
PeopleSoft HRMS Portal Pack 9.1 PeopleBook

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PeopleSoft HRMS Portal Pack Preface

This preface discusses:

- PeopleSoft applications.
- PeopleSoft HCM application fundamentals.

PeopleSoft Applications

This PeopleBook refers to the following PeopleSoft application: PeopleSoft HRMS Portal Pack.

PeopleSoft HCM Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft HCM Application Fundamentals PeopleBook*. Each PeopleSoft line of applications has its own version of this documentation.

Note. One or more pages in HRMS Portal Pack operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft HCM Application Fundamentals PeopleBook*.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM 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 HRMS Portal Pack

This chapter discusses:

- HRMS Portal Pack pagelets.
- HRMS Portal Pack integrations.
- HRMS Portal Pack implementation.

HRMS Portal Pack Pagelets

PeopleSoft HCM pagelets include:

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

- Direct Reports Phones pagelet.

PeopleSoft Recruiting Solutions pagelets include:

- Recruiter Alerts pagelet.
- My Job Openings pagelet.
- Find Job Openings pagelet.
- My Applicants pagelet.
- Job Openings pagelet.
- Quick Search pagelet.

PeopleSoft HCM to ELM On Demand pagelets include:

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

PeopleSoft HCM on Demand pagelets include:

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

PeopleSoft TalentLinks pagelets include:

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

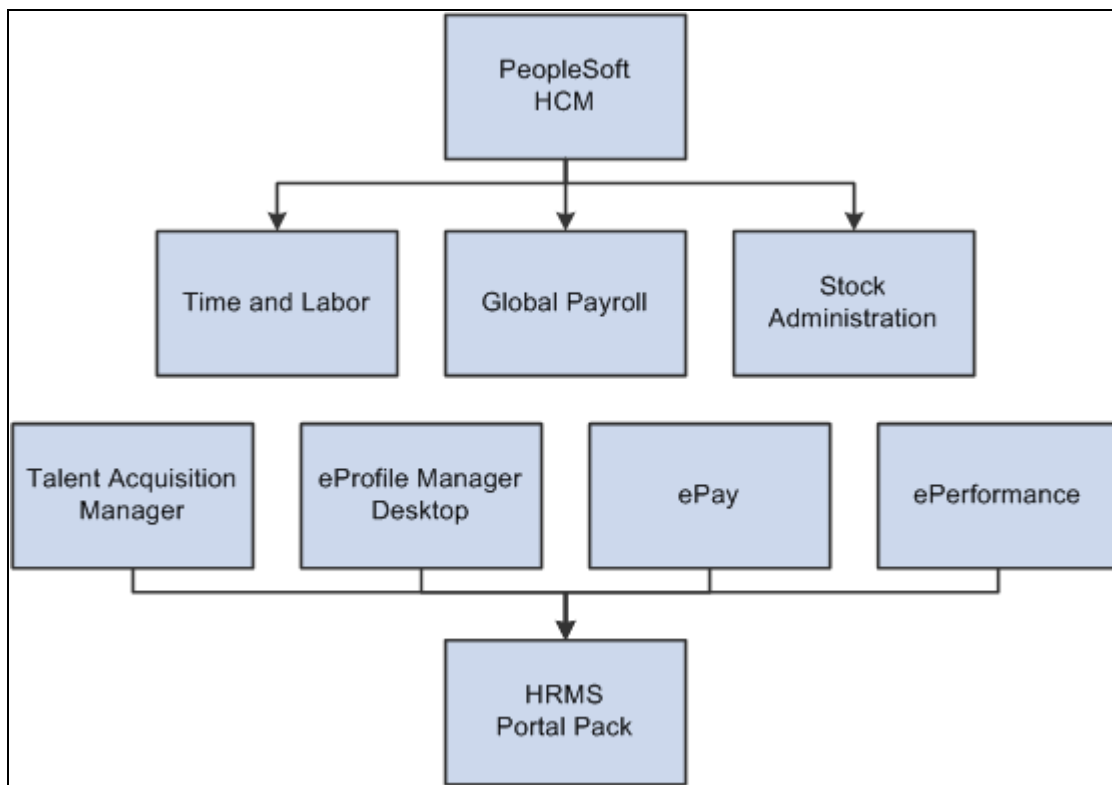
See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," page 17](#)

HRMS Portal Pack Integrations

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

The following graphic shows the PeopleSoft HCM applications that feed data to the HRMS Portal Pack:



PeopleSoft HRMS Portal Pack data sources

This documentation discusses integration considerations in the implementation chapters in this PeopleBook.

HRMS Portal Pack Implementation

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

Other Sources of Information

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

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleTools: PeopleSoft Setup Manager PeopleBook

Chapter 2

Understanding HRMS Portal Pack

This chapter discusses:

- HRMS Portal Pack overview.
- PeopleSoft pagelet activation and personalization.
- HRMS Portal Pack pagelets.

HRMS Portal Pack Overview

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

PeopleSoft Pagelet Activation and Personalization

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

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

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

See [Chapter 4, "Using HRMS Portal Pack Pagelets," Displaying Portal Pagelets, page 17](#).

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



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

See Also

Chapter 4, "Using HRMS Portal Pack Pagelets," Personalizing Pagelets, page 19

HRMS Portal Pack Pagelets

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

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

These are business process functional roles not delivered as such by PeopleTools user security roles.

- The pagelet's enabling application.

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

This table lists the pagelets and their enabling applications:

<i>Pagelet Name and Object Name</i>	<i>Audience</i>	<i>Functional Role</i>	<i>Enabling Applications</i>
Birthday Alerts CO_PE_MGR_BIRTHDAY	Employees	Manager	Human Resources (HR) eProfile Manager Desktop
Anniversary Alerts CO_PE_MGR_HIREDT	Employees	Manager	HR eProfile Manager Desktop
Direct Reports CO_PE_MGRRPTS_COMP	Employees	Manager	HR PeopleSoft eProfile Manager Desktop
Employee Leave Summary HR_PE_EMPL_LEAVE	Employees	Employee	HR PeopleSoft Global Payroll or Absence Management
Manager Leave Summary HR_PE_MGR_LEAVE	Employees	Manager	HR Global Payroll or Absence Management

Pagelet Name and Object Name	Audience	Functional Role	Enabling Applications
Stock Options ST_PE_OPTION	Employees	Employee	HR PeopleSoft Stock Administration
Paychecks PY_PE_PAYCHECK	Employees	Employee	HR PeopleSoft Payroll for North America PeopleSoft ePay
Company Directory HRCD_SRCH_PGLT	Employees	Employee	HR
Organization Directory EO_PE_CDCOMPDIR	Employees	Employee	HR
Employee Performance EP_PE_ALERT	Employees	Manager	HR PeopleSoft ePerformance
Upcoming Training CO_PE_EMP_TRAINING	Employees	Manager	HR
Scheduled Training CO_PE_MGR_TRAINING	Employees	Employee	HR
Employee Expiring Licenses CO_PE_EXP_LIC_EMP	Employees	Employee	HR
Manager Expiring Licenses CO_PE_EXP_LIC	Employees	Manager	PeopleSoft HR
Open Positions CO_PE_VACPOS	Employees	Manager	HR (optional functionality) PeopleSoft Talent Acquisition Manager Solutions
Time Management Alerts TL_PE_MGR_TMMGT	Employees	Manager	HR Time and Labor (optional) Absence Management

Pagelet Name and Object Name	Audience	Functional Role	Enabling Applications
Workforce Availability TL_PE_MGR_WRKFR	Employees	Manager	HR PeopleSoft Time and Labor (optional) PeopleSoft Absence Management
Direct Reports Phones CO_PE_EMPLPHN_COM P	Employees	Manager	HR eProfile Manager Desktop
Recruiter Alerts HRS_PE_ALERTS	Employees	Recruiter	HR Talent Acquisition Manager
My Job Openings HRS_PE_MY_JO	Employees	Recruiter	HR Talent Acquisition Manager
Find Job Openings HRS_PE_JO_SRCH	Employees	Recruiter	HR Talent Acquisition Manager
My Applicants HRS_PE_APP_SRCH	Employees	Recruiter	HR Talent Acquisition Manager
Job Openings HRS_PE_JO_APP_ALL	Employees	Recruiter	HR Talent Acquisition Manager
Quick Search HRS_PE_SRCH	Employees	Recruiter	HR Talent Acquisition Manager

See Also

Chapter 4, "Using HRMS Portal Pack Pagelets," page 17

Chapter 3

Setting Up HRMS Portal Pack

This chapter discusses how to:

- Define default settings for the Employee Performance Alerts pagelet.
- Define default settings for the Open Positions pagelet.
- Enable MapQuest for the Organization Directory pagelet.

Defining Default Settings for the Employee Performance Alerts Pagelet

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

This section discusses how to:

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

See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," Viewing the Employee Performance Pagelet, page 38](#)

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee Performance Alerts Setup	EP_ALERT_SETUP	Set Up HRMS, Product Related, ePerformance, Pagelet Alerts, Employee Performance Alerts Setup	Define settings for the Employee Performance Alerts Setup page.

Activating the Employee Performance Pagelet

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

To enable managers to use the pagelet, you must:

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

See Also


[Chapter 2, "Understanding HRMS Portal Pack," PeopleSoft Pagelet Activation and Personalization, page 5](#)

Defining Settings for the Employee Performance Alerts Settings Page

Access the Employee Performance Alerts Setup page (Set Up HRMS, Product Related, ePerformance, Pagelet Alerts).

Employee Performance Alerts Setup

*Doc Type:

*Period End Date >=: 

*Employees to display:

Self Service Edits

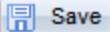
- Allow changes to Type
- Allow changes to Date Range
- Allow changes to Alert Levels
- Allow changes to Alert Days
- Allow changes to Nbr Employees

Display Alert Levels

- Complete (✓)
- On Schedule (◆)
- Standard Alert (▼)
- Critical Alert (■)
- Cancelled (✕)

Alert Days Before Due Date					
Sequence	Document Status	Critical Alerts	Standard Alerts		
10	Acknowledged	5	15	+	-
20	Review Held	10	20	+	-
30	Available for Review	15	25	+	-
40	In Progress	20	60	+	-

* Required Field

 Save

Employee Performance Alerts Setup page

Doc Type (document type)

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

See *PeopleSoft ePerformance 9.1 PeopleBook*, "Setting Up Document Templates," Defining Document Types.

