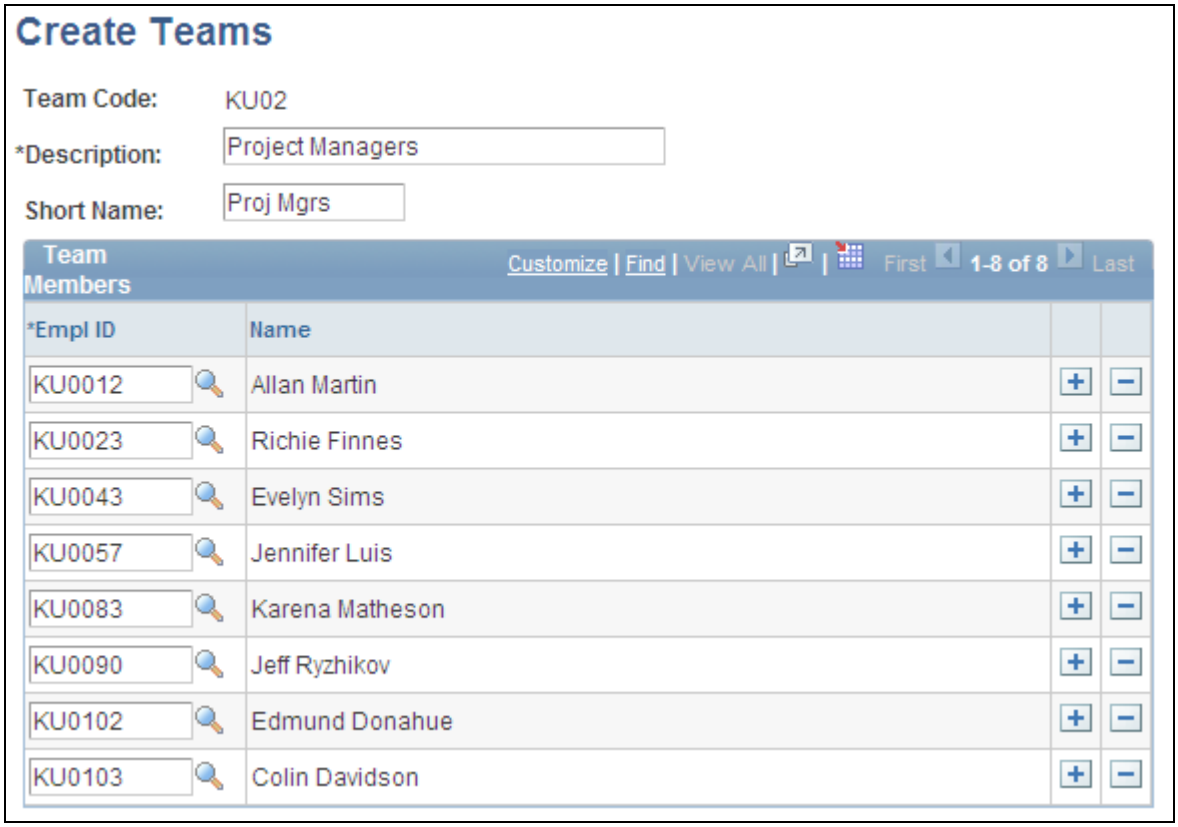
Chapter 6, "Matching Competencies to Roles," Setting Up Match Evaluation Types, page 187

Pages Used to Match Teams to Projects

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Teams	EE_TEAMS	Workforce Development, Profile Management, Match Competencies to Roles, Create Teams, Create Teams	Set up employee teams.
Team to Job Task - Competency Match	CM_TEAM_ROLE	Workforce Development, Profile Management, Match Competencies to Roles, Compare Team to Job Task, Competency Match	Analyze team competency matches. Compare the competencies assigned to a job task with the competency profiles of team members.
Competency Match Detail	CM_TEAM_ROLE_SEC	Click the Competency Match Detail link on the Team to Job Task - Competency Match page.	View the team members with the competency at the required proficiency.
Team to Job Task - Accomplishment Match	CM_TEAM_ROLE2	Workforce Development, Profile Management, Match Competencies to Roles, Compare Team to Job Task, Accomplishment Match	Compare the accomplishments required by a job task with the team members' accomplishments.
Accomplishment Match Detail	CM_TEAM_ROLE2_SEC	Click Accomplishment Match Detail on the Accomplishment Match page.	View a list of the team members with the required accomplishment.

Setting Up Employee Teams

Access the Create Teams page (Workforce Development, Profile Management, Match Competencies to Roles, Create Teams, Create Teams).

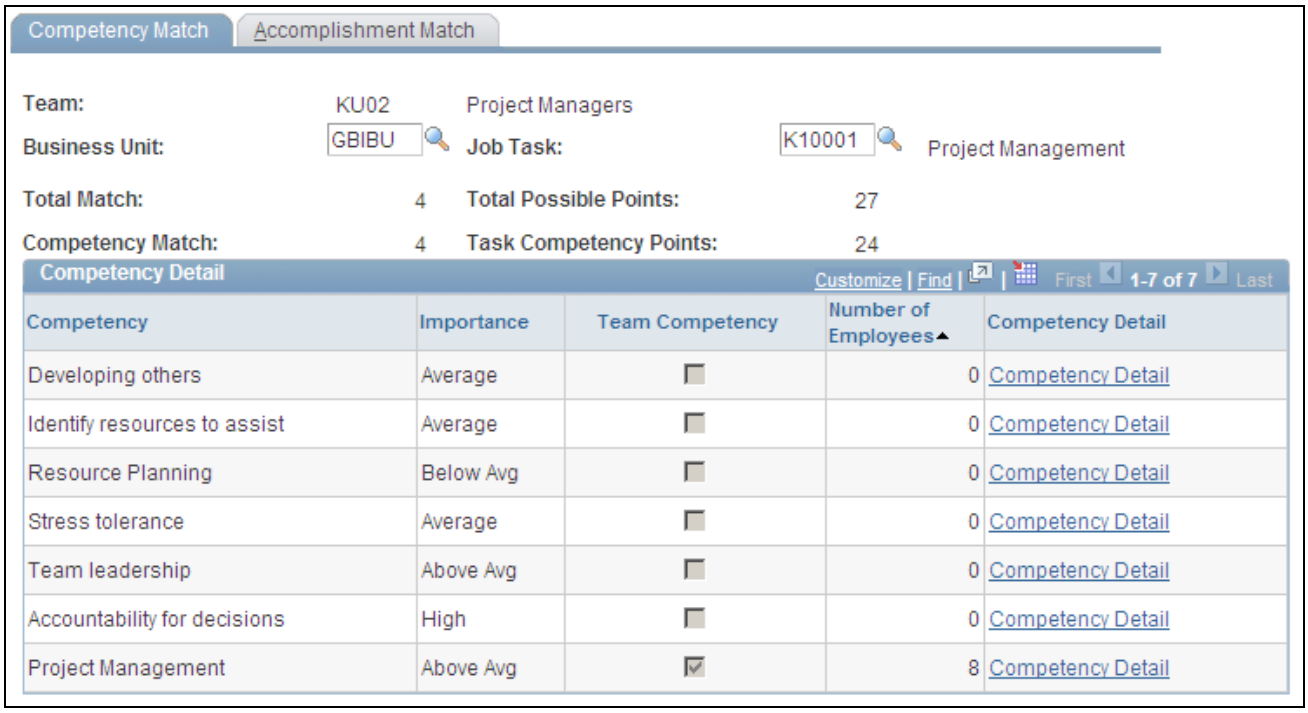


Create Teams page

Team Members Add members by selecting from the list of employee IDs. Insert new rows to add more employees.

Analyzing Team Competency Matches

Access the Compare Team to Job Task - Competency Match page (Workforce Development, Profile Management, Match Competencies to Roles, Compare Team to Job Task, Competency Match).



Compare Team to Job Task - Competency Match page

Total Match Indicates how many competency and accomplishment points the team has been awarded for the job task

Total Possible Points Indicates how many total competency and accomplishment points are possible for the task.

Competency Match Indicates how many of the team points are from competencies.

Task Competency Points Indicates how many of the task points are from competencies.

Competency Detail

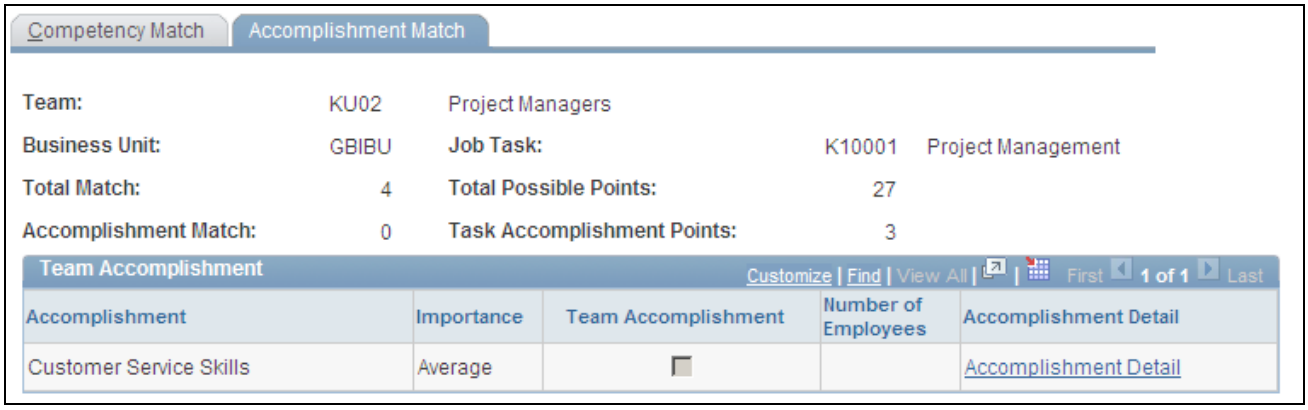
Team Competency Indicates whether any member of the team has the competency at the required proficiency.

Number of Employees Displays how many team members have the competency at the required proficiency level.

Competency Detail Click to access the Competency Match Detail page and view which team members have the required competency.

