PeopleSoft®

PeopleSoft Enterprise Staffing Front Office 8.9 PeopleBook

July 2005

PeopleSoft Enterprise Staffing Front Office 8.9 PeopleBook
SKU FSCM89SFO-B 0705

OpenSSL

SSLeay

Loki Library

Helma Project

Contents

About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

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

Example of a country-specific heading: “(FRA) Hiring an Employee”

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

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.46 PeopleBook: Using PeopleSoft Applications

PeopleSoft Enterprise Staffing Front Office Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft application fundamentals.
- Common elements used in this PeopleBook.
- Pages with deferred processing.

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 it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products and product lines:

- PeopleSoft Enterprise Contracts
- PeopleSoft Enterprise Expenses
- PeopleSoft Enterprise General Ledger
- PeopleSoft Enterprise Financial Management Solutions
- PeopleSoft Enterprise Performance Management
- PeopleSoft Enterprise Project Costing
- PeopleSoft Enterprise Resource Management
- PeopleSoft Enterprise Service Automation

PeopleSoft Application Fundamentals

The *PeopleSoft Staffing Front Office 8.9 PeopleBook* provides you with implementation and processing information for your Staffing Front Office system. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook.*

The companion documentation discusses important topics that apply to many or all PeopleSoft applications in PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

The following PeopleBooks also apply to Staffing Front Office:

- *PeopleSoft Enterprise Order to Cash Common Information PeopleBook*

- *PeopleSoft Enterprise Application Fundamentals PeopleBook*

Pages With Deferred Processing

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

See Also

PeopleTools PeopleBook: PeopleSoft Application Designer, "Guidelines for Designing Pages"

Common Elements Used in This PeopleBook

Applicant (Pending) — An individual who has applied for work online. An individual can be turned into an applicant when an authorized user has reviewed that person's records.

Applicant — An individual who has or is applying for work and can be considered for current job orders.

Employee — Individuals who can be placed on temporary assignments and for whom payroll records have been established.

Temporary Assignment — The placement of an employee of the staffing company at a client to perform work for a pre-determined period of time.

Career Assignment — The permanent placement of an individual at a client. The person becomes an employee of the staffing company's customer.

Career Master — The name of the customer record that is used to document information relating to the placement of individuals in career assignments. This record includes fee scheduling and other recruitment processing information.

Job Supplement — Provides the customer definition of a job, such as essential job functions for a position, unique safety requirements, equipment needs, and so on.

Order - Career — A request by a customer of a staffing agency to find one or more people to perform work at the client site on permanent basis as an employee of that customer.

Order - Temporary — A request by a customer of a staffing agency to find one or more people to perform work at the client site for a set period of time.

PeopleMatch — A feature of the Staffing Front Office application that searches for available candidates and matches those people to open orders based on specified criteria.

Quality Feedback — Provides information about the level of service and satisfaction for customers and employees. Uses online and mailed questionnaires as the primary instrument for gathering this information. Results are recorded for future reference.

Sales User — An individual who is responsible for the customer who uses your staffing company to place the order. The sales user is defined in the setup for the customer.

Service User — The customer service representative on a specific order who is responsible for order fulfillment and other aspects of customer service. The service user is defined in the setup for the customer.

Target Qualifications — Work-related qualifications that are most commonly used or sought by a customer, contact, or order

Worksite Master — Provides address, contact, and general information about the customer's workplace. The information provided can be specified when the system is set up. Examples of the types of information that could be entered are: location directions, dress codes, shift schedules, eating and break facilities, Americans with Disability Act (ADA) accommodations, and so on.

CHAPTER 1

Getting Started With PeopleSoft Enterprise Staffing Front Office

This chapter provides an overview of PeopleSoft Staffing Front Office and discusses:

- Staffing Front Office business processes.
- Staffing Front Office integrations.
- Staffing Front Office implementation tasks.

Note. Throughout this PeopleBook we refer to an “integrated environment.” This refers to situations where both Staffing Front Office and Pay/Bill Management are installed. The term “standalone” refers to situations where Staffing Front Office is installed without Pay/Bill Management.

PeopleSoft Staffing Front Office Business Processes

The following are the Staffing Front Office business processes:

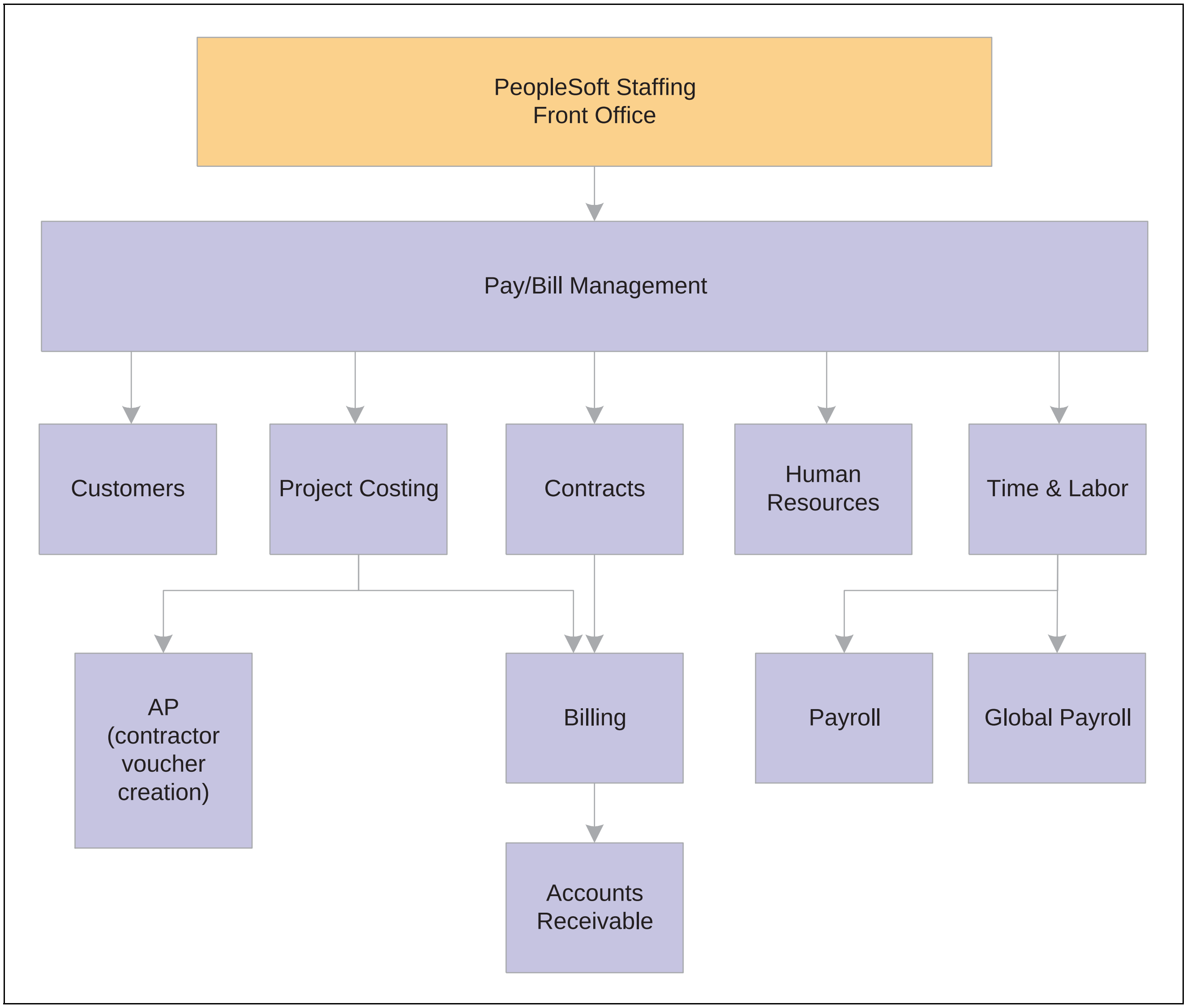
- Manage Applicant Information
- Manage Employee and Contractor Information
- Manage Customers and Prospects
- Manage Contact Information
- Process Orders
- Process Online Applications
- Post Orders Internally
- Match Employees and Contractors to Orders
- Perform Searches
- Manage Assignments
- Manage Agendas
- Review History
- Manage Resource Calendar

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

Note. For the total PeopleSoft Staffing solution, we recommend that you implement the following PeopleSoft Enterprise applications: PeopleSoft Pay/Bill Management (including PeopleSoft Project Costing, Contracts, Billing, Payables, Human Resources, Time and Labor, Payroll for North America and Global Payroll), PeopleSoft General Ledger, and PeopleSoft Receivables.

PeopleSoft Staffing Front Office Integrations

Because Staffing Front Office and Pay/Bill Management share the same transaction tables for employees, customers, contacts, orders, and assignments, Pay/Bill Management can be thought of as an integration layer between Staffing Front Office and other back-office applications such as Project Costing, Contracts, Billing, Accounts Payable, HR, Payroll, and Time and Labor.



PeopleSoft Staffing Front Office integration flow

Note. Journal entries may be sent to PeopleSoft General Ledger from PeopleSoft Project Costing, Contracts, Billing, Accounts Receivable, Payroll and Global Payroll.

We cover integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integration is located on the PeopleSoft Customer Connection Website.

Staffing Front Office Implementation

PeopleSoft Enterprise Setup Manager enables you to review a list of setup tasks for your organization for the products 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 implementation planning phase, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is in the preface of *About These PeopleBooks,* with information on where to find the most up-to-date version of each.

CHAPTER 2

Navigating in PeopleSoft Staffing Front Office

This chapter discusses how to navigate in Staffing Front Office.

Navigating in PeopleSoft Staffing Front Office

Staffing Front Office provides custom navigation center pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the Staffing Front Office custom navigation center pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator

See Also

PeopleSoft Enterprise Components for Financials, Enterprise Service Automation and Supply Chain Management 8.9 PeopleBook, "Working with Navigation Pages," Describing Navigation Pages

Using PeopleSoft Applications PeopleBook, "Working with Browser Based Applications," Using Navigation Pages

PeopleSoft Enterprise Components for Financials, Enterprise Service Automation and Supply Chain Management 8.9 PeopleBook, "Using Navigation Collections"

Pages Used to Navigate in Staffing Front Office

This table lists the Custom Navigation Center pages that are used to navigate in Staffing Front Office.

Page Name	Navigation	Usage
Front Office Management Center	Staffing, Front Office Management Center	Access the key areas of the application to manage your staffing business.
Agenda and History	Click the Agenda and History link on the Front Office Management Center page.	Work your agenda. View and create history items.
Customers and Contacts	Click the Customers and Contacts link on the Front Office Management Center page.	Add or view customer and contact information for companies or individuals.
Reports	Click the Reports link on the Front Office Management Center page.	View and create related reports.

Page Name	Navigation	Usage
Orders and Assignments	Click the Orders and Assignments link on the Front Office Management Center page.	Add or view orders and assignments.
Resources	Click the Resources link on the Front Office Management Center page.	Add, update, and review applicant, employee, and contractor information.
Search	Click the Search link on the Front Office Management Center page.	Search for candidates, orders, and customers.

CHAPTER 3

Defining Your Operational Structure

This chapter provides an overview of the PeopleSoft table setup procedure and discusses how to:

- Set up your general business environment.
- Define common definitions.
- Set up user preferences.
- Set up security.
- Set up the Verity search engine.

Understanding PeopleSoft Table Setup

PeopleSoft applications rely on tables to store your business transactions as well as the structure and processing rules that drive your system. Before you start, set up your basic framework using the pages in PeopleTools . If you are integrating with Pay/Bill Management, some of this framework should be defined first in other core Financials or HCM applications. You should work closely with administrators from your human resource and financials areas as you prepare to populate these tables.

Because of the relational design of PeopleSoft applications, the order in which you make important decisions about using the application is not necessarily the order in which you use the online pages to set up the database tables. Certain tables work as a group when you make processing or implementation decisions; therefore, you must establish data in some tables before others.

Setting Up Your General Business Environment

To set up your business environment, use the TableSet Control (SETID_TBL) and Staffing Branch (FO_BRANCH_TBL) components.

Your implementation team must decide how to classify your organization's data in Staffing Front Office. This involves determining how to define your TableSet sharing. This section provides an overview of TableSet sharing and discusses how to:

- Establish TableSet IDs.
- Set up uniform resource locators (URLs).
- Set up branches.
- Set up Project Costing business units.

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Staffing Installation Options

Understanding TableSet Sharing

TableSet sharing is a way to share common information among business units. The key to sharing that information is defining what data is available under specific circumstances. To do this, PeopleSoft uses setIDs. TableSet sharing consists of assigning setIDs to specific record groups.

Staffing Front Office provides several record groups for business unit and setID functionality.

Record groups ensure that TableSet sharing is applied consistently across related tables and views in your system. A record group can contain a single table or many tables and views. Because table sharing is defined by a record group and not by individual tables, you do not need to know every table that is involved in a particular function, such as establishing customers.

For example, mapping a new setID to record group FO_01 links that setID to all views and tables that are contained in that record group. PeopleSoft delivers your Staffing Front Office system with all tables and views assigned to record groups.

Note. Set up TableSet controls if you are sharing data across business units. If you are integrating with Pay/Bill Management, the setIDs used for customers, vendors, departments, and rates must match the setIDs used within the Financials and HRMS databases.

Branches

Branches offer your organization a structuring device through which you can implement Staffing Front Office based on how your business is organized. Your branches might be companies, subsidiaries, divisions, departments, or branch offices within your organization.

Each branch is actually a separate part of your organization. For example, you might have a southwest staffing branch and a southeast staffing branch for temporary resources.

When you establish branches in Staffing Front Office, be aware that no predefined definitions exist; use the branch organizational level in the ways most useful to you.

URL Maintenance

Staffing Front Office enables you to interact with your intranet and the Internet. Some functions in Staffing Front Office draw upon stored uniform resource locators (URLs) or web site addresses. URLs are used, for example, by the attachment function and to check stock quotes. You can add other URLs to accommodate future enhancements.

Pages Used to Set Up Your General Business Environment

Page Name	Object Name	Navigation	Usage
TableSet Control	SETID_TBL	PeopleTools, Utilities, Administration, TableSet IDs	Establish TableSet IDs to share within your environment.
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs	Set up URLs to interact with your intranet and the Internet.
Staffing Branch	FO_BRANCH_TBL	Set Up Financials/Supply Chain, Product Related, Staffing, General, Branch/BU Mapping	Define branch information and business unit mapping.

Establishing TableSet IDs

Access the TableSet Control page.

Description Enter a name to identify the TableSet control.

Short Description Enter a short name to identify the TableSet control.

Warning! TableSet IDs must be five characters long to avoid affecting system performance.

Setting Up URLs

Access the URL Maintenance page.

URL Identifier Displays the URL identifier that you entered. Define two values on this page for Staffing Front Office. Values are:

ATTACHMENTS: Defines the file transfer protocol (FTP) that specifies where in your network to store files that are attached to records in your Staffing Front Office components. For example, the path that is specified in the URL field is where you store resumes that are attached to an applicant's data. Be sure to use the exact value.

STOCK_SYMBOL: Specifies the website in which to find stock quotes for a company. You can find a customer's current stock value by clicking the stock quote link in the Customer component. Be sure to use the exact value.

Description Enter a name to identify the URL.

URL Enter the URL of the web link or FTP server that you are setting up.