Period End Date >= (period end greater than or equal to)

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

Employees to display

Enter the number of employees to list on the pagelet. If the number of employees with documents exceeds this number, the pagelet automatically includes a More link that enables the manager to list all employees with the selected document type.

Self Service Edits

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

See [Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Employee Performance Alerts Pagelet, page 9.](#)

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

Display Alert Levels

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

Alert Days Before Due Date

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

- | | |
|------------------------|---|
| Sequence | Enter the order in which this document status is to appear on the Employee Performance Alerts Personalization page.

See Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Employee Performance Alerts Pagelet, page 9. |
| Document Status | Select the status to trigger an alert. Values are: <i>Acknowledged, Available for Review, Cancelled, Completed, In Progress, Not Started</i> and <i>Review Held</i> .

See <i>PeopleSoft ePerformance 9.1 PeopleBook</i> , "Using Inquiry Pages." |

Critical Alerts and Standard Alerts These fields apply only if you select Critical Alert and Standard Alert in the Display Alert Levels group box.

Enter the number of days before a document's due date that a critical alert button or a standard alert button is to appear if the document is still in the selected status.

For example, suppose that you select the status *In Progress*, and enter *30* in the Critical Alerts field and *60* in the Standard Alerts field. This causes the standard alert button to appear on the pagelet when a document is in progress from 31 to 60 days before its due date. The critical alert button appears if the document is still in progress 30 days or less before the due date.

See Also

[Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Employee Performance Alerts Pagelet, page 9](#)

[Chapter 4, "Using HRMS Portal Pack Pagelets," Personalizing the Employee Performance Pagelet, page 25](#)

Defining Default Settings for the Open Positions Pagelet

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

This section discusses how to:

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

See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," Personalizing the Open Positions Pagelet, page 28](#)

Page Used to Define Default Settings for the Open Positions Pagelet

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

Activating the Open Positions Pagelet

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

To enable managers to use the pagelet, you must:

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

See Also

[Chapter 2, "Understanding HRMS Portal Pack," PeopleSoft Pagelet Activation and Personalization, page 5](#)

Defining Default Settings for the Open Positions Pagelet

Access the Setup Open Positions page (Set Up HRMS, Product Related, HRMS Portal Pack, Setup Open Positions, Setup Open Positions).

The screenshot shows a web interface for configuring the Open Positions pagelet. At the top, there is a header 'Pagelet Administration' followed by a sub-header 'Setup Open Positions'. Below this, there are two main sections. The first section is titled 'Detailed Position Description' and contains a checkbox labeled 'Display Position Description Link:' which is checked. The second section is titled 'Create/View Job Requisitions' and contains a checkbox labeled 'Display/Create Job Req and Review Job Req links:' which is also checked. At the bottom left of the form, there is a 'Save' button.

Setup Open Positions page

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

Display/Create Job Req and Review Job Req links (display/create job requisitions and review job requisitions links) Select to display the job requisition links. This link provides access to the Job Requisition page where you can review existing job requisitions or create a new one.

See Also

Chapter 4, "Using HRMS Portal Pack Pagelets," Personalizing the Open Positions Pagelet, page 28

Enabling MapQuest for the Organization Directory Pagelet

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

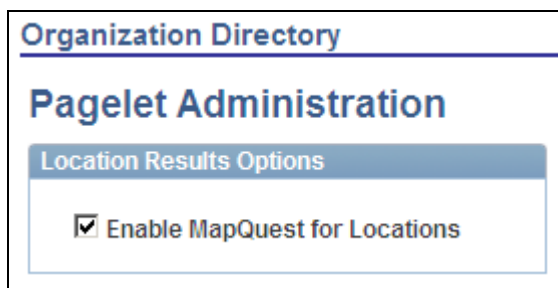
This section discusses how to enable MapQuest for locations on the Organization Directory pagelet.

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

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

Enabling MapQuest for Locations on the Organization Directory Pagelet

Access the Organization Directory - Pagelet Administration page (Set Up HRMS, Install, Product and Country Specific, Organization Directory).



Organization Directory - Pagelet Administration page

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

See Chapter 4, "Using HRMS Portal Pack Pagelets," Viewing the Organization Directory Pagelet, page 37.



Chapter 4

Using HRMS Portal Pack Pagelets

This chapter lists common elements and discusses how to:

- Display portal pagelets.
- Personalize pagelets.
- View manager pagelets.
- View employee pagelets.
- View Recruiter Alerts for Talent Acquisition Manager
- View additional Talent Acquisition Manager pagelets.

Common Elements Used in This Chapter

Number of Rows (1 to 99)	Enter the number of rows to display on the page.
Days to view in the future	Enter the number of days in the future that the system should use to display upcoming events.
Days to view in the past	Enter the number of days in the past that the system should use to display past events.
Maximum displayed rows	Enter the maximum number of rows that should appear on the page. This only limits the number of rows that appear and does not limit the amount of information that the system retrieves.
More	Click this link to view more information.
	Indicates that an approaching date is within the defined alert limit.
	Click the Customize button to define the number of rows and columns you want to display on a pagelet. Not all pagelets can be personalized.

Displaying Portal Pagelets

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

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

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

See *PeopleTools: Portal Technologies PeopleBook*, "Administering Portal Homepages and Pagelets."

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

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

Personalize [Content](#) | [Layout](#)

Menu - Classic

Search:

- ▷ My Favorites
- ▷ Self Service
- ▷ Manager Self Service
- ▷ Recruiting
- ▷ Workforce Administration
- ▷ Benefits
- ▷ Compensation
- ▷ Stock
- ▷ Time and Labor
- ▷ Payroll for North America
- ▷ Global Payroll & Absence Mgmt
- ▷ Payroll Interface
- ▷ Workforce Development
- ▷ Organizational Development
- ▷ Enterprise Learning
- ▷ Workforce Monitoring
- ▷ Pension
- ▷ Campus Community
- ▷ Student Recruiting
- ▷ Student Admissions
- ▷ Records and Enrollment
- ▷ Curriculum Management
- ▷ Financial Aid
- ▷ Student Financials
- ▷ Academic Advisement
- ▷ Contributor Relations
- ▷ SA Integration Pack
- ▷ Set Up HRMS

Birthday Alerts

No employee birthdays at this time

Stock Options

Global Business Institute 9999

Data			
Grant Number	Grant Date	Type	Price
0000000402	12/30/1999	ISO	\$21.750000
0000000372	12/31/1998	ISO	\$27.500000
0000000346	12/31/1997	ISO	\$22.125000
0000000313	12/31/1996	ISO	\$23.125000
0000000289	12/29/1995	ISO	\$19.000000
0000000262	12/31/1994	ISO	\$10.375000

[More...](#)

Time Management Alerts

Alerts	Occurrences
Overtime Limit Reached	0
Overtime Approval Required	0
Payable Time Approval Required	0
Exceptions to Review	24
Absence Approval Required	0

Direct Reports Phones

Phone Information		
Name	Business	Extension
Adland Chu		
Diane Palmer		
Susan Hoinck	925.555.3654	

[More...](#)

Portal pagelet example

See Also

PeopleTools: Portal Technologies PeopleBook, "Administering Portal Homepages and Pagelets"


Personalizing Pagelets

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

- Personalize the Direct Reports pagelet.
- Personalize the Employee Leave Summary pagelet.
- Personalize the Manager Leave Summary pagelet.
- Personalize the Stock Options pagelet.
- Personalize the Employee Performance pagelet.
- Personalize the Upcoming Training pagelet.
- Personalize the Scheduled Training pagelet.
- Personalize the Setup Open Positions pagelet.

- Personalize the Time Management Alerts pagelet.
- Personalize the Workforce Availability pagelet.
- Personalize the Direct Reports Phones pagelet.
- Personalize the Recruiter Alerts pagelet.
- Personalize the My Job Openings pagelet.

Pages Used to Personalize Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personalize Alerts	CO_PE_OPR_BIRTH_PG CO_PE_OPR_ANNIV_PG CO_PEOPRLIC_EMP_PG CO_PE_OPREXPPLIC_PG	<ul style="list-style-type: none"> •  Click the Customize button on the Birthday Alerts pagelet. • Click the Customize button on the Anniversary Alerts pagelet. • Click the Customize button on the Employee Expiring Licenses pagelet. • Click the Customize button on the Manager Expiring Licenses pagelet. 	Define default display preferences. You can define the number of days to view in the future and in the past and the maximum number of rows to display on the Birthday Alerts, Anniversary Alerts, Employee Expiring Licenses, and Manager Expiring Licenses pagelet.
Personalize Direct Reports	CO_PE_OPR_DIRPT_PG	Click the Customize button on the Direct Reports pagelet.	Specify the maximum number of rows to display on the Direct Reports pagelet, and specify if you want the business phone, employee ID, job title, or location to also display.
Select Job Title	HR_PE_EMPL_LV_EXT	<ul style="list-style-type: none"> • Click the Customize button on the Employee Leave Summary pagelet. • Click the Customize button on the Manager Leave Summary pagelet. 	Specify settings to display on the Manager Leave Summary page and the Employee Leave Summary page.
Personalize Stock Options	ST_PE_OPTION_PREF	Click the Customize button on the Stock Options pagelet.	Specify the display preferences and display fields to display on the Stock Options pagelet.