Analyzing Team Accomplishment Matches

Access the Compare Team to Job Task - Accomplishment Match page (Workforce Development, Profile Management, Match Competencies to Roles, Compare Team to Job Task, Accomplishment Match).



Compare Team to Job Task - Accomplishment Match page

Total Match Indicates how many competency and accomplishment points the team has been awarded for the job task

Total Possible Points Indicates how many total competency and accomplishment points are possible for the task.

Accomplishment Match Indicates how many of the team points are from accomplishments.

Task Accomplishment Points Indicates how many of the task points are from accomplishments.

Team Accomplishment

Team Accomplishment Indicates whether any team member has the required accomplishment.

Number of Employees Displays how many team members have the accomplishment.

Accomplishment Detail Click to access the Accomplishment Match Detail page and view which team members have the required accomplishment.

Chapter 7

Running Content Catalog and Profile Reports

This chapter discusses how to:

- Report content catalog items.
- Run profile reports.

See Also

Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 83

Reporting Content Catalog Items

This section discusses how to run the Content Catalog Listing report.

Page Used to Run the Content Catalog Report

Page Name	***Definition Name***	***Navigation***	***Usage***
Content Catalog Listing	JPM_CATLIST_RPT	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Catalog Listing, Content Catalog Listing	Run the Content Catalog Listing report (JPM_CATI_RPT) that lists the content items that have been set up for a selected content type or for all content types. Access the report in Report Manager.
Competency Summary	CM_COMPETENCY_SUMM	Set Up HRMS, Product Related, Profile Management, Content Catalog, Competency Summary, Competency Summary	Review the category that is assigned to competencies. You can view competencies in a selected competency category or a competency type.

Running the Content Catalog Listing Report

Access the Content Catalog Listing page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Catalog Listing, Content Catalog Listing).

Content Catalog Listing page

Content Type Select the content type you want the report to include. Leave this field blank to generate a report of content items for all content types.

As of Date Select a date to generate a list of content items effective as of the date specified. Leave this field blank to generate a report of content items for all dates.

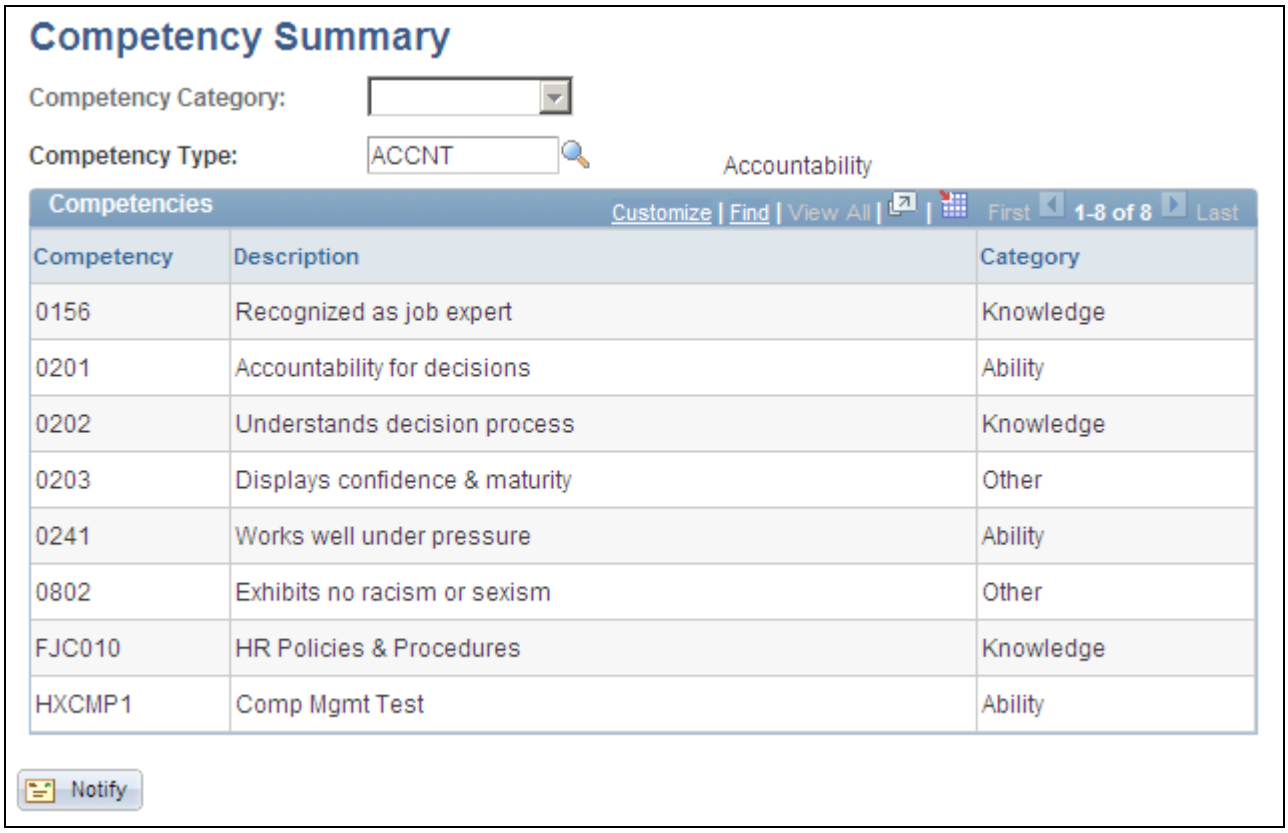
Status Select *Active* to include only items with an *Active* status in the report, *Inactive* to include only inactive items, or leave the field blank to include both active and inactive items.

See Also

Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 83

Reviewing Competency Categories

Access the Competency Summary page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Competency Summary, Competency Summary).



Competency Summary page

Select a competency category or type to list the competencies in that category or type. The competencies are listed in order of competency code.

Running Profile Reports

This section discusses how to:

- Run the Person Profile report.
- Run the Non-Person Profile report.

Pages Used to Run Profile Reports

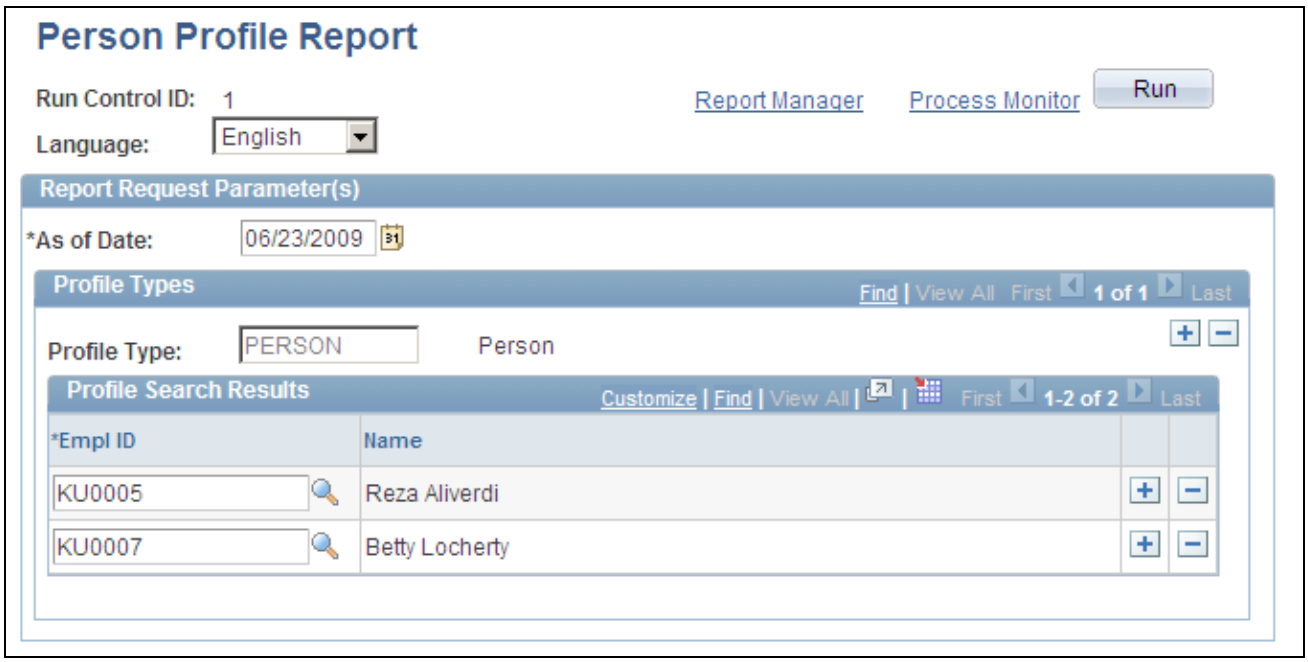
Page Name	*Definition Name*	*Navigation*	*Usage*
Person Profile Report	JPM_PPROF_RPT	Workforce Development, Profile Management, Reports, Person Profile Report, Person Profile Report	Run the Person Profile report (JPM_JPPP_RPT) to generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the employee ID in brackets in the report description.
Non-Person Profile Report	JPM_NPPROF_RPT	Workforce Development, Profile Management, Reports, Non-Person Profile Report, Non-Person Profile Report	Run the Non-Person Profile report (JPM_JPNP_RPT) to generate a PDF file for each profile listed in the run parameters. Each report shows all items in the profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the profile ID in brackets in the report description.

Page Name	Definition Name	Navigation	Usage
Competency Inventory	RUNCTL_PER011	Workforce Development, Profile Management, Reports, Competency Inventory, Competency Inventory	Run the Competency Inventory report (PER011) that lists employees in a department and their competencies. Run the Refresh Employees Table Application Engine process (PER099) before running this report to include any new employees and their associated competencies. To run this process navigate to Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table. Use the same run control ID for both the Refresh Employee Table process and the Competency Inventory report. See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Refreshing Tables to Facilitate Reporting.
License/Certificate Report	RUNCTL_CMM007	Workforce Development, Profile Management, Reports, Licenses/Certificate Renewal, Licenses/Certificate Renewal	Run the License/Certificate report (CMM007) that lists employees who need to renew a license or certificate.

Page Name	*Definition Name*	*Navigation*	*Usage*
Internal Resume	RUNCTL_PER034	Workforce Development, Profile Management, Reports, Internal Resume, Internal Resume	Run the Internal Resume report (PER034) that creates a resume-like document from the data contained in PeopleSoft tables, including the employee's PERSON profile. Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards.