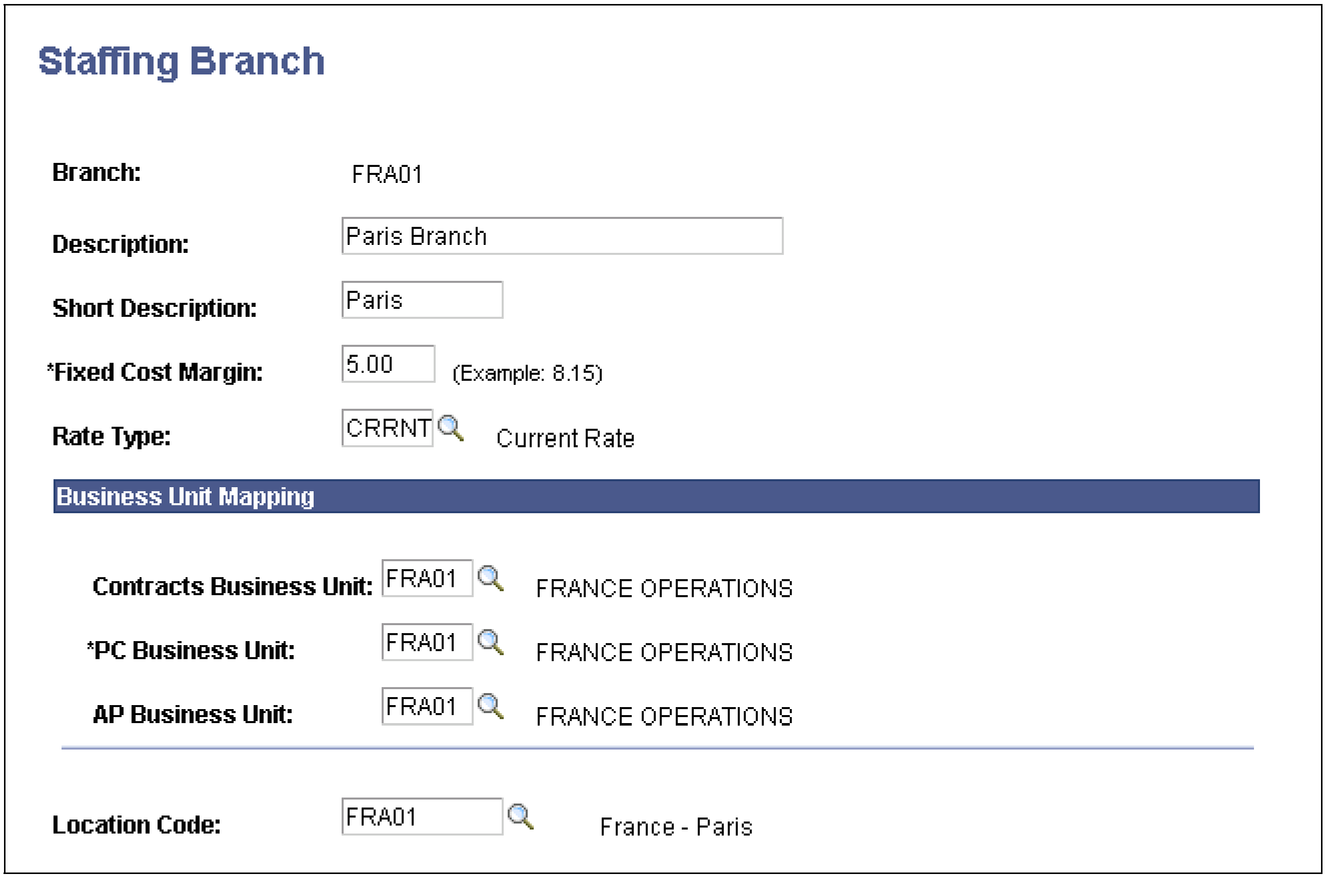
Note. URLs must be preceded by *http://* to function properly.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker, "Creating and Implementing Integrations"

Setting Up Branches

Access the Staffing Branch page.



Staffing Branch page

Branch	Select the ID of the staffing branch.
Description and **Short Description**	Enter the name of the branch or region. The system uses this value on reports, and on your internal website if you publish orders.
Fixed Cost Margin	Enter the average overhead percentage rate for this branch, not including workers' compensation. The system uses this percentage to calculate the margin for your assignments. This value appears by default in the Order Margin estimator.
Rate Type	Select the rate type that you want to use for this branch.

Note. You must set up TableSet controls if you share data across business units.

Business Unit Mapping

Contracts Business Unit	Displays the PeopleSoft Contracts business unit associated with the branch.

Note. This field appears only if you have Pay/Bill Management installed. When an order is first saved with a status different than Draft, Pay/Bill Management automatically creates a contract in the Contracts application using the contract business unit associated with the staffing branch specified in the job order.

PC Business Unit

Displays the PeopleSoft Project Costing business unit associated with the branch.

Note. This field appears even if you do not have Pay/Bill Management installed since a Project Costing business unit is part of the key of the order transaction. If Pay/Bill Management is installed, however, when an order is first saved with a status different than Draft, the system automatically creates a project in the Project Costing application using the projects business unit associated with the staffing branch specified in the job order.

AP Business Unit

The PeopleSoft Payables business unit associated with the branch.

Note. This field appears only if you have Pay/Bill Management installed. When temporary assignments are created for non-employees, Pay/Bill Management provides functionality to automatically create a voucher in the Payables application using the non-employee time reported in Time and Labor. Pay/Bill Management creates this voucher using the AP Business Unit associated with the staffing branch specified in the order.

Location Code

Enter the physical address of the branch.

Setting Up Project Costing Business Units

Staffing orders are keyed by Project Costing business units—even if you are not using Project Costing. You must set up Project Costing business units and map the staffing branches to the corresponding Project Costing business unit. If you have Staffing Front Office without Pay/Bill Management, this is the only Project Costing related configuration you must complete.

See *PeopleSoft Enterprise Project Costing 8.9 PeopleBook*, “Setting Up Project Business Units,” Defining Project Business Units.

Defining Common Definitions

This section discusses how to:

- Set up automatic numbering.
- Define rate types.
- Add or review country descriptions.
- Add or review state or province codes.
- Add or update currency codes.
- Assign national ID types.

Pages Used to Define Common Definitions

Page Name	Object Name	Navigation	Usage
Auto Numbering	AUTO_NUM_PNL	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering	Set up automatic numbering for customers, contacts, and affiliate vendors. **Note.** Orders and assignments do not use the autonumbering table, but instead use the Last EmpliD Used field on the Installation Options - Staffing page. Affiliate vendor autonumbering is only applicable if you have Staffing Front Office installed without Pay/Bill Management. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.
Market Rate Type	RT_TYPE_TBL	Set Up Financials/Supply Chain, Common Definitions, Market Rates, Market Rate Type	Define rate types to further categorize market rates. See *PeopleSoft Enterprise Global Options and Reports 8.9 PeopleBook*, "Processing Multiple Currencies," Defining Market Rate Types.
Country Description	COUNTRY_DEFN	Set Up Financials/Supply Chain, Common Definitions, Location, Country	Add or review country descriptions. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Reviewing Country Descriptions.

Page Name	Object Name	Navigation	Usage
State	STATE_DEFN	Set Up Financials/Supply Chain, Common Definitions, Location, State	Add or review a state or province codes. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Reviewing State and Province Descriptions. **Note.** PeopleSoft HCM has additional state codes for the United States that begin with special characters. These State codes are used by Payroll. Therefore, you should not synchronize the HCM and Financials state tables.
Currency Code	CURRENCY_CD_TABLE	Set Up Financials/Supply Chain, Common Definitions, Currency, Currency Code	Add or update currency codes. See *PeopleSoft Enterprise Global Options and Reports 8.9 PeopleBook*, "Processing Multiple Currencies," Maintaining Currency Tables.
National ID Types	NID_TYPE_TABLE	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, National ID Types	Assign a national ID type to a country code and provide a default national ID value. **Note.** This configuration component is used only for Staffing Front Office when implemented without Pay/Bill Management. If you have implemented Pay/Bill Management along with Staffing Front Office, synchronize this table from the HCM configuration. The Default field is used for synchronization with PeopleSoft back-office applications only. The system does not automatically enter national IDs with a default value in Staffing Front Office. Staffing Front Office uses a blank for the default value.

Setting Up User Preferences

To set up user preferences, use the Staffing (OPR_DEF_TABLE_FO) component.

User preferences are a way to set up default values that facilitate faster data entry into transaction tables. The users can override these default values on the application pages.

This section discusses how to:

- Set up staffing general user preferences.
- Set up user preferences for job data.

Pages Used to Set Up Staffing User Preferences

Page Name	Object Name	Navigation	Usage
Staffing - General Preferences	OPR_DEF_TABLE_FO1	Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences Click the Staffing - General Preferences link.	Set up general user preferences. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining User Preferences," Defining Staffing General Preferences.
Staffing - Job Data	OPR_DEF_TABLE_FO2	Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences Click the Staffing - Job Data link.	Define Staffing Front Office default values for the Job Data section of the Applicant setup pages. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining User Preferences," Defining Job Data Preferences.

Setting Up Security

To set up security, use the following components:

- Department (DEPARTMENT)
- Staffing Department Security (SCRTY_TABL_DEPT)
- Unit by Permission List (SEC_BU_CLS)
- Unit by User ID (SEC_BU_OPR)
- TableSet by Permission List (SEC_SETID_CLS)
- TableSet by User ID (SEC_SETID_OPR)
- Security Views (SECURITY_VIEWS)

You can grant access to a department, setID, or business unit using permission lists or user IDs. The pages that you use to define security using permission lists or user IDs work the same way. We discuss security for setIDs and business units in the *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook.* Department security is specific to Staffing Front Office.

This section provides an overview of security and discusses how to:

- Create a departmental reporting structure.
- Assign users permission lists.
- Grant access to a business unit using a permission list.
- Grant access to a business unit using a user ID.
- Grant access to a setID using a permission list.
- Grant access to a setID using a user ID.
- Define security types for each view of your system.
- Apply security options.

Understanding Security

This section discusses:

- Department security.
- Business unit and setID security.

Department Security

You must assign every applicant and employee who is entered in Staffing Front Office to a department. Associating a department with an employee is necessary for payroll processing and data security. All PeopleSoft users have individual security profiles that define the data that they can view or update.

You cannot access information about applicants or employees if you have not completed department security correctly.

These items must be set up for department security to work correctly:

- Department table.
- Department tree.
- Department security table.

Your security administrator should set up the department security tree using PeopleSoft Tree Manager and department security tables. Departments are setID-driven.

To enable data entry for applicants and employees, assign the user permission lists to the appropriate level in the security tree. The users with a particular permission list have access to that department's data and all data that falls underneath the department in the department tree.

Place departments on a department tree in your organization's appropriate reporting structure. You do so to ensure that the correct people at each level access the correct data.

To enter and retrieve applicant and employee data in Staffing Front Office, add all active departments to the tree manager table that is linked to your PeopleSoft logon.

Note. To gain access to an applicant or employee, add the department to the department tree under PeopleSoft Tree Manager. In addition, you must add the node (or a higher level node) to the permission list for that user under Department Security in Set Up Staffing. When you select a department for the applicant, all departments appear regardless of security. Consequently, you can mistakenly add an applicant for which no access exists.

See *PeopleTools PeopleBook: PeopleSoft Tree Manager PeopleBook*

Business Unit and SetID Security

You maintain business unit and setIDs in edit tables. You can use them as primary keys throughout the system. When a field uses an edit table to select values, you can select only the values that have been defined for that table. When PeopleSoft row-level application security is activated, you can specify values from the edit table so that only those values are available in a particular view.

Views are a means to access data horizontally across more than one table. Views are Structured Query Language (SQL) statements that filter out data rows whose key values are not needed as valid access parameters. The result is that users with the authority to access setIDs and business units see only a subset of the values from these edit tables.

After views are set up, you can specify which users or permission lists can access the pages that contain secured field values.

PeopleSoft delivers its applications with security views that apply to the key fields in your system. You can alter these views or build views of your own. A view name has one of these three file extensions to reflect the type of security for the view:

- NONVW: No security is selected for that view.
- OPRVW: Operator security is selected for that view.
- CLSVW: Class list security is selected for that view.

After you select your security options and set up security view names, you can define the actual secured field values that are used by each user or permission list. The page that you use to secure fields in your application depends on your level of system security. If you select operator-level security, you utilize user security pages. If you select class-level security, you use the permission list security pages.

See Also

PeopleTools PeopleBook: PeopleTools Security, "Understanding PeopleSoft Security"

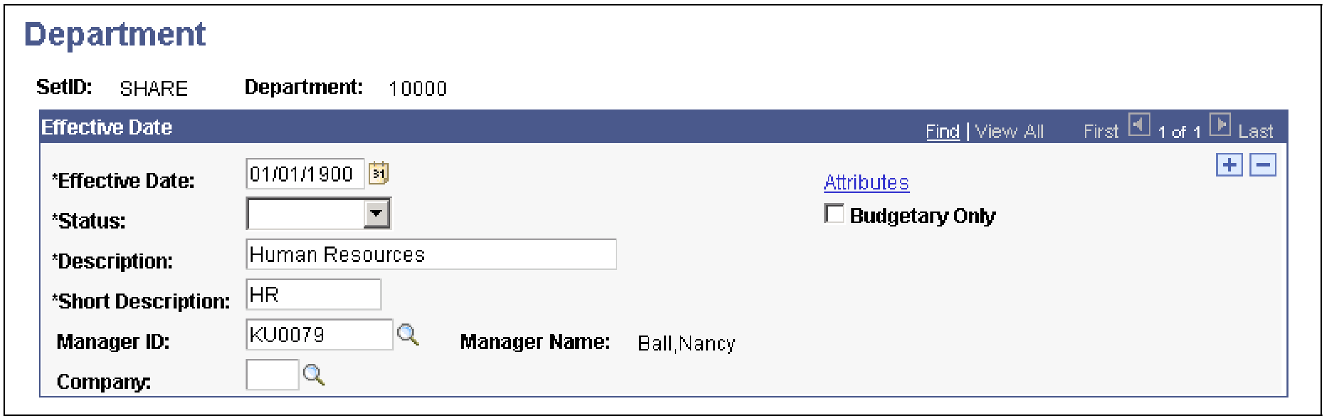
Pages Used to Set Up Security

Page Name	Object Name	Navigation	Usage
Department	DEPARTMENT	Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Define Values, ChartField Values, Department	Create a departmental reporting structure. **Note.** If you have Staffing Front Office and Pay/Bill Management you can set up departments in either HCM or in Financials and application messaging will synchronize the information. If you add departments in Financials and the information is sent by application messaging to HCM, you must populate extra fields in the HCM department component that are not visible in the Financials department component. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Department Values.
Department Security	SCRTY_TABL_DEPT	Set Up Financials/Supply Chain, Security, Staffing Department Security	Assign users permission lists to the appropriate department in the tree structure.
Department Security	FO_APPLY_SCTY	Set Up Financials/Supply Chain, Security, Staffing Apply Security Tree	Update security entries for security trees.
Business Unit Security by Permission List	SEC_BU_CLS	Set Up Financials/Supply Chain, Security, Unit by Permission List	Set up the information that an operator can access when prompting for business units. Accessed by permission list, this page displays all the business units that are accessible by the operators associated with a given permission list. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Securing Your System," Defining Row-Level Security.

Page Name	Object Name	Navigation	Usage
Business Unit Security By User ID	SEC_BU_OPR	Set Up Financials/Supply Chain, Security, Unit by User ID	Grant access to business units using user IDs. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Securing Your System," Defining Row-Level Security.
TableSet Security by Permission List	SEC_SETID_CLS	Set Up Financials/Supply Chain, Security, TableSet by Permission List	Grant access to setIDs using permission lists. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Securing Your System," Defining Row-Level Security.
TableSet Security by User ID	SEC_SETID_OPR	Set Up Financials/Supply Chain, Security, TableSet by User ID	Grant access to setIDs using user IDs. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Securing Your System," Defining Row-Level Security.
Security Views	SECURITY_VIEWS	Set Up Financials/Supply Chain, Security, Security View Names	Define the type of security for each view of your system. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Securing Your System," Defining Security Views.
Apply Security Setups	RUN_FIN9001	Set Up Financials/Supply Chain, Security, Apply Security Setups	Run the process to apply your security options. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Securing Your System," Specifying System Security Options.