Page Name	Definition Name	Navigation	Usage
Employee Performance Alerts Settings	EP_PE_OPR_ALERT	Click the Customize button on the Employee Performance pagelet.	Specify the display preferences, alert levels, and alert days before due date to display on the Employee Performance pagelet.
Personalize Upcoming Training	CO_PE_TRN_MGR_N	Click the Customize button on the Upcoming Training pagelet.	Specify the number of rows to display on the Upcoming Training pagelet, and specify the days to view each item the future.
Personalize Scheduled Training	CO_PE_TRN_MGR_PG	Click the Customize button on the Scheduled Training pagelet.	Specify the number of rows to display on the Scheduled Training pagelet, and specify the days to view each item the future.
Personalize Open Positions	CO_PE_VACPOS_CUST	Click the Customize button on the Open Positions pagelet.	Specify the number of rows to display on the Open Positions pagelet. System administrators define additional default display settings on the Pagelet Administration - Open Positions page. <u>See Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Open Positions Pagelet, page 13.</u>
Personalize Time Management Alerts	TL_PE_MGR_TMMGT_P	Click the Customize button on the Time Management Alerts pagelet.	Select the alerts to display on the Time Management Alerts pagelet.
Personalize Workforce Availability	TL_PE_MGR_WRKFRM_P	Click the Customize button on the Workforce Availability pagelet.	Select the alerts to display on the Workforce Availability pagelet.
Personalize Phones	CO_PE_OPR_PHN_PG	Click the Customize button on the Direct Reports Phones pagelet.	Specify the number of rows to display on the Direct Reports Phones pagelet, and specify the phone types (business, home, campus, mobile and so on) to display.
Personalize Alerts	HRS_PE_OPR_ALERT	Click the Customize button on the Recruiter Alerts pagelet.	Specify the recruiting items to display on the Recruiter Alerts pagelet.

Page Name	Definition Name	Navigation	Usage
Personalize My Job Openings	HRS_PE_OPR_JOS	Click the Customize button on the My Job Openings pagelet.	Specify the status and creation time frame of the openings to display on the My Job Openings pagelet, and specify the number of rows and columns to display.
Personalize My Reports	PSRF_PGLT_OPTIONS	Click the Customize button on the My Reports pagelet.	Specify the maximum number of reports within a specified number of days or hours that should display on the My Reports pagelet.

Personalizing the Direct Reports Pagelet

Access the Personalize Direct Reports page (click the Customize button on the Direct Reports pagelet).

Personalize Direct Reports page

Display Additional Information

Values include:

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

Personalizing the Employee Leave Summary Pagelet

Access the Select Job Title page (click the Customize button on the Employee Leave Summary pagelet).

Select Job Title		
Job Information		
Job Title	Department	Supervisor Name
Director-Finance	Corporate Finance	
Return		

Select Job Title page

Note. This pagelet is similar to the page used to personalize the Manager Leave Summary pagelet.

Personalizing the Manager Leave Summary Pagelet

Access the Select Job Title page (click the Customize button on the Manager Leave Summary pagelet).

Select Job Title		
Job Information		
Job Title	Department	Supervisor Name
Director-Finance	Corporate Finance	
Absences		
View Absences for the last:	<input type="text" value="0"/>	weeks
View Absences for the next:	<input type="text" value="0"/>	weeks
Return		

Select Job Title page for the Manager Leave Summary pagelet

View Absences for the last and **View Absences for the next** Enter the number of weeks in the past and in advance for which you want to display absence information.

Note. This page is similar to the page used to personalize the Employee Leave Summary pagelet.

Personalizing the Stock Options Pagelet

Access the Personalize Stock Options page (click the Customize button on the Stock Options pagelet).

Personalize Stock Options

Use this page to specify the default values used in displaying your stock options.

Display Preferences

Default Company Stock:

***Max Number of Displayed Rows:**

Sort By:

Display Fields- Select up to 4

Grant Number

Grant Date

Option Type

Grant Price

Shares Granted

Shares Exercisable

-----Or-----

Last Vesting Date

[Return Home](#)

Personalize Stock Options page

Display Preferences

Default Company Stock Select the company for which you want to display stock option information.

Max Number of Displayed Rows (maximum number of displayed rows) For multiple stock option grants, select the number of rows to appear on the pagelet. If the number of grants exceeds the number of rows, the system automatically displays the More link.

Sort By Define how the information is sorted. Values are: *Grant Date*, *Grant Number*, *Grant Price*, and *Option Type*.

Display Fields - Select up to 4

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

Grant Number Displays the grant issue number.

Grant Date Displays the issue date of each grant listed.

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

Personalizing the Employee Performance Pagelet

Access the Employee Performance Alerts Settings page (click the Customize button on the Employee Performance pagelet).

Employee Performance Alerts Settings

Display Preferences

Document Type:

Period End Date >=:

Employees to display: Use Default Settings

Alert Levels to Include

Complete (✓)

On Schedule (◆)

Standard Alert (▼)

Critical Alert (■)

Cancelled (✕)

Alert Days Before Due Date

	Critical Alerts	Standard Alerts
Acknowledged	<input type="text" value="5"/> Days	<input type="text" value="15"/> Days
Review Held	<input type="text" value="10"/> Days	<input type="text" value="20"/> Days
Available for Review	<input type="text" value="15"/> Days	<input type="text" value="25"/> Days
In Progress	<input type="text" value="20"/> Days	<input type="text" value="60"/> Days

Save [Return](#)

Employee Performance Alerts Settings page

Document Type	Select the type of document that you want to appear. You define document types on the Document Types page.
Period End Date >=	Select the end date of the performance period for which documents are to be listed. The system lists documents with the same date or later than the date entered here.
Employees to display	Enter the number of employees to list on the pagelet.
Use Default Settings	Click to reset the values on the page to the values that you defined when you last set up this page. Values are defaulted from product level.

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

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

Alert Levels to Include

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

Alert Days Before Due Date

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

See Also

Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Employee Performance Alerts Pagelet, page 9

PeopleSoft ePerformance 9.1 PeopleBook, "Setting Up Document Templates," Defining Document Types

Personalizing the Upcoming Training Pagelet

Access the Personalize Upcoming Training Page (click the Customize button on the Upcoming Training pagelet).

Personalize Upcoming Training

Indicate the maximum number of courses to display on the home page. Also, specify the number of days in the future you would like to see courses for.

Display Preferences

*Maximum displayed rows:

*Days to view in the future:

[Return](#)

* Required Field

Personalize Upcoming Training page

Maximum displayed rows Enter the number of rows of training information you want to display on the Upcoming Training pagelet.

Days to view in the future Enter the number of days into the future for which you want to see upcoming training.

Personalizing the Scheduled Training Pagelet

Access the Personalize Scheduled Training page (click the Customize button on the Scheduled Training pagelet).

Personalize Scheduled Training

Indicate the maximum number of courses to display on the home page. Also, specify the number of days in the future you would like to see courses for.

Display Preferences

*Maximum displayed rows:

*Days to view in the future:

[Return](#)

* Required Field

Personalize Scheduled Training page

Maximum displayed rows Enter the number of rows of training information you want to display on the Scheduled Training pagelet.

Days to view in the future Enter the number of days into the future for which you want to see scheduled training.

Personalizing the Open Positions Pagelet

Access the Personalize Open Positions page (click the Customize button on the Open Positions pagelet).

Personalize Open Positions page

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

Personalizing the Time Management Alerts Pagelet

Access the Personalize Time Management Alerts page (click the Customize button on the Time Management Alerts pagelet).

Personalize Time Management Alerts page

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

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

See Also

PeopleSoft Time and Labor 9.1 PeopleBook, "Managing Time"

Personalizing the Workforce Availability Pagelet

Access the Personalize Workforce Availability page (click the Customize button on the Workforce Availability pagelet).

Personalize Workforce Availability

Alerts to Display

- Currently Clocked In
- No Show for Current Shift
- Scheduled for Current Shift
- Reported Absent for Today
- Reported In Training for Today

Save [Return](#)

Personalize Workforce Availability page

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

- Currently Clocked In** Select to display employees who are currently clocked in for the current punch shift.
- No Show for Current Shift** Select to display employees who are scheduled for the current punch shift but have not clocked in.

- Scheduled for Current Shift** Select to display employees who are scheduled for the current punch shift.
- Reported Absent for Today** Select to display employees who are reported as absent.
If PeopleSoft Global Payroll is installed, the system determines if any absences are reported in the absence pages. In addition, the system detects any leave time reporting codes (TRCs) in the PeopleSoft Time and Labor application's reported elapsed time, which is not a Global Payroll absence.
- Reported In Training for Today** Select to display employees who have scheduled, approved training for the day.
This count will include the attendance statuses from the Training Administration business process of currently attending, completed, enrolled, approved and authorized.

Personalizing the Direct Reports Phones Pagelet

Access the Personalize Phones page (click the Customize button on the Direct Reports Phones pagelet).

Personalize Phones

Specify the number of direct reports you would like to see on the pagelet. Select up to three columns to display in addition to employee name.

Display Preferences

Maximum displayed rows:

Display Phone Type 1:

Display Phone Type 2:

Display Phone Type 3:

[Return](#)

Personalize Phones page

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

Personalizing the Recruiter Alerts Pagelet

Access the Personalize Alerts page (click the Customize button on the Recruiter Alerts pagelet).

Personalize Alerts

Specify the number of alerts you would like to see on your pagelet.

Display Preferences

<input checked="" type="checkbox"/> New Applicants	*Applied Within:	<input type="text" value="020 - Yesterday"/>
<input type="checkbox"/> Auto Match Results		
<input checked="" type="checkbox"/> Interviews Today		
<input type="checkbox"/> Unconfirmed Interviews		
<input checked="" type="checkbox"/> Interview Evaluations		
<input checked="" type="checkbox"/> Prepare Job Offer		
<input checked="" type="checkbox"/> Approve Job Offer		
<input checked="" type="checkbox"/> Prepare for New Hire		
<input checked="" type="checkbox"/> Approve Job Opening		
<input checked="" type="checkbox"/> Online Job Offer	Days Until Offer Expires:	<input type="text"/>
<input checked="" type="checkbox"/> Unevaluated Answers		
<input checked="" type="checkbox"/> Questionnaire Request		

[Return to Previous Page](#)

Personalize Alerts page

Use this page to select the alerts that you want to display on the Recruiter Alerts pagelet.

New Applicants and Applied Within

Select New Applicants to display the number of new applicants that have applied to your job openings within the time frame that you select in the Applied Within drop-down list box.

For example, you can select to view applicants that have applied within the last 30 days

Auto Match Results

Select to display the number of applicants currently in the Auto Match results.

Interviews Today

Select to display the number of interviews scheduled for the user.

Unconfirmed Interviews

Select to display the number of interviews that have been scheduled but are not yet confirmed.

Interview Evaluations

Select to displays the number of interview evaluations assigned to the user.