Running the Person Profile Report

Access the Person Profile Report page (Workforce Development, Profile Management, Reports, Person Profile Report, Person Profile Report).



Person Profile Report page

As of Date The report lists the person's profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Person Profile page.

Profile Type Select the profile types associated with profiles you want to print, adding a row for each profile type. The system displays person profile types only.

Note. After you select a profile type, you cannot change it.

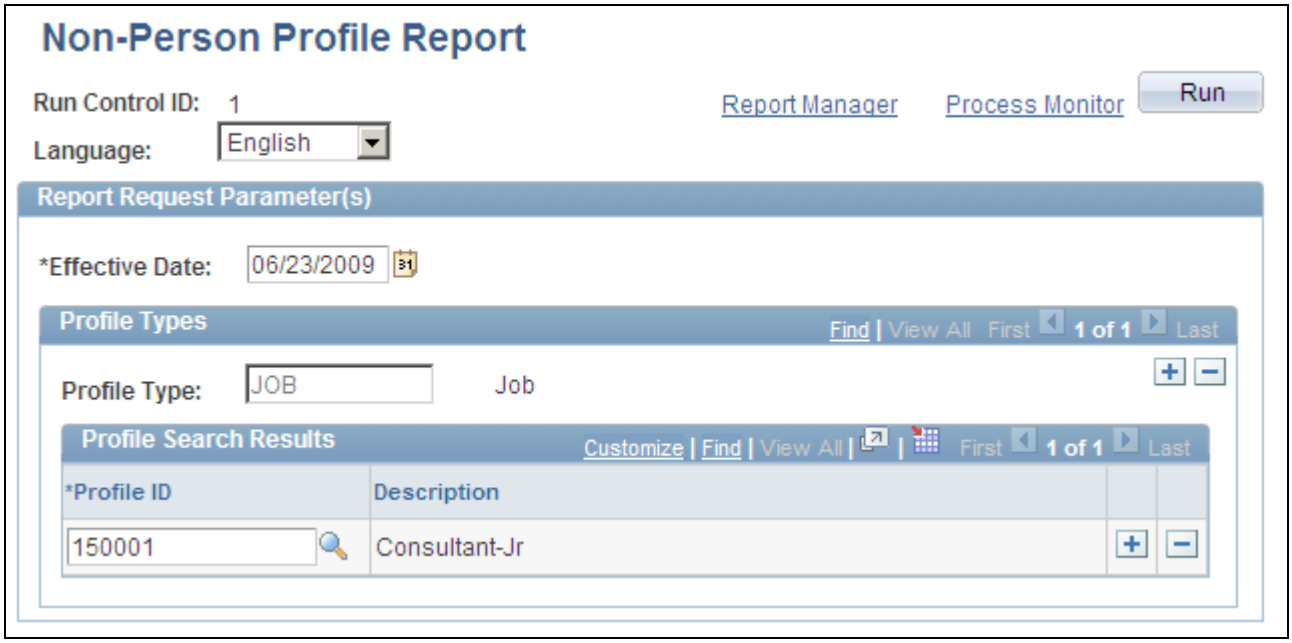
EmplID For each profile type, select the person IDs for the profiles that you want to print. You must select at least one person.

See Also

Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 83

Running the Non-Person Profile Report

Access the Non-Person Profile Report page (Workforce Development, Profile Management, Reports, Non-Person Profile Report, Non-Person Profile Report).



Non-Person Profile Report page

Effective Date The report lists the profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Non-person Profile page.

Profile Type	Select the profile types associated with the profiles that you want to print, adding a row for each profile type. The system displays non-person profile types only.
Profile ID	For each profile type, select the profiles that you want to print.

See Also

Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 83

Chapter 8

(GBR) Managing National Vocational Qualifications

This chapter provides an overview of NVQs and discusses how to:

- Set up NVQ information.
- Track employees' NVQs.
- Review NVQ summaries.
- Run NVQ reports.

Understanding NVQs

National Vocational Qualifications (NVQs) reflect the skills, knowledge, and understanding that employees possess, much like competencies. As with other accomplishments, NVQs enable transfer and progression, both within areas of competence and between them.

The national Qualifications and Curriculum Authority (QCA) coordinates the development and specification of NVQ standards. Refer to the QCA website http://www.qca.org.uk for further information. NVQ competence areas derive from a functional analysis of business roles and provide structure for competence-based qualifications. The qualifications are unit-based; the number and size of units varies between areas of competence. A unit is achieved when an enrolled employee is assessed as having competent skills and knowledge.

The following areas of work are currently covered by the NVQ system:

- Tending animals, plants, and land.
- Extracting and providing natural resources.
- Constructing.
- Engineering.
- Transporting.
- Providing health, social, and protective services.
- Providing goods and services.
- Manufacturing.
- Providing business services.

- Developing and extending knowledge and skill.
- Communicating.

NVQ competence levels include the following:

Level	***Definition***
Level 1	Competence that involves the application of knowledge and skills in the performance of a range of varied work activities, most of which may be routine or predictable.
Level 2	Competence that involves the application of knowledge and skills in a significant range of varied work activities and performed in a variety of contexts. Some of the activities are complex or non-routine, and there is some individual responsibility and autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement.
Level 3	Competence that involves the application of knowledge and skills in a broad range of varied work activities performed in a variety of contexts, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often required.
Level 4	Competence that involves the application of knowledge and skills in a broad range of complex, technical or professional work activities, performed in a wide range of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present.
Level 5	Competence that involves the application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Substantial personal autonomy and significant responsibility for the work of others and for the allocation of substantial resources is important, as personal accountability for analysis and diagnosis, design, planning, execution, and evaluation.

Several organizations develop, deliver, award, and preserve the quality of NVQs:

- *Sector bodies* identify, define, and update employment-based standards of competence for groups of occupations.
- *Awarding bodies* also develop NVQ standards. Additionally, they monitor the assessment process and award NVQs and unit certificates. They verify that employees are assessed fairly and consistently across all assessment centers.

The National Database of Vocational Qualifications contains comprehensive information on NVQs, including the units that make up each qualification, key skills, and units specifically developed for assessors and verifiers.

Setting Up NVQ Information

This section provides an overview of NVQ setup and discusses how to specify awarding bodies for NVQs.

Understanding NVQ Setup

To track NVQs, you need to define the following:

- NVQ content items.
- NVQ unit content items.
- NVQ Element content items.

  NVQ units are divided into elements and you track an employee's progress for each element separately.
- Awarding bodies.

NVQs, NVQ units, and NVQ elements are stored in the content catalog. Use the following delivered content types for NVQs:

Content Type	*Description*
NVQ ELEMENT	Use to define the elements associated with NVQ units.
NVQ UNIT	Use to define the NVQ units that are required by NVQs.
NVQ	Use to define the NVQ codes.

The content types are related as follows:

- NVQ ELEMENT is a child of NVQ UNIT. This enables an element content item to be defined for different NVQ Unit content items. Satisfying the element only satisfies it within a specific NVQ Unit.
- NVQ UNIT supports NVQ.

  This enables one NVQ unit to be linked to more than one NVQ. Satisfying one NVQ Unit qualifies as completion within all NVQs that are supported by the NVQ Unit.

When you set up NVQs, NVQ units, and NVQ elements, use the Relationship page in the Content Item component to link these items.

Set up NVQ data as follows:

1. Set up the NVQs, NVQ units, and NVQ elements in the content catalog.
2. Set up awarding body name and location using the NVQ Award Body Table component (NVQ_AWARD_BODY).

3. Assign awarding bodies to NVQs using the NVQ Award Bodies component (NVQ_DETAILS).

See Also

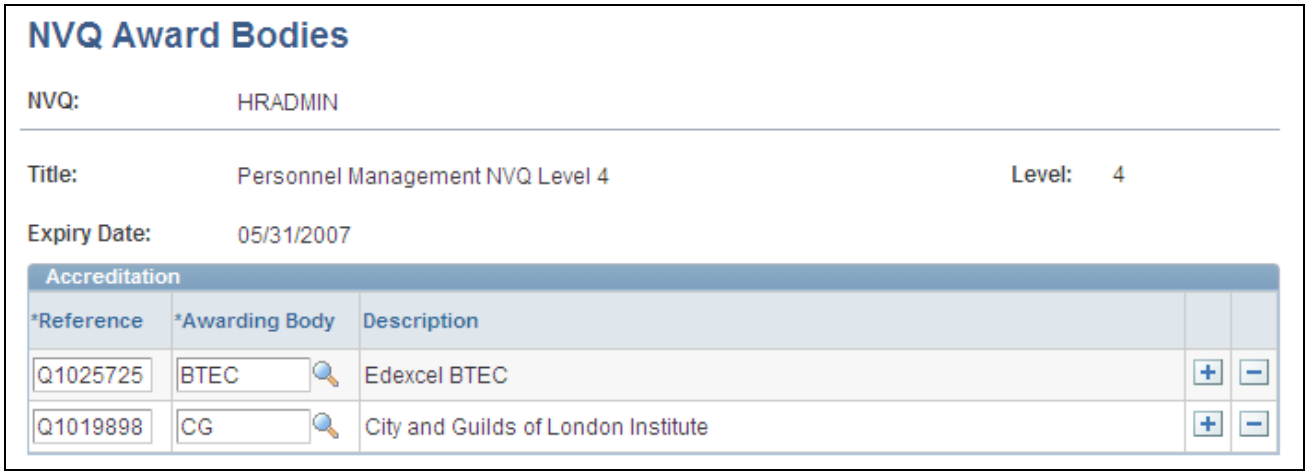
Chapter 2, "Setting Up the Content Catalog," page 9

Pages Used to Set Up NVQ Awarding Bodies

Page Name	*Definition Name*	*Navigation*	*Usage*
NVQ Award Body Table	NVQ_AWARD_TBL	Set Up HRMS, Product Related, Profile Management, Content Catalog, NVQ Award Body Table, NVQ Award Body Table	Define name and location information for NVQ awarding bodies.
NVQ Award Bodies	NVQ_DETAILS	Set Up HRMS, Product Related, Profile Management, Content Catalog, NVQ Award Bodies, NVQ Award Bodies	Specifying awarding bodies for NVQs that you have defined in the content catalog. You must set up NVQs and the NVQ Award Body Table values in before you can use this page.