Creating a Departmental Reporting Structure

Access the Department page.



Department page

Status
Select the current status of the department. Values are *Active* or *Inactive.*

Description and **Short Description**
Enter a description and short description. These fields appear on pages and in reports.

Manager ID and **Manager Name**
Enter the manager ID and name for this department.

Company
Select the payroll company into which the department reports. The system uses the payroll company to calculate workers' compensation. The system also uses the department on the order in conjunction with the state to look up the appropriate workers' compensation rate.

Note. If Staffing Front Office is installed with Pay/Bill Management, this table will be populated by either the HCM or core Financials users (thus Staffing Front Office users do not need to configure it).

Assigning Users Permission Lists

Access the Department Security page.

Row Security Permission List
Displays the row security permission list that you selected. This is established under Maintain Security.

SetID
Enter the set control value on which the system is to base your department structure.

Dept (department)
Enter the department ID that you entered on the department security tree. Users with this permission list have access to the department and any child departments that are associated with it.

Access Code
Specify which type of access the permission list has to the department ID: *No Access* or *Read/Write.*

Update security entries for security trees as necessary by accessing the second Department Security page.

Setting Up the Verity Search Engine

The Verity search engine is a third-party product that PeopleSoft has embedded into PeopleTools. Five search types—PeopleMatch, PeopleSearch, Order Search, Customer Search, and Contact Search—use the Verity search engine.

Detailed information about the Verity search engine, including configuring and using the engine, is contained in the Understanding the Verity Search Engine section of the Searching Staffing Front Office chapter.

See Chapter 6, “Searching Staffing Front Office,” Understanding the Verity Search Engine, page 71.

CHAPTER 4

Structuring Your Staffing Front Office Processing Environment

This chapter discusses your Staffing Front Office processing environment and specifically how to:

- Set up resource tables.
- Set up order tables.
- Set up general information tables.
- Set up payroll tables.

Setting Up Resource Tables

Use the pages described in this section to set up the tables and processing rules that Staffing Front Office uses to process information entered into the Employee and Applicant component pages.

To set up resource tables, use the following components:

- Jobcodes (RS_CM_JOBCODE_TBL)
- Lines of Business (LINE_OF_BUSINESS)
- Frequencies (RS_CM_FREQNCY)
- Tests (RS_CM_TEST_TBL)
- Schools (RS_CM_SCHOOL_TBL)
- Majors (RS_CM_MAJOR_TBL)
- Degrees (RS_CM_DEGREE_TBL)
- Shifts (SHIFT_CODE_TABLE)
- Recruiting Source Categories (RECRUIT_SRC_TABLE)
- Recruiting Sources (RECR_CATSRC_TABLE)
- Action Reasons (ACTRSN_TBL_GBL)

Note. In the following list, those marked with an asterisk (*) are, in an integrated environment where you have Pay/Bill Management installed as well as Staffing Front Office, configured in and owned by PeopleSoft HRMS. You set these up in HRMS and the information from these tables is synchronized with the information in the Financials tables through application messaging. Those in the following list that are not marked with an asterisk are set up in and owned by PeopleSoft Financials and do not exist in HRMS.

This section discusses how to:

- Enter job code definitions.

Note. If you have both Staffing Front Office and Pay/Bill Management installed, most of the job code setup is done in HRMS but you set up margin percents in the Financials database

---

- Enter lines of business.

  You can associate lines of business with applicants and employees. The system then uses the information as searching and matching criteria.

- Define frequencies.

Note. If you have both Staffing Front Office and Pay/Bill Management installed, perform this setup in HRMS.

- *Enter the name of tests.
- *Entering the names of schools.
- *Enter the names of majors.
- *Enter the names of degrees.
- Enter shift names.
- Set up recruiting source categories.
- Set up individual recruiting sources.
- *Define reasons for your job actions.

  When an employee job record changes, the action reason can further clarify the reason for the action taken. The values for the Action and Reason fields should be coordinated with your human resources group, and, if you are using Pay/Bill Management, the values should be identical in both Staffing Front Office and HR.

- Determine the sequence in which pages appear in the Apply Online component.

  Staffing Front Office enables potential candidates to apply to your staffing organization online using a special web page that you set up. The Apply Online Setup table determines the sequence in which each page appears to users in the self-service application.

In addition, you must set up the following information:

Type	Navigation	Reference
Resource Setup	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Resource Setup	PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, Defining Financials and Supply Chain Management Common Definitions, “Setting Up Resources” See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Resources.

Type	Navigation	Reference
*Competencies	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Competencies **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, “Establishing Application Setup Tables for Competencies” See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Establishing Application Setup Tables for Competencies.
*Competency Types	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Competency Types **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, “Establishing Application Setup Tables for Competencies” See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Establishing Application Setup Tables for Competencies.
Load Holidays	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Load Holidays	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Enabling Resource Schedules, Defining Holidays on Resource Schedules See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, “Enabling Resource Schedules,” Defining Holidays on Resource Schedules.
Holidays Holiday Schedule	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Holidays	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Work Definitions See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Establishing Application Setup Tables for Work Definitions.
*Honors/Awards	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Honors/Awards **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Accomplishments See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Establishing Application Setup Tables for Accomplishments.

Type	Navigation	Reference
*Languages	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Languages **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Accomplishments See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Accomplishments.
*Licenses/ Certifications	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Licenses /Certifications **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Accomplishments See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Accomplishments.
*Memberships	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Memberships **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Accomplishments See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Accomplishments.
*Rating Models	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Rating Models **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Competencies See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Competencies.

Type	Navigation	Reference
*School Types	Set Up Financials/Supply Chain, Common Definitions, Resources Data, School Types **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Accomplishments See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Accomplishments.
*Name Prefix	• Set Up Financials /Supply Chain, Product Related, Staffing, Resources, Name Prefix • Set Up HRMS, Foundation Tables, Personal, Name Prefix, Name Prefix Table **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Personal Information Foundation Tables, Setting Up Additional Name Information
*Name Suffix	• Set Up Financials /Supply Chain, Product Related, Staffing, Resources, Name Suffix • Set Up HRMS, Foundation Tables, Personal, Name Suffix, Name Suffix Table **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Personal Information Foundation Tables, Setting Up Additional Name Information

Type	Navigation	Reference
*National ID Types	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, National ID Types **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials.	PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Personal Information Foundation Tables, Defining National ID Types See Chapter 3, "Defining Your Operational Structure," page 7.
Resource Group Setup	Staffing, Resources, Resource Group Setup	PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Enabling Resource Matching and Cache Processes, Establishing Resource Groups See *PeopleSoft Enterprise Resource Management 8.9 PeopleBook*, "Enabling Resource Matching and Cache Processes," Establishing Resource Groups. **Note.** The Resource Pool and Supervisor fields do not display when you access this page from the Staffing menu path. In addition, while the Resource Management tree is based on a department tree, resource groups created for staffing use a staffing branch tree.

See Also

Chapter 7, "Creating Applicant and Employee Records," Entering Data to Create New Applicant Records, page 90

Pages Used to Set Up Resource Tables

Page Name	Object Name	Navigation	Usage
Job Code Definition	RS_CM_JOBCODE_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Jobcodes	Define job code information in Staffing Front Office. Before entering this information, set up your lines of business. **Note.** If you are integrating with Pay/Bill Management, job codes are established in HRMS. This page should be used for retrieving and updating job codes with specific Staffing Front Office information. You should not create them using this page.

Page Name	Object Name	Navigation	Usage
Lines of Business	LINE_OF_BUSINESS	Set Up Financials/Supply Chain, Product Related, Staffing, General, Lines of Business	Define broad categories of job sectors and product areas in which your applicants and employees have worked and your customers operate their businesses.
Frequency Setup	RS_CM_FREQNCY_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Frequencies	Define payroll frequencies. **Note.** If you have Pay/Bill Management installed, configure frequencies in HRMS; they are synchronized with Financials through application messaging.
Test	RS_CM_TEST_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Tests	Define the names of the tests that you regularly administer to applicants and employees. **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials. See PeopleSoft 8.9 Human Resources PeopleBook: Manage Competencies, Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments
School	RS_CM_SCHOOL_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Schools	Define the names of the schools to be referred in the education records of your applicants and employees. The school code table serves as a prompt table on the Education page in the Applicant and Employee components **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials. See PeopleSoft 8.9 Human Resources PeopleBook: Manage Competencies, Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments

Page Name	Object Name	Navigation	Usage
Major	RS_CM_MAJOR_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Majors	Define the names of the majors to be referred in the education records of your applicants and employees. **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials. See PeopleSoft 8.9 Human Resources PeopleBook: Manage Competencies, Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments
Degree	RS_CM_DEGREE_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Degrees	Define the names of the degrees to be referred in the education records of your applicants and employees. **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials. See PeopleSoft 8.9 Human Resources PeopleBook: Manage Competencies, Setting Up Competencies and Accomplishments, Setting Up Educational Qualifications and Accomplishments
Shift	SHIFT_CODE_TABLE	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Shifts	Define the shifts that your employees can work.
Recruiting Source Categories	RECRUIT_SRC_TABLE	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Recruiting Source Categories	Define recruiting source categories.
Recruiting Sources	RECR_CATSRC_TABLE	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Recruiting Sources	Define individual recruiting sources.

Page Name	Object Name	Navigation	Usage
Action Reason	ACTRSN_TBL_GBL	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Action Reasons	Define the reasons for your employment actions. **Note.** If you have Pay/Bill Management installed, you must set up this table in HRMS, not in Financials. See PeopleSoft 8.9 Human Resources PeopleBook: Administer Workforce, Setting Up the Administer Workforce Business Process, Defining Duty Types and Reasons for Personnel Actions
Apply Online	FO_ESS_OPTIONS	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Apply Online	Determine the sequence of pages in the Apply Online component.

Setting Up Job Codes

Access the Job Code Definition page.

Effective Date Select the date the job code is effective.

Status Select the current status of this job code: *Active* or *Inactive.*

Line of Business Enter the product area to which the job code belongs.

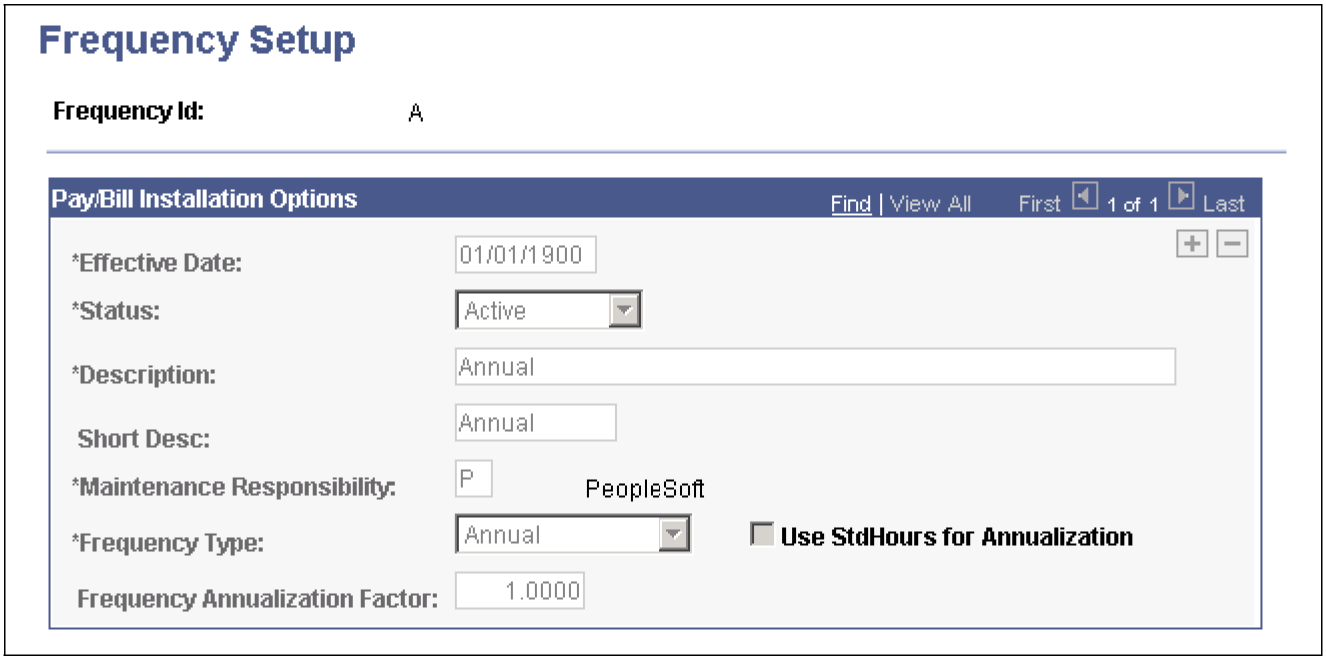
Defining Lines of Business

Access the Lines of Business page.

Enter a unique code to identify this line of business, and enter a short and long description.

Entering Frequencies

Access the Frequency Setup page.



Frequency Setup page

Note. If you are integrating with Pay/Bill Management, you establish the frequency information in PeopleSoft HRMS and it is sent to Financials. If this is your situation and you are a system administrator, PeopleSoft recommends that you do not make this page accessible to general users.

Maintenance Responsibility

Select a maintenance responsibility:

- *C* (customer): You define the frequency ID, and are responsible for keeping this frequency code up to date.
- *P* (PeopleSoft): PeopleSoft delivers the frequency in the system and is responsible for keeping it up to date. The other fields on this page become unavailable.

Frequency Type

Select a frequency type, such as: *Annual, Hourly,* or *Daily.*

Note. The Use StdHours for Annualization check box becomes available after you save the page, and only if you select the *Hourly* frequency type.

Use StdHours for Annualization (use standard hours for annualization)

Select to have the system use job standard hours for annualization instead of the frequency annualization factor. The system sets the frequency annualization factor to 0. After you select this check box and save the page the Frequency Annualization Factor field becomes unavailable.

Note. You can use only hourly frequencies that use standard hours for annualization for compensation and pay frequency in PeopleSoft HRMS, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll.

Frequency Annualization Factor

Enter the number of frequency periods to occur in one year.

For example, a *Daily* compensation frequency is *260* because there are 260 workdays in the year. You can also define a frequency. For example, a frequency ID you name W53 would have a *Weekly* frequency type and a frequency annualization factor of *53.*

Warning! If you change the effective status, frequency type, or annualization factor of an existing frequency, you receive a warning message saying that previous calculations using this frequency aren't synchronous with the new values of the frequency.

See Also

PeopleSoft Enterprise Resource Management 8.9 PeopleBook, Setting Up PeopleSoft Resource Management Without an Integrated HRMS, Establishing Application Setup Tables for Work Definitions

Entering the Names of Tests

Access the Test page.

Enter a short and long description for the test.

Note. Test table codes are global, not driven by setID.

Entering the Names of Schools

Access the School page.

School Code and **Description**	Enter a unique code and description for each school.
Country	Enter the country in which the school is located.
State	Enter the state in which the school is located.

Entering the Names of Majors

Access the Major page.

Enter a unique code for the major and a short and long description.

Entering the Names of Degrees

Access the Degree page.

Enter a Degree Code, Description, Short Description, and Country for the degree.

Entering Shift Names

Access the Shift page.

Enter a Shift Code, Description, and Short Description, for the shift.

Setting Up Recruiting Source Categories

Access the Recruiting Source Categories page.

Note. Access this page only if you have Staffing Front Office installed.

Enter a Category, Description, and Short Description.

Setting Up Individual Recruiting Sources

Access the Recruiting Sources page.

Enter a Source, Description, and Short Description.

Defining Reasons for Your Employment Actions

Access the Action Reason page.

Enter the Effective Date and Status of the action reason as well as a short and long description.

Note. If you have Pay/Bill Management in addition to Staffing Front Office, this table should be configured in HRMS and synchronized with Financials through application messaging. If this is your situation and you are a system administrator, do not make this page accessible to general users.