Prepare Job Offer

Select to display the number of applicants in the Prepare Job Offer queue.

Approve Job Offer

Select to display the number of applicants in the Approve Job Offer queue.

Prepare for New Hire	Select to display the number of new hire proceedings for applicants that have accepted job offers.
Approve Job Opening	Select to display the number of job openings waiting for approval.
Online Job Offer and Days Until Offer Expires	Select to display the number of open online job offers that you created that have expired or that will expire within the number of days that you enter. Open online job offers are offers that you posted to Candidate Gateway that have not been accepted or rejected. The offer status must be <i>Extend</i> .
Unevaluated Answers	Select to display the number of open-ended screening question evaluations that the user has requested but that the assigned evaluators have not yet completed.
Questionnaire Request	Select to display the number of applicants who have not completed the questionnaires for job openings to which they are linked.

See Also

PeopleSoft Talent Acquisition Manager 9.1 PeopleBook

[Chapter 4, "Using HRMS Portal Pack Pagelets," Viewing Recruiter Alerts for Talent Acquisition Manager, page 48](#)

Personalizing the My Job Openings Pagelet

Access the Personalize My Job Openings page (click the Customize button on the My Job Openings pagelet).

Personalize My Job Openings

Select the information that should display on the pagelet. The values selected for Status Code and Created Within are the criteria that determine which Openings display on the pagelet. The selected values in the Additional Columns list determine which columns are displayed on the pagelet. The Job Opening column is preselected and will always display.

My Job Openings

With Status of:

Created Within:

Maximum displayed rows:

Additional Columns (max. = 5)

- Job Opening
- Job Opening Title
- Location
- Hiring Manager
- Status
- Days Open (Since Approval)
- Target Openings
- Number Filled Openings
- Number of Applicants
- Job Opening Activity Hyperlink
- Actions

[Return to Previous Page](#)

Personalize My Job Openings page

Use this page to define what information displays on the My Job Opening pagelet. Use the fields in the upper portion of the page to place parameters on the type of information you select in the lower portion of the page. To include a type of information on the pagelet, select the corresponding check box. The Job Opening check box is selected as a default, and you can select four more types of information to display on the pagelet.

With Status of

Select a specific status for which you want to view job openings. If you do not make a selection, job openings in all statuses that meet other criteria you specify on this page will be available using the My Job Opening pagelet.

Created Within

Select a point in time from which you want to view job openings. For example, select *Last Month* to display your job openings for the last 30 days or *Last Week* to see your openings for the last seven days. If you do not make a selection, the system does not display any results on the My Job Opening pagelet.

Maximum displayed rows

Enter the number of rows you want to display on the My Job Opening pagelet. You can enter up to 99 rows; however, the system will only display the number of job openings that meet the criteria you specify.

See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," Viewing the My Job Openings Pagelet, page 58](#)
PeopleSoft Talent Acquisition Manager 9.1 PeopleBook

Viewing Manager Pagelets

This section discusses:

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

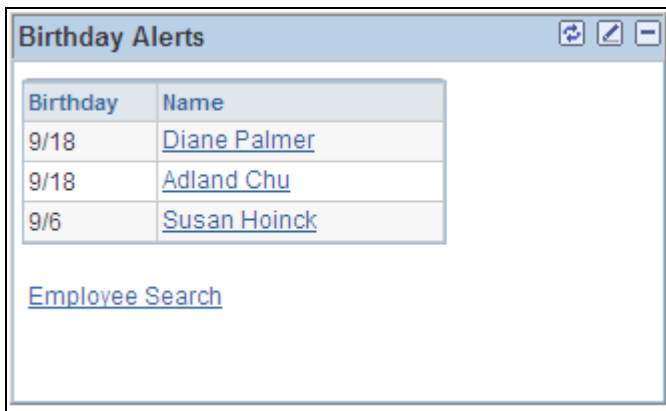
Note. You can personalize many of these pagelets, so they can appear differently in the application than described in this chapter.

See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," Personalizing Pagelets, page 19](#)

Viewing the Birthday Alerts Pagelet

The Birthday Alerts pagelet displays upcoming employee birthdays.



Birthday	Name
9/18	Diane Palmer
9/18	Adland Chu
9/6	Susan Hoinck

[Employee Search](#)

Birthday Alerts pagelet

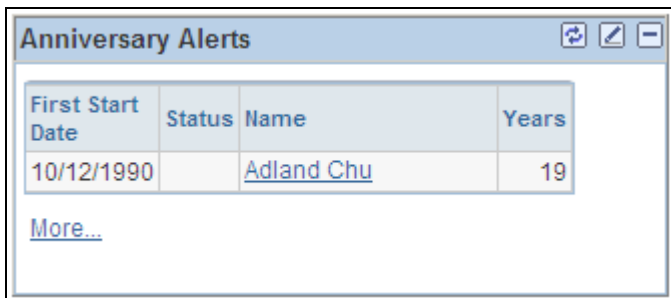
Managers use this pagelet to view the birth dates for their direct reports.

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

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

Viewing the Anniversary Alerts Pagelet

The Anniversary Alerts pagelet displays upcoming employee job anniversaries.



First Start Date	Status	Name	Years
10/12/1990		Adland Chu	19

[More...](#)

Anniversary Alerts pagelet

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

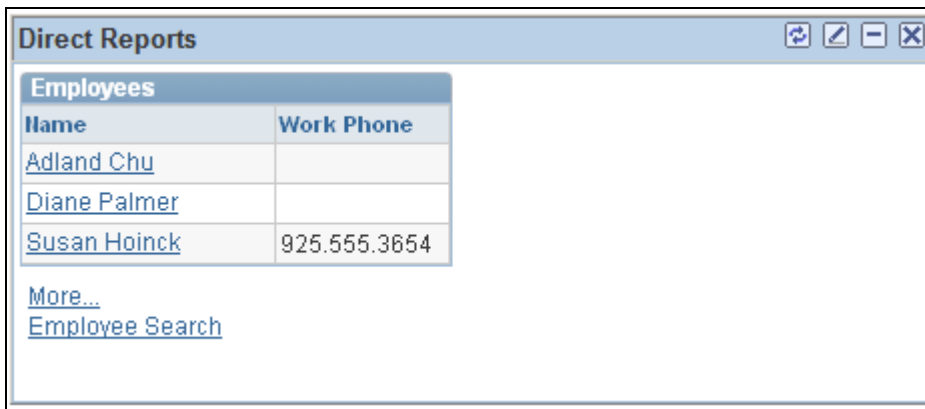
Click an employee name to access the Employee Information page where you can view additional information about a specific employee and access links to pages with more specific employee information.

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

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

Viewing the Direct Reports Pagelet

The Direct Reports pagelet displays information on direct reports.



Employees	
Name	Work Phone
Adland Chu	
Diane Palmer	
Susan Hoinck	925.555.3654

[More...](#)
[Employee Search](#)

Direct Reports pagelet

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

Name Click a link in the Name column to access the View Employee Personal Information page where you enter data and click Continue to access the Employee Information page in eProfile. On the Employee Information page in eProfile, you can view additional details for a specific employee. The Employee Information page also contains links to related employee data pages.

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

The narrow version displays only the data specified in the Display Additional Information filed on the Personalize Direct Reports page.

Employee Search Click to access the Employee Search page where you can define search criteria to find a specific employee.

Skill Click to access the Current Team Profiles page for profiles to which you have security access, where you can view detailed information regarding the skills of a selected employee.

Note. The Skilllink appears only on the wide version of the Direct Reports pagelet.

Training Click to access the Training Summary page where you can view detailed information regarding training for a specific employee.

Note. The Traininglink appears only on the wide version of the Direct Reports pagelet.

Viewing the Manager Leave Summary Pagelet

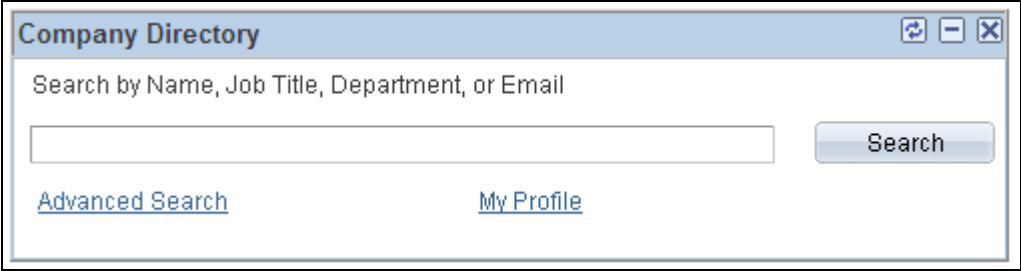
The Manager Leave Summary pagelet displays information about absence requests from employees.

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

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

Viewing the Company Directory Pagelet

The Company Directory pagelet displays search fields to locate employees by name, job title, department, or email. You also have the option to use an advanced search, where you can enter additional search criteria.



Company Directory pagelet

Employees use this pagelet to search for people using the Company Directory feature.

Advanced Search

Click this link to access the Company Directory - Search For People: Advanced Search page. Use the Advanced Search link to enter multiple criteria to search for an individual.