Specifying Awarding Bodies for NVQs

Access the NVQ Award Bodies page (Set Up HRMS, Product Related, Profile Management, Content Catalog, NVQ Award Bodies, NVQ Award Bodies).



NVQ Award Bodies page

Level Displays the NVQ level that is defined for the NVQ in the content catalog.

Expiry Date Displays the date on which current NVQ details will be reviewed by the awarding bodies.

Reference and **Awarding Body** Select one or more awarding bodies. Enter the reference numbers for each awarding as provided by the NVQ.

Processing Employees' NVQs

This section discusses how to:

- Register employees for NVQ programs.
- Enter NVQ review information.
- Track NVQ unit status.
- Enter NVQ unit detail.
- Enter NVQ unit element detail.
- View NVQ information from a person's profile.

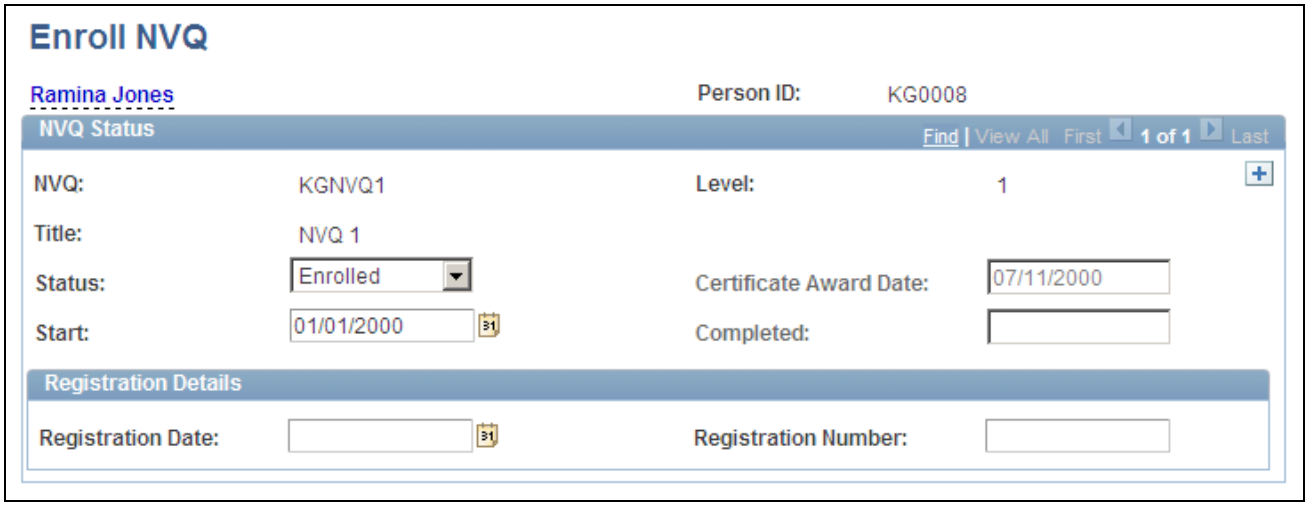
Pages Used to Process Employees' NVQs

Page Name	*Definition Name*	*Navigation*	*Usage*
Enroll NVQ	NVQ_EMPLNVQS	Workforce Development, Profile Management, Manage NVQ GBR, Enroll NVQ, Enroll NVQ	Register employees for NVQ programs.
NVQ Review	NVQ_REVIEW	Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Review	Enter an NVQ review.
NVQ Unit Plan	NVQ_UNIT_PLAN	Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Unit Plan	Populate and track unit status for an NVQ review.
Unit Detail	NVQ_UNIT_PLAN_SEC	Click the Detail link for an NVQ unit on the NVQ Unit Plan page.	Enter details for an NVQ unit being reviewed.
Element Detail	NVQ_EMPLELEM_SEC	Click the Detail link for an element on the Unit Detail page.	Enter details for an element of an NVQ unit being reviewed.

Page Name	Definition Name	Navigation	Usage
View NVQs View NVQ Units	JPM_PROF_DTL_SEC	Click the NVQ or NVQ Unit link within the Person Profile page, NVQ tab.	View NVQ and NVQ Units details for a given person's profile.

Registering Employees for NVQ Programs

Access the Enroll NVQs page (Workforce Development, Profile Management, Manage NVQ GBR, Enroll NVQ).



Enroll NVQ page

Status Enter the status of the NVQ for which you are registering the employee. Valid values are:

- *Achieved:* Select to indicate that the employee achieved the NVQ. You can select this value only if all of the associated NVQ units have a status of Completed.
- *Cancelled:* Select to cancel the employee's registration for the NVQ program.
- *Enrolled:* Select to enroll the employee in the NVQ program.
- *Previous Achievement:* Select to indicate that the employee already achieved this NVQ prior to enrollment in this program.

Start Enter the date on which you set the NVQ status.

Certificate Award Date Enter the date of the NVQ certificate award. This field is available only if you select *Achieved* or *Previous Achievement* in the Status field.

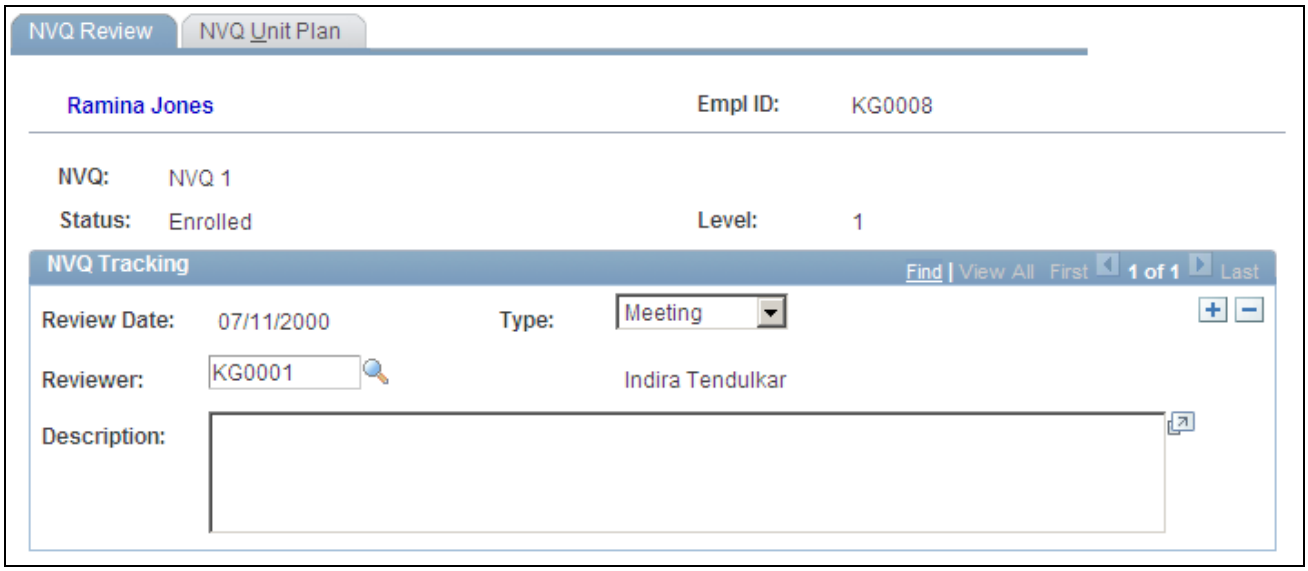
Completed Enter the date on which the NVQ was completed. This field is available only if you select *Achieved* or *Previous Achievement* in the Status field.

Registration Date and **Registration Number** Enter the date the employee registered for the NVQ program along with any registration number assigned to the employee.

When you save this page, the system updates the Manage Profiles profile tables with the enrollment information using the SetPersonProfileItems service. You can then view the enrollment information when you access the Person Profile page for the employee.

Entering an NVQ Review

Access the NVQ Review page (Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Review).



NVQ Review page

Review Date Enter or view the date of the review.

Type Select the type of review you are entering. Valid values are:

- *Brief Meet*
- *Meeting*
- *Requested*
- *Review*

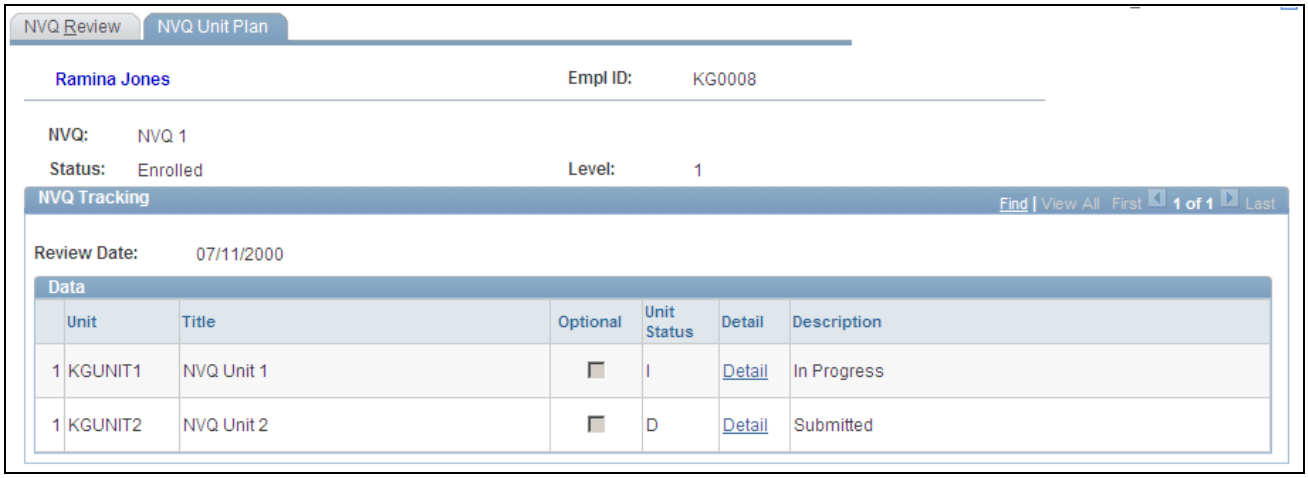
Reviewer Enter the ID of the reviewer.