If you do not have Pay/Bill Management installed, use this page to maintain the information.

Defining the Sequence in Which Pages Appear in the Apply Online Component

Access the Apply Online page.

You must select the check boxes for the Welcome Page and the Submit Application page, and these must be ordered first and last, respectively.

Select the check box next to the other pages that you want to include (or clear those you do not want to include) and indicate the order in which you want them to appear by entering a number that is greater than *1* and less than *99* in the corresponding Sequence column field.

Setting Up Order Tables

To set up your order tables, use the Rate Profile (FO_RATE_PROFILE), User Order Type (FO_ORDER_TYPE), and Rate Element (FO_RATE_ELEMENT) components.

You can use the pages described in this section to set up the tables and processing rules that Staffing Front Office references to process the information entered into the Order and Assignment component pages.

This section discusses how to:

- Create rate profiles.
- Create user-defined order types.
- Create rate elements.
- Set up order event groups.

The system uses order event groups to automatically schedule a set of agenda items, such as calls or visits, once a candidate accepts a temporary or career assignment. Each order event is associated with a setID.

Order Events automatically generate agenda items based on the criteria that is set. The objective for multiple agenda items is to monitor how an employee is working out on a career or temporary order. The system schedules order events when an applicant or an employee accepts an offer.

- Create career order fee schedules.

  The fee schedules that you set up are used to calculate the placement fee fields on the in the Order component. Fee schedules enable you to project a maximum and minimum income amount based on the salary range you enter on the career order. Potential income scales are setID-driven.

- Create fall off terms.

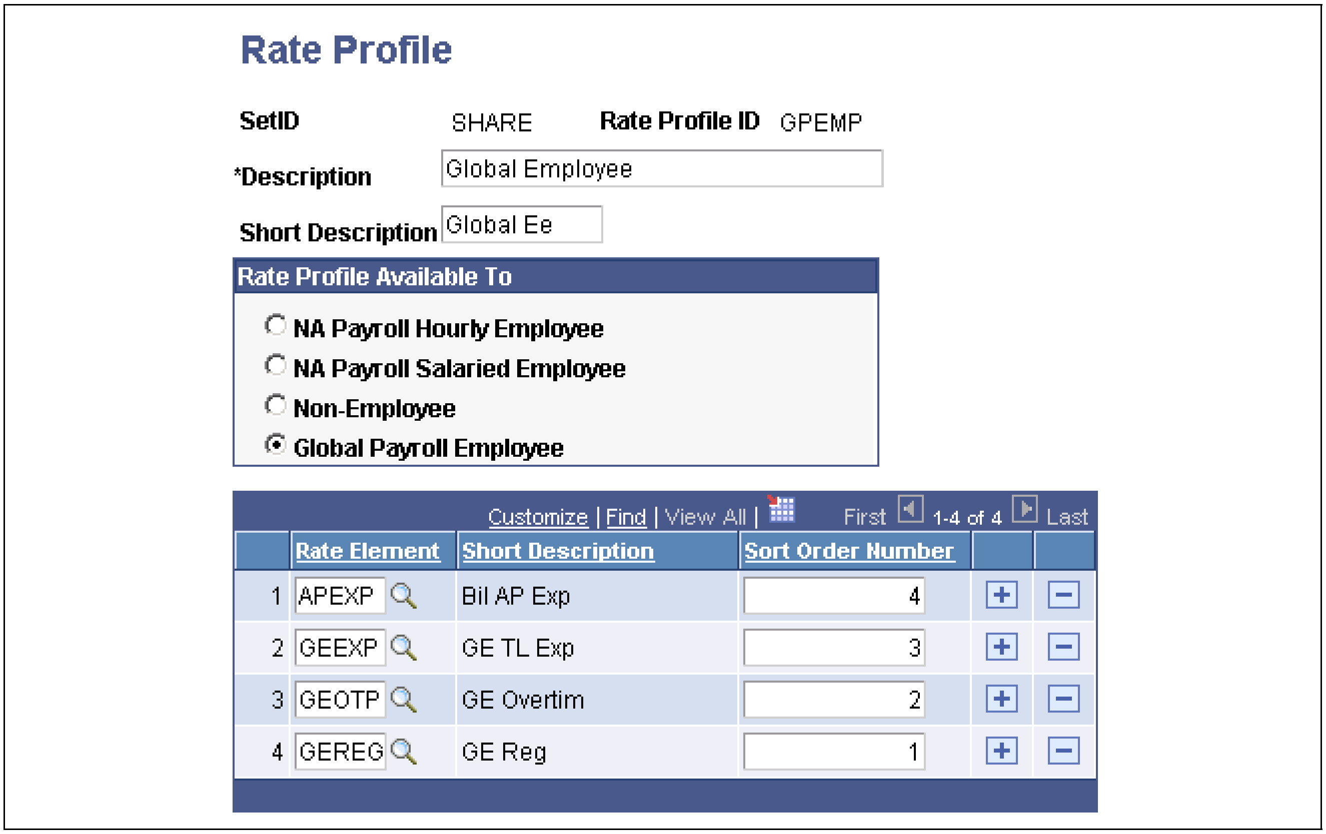
  A fall off indicates that a candidate did not begin or complete a career placement that he or she accepted. When Pay/Bill Management is installed in addition to Staffing Front Office, when a fall off occurs, a credit is automatically created for the customer in the Billing application.

Pages Used to Set Up Order Tables

Page Name	Object Name	Navigation	Usage
Rate Profile	FO_RATE_PROFILE	Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Rate Profile	Define rate profile elements for temporary and salaried staff as well as contractors. Use this page whether or not you have Pay/Bill Management installed.
User Order Type	FO_ORDER_TYPE	Set Up Financials/Supply Chain, Product Related, Staffing, Orders, User Order Types	Set up user-defined order types.
Rate Element	FO_RATE_ELEMENT	Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Rate Elements	Define FLSA category, rate behavior, and employee type for the rate element, and enter pay descriptions for temporary and salaried staff and contractors. Set the action for how you want to use the pay type, and enter the factor by which you want the system to multiply the pay rate.
Order Event Group	FO_ORDR_EVENT	Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Order Event Groups	Define a series of agenda items that you want to schedule when a candidate accepts an offer. The order events trigger the creation of entries in the agenda table.
Fee Schedule	POTENTIAL_INCOME	Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Fee Schedules	Define career-order fee schedules. The fee schedules are used in career orders to determine the percentage to be applied on the employee's compensation to calculate the placement fee.
Fall Off	FALL_OFF_TBL	Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Fall Offs	Define a list of terms to indicate why a candidate did not begin or complete a career placement that he or she accepted.

Entering Rate Profile Definitions

Access the Rate Profile page.



Rate Profile page

Description and Short Description

Enter descriptions for the Rate Profile ID you selected. For example, *NA Salaried* (North American salaried) or *GPEMP* (global employee).

Note. When Staffing Front Office is installed without Pay/Bill Management, only four rate profiles can be created (one each for NA hourly employees, NA salaried employees, non-employees and Global Payroll employees). When Staffing Front Office is installed with Pay/Bill Management, you can create as many different rate profiles as needed.

Rate Profile Available To

NA Payroll Hourly Employee (North American payroll hourly employee),**NA Payroll Salaried Employee** (North American payroll salaried employee), **Non-Employee,** or **Global Payroll Employee**

Select an employee type to which to make the rate profile available.

Rate Element

Enter the rate elements for this profile ID.

Sort Order Number

Enter the order in which this rate element displays when creating an assignment that uses this rate profile.

See Also

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Rate Profiles

Creating User Defined Order Types

Access the User Order Type page.

User Order Type Enter up to a five-character title for this order type.

Description Enter a description of the order type.

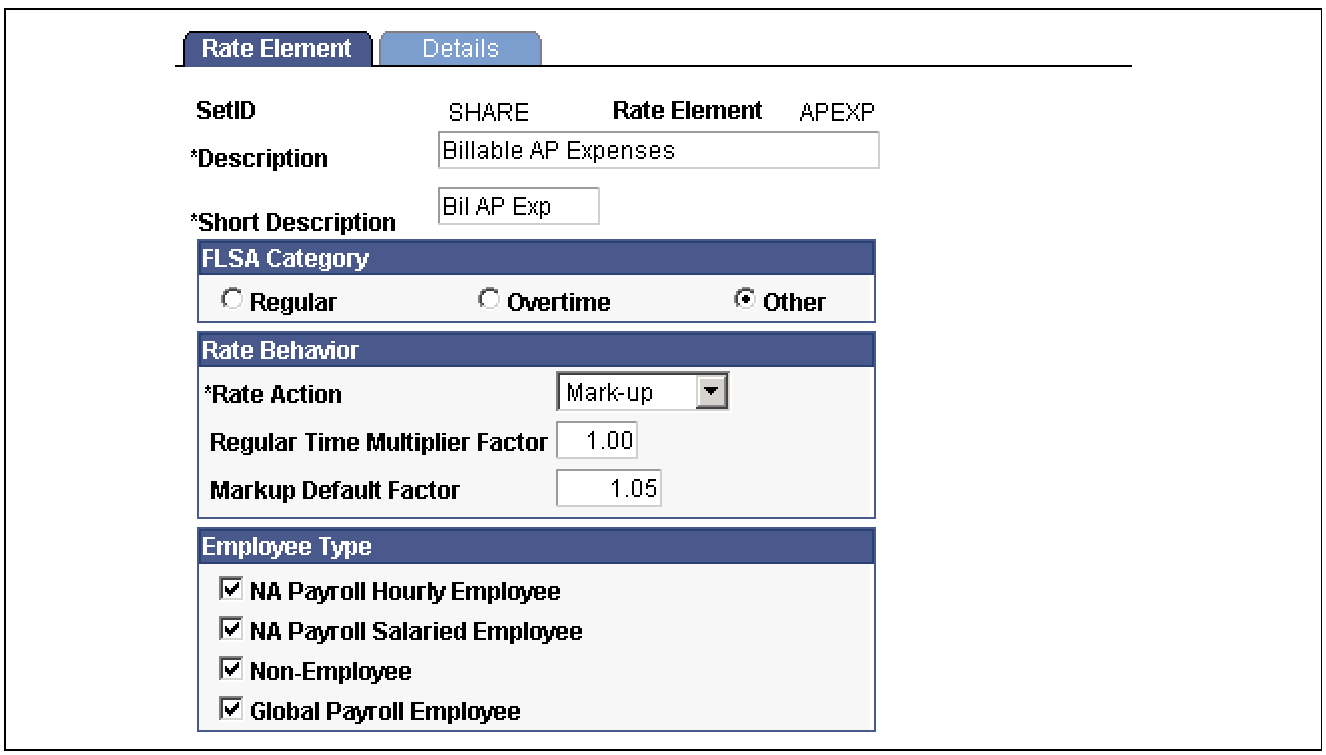
Type of Order Select the system-defined order type: *Career Order* or *Temporary Order.*

Note. Each user-defined order type must map to one of these two system-defined order types.

Temp To Hire If you selected *Temporary Order* in the Type of Order field, enter a user-defined order type to be used in case a temporary assignment is converted to a permanent placement at the customer site.

Creating Rate Elements

Access the Rate Element page.



Rate Element page

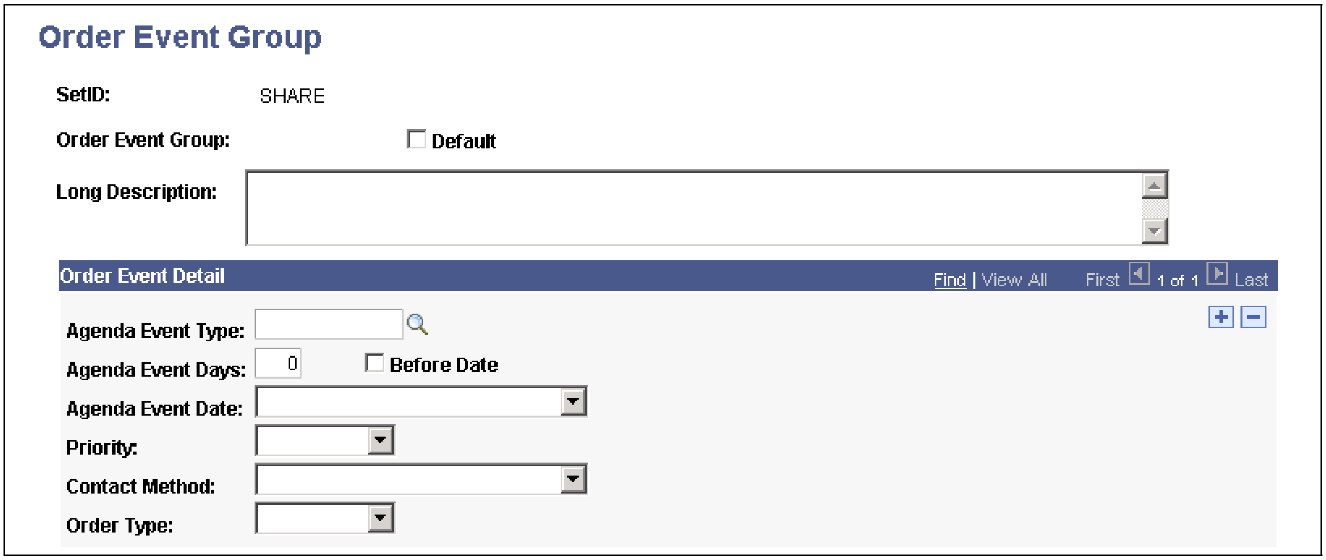
We discuss this page in the Pay/Bill Management PeopleBook. Only the first page in this component is used when Front Office is installed without Pay/Bill Management. When Pay/bill Management is installed, both pages as used.

See Also

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, “Configuring Your PeopleSoft Pay/Bill Management System,” Setting Up Rate Profiles and Rate Elements

Setting Up Order Events

Access the Order Event Group page.



Order Event Group page

Default	Select this check box to set the order event group that will be the default used if a group has not been selected for a contact or an order.
Agenda Event Type	Enter an event, such as *AVAIL* (availability), *CALL,* or *OFFER* (make offer).
Agenda Event Days	Enter the number of days from the agenda event date that you want the agenda item scheduled. This determines when a call or visit should occur using the current date, the start date, or the end date of the assignment as a counting point.
Before Date	Select this check box to indicate that you want the item scheduled before the agenda event date.
Agenda Event Date	Select either *Current Date, End Date* (for the assignment), *Guarantee Date* (for the assignment), or *Start Date* (for the assignment).
Priority	Select a priority to associate with the agenda event when the system schedules the item to the agenda: *High, Low, Medium.*
Contact Method	Select *E-Mail, In-Person, In-Writing, Telephone Call,* or *Verbal.* The method displays as the preferred contact method when the system creates the agenda item.
Order Type	Select an option to indicate whether the agenda event applies to temporary orders, career orders, or both.

Creating Career-Order Fee Schedules

Access the Fee Schedule page.

From and To	Enter the lower and upper salary range for the fee percentage. **Note.** Salary ranges must begin at the lowest amount and continue to the highest. Salary ranges cannot overlap.
Fee % (fee percent)	Enter the percentage of salary plus additional pay (for example, a hiring bonus) that your organization takes as a placement fee.

Creating Fall Off Terms

Access the Fall Off page.

Enter a fall off code in the Fall Off Code field as well as a Description and any Comments. Fall off codes are setID-driven.

Examples include a candidate not showing up for work on the first day (*No Show*) or a candidate not returning to work after starting the job (*Quit*).