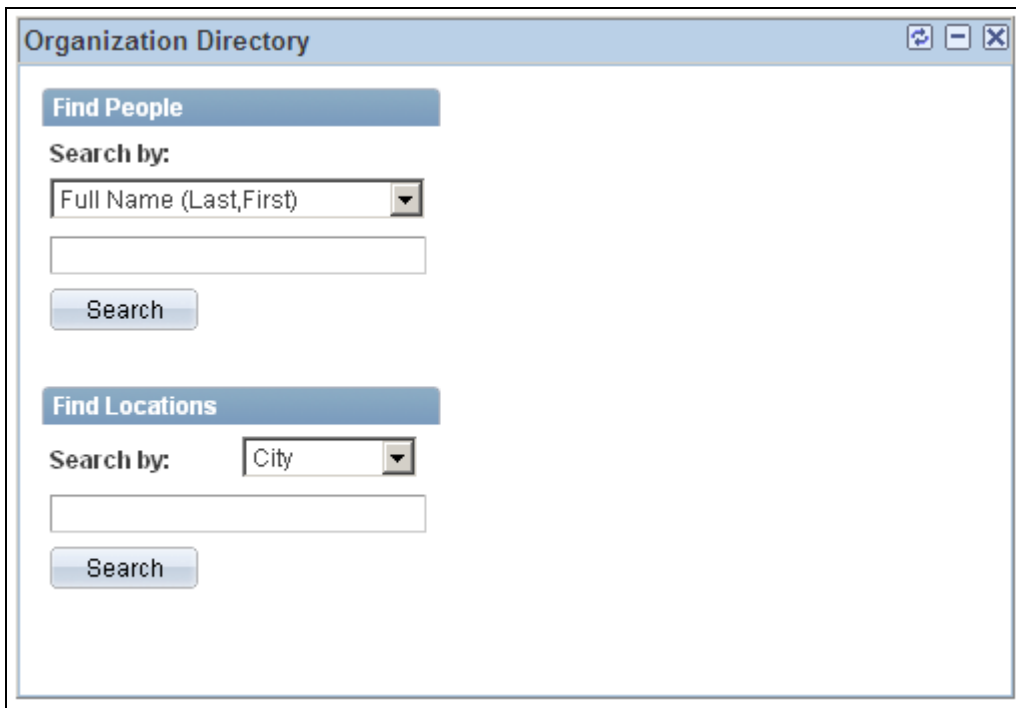
My Profile

Click this link to have the system display your information as the focus in the Company Directory component.

See *PeopleSoft HR 9.1 PeopleBook: Administer Workforce*, "Viewing Summary Workforce Information," Using the Org Chart Viewer.

Viewing the Organization Directory Pagelet

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



The screenshot shows a window titled "Organization Directory" with standard window controls (maximize, minimize, close) in the top right corner. The window contains two main sections:

- Find People:** A blue header bar. Below it, the text "Search by:" is followed by a dropdown menu currently set to "Full Name (Last,First)". Below the dropdown is a text input field and a "Search" button.
- Find Locations:** A blue header bar. Below it, the text "Search by:" is followed by a dropdown menu currently set to "City". Below the dropdown is a text input field and a "Search" button.

Organization Directory pagelet

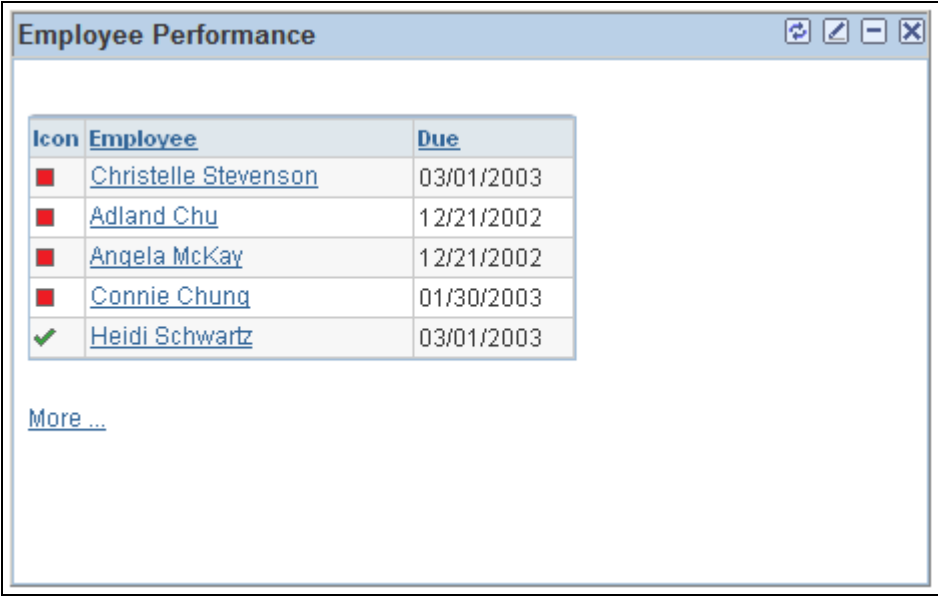
Employees use this pagelet to search for people or locations.

See Also

[Chapter 3, "Setting Up HRMS Portal Pack," Enabling MapQuest for the Organization Directory Pagelet, page 15](#)

Viewing the Employee Performance Pagelet

The Employee Performance pagelet displays summarized employee performance information.



Icon	Employee	Due
■	Christelle Stevenson	03/01/2003
■	Adland Chu	12/21/2002
■	Angela McKay	12/21/2002
■	Connie Chung	01/30/2003
✓	Heidi Schwartz	03/01/2003

[More ...](#)

Employee Performance pagelet

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

Employee

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

More

Click this link to access performance information for additional employees.

See Also

[Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Employee Performance Alerts Pagelet, page 9](#)

Viewing the Scheduled Training Pagelet

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

Employee Name	Course Start Date	Enrollment Status
Susan Hoinck	09/18/2009	Enrolled

[More...](#)

Scheduled Training pagelet

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

Click the More link to access the Scheduled Training page.

See Also

PeopleSoft eDevelopment 9.1 PeopleBook, "Requesting Employee Training," Reviewing Training History Information

PeopleSoft eDevelopment 9.1 PeopleBook, "Requesting Employee Training"

Viewing the Manager Expiring Licenses Pagelet

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

Licenses and Certificates	
Name	License/Certificate
Diane Palmer	Cardio Pulmonary Resuscitation
* Susan Hoinck	Cardio Pulmonary Resuscitation

* Renewal in Process

Manager Expiring Licenses pagelet

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

Viewing the Open Positions Pagelet

The Open Positions pagelet displays information on positions currently open.



Department	Position	Position Headcount
Finance	Manager General Ledger	1
HQ	Country Manager	1
HR	Payroll Officer	1
HR	Snr Mgr Human Resources	1
Sales Frce	Sales Manager	1

[More](#)

Open Positions pagelet

Position Displays the position title.

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

More Click to access the complete list of open positions.

See Also

[Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Open Positions Pagelet, page 13](#)

Viewing the Time Management Alerts Pagelet

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

Alerts	
Alerts	Occurrences
Overtime Limit Reached	0
Overtime Approval Required	0
Payable Time Approval Required	0
Exceptions to Review	24
Absence Approval Required	0

Time Management Alerts pagelet

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

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

Note. This page requires implementation of Time and Labor.

Overtime Limit Reached

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

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

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

Overtime Approval Required

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

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

Payable Time Approval Required

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

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

Exceptions to Review

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

The occurrences indicate the number of exceptions to review.

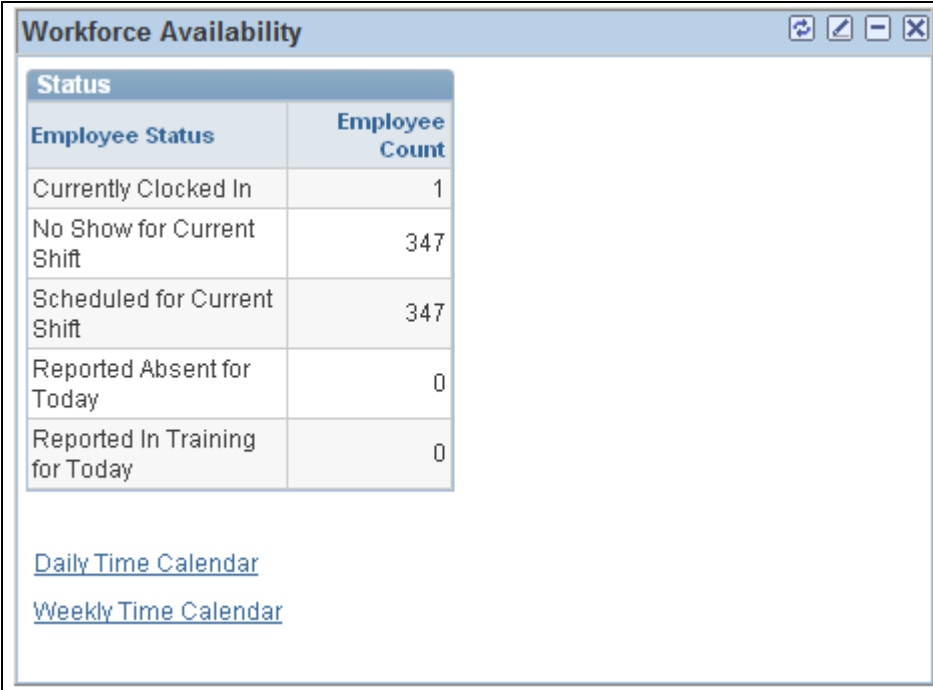
Absence Approval Required Click to view and approve Global Payroll absence requests for employees. This link only displays if Global Payroll is installed. The occurrences indicate the number of absence requests to be approved.

See Also

PeopleSoft Time and Labor 9.1 PeopleBook, "Managing Time," Managing Exceptions

Viewing the Workforce Availability Pagelet

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



Status	
Employee Status	Employee Count
Currently Clocked In	1
No Show for Current Shift	347
Scheduled for Current Shift	347
Reported Absent for Today	0
Reported In Training for Today	0

[Daily Time Calendar](#)

[Weekly Time Calendar](#)

Workforce Availability pagelet

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

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

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

Daily Time Calendar and Weekly Time Calendar

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

See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," Personalizing the Workforce Availability Pagelet, page 29](#)

Viewing the Direct Reports Phones Pagelet

The Direct Reports Phones pagelet displays employee phone contact information.



Phone Information		
Name	Business	Extension
Adland Chu		
Diane Palmer		
Susan Hoinck	925.555.3654	
More...		