Description Enter any pertinent notes you want to record for the review.

Note. You must also enter information in the required fields on the NVQ Unit Plan page before you can save the information on the NVQ Review page.

Tracking NVQ Unit Status

Access the NVQ Unit Plan page (Workforce Development, Profile Management, Manage NVQ GBR, Track NVQ, NVQ Unit Plan).



NVQ Unit Plan page

This page enables you to track the status of the NVQ units associated with an NVQ program in which an employee is enrolled. Each time you create a new review on the NVQ Review page, you must populate the NVQ units on this page and enter a value in the Unit Status column for each unit.

Populate NVQ Units Click to populate the NVQ Tracking, Data grid with the units defined with a *Supports* relationship with the content item associated with the NVQ. Once you have populated the grid, this button is no longer visible.

Unit Status Select the status for each NVQ unit in the NVQ Tracking, Data grid. Valid values are:

- *C (Completed)*
- *D (Submitted)*
- *I (In Progress)*
- *N (Not Started)*
- *P (Planned)*

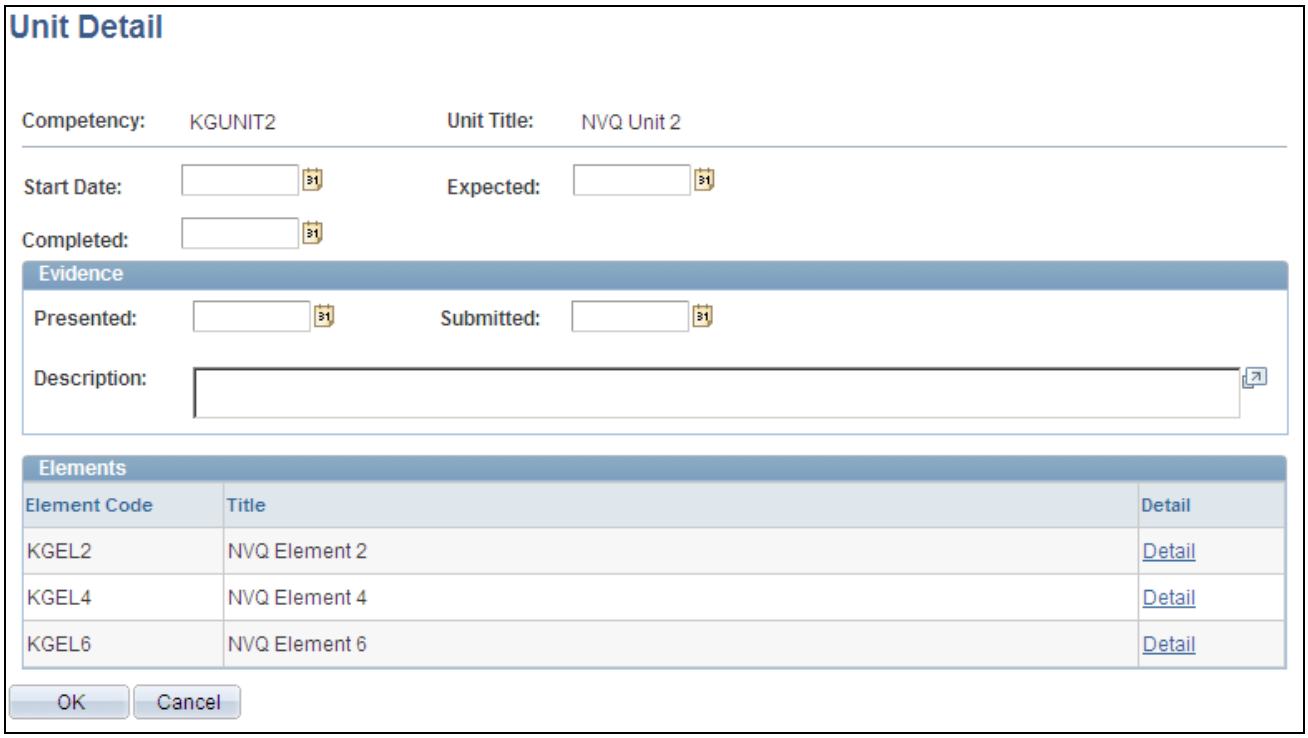
Note. The system changes the status to *Completed* automatically for a unit when you enter a date in the Completed field on the Unit Detail page. All NVQ units associated with an NVQ must have a status of *Completed* before you can set the NVQ status to *Achieved* on the Enroll NVQ page.

Detail Click to access the Unit Detail page.

When you create and save a new review using the Track NVQ component, the system updates the Manage Profiles profile tables using the SetPersonProfileItems service (or the DeletePersonProfileItems service if you deleted a review). You can then view the tracking information for both the NVQ and NVQ Units content sections on the Person Profile page.

Entering NVQ Unit Detail

Access the Unit Detail page (click the Detail link on the NVQ Unit Plan page).



Unit Detail page

Start Date Enter the date on which the employee began the NVQ unit.

Expected Enter the date on which the employee is expected to complete the NVQ unit.

Completed Enter the actual date on which the employee completed the NVQ unit. When you enter a date in this field and click the OK button, the system automatically sets the status of the NVQ unit to *Completed.*

Presented Enter the date on which the evidence was presented.

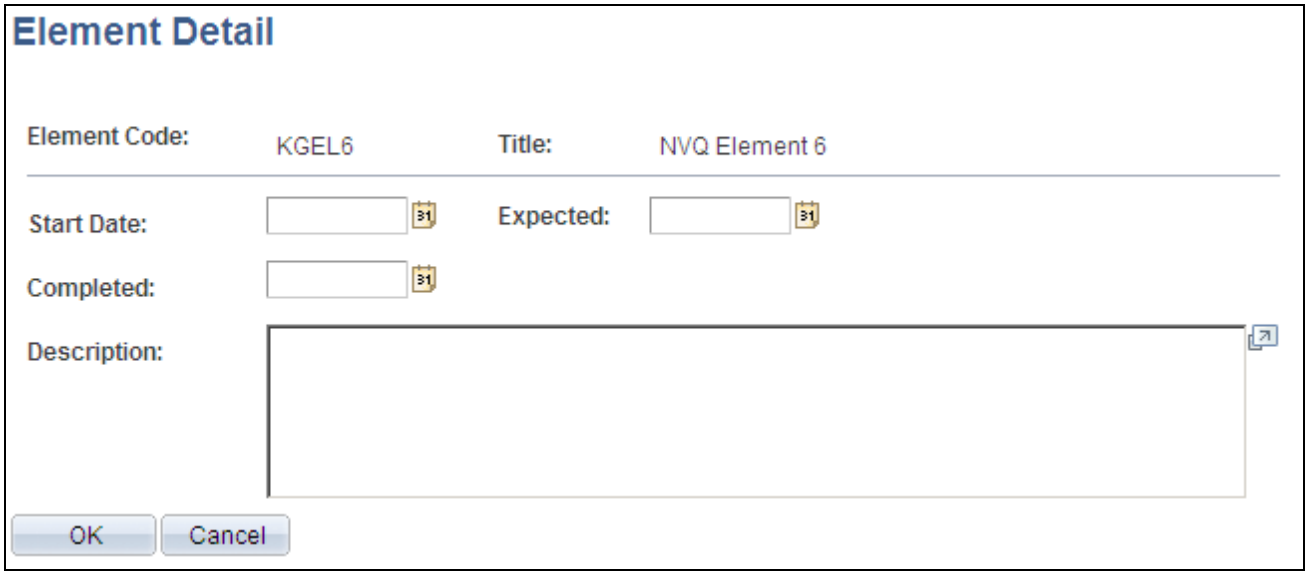
Submitted Enter the date on which the evidence was submitted.

Description Enter information regarding evidence submitted by the employee toward the completion of the NVQ unit.

Detail Click to access the Element Detail page.

Entering NVQ Unit Element Detail

Access the Element Detail page (click the Detail link for an element on the Unit Detail page).