Setting Up General Information Tables

To set up general information tables, use the following components:

- Billing Calculation (FO_JOB_BILLING)
- Job Titles (FO_JOBTITLE)
- Event Types (FO_EVENT_TYPE)
- Contact Type Codes (CONTACT_TYPE_CODE)
- Contact Events (FO_EVENT_CONT_TYPE)
- Form Items (TEMPLATE_ITEM_TBL)
- Forms (FO_TEMPLATE_TABLE)
- Affiliate Vendors (AFFL_VENDOR)
- Order Priority (RS_SO_PRIORITY)
- Resource Priorities (FO_RSRC_PRIORTY)
- Salutation Table (SALUTATION_TABLE)
- Attachments (ATTACHMENT_TBL)
- Auto Numbering (AUTO_NUM_PNL)
- Auto Numbering by Installation (AUTO_NUM_INSTALL)
- Qualification Profile (RS_RESRC_TEMPLT)
- Task Categories (RS_TASK_TYPE)
- Test Configuration Details (FO_TEST_CFG_DTL)

You can use the pages described in this section to set up the tables and processing rules that Staffing Front Office will employ to process information entered into the Order, Applicant, Employee, Customer, and Assignment components.

This section discusses how to:

- Entering default values for pay grades and margin rates.
- Enter job title codes.
- Create or modify event types for the agenda, history, and event group functions.

  When you define agenda event types the system uses them to classify agenda and history items. Agenda events are used to create action items. Action items become history items when complete. The system uses agenda events with temporary and career orders. Event types are global, not setID-driven.
- Define customer contact types.
- Create contact events.
- Create form items.
- Group form items into a form.
- Create affiliate vendors,

  You only create affiliate vendors here if you have Staffing Front Office without Pay/Bill Management. If you also have Pay/Bill Management installed, you set up vendors in PeopleSoft Payables.

  If you use other staffing companies to fill orders for temporary work, you must set up those companies as vendors. When an individual is added as a contractor in order to be placed on assignments, you must associate the individual with one of these vendors. You can enable automatic numbering to increment the vendor ID by one number each time you save a new vendor. Affiliate Vendors are setID-driven.
- Establish priority status codes for orders.
- Establish priority status codes for resources.
- Enter salutations.
- Set up attachment types.

  Attachment types are descriptions of attachments. The system uses them as prompt values wherever Staffing Front Office supports attachments (for example, to attach a resume in the Applicant component).
- Set up autonumbering for customers, contacts, and affiliate vendors.
- Set up autonumbering for agenda, history, and applicant IDs.
- Create qualification profiles.
- Create task categories.
- Create test configuration details.

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Defining Additional Common Information

Pages Used to Set Up General Information Tables

Page Name	Object Name	Navigation	Usage
Billing Calculation	FO_JOB_BILLING	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Jobcodes, Billing Calculation	Define default values for pay grades and the margin rates at which an order is profitable.
Job Category and Related Titles	FO_JOBTITLE	Set Up Financials/Supply Chain, Product Related, Staffing, General, Job Titles	Define job title codes.
Event Types	FO_EVENT_TYPE	Set Up Financials/Supply Chain, Product Related, Staffing, General, Event Types	Define events for the agenda, history, and event group functions.
Contact Type Code	CONTACT_TYPE_CODE	Set Up Financials/Supply Chain, Product Related, Order Management Foundation, Contact Type Codes	Define different types of customer contacts. The system uses contact types to classify the type of contacts related to a customer. You can assign contact types on the Related Customers page in the Contact component. See *PeopleSoft Enterprise Order Management 8.9 PeopleBook*, “Implementing PeopleSoft Order Management Options,” Setting Up Order Processing Options.
Contact Events	FO_EVENT_CONT_TYPE	Set Up Financials/Supply Chain, Product Related, Staffing, General, Contact Events	Define a list of marketing events in which you want to include the contacts.
Form Item	TEMPLATE_ITEM_TBL	Set Up Financials/Supply Chain, Product Related, Staffing, General, Form Items	Define items that will appear on your forms.
Form	FO_TEMPLATE_TABLE	Set Up Financials/Supply Chain, Product Related, Staffing, General, Forms	Group form items into a form.
Vendor	AFFL_VENDOR	Staffing, Vendors and Contractors, Affiliate Vendors	Define affiliate vendors that you might use to fill orders for temporary work if all of your resources are busy on assignments. This component should only be used by customers who have Staffing Front Office without Pay/Bill Management.

Page Name	Object Name	Navigation	Usage
Vendor Phone Information	VENDOR_PHONE_SEC	Click the Telephone link on the Affiliate Vendor page.	Enter phone information for affiliate vendors.
Order Priority	RS_SO_PRIORITY	Set Up Financials/Supply Chain, Product Related, Staffing, Orders, Order Priority	Define the relative priority of orders.
Resource Priority	FO_RSRC_PRIORTY	Set Up Financials/Supply Chain, Product Related, Staffing, Resources, Resource Priorities	Define the relative priority of resources.
Salutation Table	SALUTATION_TABLE	Set Up Financials/Supply Chain, Common Definitions, Customers, Salutation Table	Define the salutations or greetings that you want to use in your system. See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining Additional Customer Information," Establishing Customer-Related General Options.
Attachment Type	ATTACHMENT_TBL	Set Up Financials/Supply Chain, Common Definitions, Attachments	Define the types of attachments that you want the system to accept. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.
Auto Numbering	AUTO_NUM_PNL	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering	Define automatic numbering specifications for customers, contacts and affiliate vendors. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.

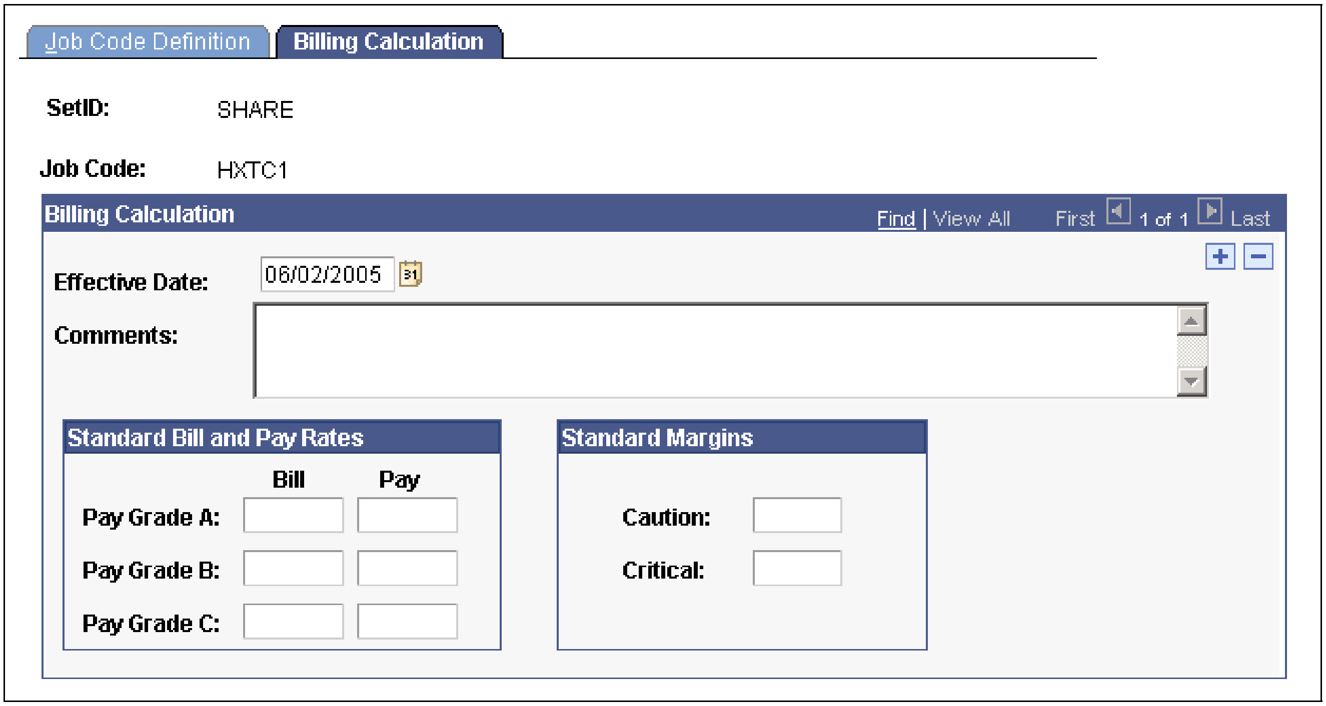
Page Name	Object Name	Navigation	Usage
Auto Num Install (Auto Number Install)	AUTO_NUM_INSTALL	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering by Installation	Set up automatic numbering specifications by installation for agenda, history, and applicant IDs. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.
Qualification Profile	RS_RESRC_TEMPLT	Staffing, Resources, My Qualification Profiles	Create or update qualification profiles for personal use.
Task Categories	RS_TASK_TYPE	Set Up Financials/Supply Chain, Product Related, Staffing, General, Task Categories	Create task categories. At least one task category needs to be created for staffing assignments if you configure the Staffing Installation options to populate the Resource Calendar when assignments are created.
Test Configuration Details	FO_TEST_CFG_DTL	Set Up Financials/Supply Chain, Product Related, Staffing, General, Test Configuration Details	Create test configuration details. The test configuration details enable users to do combination searches in PeopleMatch and PeopleSearch by specifying both a test ID and a test score as part of the search criteria.

See Also

PeopleSoft Enterprise Resource Management 8.9 PeopleBook, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Competencies

Entering Default Values for Pay Grades and Margin Rates

Access the Billing Calculation page.



Billing Calculation page

Billing Calculation

Effective Date and **Comments**

Enter the date the job code rates and margins are effective, and any comments.

Note. This effective date is independent of the effective date for the job code on the Job Code Definition page.

Standard Bill and Pay Rates

Bill and **Pay**

Enter values for the pay grades that will display on the Orders - Billing page. You can use this information to determine the appropriate rates.

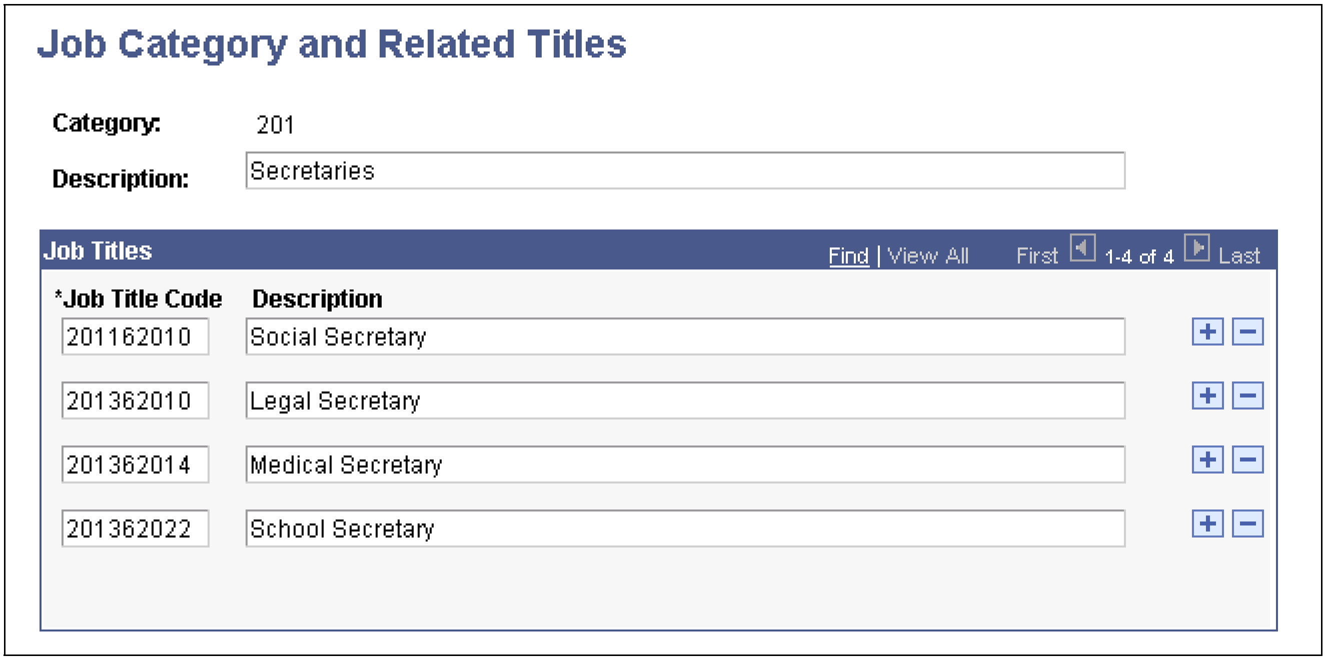
Standard Margins

Caution and **Critical**

Enter the margin percentages at which an order is not profitable. The system uses this entry for a calculation in the Order and Assignment components. Color-coded symbols signal the profitability of the order. A margin that falls below the specified caution margin displays a yellow symbol; a margin that falls below the critical margin displays a red symbol.

Entering Job Title Codes

Access the Job Category and Related Titles page.



Job Category and Related Titles page

Category	Displays a three character job title category.
Job Title Code and **Description**	Enter a unique code for the job title, and enter a description.

See Also

PeopleSoft Enterprise Resource Management 8.9 PeopleBook, "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Work Definitions

Creating or Modifying Events Types for the Agenda, History, and Event Group Functions

Access the Event Types page.

Event Type and **Description**	Enter a unique code to identify an event type, and then enter a description.

Warning! You can modify or add event types to this list. However, do not change the following events: *CALL, OFFER,* and *FALL.*

Creating Contact Event Listings

Access the Contact Events page.

Event Contact Type	Enter the name of the contact event.
Contact Event Frequency	Enter how often the event takes place, such as *QUARTERLY,* or *MONTHLY.*

Creating Form Items

Access the Form Item page.

In Field Name, enter a description of the type of data you are capturing. These can be questions or field names that will appear on the form entry pages.

Grouping Form Items

Access the Form page.

Effective Date	Enter the date the form is effective.
Status as of Effective Date	Select the status of the form: *Active* or *Inactive.*
Description	Enter the name of the form.
Sequence Number	Enter a number to determine the order in which the form items will appear. Form items appear from the lowest to the highest number.
Form Item	Select the form item that you want to display on the form.

Creating Affiliate Vendors

Access the Vendor page.

Note. If you have Pay/Bill Management installed along with Staffing Front Office, we recommend that you do not make this page accessible to general users.

Name	Enter the vendor name.
Federal ID	Enter the federal tax ID of the vendor.
Website URL	Enter a link to the vendor's website.
	Click the URL button to connect to the vendor's web site entered on the left. If you are adding a new affiliate vendor, you may have to save the page prior to using the URL button.
Contact Name	Enter the name of the contact at the vendor.
Email ID	Enter the contact's email address.
	Click the Send Email button to send an email.
Country	Select the country where the vendor is located. **Note.** The system displays the address fields based on the country you select. Enter the address information after you enter the country.
Telephone	Click this link to enter the vendor's phone numbers.

Establishing Priorities for Orders

Access the Order Priority page.

Sequence Number	Enter a value to indicate the relative priority of orders.
Description	Enter a description of the priority.

Establishing Priorities for Resources

Access the Resource Priority page.

Priority Sequence Number	Enter a value to indicate the relative priority of resources. Enter a Description as well.

Creating Qualification Profiles

Access the Qualification Profile page.

Profile Description

Description	Enter a description for this profile.
Comments	Enter any comments to accompany the profile.
This qualification profile is for my personal use only. Do not make this profile visible to any other users.	Select this check box to prevent other users from being able to view your profile.

Profile Competencies

Competency	Enter a competency you want the resource to possess, their Proficiency at it, its relative Importance, and the preferred Years of Work Experience you'd like the resource to have utilizing the particular competency.

Profile Accomplishments

Select the accomplishments you want the resource to have achieved.

Degrees	Enter Accomplishment, Major Code, and Importance.
Languages	For each language, select the appropriate desired efficiency that the resource Speak, Read, and Write, and the overall Importance of their language skill.
Licenses	Enter theAccomplishment, Country, State, and Importance.
Memberships	Enter the Accomplishment and Importance.

Creating Task Categories

Access the Task Categories page.