Direct Reports Phones pagelet

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

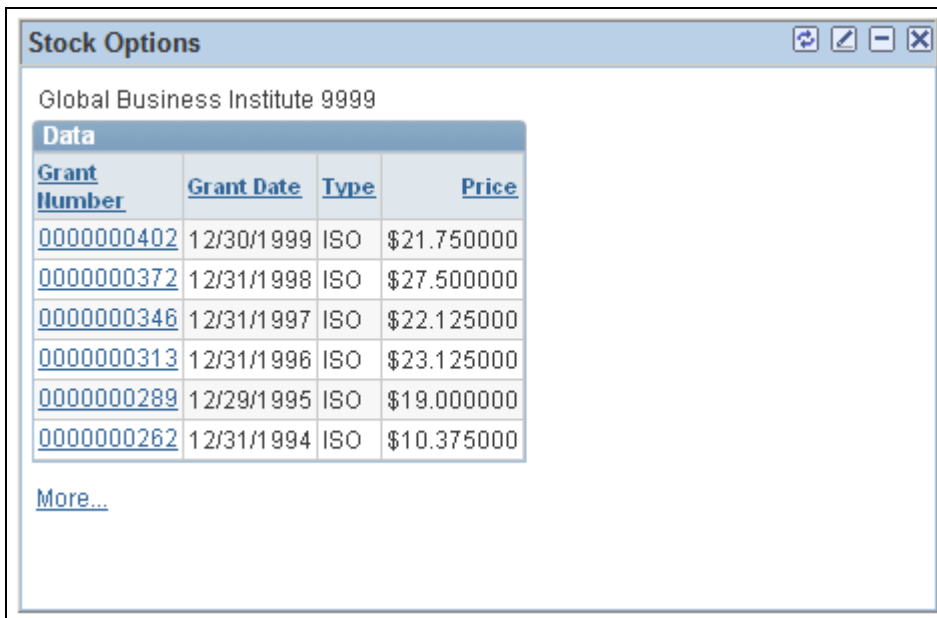
Name Click a value in the Name column to see more details about the direct report.

More Click to access a wider version of the pagelet with multiple columns showing additional data.
The narrow version displays only one phone type using Display Phone Type 1 from the Personalize Phones page.

Viewing Employee Pagelets

This section discusses:

- Viewing the Employee Leave Summary pagelet.
- Viewing the Stock Options pagelet.
- Viewing the Paychecks pagelet.



Global Business Institute 9999

Data			
Grant Number	Grant Date	Type	Price
0000000402	12/30/1999	ISO	\$21.750000
0000000372	12/31/1998	ISO	\$27.500000
0000000346	12/31/1997	ISO	\$22.125000
0000000313	12/31/1996	ISO	\$23.125000
0000000289	12/29/1995	ISO	\$19.000000
0000000262	12/31/1994	ISO	\$10.375000

[More...](#)

Stock Options pagelet

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

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

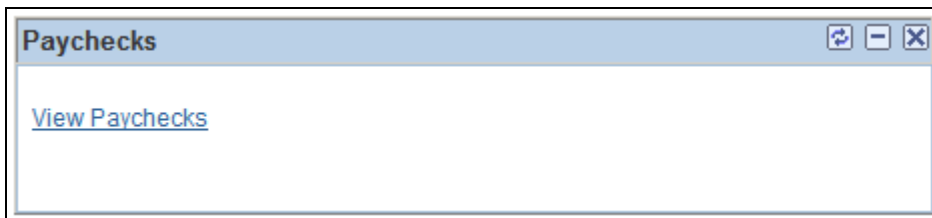
See Also

PeopleSoft Stock Administration 9.1 PeopleBook, "Administering Grants"

PeopleSoft Stock Administration 9.1 PeopleBook, "Understanding Stock Purchase Plans"

Viewing the Paychecks Pagelet

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



Paychecks pagelet

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

Viewing the Upcoming Training Pagelet

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



Upcoming Training pagelet

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

Click the More link to access the Upcoming Training page.

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

Viewing the Employee Expiring Licenses Pagelet

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

Licenses and Certificates	
License/Certificate	Expiration Date
Cardio Pulmonary Resuscitation	09/06/2009

Employee Expiring Licenses pagelet

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

Viewing Recruiter Alerts for Talent Acquisition Manager

The recruiter alerts pagelet consolidates a variety of important information for recruiters. From the pagelet, you can access detail pages with additional information.

This section discusses:

- The Recruiter Alerts pagelet.
- The Unconfirmed Interview Summary page.
- the Interview Evaluation Summary page.
- The Prepare Job Offer page.
- The Online Job Offer page.
- The Unevaluated Answers page.
- The Questionnaire Request page.

See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," Personalizing the Recruiter Alerts Pagelet, page 30](#)

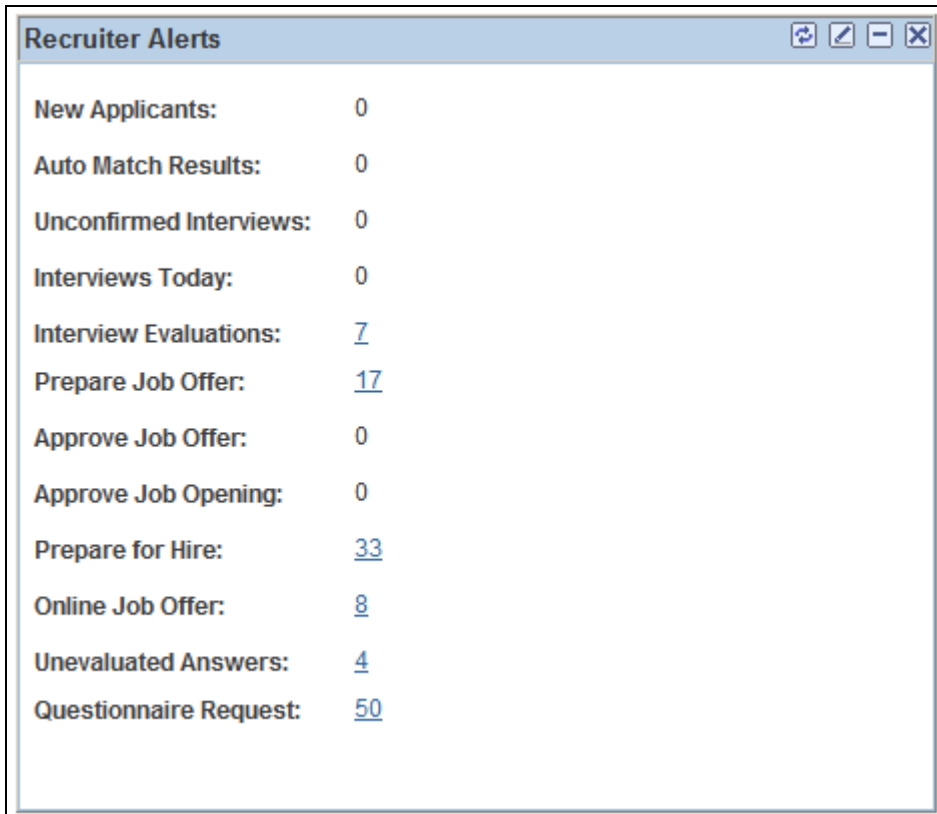
Pages Accessed from the Recruiter Alerts Pagelet

Note. This table lists the pages that are accessed *only* from the Recruiter Alerts pagelet. The Recruiter Alerts pagelet also provides links to Talent Acquisition Manager pages (pages that you can also access through standard menu navigation); these pages do not appear in this section.

Page Name	Definition Name	Navigation	Usage
Unconfirmed Interview Summary	HRS_UNC_INT_SUM	Click the Unconfirmed Interviews link on the Recruiter Alerts pagelet.	Review a list of applicants with unconfirmed interviews where you are an interviewer.
Interview Evaluation Summary	HRS_EVAL_SUMM	Click the Interview Evaluations link on the Recruiter Alerts pagelet.	Review a list of applicants whose interview evaluations you need to complete.
Prepare Job Offer	HRS_PSNAPPFOR_LIST	Click the Prepare Job Offer link on the Recruiter Alerts pagelet.	Review a list of applicants who are in the offer phase of the recruitment process for your job openings.
Online Job Offer	HRS_OFFER_OJO_LIST	Click the Online Job Offer link on the Recruiter Alerts pagelet.	Review a list of applicants who have received online job offers that are posted to Candidate Gateway and that will expire within the time frame you specify when you configure the Recruiter Alerts pagelet.
Unevaluated Answers	HRS_UNEVAL_ANS	Click the Unevaluated Answers link on the Recruiter Alerts pagelet.	Review a list of applicants for your job openings whose answers to open-ended questions have not yet been evaluated; send reminders to the evaluators.
Questionnaire Request page	HRS_PSNAPPFOR_LST	Click the Questionnaire Request link on the Recruiter Alerts pagelet.	Review list of applicants who have not completed an online questionnaire after being linked to one of the user's job openings and after being sent a request to complete the questionnaire.

Viewing the Recruiter Alerts Pagelet

The Recruiter Alerts pagelet provides recruiters with summary information for the recruiters own job openings. These are job openings in which the user is on the hiring team in any role.



Recruiter Alerts pagelet

The Recruiter Alerts pagelet provides recruiters with summary information for the recruiters own job openings.

To personalize which alerts appear on this page, click the Customize button in the upper right-hand corner.

For each alert, the system displays the number of associated occurrences. Clicking the number opens a page that lists the individual occurrences.

The following table lists the alerts that appear on this pagelet and explains what the number represents. The last column in the table identifies the page that appears if you click the number and indicates whether the page is a Talent Acquisition Manager page or whether the page is a Portal Pack page that you can access only from the Recruiter Alerts pagelet.