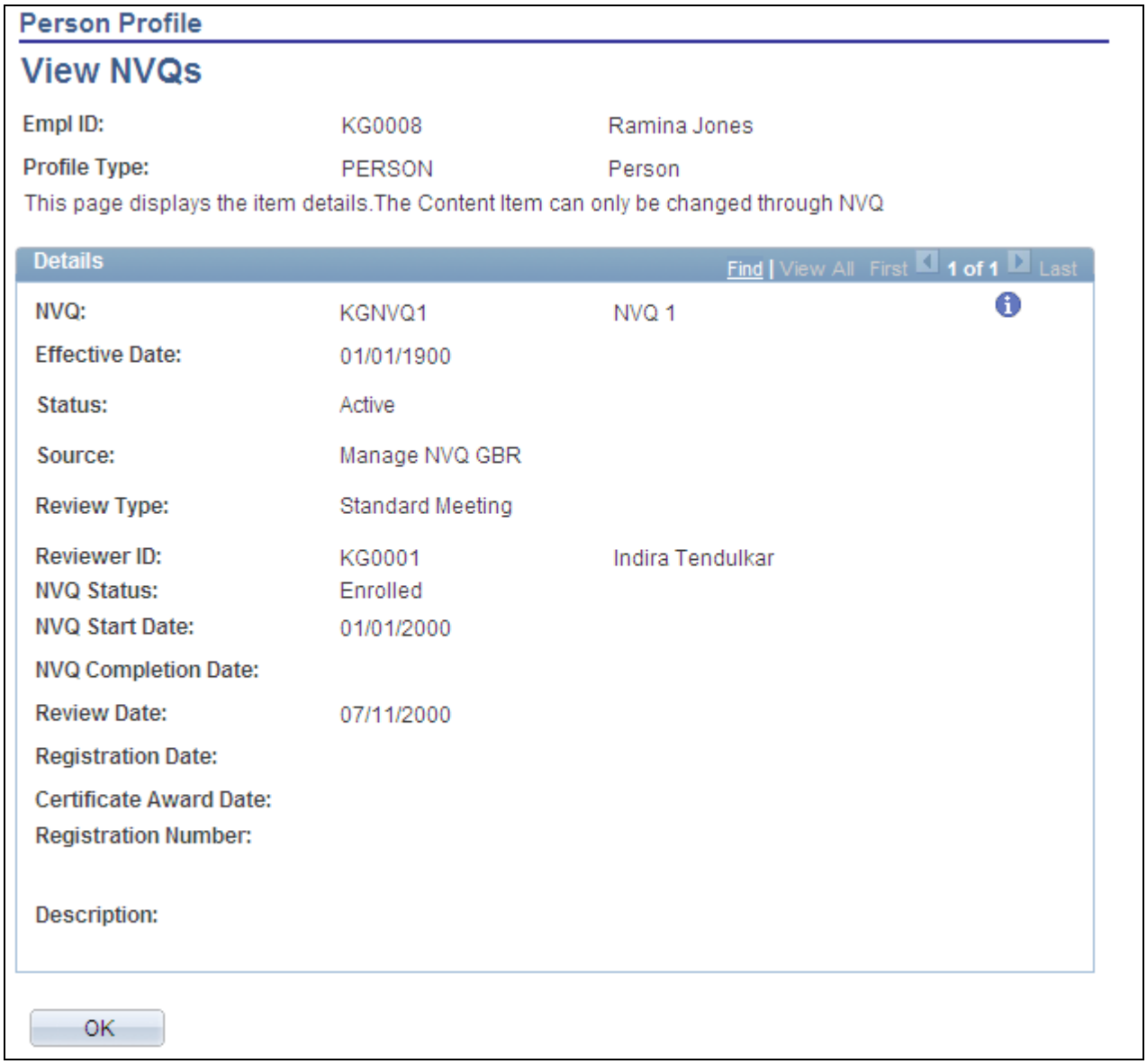


Element Detail page

Start Date	Enter the date on which the employee began the element.
Expected	Enter the date on which the employee is expected to complete the element.
Completed	Enter the actual date on which the employee completed the element.
Description	Enter any information pertinent to the completion of the element.

Viewing NVQ Information from a Person's Profile

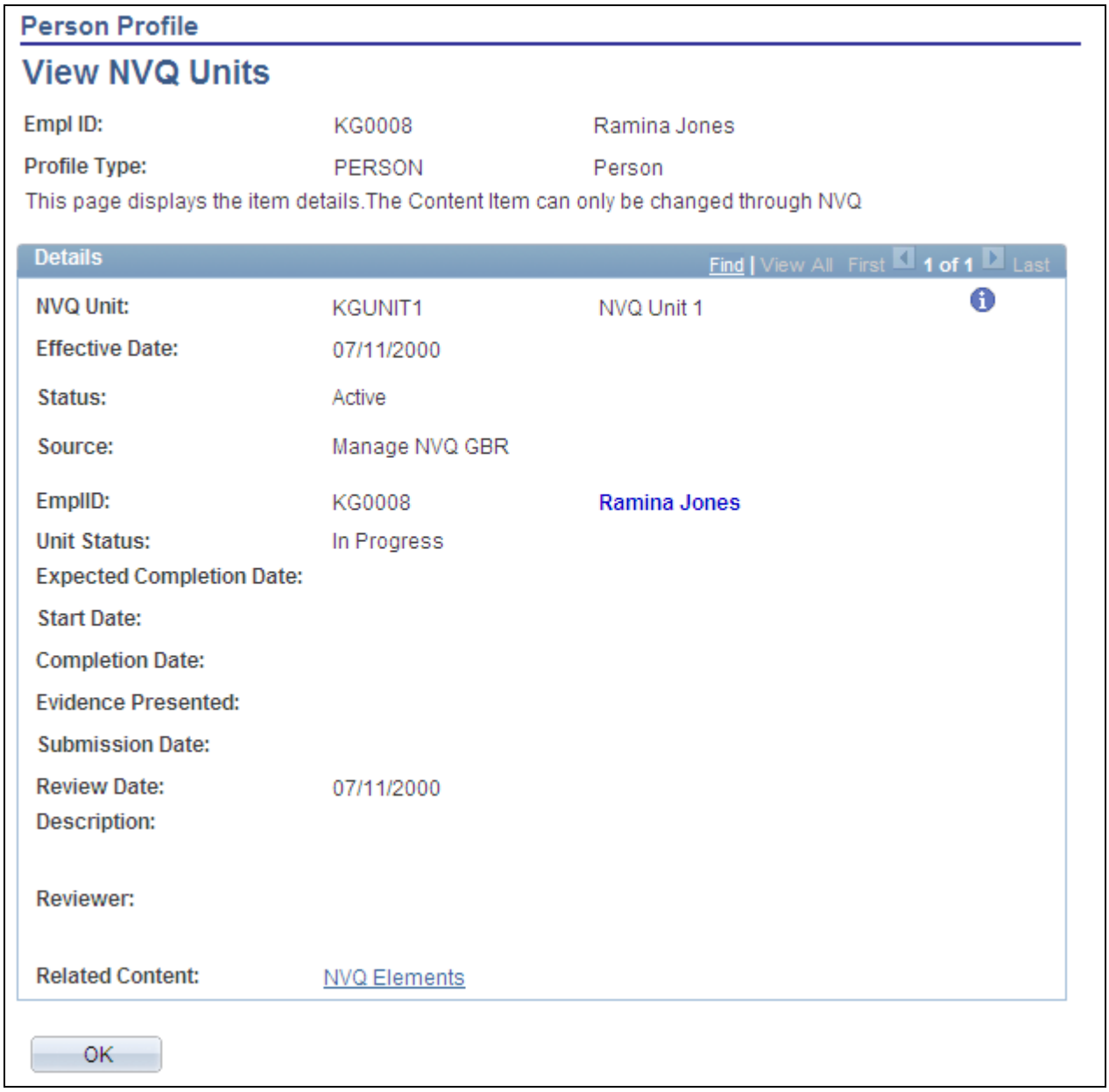
Access the View NVQs page (click the NVQ link within the Person Profile page, NVQ tab).



View NVQs page

The Details section on this page displays the original NVQ enrollment values that you entered on the Enroll NVQ page. Each review that you enter for this NVQ using the Track NVQ component appears on this page as an additional effective-dated row with updated values.

Access the View NVQ Units page (click the NVQ Unit link within the Person Profile page, NVQ tab).



View NVQ Units page

Each effective-dated row on the View NVQ Units page displays information for an NVQ review. You can view details for elements associated with an NVQ unit by clicking the NVQ Elements link.

See Also

Chapter 5, "Managing Profiles," Creating and Updating Person Profiles, page 119

Reviewing NVQ Summaries

This section discusses how to:

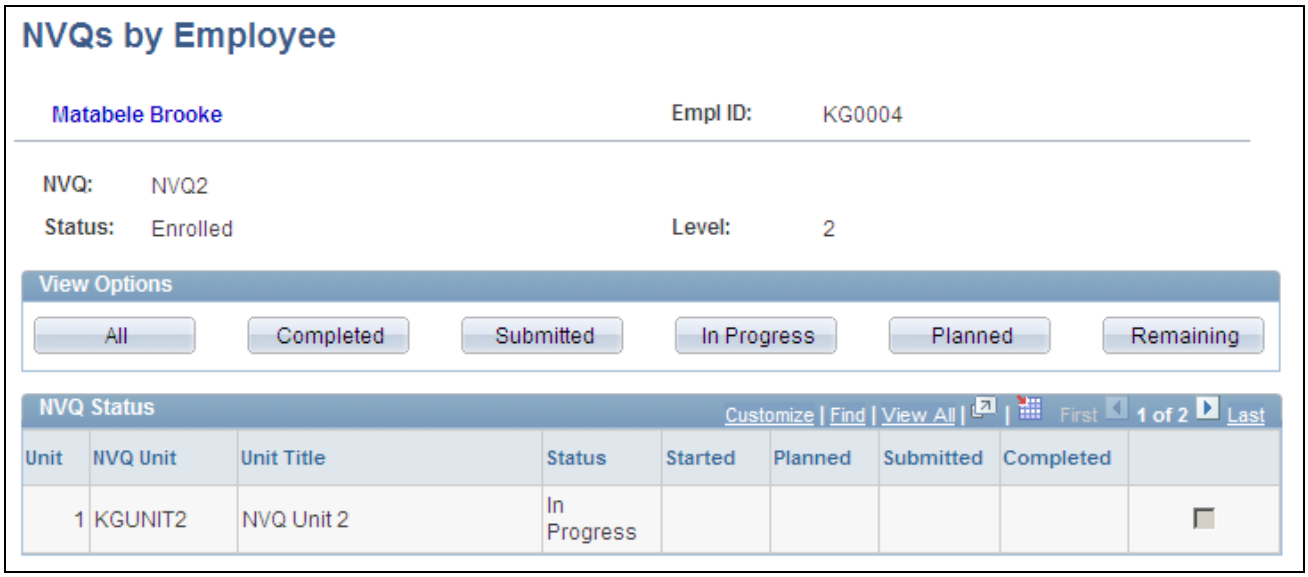
- Review an employee's NVQs.
- Review employees associated with an NVQ.

Pages Used to Review NVQ Information

Page Name	*Definition Name*	*Navigation*	*Usage*
NVQs by Employee	NVQ_SUMMARY1	Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Employee, NVQs by Employee	Review all NVQs associated with an employee.
NVQs by Qualification	NVQ_SUMMARY2	Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Qualification, NVQs by Qualification	View the employees associated with an NVQ.

Reviewing an Employee's NVQs

Access the NVQs by Employee page (Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Employee, NVQs by Employee).