You must configure at least one task category and must select the Use for Assignment check box. This category must be the same as the Default Task Category specified on the Staffing Installation page.

Note. The Map Time Reporting Codes group box is only to be used for Resource Management, not for Staffing Front Office.

Resource Schedule Categories

Task Description
Enter a description of the task category.

Use for Assignment
Select this check box if you want the system to use the task category for assignments.

Comments
Enter any comments relevant to the task category.

Flexibility and **Reserved Status Flexibility**
Enter a decimal value between *0* and *1* to indicate the relative possibility that a task in this task category can be moved or rescheduled.

Map Time Reporting Codes

SetID
Enter the setID to which you want to map the time reporting code. This field is used only by Resource Management. It is not used by Staffing Front Office.

Time Reporting Code
Enter the code to map to the setID. This field is used only by Resource Management. It is not used by Staffing Front Office.

Creating Test Configuration Details

Access the Test Configuration Details page.

Test ID
The ID of the test you selected.

Pass/Fail
Select to indicate the test result is measured through a simple a pass or fail assessment.

Range
Select to indicate that the test results are measured via a numeric score. In the From and To fields, enter a range to define the acceptable scores for the test.

Setting Up Payroll Tables

To set up payroll tables, use the following components:

- Companies (COMPANY_TBL)
- Location (LOCATION_TBL)
- Benefit Programs (BEN_DEF_PROG)
- Pay Groups (PAYGROUP_TABLE)
- Tax Locations (TAX_LOCATION_TBL)
- State Tax Properties (STATE_TAX_TABLE)
- Local Tax Properties (LOCAL_TAX_TABLE)
- Workers’ Comp Company Setup (FO_WC_CO_MOD)
- Workers’ Comp State Codes (FO_WC_STATE)
- Workers’ Comp State Rates (FO_WC_CO_STATE)
- Workers’ Comp by Job Code (FO_JOBCODE_PRD)

Use the pages described in this section to set up the tables and processing rules that Staffing Front Office will use to process information entered into the pages that make up the Applicant, Employee, and Assignment components.

This section discusses how to:

- Create or modify your payroll company.

  You must define at least one company. If your Staffing Front Office application integrates with PeopleSoft HRMS, each employee must be associated with a company to pass payroll and human resource information to Pay/Bill Management. In integrated environments, companies should be defined in HRMS and are synchronized with Financials through application messages. Work with your human resources group to establish appropriate company values. The company value is global, not setID driven.

  Note. If you have Payroll for North America in addition to Staffing Front Office, you only configure the tax tables in HRMS.

- Create or modify locations codes.
- Add location details.
- Set up your company's benefit programs.

  You must define at least one benefit program in Staffing Front Office. Every employee must be associated with a benefit program in Staffing Front Office to pass payroll and benefits information in Pay/Bill Management. In integrated environments, benefit programs should be defined in HRMS and are synchronized with Financials through application messages.

- Create payroll processing groups.

  You must define at least one pay group in Staffing Front Office. Paygroups are set up by company, and are not driven by setID. To enter a pay group, you must first create a company for payroll. In integrated environments, pay groups should be defined in HRMS and are synchronized with Financials via application messages.

- Define payroll tax locations.

  You must define at least one tax location code in Staffing Front Office. The values you specify are the individual taxing locations for payroll processing; payroll uses these codes. The tax location code value is global, not driven by setID. In integrated environments, tax location codes should be defined in HRMS and are synchronized with Financials through application messages.

- Set up the state tax properties.

  The information that appears in Staffing Front Office is for reference purposes only. You should maintain the information in the application that you use for back-office transactions.

- View geographical area information for local taxing authorities.
- View local withholding tax methods and rates.
- View a locality's tax reporting requirements.
- Set up a workers' compensation company.
- Associate a workers' compensation code with a state.
- Establish rates for each of your workers' compensation codes.
- Associate workers' compensation codes with job codes.

Note. If you are integrating with Pay/Bill Management, these tables are set up in PeopleSoft HRMS and are sent back to Financials through application messaging to be used when hiring employees and filling orders. These pages should not be accessible to users within Staffing Front Office.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook

Pages Used to Set Up Your Payroll Tables

Page Name	Object Name	Navigation	Usage
Company	COMPANY_TBL	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Companies	Define or modify your payroll company. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging.
Location Definition	LOCATION_TBL	Set Up Financials/Supply Chain, Common Definitions, Location, Location	Define locations codes, including all address information. You must define at least one location in Staffing Front Office. Location is a required field in PeopleSoft HRMS. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Locations.
Location Detail	LOCATION_TBL2	Set Up Financials/Supply Chain, Common Definitions, Location, Location, Location Detail	Add details to a location definition. See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Locations.

Page Name	Object Name	Navigation	Usage
Benefit Program	BEN_PROG_DEFN1	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Benefit Programs	Define the benefit programs your organization offers. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See PeopleSoft Enterprise Benefits Administration 8.9 PeopleBook, Building Automated Benefit Programs, Building Benefit Programs with the Benefit Program Table
Pay Group	PAYGROUP_TABLE1	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Pay Groups	Define processing payroll groups. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, Setting Up Pay Groups, Defining Pay Groups
Tax Location	TAX_LOCATION_TBL1	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Tax Locations	Define payroll tax locations. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Payroll Tax Tables, (USA) Defining Tax Locations
State Tax Properties	STATE_TAX_TABLE	Set Up Financials/Supply Chain, Common Definitions, Payroll Tax, State Tax Properties	This setup page is used for prompts when capturing employee tax information in environments where Staffing Front Office is used as a standalone application (Pay/Bill Management is not installed).

Page Name	Object Name	Navigation	Usage
Local Tax Table1	LOCAL_TAX_TABLE1	Set Up Financials/Supply Chain, Common Definitions, Payroll Tax, Local Tax Properties	Define geographical area information for local taxing authorities. Use this page for prompts when capturing employee tax information in environments where Staffing Front Office is used as a standalone application (Pay/Bill Management is not installed).
Local Tax Table2	LOCAL_TAX_TABLE2	Set Up Financials/Supply Chain, Common Definitions, Payroll Tax, Local Tax Properties, Local Tax Table2	Define local withholding tax methods and rates. Use this page for prompts when capturing employee tax information in environments where Staffing Front Office is used as a standalone application (Pay/Bill Management is not installed).
Local Tax Table3	LOCAL_TAX_TABLE3	Set Up Financials/Supply Chain, Common Definitions, Payroll Tax, Local Tax Properties, Local Tax Table3	Define a locality's tax reporting requirements. Use this page for prompts when capturing employee tax information in environments where Staffing Front Office is used as a standalone application (Pay/Bill Management is not installed).
Workers' Comp Company Setup (Workers' Compensation Company Setup)	FO_WC_CO_MOD	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Workers' Comp Company Setup	Define the workers' compensation companies that your want to use to determine bill and pay rates in margin calculations. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See *PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook*, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Workers' Compensation.

Page Name	Object Name	Navigation	Usage
Workers' Comp State Codes (Workers' Compensation State Codes)	FO_WC_STATE	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Workers' Comp State Codes	Associate workers' compensation codes to states. If you populate the workers' compensation control tables, your Staffing Front Office users do not need an in-depth understanding of workers' compensation regulations to create an order. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See *PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook*, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Workers' Compensation.
Workers' Comp State Rates (Workers' Compensation State Rates)	FO_WC_CO_STATE	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Workers' Comp State Rates	Set up the applicable workers' compensation rates that your company pays in each state in which your employees work. The system uses this rate in the margin calculation to determine optimal pay and bill rates for orders and assignments. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See *PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook*, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Workers' Compensation.

Page Name	Object Name	Navigation	Usage
Workers' Comp by Job Code (Workers' Compensation by Job Code)	FO_JOBCODE_PRD	Set Up Financials/Supply Chain, Product Related, Staffing, Payroll, Workers' Comp by Job Code	Associate job codes with workers' compensation codes for the states in which your organization conducts business. If you have Staffing Front Office and Pay/Bill Management installed, configure this table in HRMS and synchronize it with Financials through application messaging. See *PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook*, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Workers' Compensation.

Creating or Modifying Your Payroll Company

Access the Company page.

After you enter an ID to define the company, select an Effective Date and enter a Description.

Setting Up Your Company's Benefit Programs

Access the Benefit Program page.

Status as of Effective Date Enter the current status of this benefit program: *Active* or *Inactive.*

Currency Code Enter the default currency code for the benefit program.

If you do not offer benefits, set up a program for no benefits. The benefit program value is global, not driven by setID.

Creating Payroll Processing Groups

Access the Pay Group page.

Enter the date the pay group is effective, and then enter a short and long description.

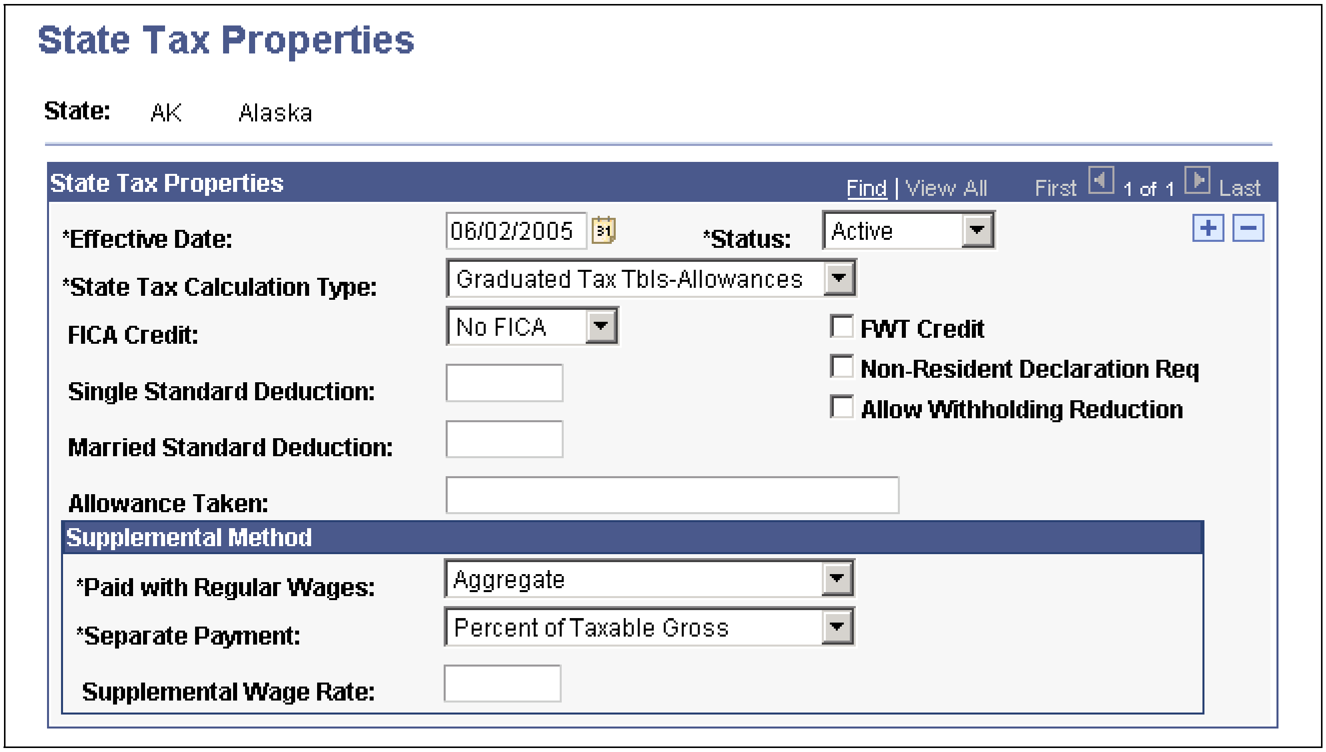
Defining Payroll Tax Locations

Access the Tax Location page.

Select the current Status of the tax location code (*Active* or *Inactive*), and enter a long and short description.

Setting Up the State Tax Properties

Access the State Tax Properties page.



State Tax Properties page

State — The state for which you are creating or modifying information.

State Tax Calculation Type — Select the type of tax calculation that is required by the state:

- *Graduated Tax Tbls-Allowances*
- *Graduated Tax Tbls-Annl Exem*
- *No State Withholding*
- *Not Applicable*
- *Percent of FWT (Many)*
- *Percent of FWT (One)*
- *Percent of Taxable Gross*

FICA Credit (federal insurance contributions act credit) — Select a value to indicate whether the state gives credit for FICA during calculation of state income tax withholding: *Act. FICA, NO FICA,* or *Prorate.*

FWT Credit (federal withholding tax credit) — Select this check box to indicate whether the state gives credit for FWT during calculation of state income tax withholding.

Single Standard Deduction — Enter the standard deduction amount for single tax filers.

Non-Resident Declaration Req (non-resident declaration required) — Select this check box to indicate whether the state requires a non-resident declaration for non-resident employees.

Married Standard Deduction — Enter the standard deduction amount for married tax filers.

Allow Withholding Reduction — Select this check box to indicate whether the state allows a reduction amount to be computed in the state withholding calculation.

Note. Currently, this applies to Connecticut only.

Allowance Taken — Enter the amount tax filers are allowed to deduct from their taxes.

Supplemental Method

Paid with Regular Wages and **Separate Payment** — PeopleSoft delivers the required selection:

- *Aggregate*
- *Aggregate - No Annualize*
- *Aggregate-No Tax else Percent*
- *Non-Resident Supplemental*
- *Not Applicable*
- *Percent of Taxable Gross*
- *Special Table*
- *Special Table with Exemptions*

Supplemental Wage Rate — Enter the rate at which supplemental wages should be calculated.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Payroll Tax Tables, Viewing Standard Deductions, Allowance Amounts, and Supplemental Taxes

Setting Up for Local Tax Properties

Access the Local Tax Table1 page.

Maintenance Responsibility — Select Customer if your organization will maintain the locality; otherwise select PeopleSoft.

Local Jurisdiction — Define for the tax entity:

- *Combined:* Select to indicate that the locality represents both a municipality and a school district.
- *County:* Select to indicate that the locality represents a county.
- *Municipal:* Select to indicate that the locality represents a municipality.
- *Other:* Select to indicate an entity other than those in the list.
- *School:* Select to indicate that the locality represents a school district.
- *State:* Select to indicate that the locality represents a state.

Partial Indicator (PA Only)(partial indicator Pennsylvania only) — Select this check box to indicate if multiple municipalities apply to a single school district for any Pennsylvania locality.

Locality Name Enter the municipality name from the register (except for school district entries, which are school district names). Combined jurisdictions end with M+SD.

Other Locality Name For Pennsylvania localities, combined entries display the school district name.

School dist code (PA only) Enter the appropriate school district for any Pennsylvania locality.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Payroll Tax Tables, (USA) Updating Local Tax Information

Setting Up Local Withholding Tax Methods and Rates

Access the Local Tax Table2 page.

Local Tax Information

Local Tax Calculation Type Select the calculation method used to determine the amount of local income tax withheld:

- *Amt Per Mo* (amount per month)
- *Amt Per Pd* (amount per period)
- *Amt Per Q* (amount per quarter)
- *Amt Per Yr* (amount per year)
- *Rate x SWT* (rate multiplied by SWT)
- *Rt x FLSA* (rate multiplied by the Fair Labor Standards Act rate)
- *Rt x TaxGr* (rate multiplied by the tax grade)
- *Tax Tables*

Withhold On Work Locality Only Select to have taxing authorities consider only the wages earned in that locality as taxable for resident taxes. If the employee does not work in the locality, the tax authority does not take resident taxes.

Graduated Tax Table Code This option takes effect if the locality requires that the system reference tax tables during calculation, as they do for New York City, Yonkers, and Maryland counties, for example. The graduated tax table code that you enter here links the record to the appropriate entry in the PeopleSoft Federal/State Tax Table, where tax rates are stored.

Tax Class Enter the appropriate tax class, such as *Excise, Local ER,* or *Occ Priv.* Tax classes identify different taxes that share certain characteristics.