Alert Label	Description	Page Accessed
New Applicants	Displays the number of new applicants that have applied to your job openings within a certain number of days. You define the default setting for monitoring new applicants using the Applied Within field when you personalize recruiter alerts.	Find Applicants page (Talent Acquisition Manager). When you access the Find Applicants page from this link, it displays the applicants who have applied within the selected time frame. <i>See PeopleSoft Talent Acquisition Manager 9.1 PeopleBook, "Searching for Applicants," Performing Basic Database Searches.</i>

Alert Label	Description	Page Accessed
Auto Match Results	Displays the number of applicants currently in the Auto Match Results queue.	Click the link to view the automatch search results. See <i>PeopleSoft Talent Acquisition Manager 9.1 PeopleBook</i> , "Searching for Applicants," Automatch Searches.
Unconfirmed Interviews	Displays the number of interviews that are scheduled for the user that have not yet been confirmed.	Unconfirmed Interview Summary page (Portal Pack). This page lists applicants with unconfirmed interviews where you are an interviewer.
Interviews Today	Displays the number of interviews scheduled for the user on that specific day.	Interview Calendar page (Talent Acquisition Manager). See <i>PeopleSoft Talent Acquisition Manager 9.1 PeopleBook</i> , "Interviewing Applicants," Reviewing Personal Interview Calendars.
Interview Evaluations	Displays the number of incomplete interview evaluations assigned to the user.	Interview Evaluation Summary page (Portal Pack). This page lists the interview evaluations that you need to complete.
Prepare Job Offer	Displays the number of applicants that are in the offer phase of the recruitment process for the user's job openings.	Prepare Job Offer page (Portal Pack). This page lists applicants who are in the offer phase of the recruitment process for your job openings.
Approve Job Offer	Displays the number of applicants in the Approve Job Offer queue. If approval authority is delegated to a proxy who has access to this pagelet, the delegated transactions are included in this count (and not the delegator's count) during the delegation period.	Pending Approvals page (Talent Acquisition Manager). Use this page to review and act on the job offers that require your approval. See <i>PeopleSoft Talent Acquisition Manager 9.1 PeopleBook</i> , "Making Job Offers," Approving Job Offers.
Approve Job Opening	Displays the number of job openings waiting for approval. If approval authority is delegated to a proxy who has access to this pagelet, the delegated transactions are included in this count (and not the delegator's count) during the delegation period.	Pending Approvals page (Talent Acquisition Manager). Use this page to review and act on the job openings that require your approval. See <i>PeopleSoft Talent Acquisition Manager 9.1 PeopleBook</i> , "Creating Job Openings," Approving Job Openings.

Alert Label	Description	Page Accessed
Prepare for Hire	Displays the number of applicants with an <i>Offer Accepted</i> disposition for the user's job openings.	Find Applicants page (Talent Acquisition Manager). When you access the Find Applicants page from this link, it displays the applicants who have the disposition <i>Offer Accepted</i> . See <i>PeopleSoft Talent Acquisition Manager 9.1 PeopleBook</i> , "Searching for Applicants," Performing Basic Database Searches.
Online Job Offer	Displays the number of open online job offers that you created that have expired or that will expire within the number of days that you enter. Open online job offers are offers that you posted to Candidate Gateway that have not been accepted or rejected. The offer status must be <i>Extend</i> .	Online Job Offer page (Portal Pack) This page displays job offers that are posted to Candidate Gateway and that will expire within the time frame you specify when you configure the Recruiter Alerts pagelet.
Unevaluated Answers	Displays the number of open-ended screening question evaluations that the user has requested but that the assigned evaluators have not yet completed.	Unevaluated Answers page (Portal Pack). This page lists the applicants whose answers to open-ended questions have not been evaluated, along with the names of the assigned evaluators.
Questionnaires Request	Displays the number of applicants who have not completed the questionnaires for job openings to which they are linked.	Questionnaire Request page (Portal Pack) This page lists the applications that require applicant attention to questionnaires. The system sent an initial email notification to these applicants at the time they were linked to the job opening; on this page you can send additional email reminders to selected applicants.

Viewing the Unconfirmed Interview Summary Page

The Unconfirmed Interview Summary page lists applicants with unconfirmed interviews where you are an interviewer.

Unconfirmed Interview Summary

Unconfirmed Interviews					
	Name	Job Opening ID	Job	Interview Status	Manage Interviews
1	Nora Massey	500404	Junior Counsel Position - Reference 500404	U	Manage Interviews

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Unconfirmed Interview Summary


Manage Interviews

Click this link to access the Interview Schedule page, where you manage interview schedules.

Viewing the Interview Evaluation Summary Page

The Interview Evaluation Summary page lists the interview evaluations that you need to complete.

Interview Evaluation Summary

Interview Evaluation Summary					Customize Find View All  First 1-7 of 7 Last
Applicant	Name	Job Opening	Job		
335	Cathy Ford	100	HR-System Test Job Code	View Summary	
1009	Ismael St James	30005	Analyst-Business	View Summary	
1050	Hank Bellows	30040	Admin Assistant	View Summary	
100104	Mat Pearce			View Summary	
100105	Mat Pearce	10131	Administrative Assistant	View Summary	
100227	Charles Rowell	10253	PL/SQL Programmer	View Summary	
300064	Ahmed Mohammad	300064	Store Manager Q	View Summary	

[Return to Previous Page](#)

Interview Evaluation Summary page

View Summary

Click this link to access the Disposition Details - Interview page, where you manage interview evaluations.

Viewing the Prepare Job Offer Page

The Prepare Job Offer page lists applicants who are in the offer phase of the recruitment process for your job openings.

Prepare Job Offer

Listed below are the applicants who are in the offer phase for your requisitions. Select Applicant name to enter or edit offer details and to submit an offer request.

Applicants				
Name	Applicant	Disposition	Job Opening	Posting Title
Al Brah	330	Offer	290013	Financial Analyst
Fulltime WGIGS1	100034	Accepted	10019	Personnel Clerk
Fulltime WGIWG10	100037	Accepted	10018	Personnel Clerk
Heather Hamilton	1008	Accepted	30005	Analyst-Business
Imran Khan	100093	Accepted	10123	Guest Services Manager
Ivy Goodfellow	100033	Accepted	10018	Personnel Clerk
James Jones	109	Offer	290106	Consultant-Junior
Janet Jester	1011	Offer	30005	Analyst-Business
Joe Neri	100007	Offer	10008	Data Entry Clerk
John Johnson	100036	Accepted	10007	Web Designer

[Return to Previous Page](#)

Prepare Job Offer page

Name and Applicant

Click either of these links to access applicant data on the Manage Applicant page.

Job Opening

Click this link to access the Job Opening page.

From the Prepare Job Offer page, you can drill down into specific applicant records or job openings to enter or edit offer details.

Viewing the Online Job Offer Page

The Online Job Offer page displays job offers that are posted to Candidate Gateway and that will expire within the time frame you specify when you configure the Recruiter Alerts pagelet.

Online Job Offer

Listed below are the applicants who have received online job offer for your requisitions. Select the applicant's name to view the job offer details.

Applicants Customize View All 1 First 1 of 1 Last					
Applicant Name	Applicant ID	Job Opening	Offer Date	Expiration Date	Status
Katrina Brown	277	Specialist-HRIS - 290005	05/31/2009	06/10/2009	Original

[Return to Previous Page](#)

Online Job Offer page

Applicant Name Click this link to access the Prepare Job Offer page for this applicant's offer.

Applicant ID Click this link to access applicant data on the Manage Applicant page.

Job Opening Click this link to access the Job Opening page.

Viewing the Unevaluated Answers Page and Sending Evaluation Reminders

The Unevaluated Answers page displays a list of applicants for your job openings whose answers to open-ended questions have not yet been evaluated.

Unevaluated Answers

Select rows to send reminder email to the Evaluator or to remove the evaluator from the Job Opening, then choose the appropriate action button.

Applicants with Unevaluated Answers					
Select	Applicant	Job Opening	Question ID	Date Applied	Evaluator
<input type="checkbox"/>	Deepak Patel	300089	1029	02/06/2009 7:14AM	Jacob Taylor
<input type="checkbox"/>	Mickey Stevens	500395	1034	05/31/2009 2:09PM	Betty Locherty
<input type="checkbox"/>	Cormac Francis	500395	1034	05/31/2009 2:25PM	Betty Locherty

[Select All](#) [Deselect All](#)

[Send Reminder](#) [Delete Request](#)

Unevaluated Answers page

Applicant Click this link to access applicant data on the Manage Applicant page.

Job Opening Click this link to access the Job Opening page.

Send Reminder Select the check box next to one or more of the applicants in the grid, then click the Send Reminder button to send a reminder to the evaluators who are assigned to evaluate answers for the selected applicants.

Delete Request Select the check box next to one or more of the applicants in the grid, then click the Delete Request button to remove the selected rows from this grid. Removing rows from this grid does *not* change anything about the screening process; unevaluated answers are still included in screening. If there are no evaluations for the answer, then the applicant receives no points for the answer.

Viewing the Questionnaire Request Page

The Questionnaire Request page displays a list of applicants who have not completed an online questionnaire after being linked to one of the user's job openings and after being sent a request to complete the questionnaire.

Questionnaire Request

Listed below are the applicants who have not completed the questionnaires for your requisitions. Choose Send Reminder to send email to selected applicants to remind them to complete answers to the questionnaires.

Applicants				
Select	Name	Applicant	Job Opening	Posting Title
<input type="checkbox"/>	ABELIE CLIVE	300084	300090	Guest Services Manager
<input type="checkbox"/>	Adrienne Turner	100021	10041	Web Developer
<input type="checkbox"/>	Adrienne Turner	100021	10040	Guest Services Manager
<input type="checkbox"/>	Annie Archive	100112	10139	Administrative Assistant
<input type="checkbox"/>	Christopher Boardman	100017	10041	Web Developer
<input type="checkbox"/>	Christopher Boardman	100017	10040	Guest Services Manager
<input type="checkbox"/>	Clearo Ra Cleo	500019	500404	Junior Counsel Position - Reference 500404
<input type="checkbox"/>	Clearo Ra Cleo	500019	500403	Counsel-General - Health Insurance Speciality - Reference 500403
<input type="checkbox"/>	Deborah Diba	1023	30012	Human Resource Analyst
<input type="checkbox"/>	Deborah Diba	1023	30013	Human Resource Analyst

[Select All](#)

[Deselect All](#)

[Send Reminder](#)

[Return to Previous Page](#)

Questionnaire Request page

Name and Applicant

Click either of these links to access applicant data on the Manage Applicant page.

Job Opening

Click this link to access the Job Opening page.

Viewing Additional Talent Acquisition Manager Pagelets

This section discusses:

- Viewing the My Job Openings pagelet.
- Viewing the Find Job Openings pagelet.
- Viewing the My Applicants pagelet.
- Viewing the Job Openings pagelet.

- Viewing the Quick Search pagelet.