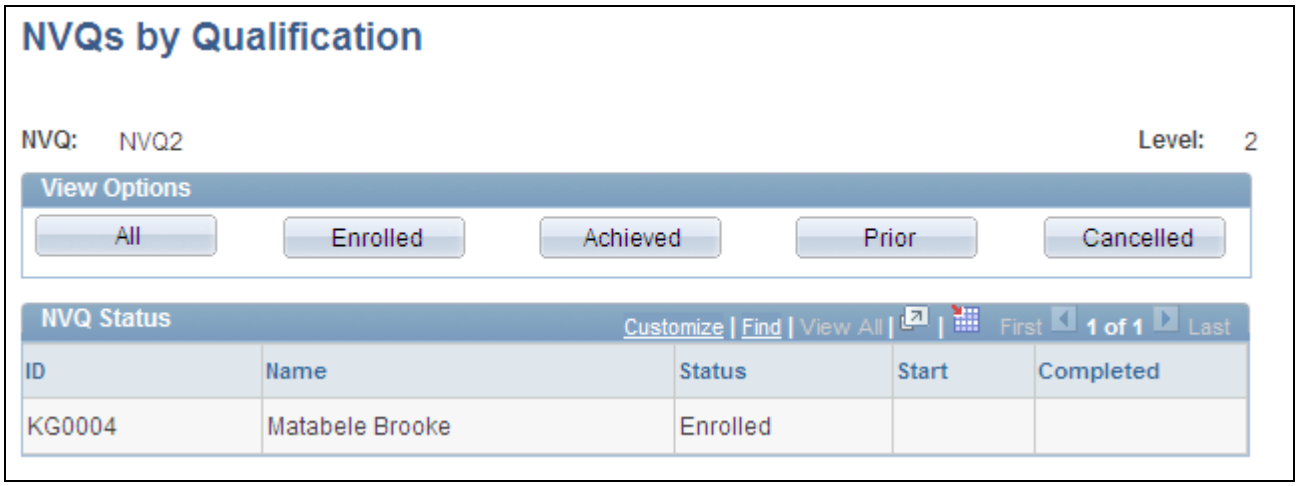
NVQs by Employee page

The system lists the NVQ units sorted by status and date. Click a button in the View Options group box to see only those units of a given status.

Note. Only those NVQ units listed in the employee's PERSON profile are included. The system does not check employees' profiles of any other type.

Reviewing Employees Associated with an NVQ

Access the NVQs by Qualification page (Workforce Development, Profile Management, NVQ Reports GBR, NVQs by Qualification, NVQs by Qualification).



NVQs by Qualification page

The system lists all the employees associated with the selected NVQ, sorted by status and date. Click a button in the View Options group box to see only those employees of a given status.

Running NVQ Reports

This section lists the pages used to run NVQ reports and discusses how to run the Initialize Plan process.

Note. You must run the Initialize Plan process before running the Employee Plan (NVQ006) report.

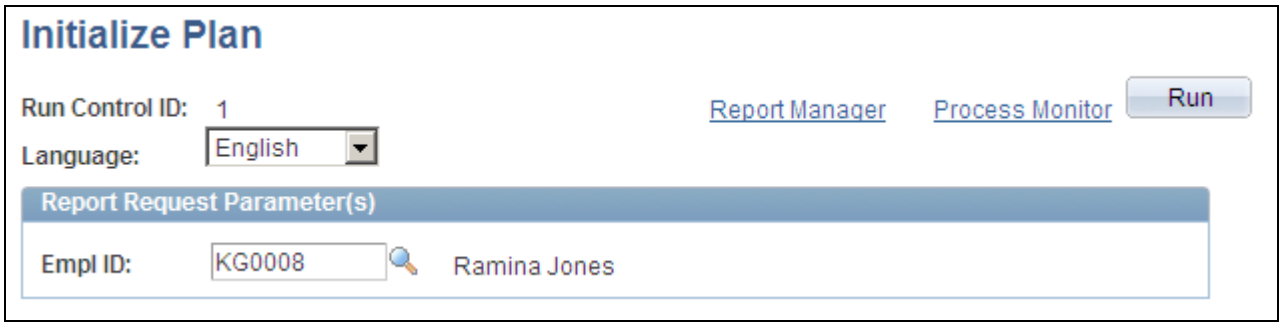
Pages Used to Run NVQ Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
NVQ001	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Employee Status, NVQ001	Run the NVQ - Employee Status report (NVQ001). This report lists employees assigned to an NVQ and their status.

Page Name	*Definition Name*	*Navigation*	*Usage*
NVQ002	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Unit Listing, NVQ002	Run the NVQ - Unit Listing report (NVQ002) that lists all defined NVQ units.
NVQ003	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, NVQ Listing, NVQ003	Run the NVQ - NVQ Listing report (NVQ003) that lists all defined NVQs.
NVQ004	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Unit/Element, NVQ004	Run the NVQ – Unit/Element Listing report (NVQ004) that lists the elements associated with NVQ units.
Initialize Plan	RUNCTL_NVQ005	Workforce Development, Profile Management, NVQ Reports GBR, Initialize Plan, Initialize Plan	Run the Initialize Plan process (NVQ005) for a selected employee. This SQR process compiles the data required for the Employee Unit Plan report (NVQ006).
NVQ006	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports GBR, Employee Plan, NVQ006	Run the Employee Unit Plan report (NVQ006). This report summarizes an employee's NVQ Unit plan. **Note.** You must run the Initialize Plan process (NVQ005) before you can generate the report.

Running the Initialize Plan Process

Access the NVQ005 page (Workforce Development, Profile Management, NVQ Reports GBR, Initialize Plan, Initialize Plan).



Initialize Plan page (NVQ005 process)

Use this page to run the Initialize Plan process (NVQ005) that compiles the data required to generate the Employee Unit Plan report (NVQ006).

Language Automatically populated based on the run control ID that you selected.

Override the default language if necessary.

Appendix A

Content Type and Profile Type Properties

This appendix provides an overview of properties and discusses:

- Content type properties.
- Profile type properties.

Understanding Properties

When you set up a content type, you select the properties, or field names, that are shared by items of that type. The system displays the properties that you define for a content type as fields on the Item Details page when you set up content items. These properties will be used to describe the content items when you define them.

After you add content types to profiles to create content sections, you will then add the properties that will be available for viewing or updating when the content item is added to a profile. When users add profile items to the profile, the system displays the properties you define for the content section.

The order in which properties are displayed on the Item Details page or in profiles is determined by the system. The tables in this appendix list the properties in the order that they are displayed.

See Also

Chapter 2, "Setting Up the Content Catalog," Setting Up Content Types and Properties, page 15

Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 69

Content Type Properties

This table lists the properties (field names) that you can add to a content type in the Content Types component, the order in which the properties are displayed on the Item Details page, the default label text, and the type of information you can track using this property.

Sequence	***Property***	***Default Label Text***	***Description***
1	JPM_CAT_ITEM_ID	Content Item ID	The system populates this field with the item ID. **Note.** This is a required property and the system adds it to all new content types.
2	EFFDT	Effective Date	The item's effective date. **Note.** This is a required property and the system adds it to all new content types.
3	EFF_STATUS	Status as of Effective Date	The item status as of the effective date. **Note.** This is a required property and the system adds it to all new content types.
4	JPM_DESCR90	Description	The item description. It is used as a related display field for the item ID in the profile. **Note.** This is a required property and the system adds it to all new content types.
5	DESCRLONG	Long Description	A long description of the content item.
6	DESCRSHORT	Short Description	A short description of the content item.
7	CM_CATEGORY	Category	The category to which an item belongs. An item can belong to one category only. This property is useful for competency-related content types. However you can also use content groups to group items.
8	JPM_CAT_ITEM_SRC	Content Item Source	Specifies the origin of a content item. Valid values are: *Customer Defined, DDI,Lominger,* or *PDI.*
9	RATING_MODEL	Rating Model	The rating model. Use this field if the content type is associated with rating models.

Sequence	***Property***	***Default Label Text***	***Description***
10	COUNTRY	Country	The country in which this item applies. This property is useful for content types that have country-specific items.
11	EP_SUB_LEVEL	Level	The level of the item. When this row is entered in a content type, the List field appears. Select a list that contains the values you want to use. Lists and valid values are defined on the Custom List Values page. This property is used with sub-competencies.
12	EDUCATION_LVL	Education Level	The education level desired or required for this content item.
13	TYPE_OF_STUDY_GER	Type Of Study	(DEU) A German property that indicates the type of study. Valid values are: *Chemistry,Commerce, Constr/Mining,Electronic,Food, Forestry,Glass,Hotels,Mechanic, Other,* Printing, *Public Sector,* and *Textiles.* This property is used with degrees.
14	FIELD_OF_STUD_GER	Field Of Study	(DEU) A German property that indicates the field of study *(Commercial,Industrial,* or *Technical).* This property is used with degrees.
15	FP_DEGREE_LVL	Level	(FRA) The degree level. This field is used for French Public Sector only.
16	HP_STATS_DEG_LVL	Stats-Can Degree Level	(CAN) The Canadian degree level.
17	SATISFACTION_MTHD	Satisfaction Method	Use to specify how an element is achieved. Valid values are: *Attend Training Course, Dispensation Given, Off Job Training,On Job Training, Possess License/Certificate, Recognition of Prior Learning, Supervisor Assessment.* This property is used with the ELEMENT content type.
18	NVQ_LEVEL	Level	(GBR) The level of an NVQ *(1, 2,3,4* or *5)*
19	JPM_DURATION_1	Duration (1)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (1) field, which defines the duration unit.

Sequence	***Property***	***Default Label Text***	***Description***
20	JPM_DURATION_TYPE 1	Duration Type (1)	Specifies the units for the Duration (1) field. Select from *Days,Months,Years,* or *Hours*.
21	JPM_DURATION_2	Duration (2)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (2) field, which defines the duration unit.
22	JPM_DURATION_TYPE 2	Duration Type (2)	Specifies the units for the Duration (2) field. Select from *Days,Months,Years,* or *Hours*.
23	JPM_YN_1	User Yes/No (1)	A generic Yes/No check box. If the check box is selected, it indicates Yes, and if it is not selected this indicates No.
24	JPM_YN_2	User Yes/No (2)	A generic Yes/No check box.
25	JPM_YN_3	User Yes/No (3)	A generic Yes/No check box.
26	JPM_YN_4	User Yes/No (4)	A generic Yes/No check box.
27	JPM_YN_5	User Yes/No (5)	A generic Yes/No check box.
28	JPM_DATE_1	User Date (1)	A generic date field.
29	JPM_DATE_2	User Date (2)	A generic date field.
30	JPM_TEXT254_1	User Text - 254 Char	A comment field of up to 254 characters.
31	JPM_TEXT254_2	User Text - 254 Char	A comment field of up to 254 characters.
32	JPM_TEXT254_3	User Text - 254 Char	A comment field of up to 254 characters.
33	JPM_TEXT254_4	User Text - 254 Char	A comment field of up to 254 characters.
34	JPM_TEXT1325_1	User Text - 1325 Char	A comment field of up to 1325 characters.
35	JPM_TEXT1325_2	User Text - 1325 Char	A comment field of up to 1325 characters.