Low Gross Enter the minimum taxable gross for the bracket.

Minimum Tax If there is a minimum amount on a particular type of tax, enter that limit amount.

Maximum Tax If there is a limit on a particular type of tax, enter that limit amount.

Annual Exemption If there is an annual exemption for the tax, enter the amount.

Tax Rates

Resident	Enter the tax rate for residents of the locality.
Nonresident	Enter the tax rate for non-residents of the locality.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Payroll Tax Tables, (USA) Updating Local Tax Information

Setting Up a Locality's Tax Reporting Requirements

Access the Local Tax Table3 page.

Tax Reporting

Locality Short Name	Enter a name for the locality.
Tax Reporting	Select the interval required by the locality for tax reporting: *Annual,Monthly,* or *Quarterly.*
W2 Print Name	Enter the name that you want to print on the W2 form.
W2 Mag Media Code (W2 magnetic media code)	Enter the magnetic media code for the W2s you will be printing.
Employee Detail Required	Select this check box to require employee detail.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, Setting Up Payroll Tax Tables, (USA) Updating Local Tax Information

Setting Up a Company's Workers' Compensation Rules

Access the Workers' Comp Company Setup page.

Status	Select the status of the workers' compensation company.
Company Modifier	Enter the number by which you want to multiply workers comp rates to for employees hired in this company.

Associating a Workers' Compensation Code With a State

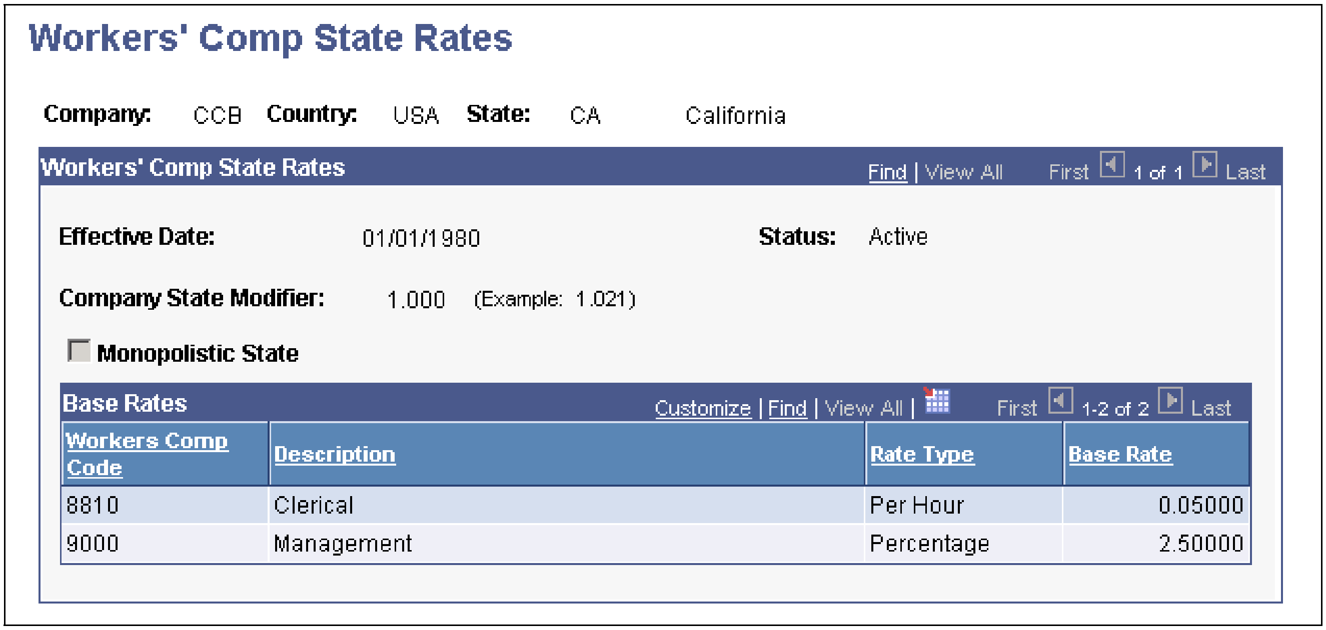
Access the Workers' Comp State Codes page.

Enter the Workers' Comp Code that you want to associate with the state, and then enter a long and short description.

Note. We recommend you have a workers' compensation specialist set up the information in this table.

Establishing Rates for Each of Your Workers' Compensation Codes

Access the Workers' Comp State Rates page.



Workers' Comp State Rates page

Status Select either *Active* or *Inactive.*

Company State Modifier If you have a company factor to be applied to premiums in this state, enter the value here. This value overrides the company modifier.

Monopolistic State Select this check box to override the modifier with a value of *1.* This results in the modifier having no effect on the workers' compensation calculation.

Note. Viewing the Workers' Comp Rates page is dependent upon setting up values in the Workers' Comp Company Setup and Workers' Comp State Code pages.

Base Rates

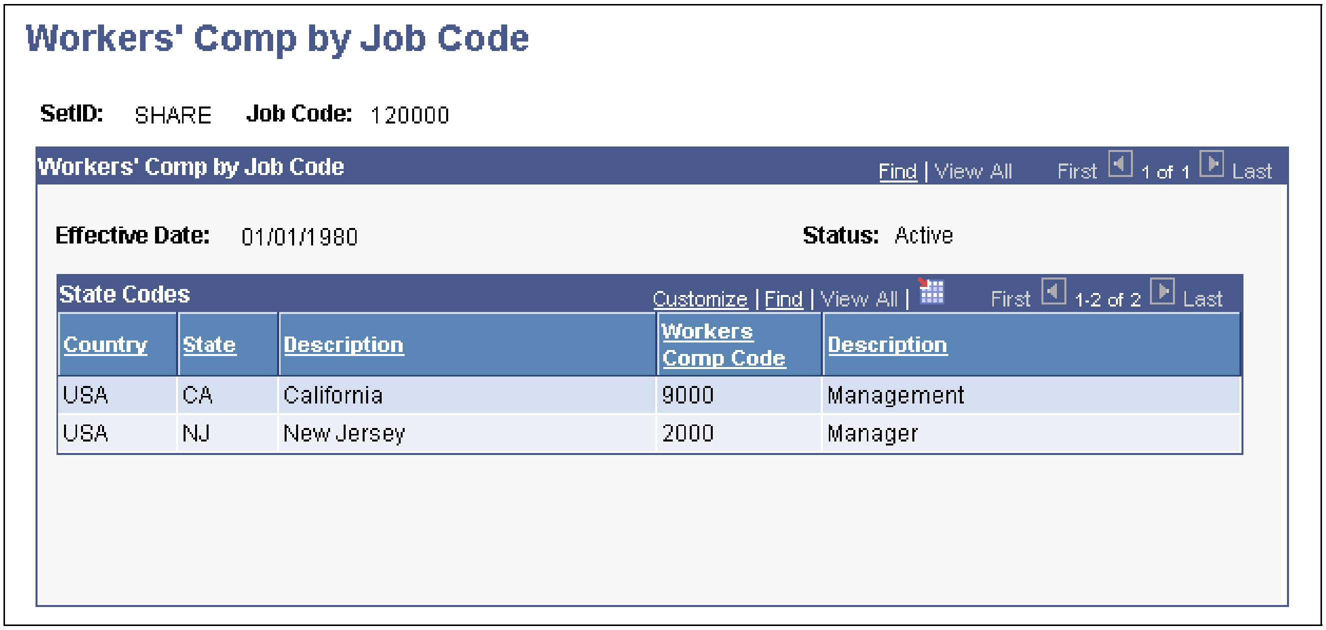
Workers Comp Code Select the workers' compensation code that you want associated with the chosen Company, Country, and State.

Rate Type Select either *Per Hour* or *Percentage.*

Base Rate Enter a percentage or the hourly rate to represent the workers' compensation rate you pay in the state.

Associating Workers' Compensation Codes With Job Codes

Access the Workers' Comp by Job Code page.



Workers' Comp by Job Code

SetID: SHARE **Job Code:** 120000

Workers' Comp by Job Code Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 **Status:** Active

State Codes Customize | Find | View All | First 1-2 of 2 Last

Country	State	Description	Workers Comp Code	Description
USA	CA	California	9000	Management
USA	NJ	New Jersey	2000	Manager

Workers' Comp by Job Code page

Enter the Country, State, and Workers Comp Code that you want to associate with the Job Code.

CHAPTER 5

Using Enterprise Integration Points

This chapter provides an overview of Enterprise Integration Points (EIPs) for Staffing Front Office and discusses how to set up integration broker message subscriptions.

Understanding Enterprise Integration Points

EIPs use a variety of PeopleSoft integration tools to integrate data across an enterprise.

Among the PeopleSoft integration tools that are used with Staffing Front Office are PeopleSoft Integration Broker and Component Interfaces.

Note. The only messages and component interfaces required by Staffing Front Office will be used when Staffing Front Office is installed with Pay/Bill Management (thus including both FSCM and HRMS).

This section discusses:

- PeopleSoft Integration Broker.
- Component interfaces.

Integration Broker

Integration Broker is middleware technology that facilitates synchronous and asynchronous messaging among internal systems and trading partners, while managing message structure, message format, and transport disparities. Using a publish and subscribe protocol, dynamic data that is external to Staffing Front Office is *published* by an application, such as PeopleSoft HRMS, to be picked up by other PeopleSoft applications such as Staffing Front Office, which is the *subscriber* to the changes in data. PeopleSoft Integration Broker provides integration that is close to real time, which means that the publisher does not need to be connected to the subscriber when publishing the data. This is similar to how email works. Staffing Front Office only uses Integration Broker and application messages when installed in conjunction with Pay/Bill Management and HRMS.

Note. You must activate the Publication/Subscription feature on your Financials and HRMS application servers.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker, "Understanding Integration Broker."

Component Interfaces

Every organization depends on real-world business objects—such as orders in Staffing Front Office and invoices in PeopleSoft Receivables—to conduct its business. In PeopleSoft applications, *components* represent real-world business objects. For example, an invoice component is a way to capture, store, and display essential information that is related to an invoice—including the general billing and shipping information and details about each line item. While online, a user can view, enter, and manipulate data about a business object through the use of a component and its associated pages.

Components have keys that enable navigation to a specific instance of a business object. Keys also include the essential information that describes the object (the fields in the component). Additionally, a component includes an organization's business rules that are associated with the type of business object that the component represents.

Component interfaces expose the functionality that is delivered in the myriad of components that make up PeopleSoft applications. A component is a minute transaction that implements a business process or function. A *component interface* provides real-time synchronous access to the PeopleSoft business rules and data associated with a business component. A component interface is a PeopleTools object that is created in PeopleSoft Application Designer. It exposes a PeopleSoft component for synchronous access from another application.

See Also

PeopleTools PeopleBook: PeopleSoft Component Interfaces, "Understanding Component Interfaces"

Setting Up Integration Broker Message Subscriptions

Staffing Front Office EIPs are delivered with all settings enabled for full functionality. When you integrate Staffing Front Office with HRMS and Financials, you must activate the integration broker messages.

This section discusses how to:

- Set up messages: incremental synchronization.
- Set up messages: full-table synchronization.
- Activate full-table publish rules.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Tools and Utilities PeopleBook

Setting Up Messages: Incremental Synchronization

Staffing Front Office uses Integration Broker to integrate HRMS and Financials application tables. The messages are delivered with a default status of *Inactive.* You must activate each message before attempting to publish messages or subscribe to messages between databases. You must activate these messages in both the HRMS and FSCM databases.

To begin using Integration Broker, you must enable the publishing and subscribing of messages in HRMS and Financials. In some PeopleSoft systems, the direction of the publish-subscribe rule for messages might be bidirectional or unidirectional; however, Staffing Front Office uses a unidirectional model to keep data synchronized. The publish and subscribe rules might also be incremental or full table synchronization for each message.

The following table contains the incremental synchronization messages that update the Staffing Front Office, Pay/Bill Management, HRMS, and Financials applications every time a user changes data that is relevant to Staffing Front Office. These messages are published from HRMS, or Financials.

After you activate these messages, every subsequent change to data in any of the records associated with these messages triggers the publication and subscription of the new or deleted data. The result is that Staffing Front Office reflects the change within a few seconds. All of the following messages are necessary when you have Staffing Front Office installed along with Pay/Bill Management. Staffing Front Office alone does not have any messages.

Note. You must activate these messages in the HRMS and FSCM databases.

Message	Message Channel
ACTION_REASON_SYNC	ACTION_REASON
BUS_UNIT_HR_SYNC	HR_SETUP
CM_TYPE_SYNC	PERSON_SETUP
COMPANY_SYNC	FO_SYNC
COMPETENCY_SYNC1	PERSON_SETUP
COMPETENCY_SYNC2	COMPETENCY
COMPETENCY_SYNC3	COMPETENCY
COUNTRY_SYNC **Note.** This is delivered as system data. Although it is possible to, you will probably not need to synchronize this message because you’re unlikely to make changes to the Country table.	ENTERPRISE_SETUP
CURR_QUOTE_MTHD_SYNC	MARKET_RATES
CURRENCY_SYNC **Note.** This is delivered as system data. Although it is possible to, you will probably not need to synchronize this message because you’re unlikely to make changes to the Currency Codes table.	ENTERPRISE_SETUP
CUSTOMER_SYNC	CUSTOMER
DEPT_S2YNC	ENTERPRISE_SETUP

Message	Message Channel
DEPT_SYNC_EFF	ENTERPRISE_SETUP
FREQUENCY_SYNC	PERSON_SETUP
FO_APP_HIRE	FO_APP_HIRE
FO_ASGN_CONFIRM	FO_ASSIGNMENTS
FO_ASGN_CREATE	FO_ASSIGNMENTS
FO_ASGN_RATES_SYNC	FO_ASSIGNMENTS
FO_ASGN_UPD	FO_ASSIGNMENTS
FO_EMPL_DATA_SYNC	FO_SETUP
FO_RATE_ELEM_SYNC	FO_SETUP
FO_WC_CO_MOD_SYNC	FO_SYNC
FO_WC_CO_STATE_SYNC	FO_SYNC
FO_WC_STATE_SYNC	FO_SYNC
HOLIDAY_DATE_SYNC	PERSON_SETUP
JOBCODE_SYNC	PERSON_SETUP
LOCATION_SYNC	ENTERPRISE_SETUP
MARKET_RATE_LOAD	MARKET_RATE_LOAD
MARKET_RATE_DEFN_SYNC	MARKET_RATES
MARKET_RATE_INDEX_SYNC	MARKET_RATES
MARKET_RATE_SYNC	MARKET_RATES

Message	Message Channel
MARKET_RATE_TYPE_SYNC	MARKET_RATES
PERSON_ACCOMP_SYNC	PERSON_DATA
PERSON_BASIC_SYNC	PERSON_DATA
PERSON_COMPETENCY_SYNC	PERSON_DATA
PERSON_VISA_CITIZEN_SYNC	PERSON_DATA
PROJECT_ACTIVITY_SYNC	PROJECTS_SETUP
PROJECT_ACTIVITY_TEAM_SYNC	PROJECTS_SETUP
PROJECT_SYNC	PROJECTS_SETUP
PROJECT_TEAM_SYNC	PROJECTS_SETUP
RATING_MODEL_SYNC	RATING_MODEL
SCHOOL_SYNC	PERSON_SETUP
STATE_SYNC **Note.** This is delivered as system data. Although it is possible to, you will probably not need to synchronize this message because you're unlikely to make changes to the State table. Additionally, HRMS has extra state codes that are used for payroll processing. These state codes should *not* be synchronized between Financials and HRMS.	ENTERPRISE_SETUP
UOM_SYNC	ENTERPRISE_SETUP
WORKFORCE_SYNC	PERSON_DATA

Setting Up Messages: Full-Table Synchronization

Full-table synchronization is more data-destructive than incremental synchronization. Incremental synchronization messages modify, delete, or add only the data that a user has affected in performing an individual transaction. Full-table synchronization messages delete all data in the target record first and then load a copy of the source record.