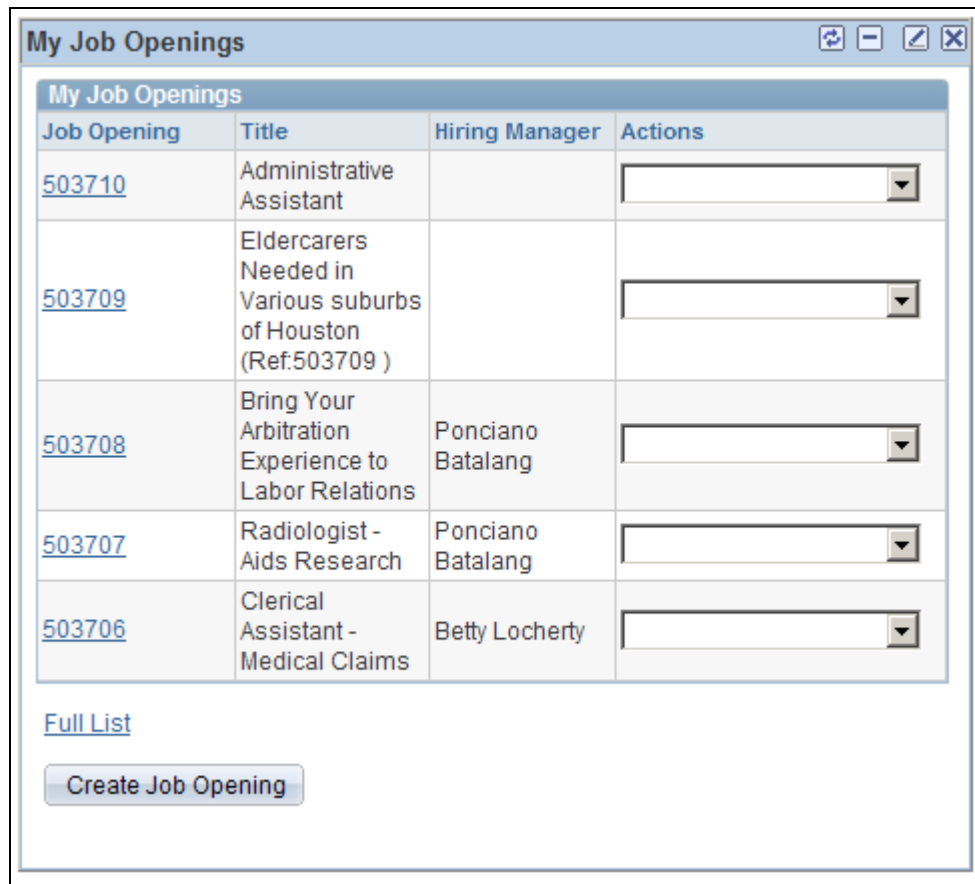
See Also

PeopleSoft Talent Acquisition Manager 9.1 PeopleBook

PeopleSoft Candidate Gateway 9.1 PeopleBook

Viewing the My Job Openings Pagelet

The My Job Openings pagelet displays the job openings that you created or where you are on the hiring team. Personalize the pagelet to control which of your job openings appear.



My Job Openings pagelet

Note. If there are no job openings that meet the criteria you selected, the pagelet displays the message *No results found for the search criteria specified.*

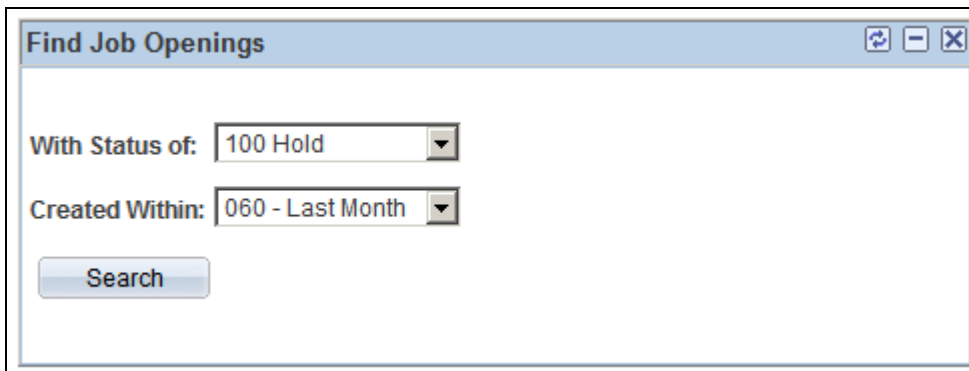
Job Opening

Click this link to access the Job Opening page, where you can review detailed information about the job opening.

Title	Displays the default posting title for the job opening. Select the Job Opening Title check box on the Personalize My Job Openings page to display this value.
Location	Displays the recruiting location associated with the job opening.
Hiring Manager	Displays the manager responsible for the job opening.
Status Code	Displays the current status of the job opening.
Days Open	Displays the number of days since the job opening has been approved.
Target Openings	Displays the number of openings for this job opening.
Number Filled Openings	Displays the number of openings that have been filled for this job opening.
Nbr of Applicants (number of applicants)	Displays the number of applicants attached to this job opening.
Activity	Click the Activity icon to access the Job Opening page: Activity & Attachments tab.
Actions	<p>Select an action to perform. The system launches the appropriate page for the action. Select from the following options:</p> <ul style="list-style-type: none"> • <i>Search for Applicants</i>: Select to access the Job Opening page: Find Applicants tab, where you can search for applicants for the job opening. • <i>Post Job Openings</i>: Select to access the Manage External Postings page, where you can post the job opening to an external job board or vendor. • <i>View Job Postings</i>: Select to access the Search Postings - Basic Search page, where you can search for job postings. • <i>Clone Job Openings</i>: Select to access the Clone Job Opening page, where you can copy the job opening to create a new opening. • <i>View Status History</i>: Select to access the Job Opening page: Activity & Attachments tab, where you can view the job history. • <i>Manage Applicants</i>: Select to access the Job Opening page: Manage Applicants tab, where you can manage recruiting processes for the job opening.
Full List	Click this link to access the Browse Job Openings page, where you can list job openings that meet the criteria you specify.
Create Job Opening	Select to access the Enter Primary Job Opening Information page where you can begin the process of creating a job opening.

Viewing the Find Job Openings Pagelet

The Find Job Openings pagelet displays search options for finding job openings.



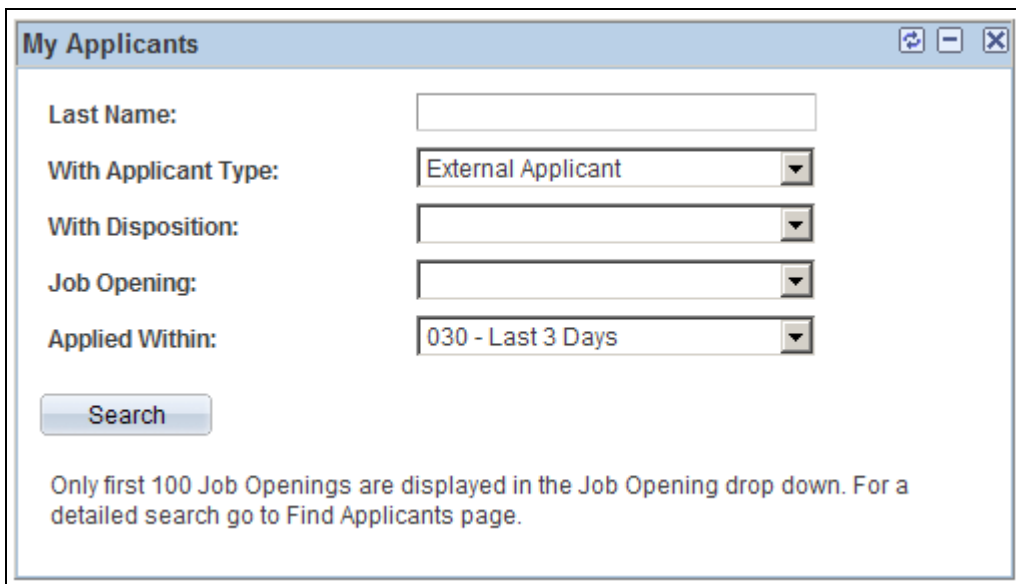
Find Job Openings pagelet

Use this pagelet to choose filtering criteria for finding job openings. Filter based on the job opening's status and when the job opening was created.

When you click the Search button, the Browse Job Openings page appears with the selected filters applied.

Viewing the My Applicants Pagelet

The My Applicants pagelet displays search options for your applicants (applicants that are attached to job openings where you are either the originator or part of the hiring team).



My Applicants pagelet

Use this pagelet to perform an applicant search using a subset of the criteria that is available on the Find Applicants page. When you click the Search button, the Find Applicant page appears and shows the results of your search.

Viewing the Job Openings Pagelet

The Job Openings pagelet displays job openings for all positions.



The screenshot shows a window titled "Job Openings" with a table of job details. Below the table is a "Full List" link and a "Create Job Opening" button.

Job Details		
Job Opening	Title	Status
994488	Eben Director	Open
900014	Supervisory Personnel Manageme	Open
900007	Supervisory Personnel Manageme	Open
900006	Director of Personnel	Open
900005	Supervisory Personnel Manageme	Open

[Full List](#)

Job Openings pagelet

Use this pagelet to view and update job openings.

See Also

[Chapter 4, "Using HRMS Portal Pack Pagelets," Viewing the My Job Openings Pagelet, page 58](#)

Viewing the Quick Search Pagelet

The Quick Search pagelet displays search fields for applicants and job openings.



The screenshot shows a window titled "Quick Search" with standard window controls (refresh, minimize, maximize, close). Inside the window, there is a dropdown menu with the text "Applicant (Last,First Name)" and a small downward arrow. Below the dropdown is a text input field containing the text "Johnson,Robert". At the bottom of the window is a button labeled "Search".

Quick Search pagelet

Use this pagelet to initiate a search for information about applicants and job openings. Select a search option, then enter a corresponding value in the lower field and click Search to view search results on the appropriate Talent Acquisition Manager page.

Search options include:

- *Applicant (Last, First Name)*: Enter the applicant's last name and then first name, then search to view the search results on the Find Applicants page.
- *Hiring Mgr (Name)*(hiring manager name): Enter the hiring manager's first and last name, then search to view the search results on the Find Job Openings page.
- *Job Opening Number*: Enter the job opening number, then search to view the search results on the Find Job Openings page.
- *Search Resume Text*: Enter text that you want to search for in a resume, then search to view the search results on the Find Applicants page.

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