Profile Type Properties

This table lists the properties (field names) that you can add to a content section in the Profile Types component, the order in which the properties are displayed on the profile page, the property attributes, and any special Profile Management processing tied to the property.

Sequence	***Content Property***	***Data Type***	***Maximum Length***	***Prompt Value Source***	***Country Section***	***Special Processing***
1	JPM_CAT_ITEM_ID	Character	12			Automatically included in the content section.
2	EFFDT	Date				Automatically included in the content section. If effective dated content is not desired, then it can be removed.
3	EFF_STATUS	Character	1	Translate values A, I		
4	JPM_JP_ITEM_SRC	Character	4			Automatically set by interfacing products. If this field has a value, then the profile item cannot be updated in Profile Management.
5	JPM_CAT_ITEM_QUAL	Character	12			User configurable key tied to a qualifier set.
6	JPM_CAT_ITEM_QUAL2	Character	12			User configurable key tied to a qualifier set.
7	JPM_ADHOC_DESCR	Character				Automatically included for free-form content types.
8	JPM_PERSON_ID_1	Character	11	PERSON_NAME		
9	EP_APPRAISAL_ID	Number	8			

Sequence	Content Property	Data Type	Maximum Length	Prompt Value Source	Country Section	Special Processing
10	RATING_MODEL	Character	4	Rating Model table		Value automatically defaults from content item definition, then from profile type content section if none exists.
11	JPM_RATING1	Character	1	Rating Model table		
12	JPM_INTEREST_LEVEL	Character	1	Rating Model INT		
13	JPM_VERIFY_METHOD	Character	1	Translate values		
14	BUSINESS_UNIT	Character	5	Business Unit Table		PERSON profile validations
15	LOCATION	Character	10	Location Table		PERSON profile validations
16	MAJOR_DESCR	Character	100			PERSON profile validations
17	COUNTRY	Character	3	Country Table		PERSON profile validations
18	STATE	Character	6	State Table		PERSON profile validations
19	SCHOOL_TYPE	Character	3	School Type Table		
20	SCHOOL_CODE	Character	10	School Table		PERSON profile validations
21	SCHOOL_DESCR	Character	100			PERSON profile validations
22	MAJOR_CODE	Character	10	Major Table		
23	JPM_MINOR_CD	Character	10	Major Table		
24	MINOR_DESCR	Character	100			PERSON profile validations
25	AVERAGE_GRADE	Character	5			

Sequence	Content Property	Data Type	Maximum Length	Prompt Value Source	Country Section	Special Processing
26	PRACTIC_GRADE_GER	Character	4		DEU	
27	THEORY_GRADE_GER	Character	4		DEU	
28	IPE_SW	Character	1	Translate values Y/N	DEU	
29	EDUC_LVL_AUS	Character	1	Highest education achievement translate values	AUS	
30	APS_HEDUC_CD_AUS	Character	2	Higher education level translate values	AUS	
31	FACULTY_CODE	Character	10	JPN Faculty Table	JPN	
32	FACULTY_DESCR	Character	100		JPN	PERSON profile validations
33	SUBFACULTY_CODE	Character	10	JPN Sub-Faculty Table	JPN	
34	SUBFACULTY_DESCR	Character	100		JPN	PERSON profile validations
35	MAJOR_CATEGORY	Character	1	Education category translate values	JPN	
36	GVT_CREDIT_HOURS	Character	3		USF	
37	GVT_CRED_HRS_TYPE	Character	1	Education credit unit translate values	USF	
38	JPM_RATING2	Character	1	Rating Model table		

Sequence	Content Property	Data Type	Maximum Length	Prompt Value Source	Country Section	Special Processing
39	JPM_RATING3	Character	1	Rating Model table		
40	FP_SUBJECT_CD	Character	3	FPS Degree Subject Table	FPS	
41	FP_SKIL_HIR	Character	1	Translate values Y/N	FPS	
42	FP_SKIL_PRM	Character	1	Translate values Y/N	FPS	
43	FP_SKIL_TEN	Character	1	Translate values Y/N	FPS	
44	FP_DEGR_REQUIRED	Character	1	Translate values Y/N	FPS	
45	BONUS_AMOUNT_FRA	Number	5.2		FRA	
46	BONUS_DT_FRA	Date			FRA	
47	NVQ_STATUS	Character	1	NVQ Status translate values		
48	JPM_IMPORTANCE	Character	1	Importance rating level translate values		
49	JPM_INTEGER_1	Number	8			PERSON profile validations
50	JPM_INTEGER_2	Number	8			PERSON profile validations
51	JPM_PCT_1	Number	3			
52	JPM_PCT_2	Number	3			
53	JPM_DECIMAL_1	Number	7.2			
54	JPM_DECIMAL_2	Number	7.2			

Sequence	Content Property	Data Type	Maximum Length	Prompt Value Source	Country Section	Special Processing
55	JPM_MANDATORY	Character	1	Translate values Y/N		
56	JPM_YN_1	Character	1	Translate values Y/N		PERSON profile validations
57	JPM_YN_2	Character	1	Translate values Y/N		
58	JPM_YN_3	Character	1	Translate values Y/N		
59	JPM_YN_4	Character	1	Translate values Y/N		
60	JPM_YN_5	Character	1	Translate values Y/N		
62	JPM_DATE_2	Date				PERSON profile validations
63	JPM_DATE_3	Date				PERSON profile validations
64	JPM_DATE_4	Date				
65	JPM_DATE_5	Date				
66	JPM_DATE_6	Date				
67	JPM_TEXT254_1	Character	254			
68	JPM_TEXT254_2	Character	254			
69	JPM_TEXT254_3	Character	254			
70	JPM_TEXT254_4	Character	254			
71	JPM_TEXT254_5	Character	254			
72	JPM_TEXT1325_1	Character	1325			PERSON profile validations

Sequence	Content Property	Data Type	Maximum Length	Prompt Value Source	Country Section	Special Processing
73	JPM_TEXT1325_2	Character	1325			
74	SETID_DEPT	Character	5	SetID Table		
75	DEPTID	Character	10	Department Table		
76	JPM_OBSTACLE_1	Character	2	Translate values		
77	JPM_LOC_BUNIT_1	Character	5	Business Unit Table		
78	JPM_LOCATION_1	Character	10	Location Table		
79	JPM_LOC_BUNIT_2	Character	5	Business Unit Table		
80	JPM_LOCATION_2	Character	10	Location Table		
81	JPM_AREA_PREF_1	Character	2	Geographic Preference Table		
82	JPM_AREA_PREF_2	Character	2	Geographic Preference Table		
83	JPM_AREA_PREF_3	Character	2	Geographic Preference Table		
84	JPM_CNTRY_PREF_1	Character	3	Country Table		
85	JPM_CNTRY_PREF_2	Character	3	Country Table		
86	JPM_CNTRY_PREF_3	Character	3	Country Table		
87	LASTUPDDTTM	DateTime				Set by system when profile item is added of updated.

Sequence	Content Property	Data Type	Maximum Length	Prompt Value Source	Country Section	Special Processing
88	LASTUPDOPRID	Character	30			Set by system when profile item is added of updated.
89	JPM_SOURCE_ID2	Character	12			Contains the syndication source profile ID. This property is always display-only.
90	JPM_WF_STATUS	Character	1	Translate values Approved, Denied, Pending, Saved, New		System updates workflow status of a profile item. This property is always display-only.

Property Initializations and Validations

The following initialization/validations are delivered to work with the PERSON Profile Type definition. An entry for the profile type exists in the table JPM_PKG_TYPES to specify that the validations in the application class ControllerPerson are active. If these validations are not desired, then the entry for the PERSON profile type can be removed from JPM_PKG_TYPES. When creating a new profile type, these validations will be included if the profile type is cloned from the delivered PERSON profile type and the Copy Validations check box is selected.

Property	Profile	Content Type	Validation/Initialization
JPM_TEXT1325_1	PERSON	Competency	Populated with content item description.
JPM_INTEGER_1 JPM_INTEGER_2	PERSON	Competency	Year Acquired must be earlier than or equal to Year Last Used.
EFFDT JPM_DATE_3	PERSON	Membership Honors & Awards	Date issued cannot be greater than end date.
EFFDT JPM_DATE_3	PERSON	Licenses	Issue Date cannot be greater than Expiration Date.
JPM_DATE_3 JPM_DATE_2	PERSON	Membership	Mandate End Date cannot be greater than Mandate Begin Date.

Property	*Profile*	*Content Type*	*Validation/Initialization*
JPM_YN_1 JPM_INTEGER_2	PERSON	Degrees	Graduate Indicator must not be selected when Year Acquired is in future.
GVT_CRED_HRS_TYPE GVT_CREDIT_HOURS	PERSON	Degrees	Credit Hours Type is required if Credit Hours are entered
COUNTRY STATE SCHOOL_CODE	PERSON	Degrees Education Level	Ensures that country, state, and school code values work together.
COUNTRY STATE	PERSON	Licenses	Ensures that country, state values work together.
BUSINESS_UNIT LOCATION COUNTRY	PERSON	Current Location	Initializes values from primary job.
JPM_YN_1 JPM_DATE_3	PERSON	Licenses	Set the Renewal Required field from the content catalog. If renewal is required, then set expiration date to date issued plus renewal length.
FACULTY_DESCR	PERSON	Degrees	Populate Faculty description from JPN Faculty Table if code specified.
SUBFACULTY_DESCR	PERSON	Degrees	Populate Sub Faculty description from JPN Faculty Table if code specified.
MAJOR_DESCR	PERSON	Degrees	Populate Major description from Major Table if code specified.
MINOR_DESCR	PERSON	Degrees	Populate Minor description from the Major Table if code specified.
SCHOOL_DESCR			Populate SCHOOL_DESCR from School Table if code specified.

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