Full-table synchronization is generally used at the beginning of an implementation to synchronize data among databases. After that point, it should be used sparingly.

Warning! Do not activate any messages that are identified as FULL_SYNC or FULLSYNC unless you are absolutely certain that you want to overwrite all of the data in the records that are associated with the message in the database. Understanding how full—table synchronization messages work is especially important if you have a different list of departments or locations in your Financials database than you have in your HRMS database. For example, synchronizing your departments using a FULLSYNC message would overwrite all of your Financials departments with your HRMS departments.

Note. When using Full Synchronization Messages, your primary concern is that you do not inadvertently overwrite valid data. To prevent this problem, you should generally adhere to the rule of not activating Full Synchronization Messages for any record that receives input from multiple databases.

The messages shown in the following table are full-table synchronization messages. You should carefully consider the effect of activating any of these messages.

Message	Message Channel
ACTION_REASON_FULLSYNC	ACTION_REASON
BEN_DEFN_PGM_FULLSYNC	FO_SYNC
BUS_UNIT_HR_FULLSYNC	HR_SETUP
CM_TYPE_FULLSYNC	PERSON_SETUP
COMPANY_FULLSYNC	FO_SYNC
COMPETENCY_FULLSYNC1	PERSON_SETUP
COMPETENCY_FULLSYNC2	COMPETENCY
COMPETENCY_FULLSYNC3	COMPETENCY
COUNTRY_FULLSYNC	ENTERPRISE_SETUP
CURR_QUOTE_MTHD_FULLSYNC	MARKET_RATES
CURRENCY_FULLSYNC	FO_SYNC
CUSTOMER_FULLSYNC	CUSTOMER
DEPT_FULLSYNC	ENTERPRISE_SETUP

Message	Message Channel
FO_CO_LOCALTAX_FULLSYNC	FO_SYNC
FO_CO_STATETAX_FULLSYNC	FO_SYNC
FO_COMP_RATECD_FULLSYNC	FO_SYNC_HRTOFO
FO_EMPL_CTG_FULLSYNC	FO_SYNC_HRTOFO
FO_EMPL_DATA_FULLSYNC	FO_SYNC
FO_GP_PYGRP_FULLSYNC	FO_SYNC
FO_NID_TYPE_TBL_FULLSYNC	FO_SYNC_HRTOFO
FO_RATE_ELEM_FULLSYNC	FO_SETUP
FO_WC_CO_MOD_FULLSYNC	FO_SYNC
FO_WC_CO_STATE_FULLSYNC	FO_SYNC
FO_WC_STATE_FULLSYNC	FO_SYNC
FREQUENCY_FULLSYNC	PERSON_SETUP
JOBCODE_FULLSYNC	FO_SYNC
LOCATION_FULLSYNC	FO_SYNC
MARKET_RATE_FULLSYNC	MARKET_RATES
MARKET_RATE_INDEX_FULLSYNC	MARKET_RATES
MARKET_RATE_TYPE_FULLSYNC	MARKET_RATES
PAYGROUP_FULLSYNC	FO_SYNC
PERSON_ACCOMP_FULLSYNC	PERSON_DATA

Message	Message Channel
PERSON_BASIC_FULLSYNC	PERSON_DATA
PERSON_COMPETENCY_FULLSYNC	PERSON_DATA
PERSON_VISA_CITIZEN_FULLSYNC1	PERSON_DATA
PROJECT_ACTIVITY_FULLSYNC	PROJECTS_SETUP
PROJECT_ACTIVITY_TEAM_FULLSYNC	PROJECTS_SETUP
PROJECT_FULLSYNC	PROJECTS_SETUP
PROJECT_TEAM_FULLSYNC	PROJECTS_SETUP
RATING_MODEL_FULLSYNC	RATING_MODEL
REGULATORY_REGION_FULLSYNC	PERSON_SETUP
SCHOOL_FULLSYNC	PERSON_SETUP
SCHOOL_TYPE_FULLSYNC	PERSON_SETUP
STATE_FULLSYNC	ENTERPRISE_SETUP
TAX_HEADER_TBL_FULLSYNC	FO_SYNC
TAX_LOCATION1_FULLSYNC	FO_SYNC
TL_TASKGRP_TBL_FULLSYNC	FO_SYNC
TL_WRKGRP_TBL_FULLSYNC	FO_SYNC
UOM_FULLSYNC	ENTERPRISE_SETUP
WORKFORCE_FULLSYNC	PERSON_DATA

Activating Full-Table Publish Rules

Full-table messages in PeopleSoft Integration Broker are delivered with a status of *Inactive.* The publishing rules must be activated. When the appropriate messages are activated, information that is shared by the FSCM and HRMS databases is updated properly.

For example, the system publishes (Full Table Publish) data from the HRMS table DEPT_TBL. Table DEPT_TBL will be populated with new data from HRMS, and all old data will be deleted. The data from this table is published in the message DEPT_FULLSYNC.

CHAPTER 6

Searching Staffing Front Office

Staffing Front Office searches are performed by the Verity search engine. This chapter provides an overview of the Verity search engine and discusses how to:

- Set up the Verity search engine and Cache Administration process.
- Perform searches.

Understanding the Verity Search Engine

The Verity search engine is a third-party product that is embedded into PeopleTools. The searches are not performed directly against the database, but are performed by the Verity search engine against a Verity collection. The Verity collection is created based on the information contained in Staffing Front Office. This collection is not updated online, but through a batch process.

The Verity search is implemented as an Application Class that receives search criteria as input and returns results in the form of resources, orders, and so on, with associated scores.

Staffing Front Office uses five types of searches:

- PeopleMatch
- PeopleSearch
- Customer Search
- Contact Search
- Order Search

The first two of these are forward searches, meaning they look for resources that match a certain criteria. The last three search types are reverse searches, meaning they look for customers, contacts, and orders that match a certain criteria, typically a candidate's experience or preferences. The last three searches are combined in a single component called Opportunity Search.

PeopleSoft delivers a standard searching template for these search types. However, Staffing Front Office customers must define their own search criteria for their organization as part of the implementation process.

To optimize searching capabilities and performance, the system extracts data from Staffing Front Office records and places the data into two types of ASCII text files: BIF and DAT.

For PeopleMatch and PeopleSearch, the system can also extract information from electronic attachments such as resource resumes. However, the creation of Verity collections is slower when electronic documents are processed. To optimize performance when resume searches are needed, Staffing Front Office provides a field in the Applicant and Employee components into which users can paste resume ASCII text. Using this method (instead of electronic attachments) greatly reduces Verity collection creation time. Even if users paste their resumes this way, they can still attach electronic resumes to the applicant and employee records to present them to customers.

The Search Index Creation process (FO_SRCH1_AE) captures Verity definitions (zones and fields) and generates the appropriate index files. The system applies a key to the templates according to the Verity Key field (SRCH_VERITY_CD). This key is used to identity the correct index files for the Verity search engine.

When configuring the five search types, you define the following attributes:

- The list of configurable fields and settings used in the search type.
- The availability algorithm to be used (applicable to PeopleMatch and PeopleSearch only).
- Factor weights.

  You can define factor weights as part of the search configuration and factor family weights in the actual search pages.
- Scores to calculate.
- The name of the Verity index and other Verity paths required to build the index (.BIF files and style files).

Note. For instructions on installing the Verity search engine with Staffing Front Office, refer to the installation procedures for Staffing Front Office on the PeopleSoft Customer Connection website.

Reverse Searching

Opportunity Search is a reverse search. Reverse searching consists of searching orders, customers, and contacts that would be a good fit for a particular resource.

Forward Searching

PeopleMatch and PeopleSearch are forward searches. They consist of searching resources that meet a certain criteria such as job order required and desired qualifications. Forward searches calculate both the resource qualification and preference scores. Additionally, these searches can also provide resource availability information. There are two availability calculation options for PeopleMatch and PeopleSearch:

- Simple Availability:

  Availability is not calculated as a separate score or percentage, but as part of the overall search criteria using fields such as the count of active assignments, the candidate's first date available, shifts preferred by the resource, and so on.
- Resource Management Availability:

  Results are calculated based on how busy a resource is in a specific period of time. This option uses the resource calendar to determine his or her availability. This calendar is populated automatically when the resource is placed in a temporary assignment, or manually when a user adds an appointment for the resource. To use this availability calculation method, you must configure the Staffing Installation Options to use resource calendars.

The choice of availability algorithm is defined in the search type configuration. For an availability algorithm to be used with a search type, the resource calendar must be current.

Setting Up the Verity Search Engine and Cache Administration Process

Use the pages described in this section to set up the tables and processing rules that Staffing Front Office uses when running the Verity search engine processes.

You should periodically run the Cache Administration process to correct inaccuracies in the data, and to reorganize the database indexes for these tables, as well as to update standings.

To set up the Verity search engine, use the Search Configuration (RS_VERITY_CONFIG) and Factor Weights components (RS_SRCH_FACT_WGHT).

This section discusses how to:

- Define the Verity settings.
- Define factor weights.
- Define records and fields.
- Define search fields to create the Verity index files.
- Refresh cache tables and build the Verity indexes.
- Maintain and schedule the Verity Index File Creation process and the Cache Creation process.
- Run the Cache Optimization program.
- Run the Cache Administration program.

Pages Used to Set Up the Verity Search Engine and Cache Administration Process

Page Name	Object Name	Navigation	Usage
Verity Settings	RS_VERITY_CONFIG	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Search Configuration	Configure parameters for the Verity search engine.
Factor Weights	RS_SRCH_FACT_WGHT	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Search Configuration, Factor Weights	Define the relative importance of each factor within its family.
Miscellaneous	RS_CACHE_MISC	Set Up Financials/Supply Chain, Common Definitions, Search, Cache Administration	Specify processes to refresh cache tables and create verity collections.
Maintain Search Index	RS_SRCH_INDEX	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Maintain Search Index	Capture the parameters needed to create the Verity index files.
Refresh Optimization Cache	RUN_RS_DF	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Refresh Optimization Cache	Recalculate and cache selected factor fit scores for all eligible resources.
Summary	RS_CACHE_SUMMARY	Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration, Summary	Confirm the list of processes that you want to run or schedule for the future.

Defining the Verity Settings

Access the Verity Settings page.

Search Type

Displays the types of search:

- PMSRC: PeopleMatch
- PLSRC: PeopleSearch
- CSTSR: Customer Search
- CNTSR: Contact Search
- ORDSR: Order Search

Verity Model

This is a display-only field that directs the Verity search engine to read a specific collection. All delivered searches create two sets of search collection files—collection A and collection B. When Verity collections are being created or updated, users cannot search them. Therefore, the system keeps a backup collection file to be available to users will another collection is created or updated. For Staffing Front Office to add new rows into the search collection, the system alternates between collection A and collection B. When collection A is in use, all updates are done on collection B. After the updates are completed for collection B, the system automatically moves users to collection B and collection A is released. This alternating approach enables the system to add new rows into the collection without forcing users to log out.

File Settings

Enter the location of the style files in the Style Files field. The directory specified here must contain the delivered style files. The Search Style files are located in PS_HOME/Data/Search. For each FO_FO_STAFFING directory, a style directory must be present and a series of style files must exist under that directory.

Note. Verity needs to know the actual directory path and that path needs to be accessible from your process scheduler server by the user ID that runs the process scheduler.

When you select a PeopleSearch (PLSRC) or PeopleMatch (PMSRC) search type, the Resume Files field also appears, in which you can enter the location of the folder where you store your resume files. The system reads the resumes in the folder when building the Verity collection. This applies to PeopleSearch and PeopleMatch only. The resume attachment feature for applicants and employees allows applicants to attach their own resumes to Staffing Front Office. The attachment process uses FTP to move the resumes from the users' own workstations into a designated system directory. Verity needs to know the location of that system directory before it can incorporate the resume into the Search File Creation process.

Note. The applicant and employee components capture resumes both in the form of electronic document attachments and in an ACSII text field. When configuring the Verity searches for PeopleMatch and PeopleSearch, you can have the system include the attachments in the Verity collections and indexes by specifying *c:\resumes,* for example, in the Resume Files field. If you do decide to include electronic attachments, the creation of Verity indexes may be slower. As an alternative, leave the Resume Files field blank so that the system will only search on the resume ASCII field. You can still attach resume documents to your applicant and employee records to present them to your customers, but they will not be part of the Verity index.

Performance Settings

Define the size of your result set by entering a value in the Buffer Resultset Size (in rows) field.

Availability Method

Enter a method to that the system will use to calculate availability scores in the verity search results: *Daily Summarization* or *No Availability Calculation.*

Note. This group box appears only if you select the PeopleSearch (PLSRC) or PeopleMatch (PMSRC) search type. when Daily Summarization is selected, the system calculates the percentage of time that a resource will be available between the start and end dates specified in the Order or in the PeopleSearch component. When No Availability Calculation is selected, the system does not calculate availability scores and users may have to rely on other information such as the count of active assignments to infer whether a resource is available or not.

Defining Factor Weights

Access the Factor Weights page.

Preferences and **Qualifications**: The Staffing Front Office search components present the results with their associated search score. The score is a weighted average of several factors.

For each factor family grouping, enter the relative importance of each factor, such as AccomplishmentsCompetency Proficiency, or Resume. Values are *0 - Not at all important, 1 - Much less important, 2 - Less important, 3 - Important, 4 - More important,* or *5 - Much more important.*

Defining Records and Fields

Access the Configurable Fields page.

Sort Order Enter a number to change the order of the fields on the page. This field controls in which order the fields are listed on the actual search page.

Category Enter the category to which you want to group fields.

Note. You can define views to join multiple records and use that view for the Verity index creation. You can also create views with complex joins or outer joins, but this is considered a specific customer configuration. Note that complex joins, outer joins and joins with multiple tables and views may significantly decrease the performance of the verity collection creation process.

Column Enter the name of the field as you want it to appear in searches.

Show In Search Select the check box to indicate which fields display on the search page. Selecting a given check box causes the system to include that field as a searching field. When generating the SQL to extract the raw data for the Verity collection, the fields with this check box selected are named in the SQL. When creating the Verity ASCII text files, the system writes out the field as a data field. In addition, the fields are also included in the Verity STYLE.UFL file.

Show In Results Select the check box to indicate that the system should display this field in the search result set.

Free Form Select the check box to make Verity treat the field as a free-form search—that is, a search with no field edits. Generally, a free-form search is used for text searching (for example, searching for a description). All fields defined as free-form are considered zone fields in Verity.

Allow Compare Select the check box to enable the use of comparison operators (such as <, >, and =) when searching.

Note. To make searching faster, the system treats all fields as Verity zones. When a field is treated as a Verity zone, you cannot use comparison operators. If you select the Allow Compare check box, the field is treated as a Verity field and you can use the <, >, and = comparison operators.

Defining Search Fields to Create the Verity Index Files

Access the Available Configurable Fields page.

Category Enter the name of the category into which you want to group fields.

Column Enter the name of the field as you want it to appear in searches.

Record (Table) Name Enter the actual record name.

Field Name Enter the actual field name.

Result Column Select the check box to indicate that the system should use the field for result display purposes.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Understanding PeopleSoft Process Scheduler"

Refreshing Cache Tables and Building the Verity Indexes

Access the Miscellaneous page.

Refresh Current Eligible Resources Select this check box to update the Eligible Resource Cache table (RS_ELGBL_WRKR) with current eligible resource information. In addition to tracking the current, eligible resources, the table stores the resource's job-related information such as job code and location. The program is required when routine changes are made to a resource's job-related information.

Run this program nightly and as required.

Refresh Resource Schedule Cache Select to update the Resource Schedule Cache table (RS_DF_WRKR_DATE) that is used to track a resource's schedule. The program purges old availability date and ineligible resource data. It is required when:

- Implementation takes place.
- Standard hours or default days change in the Scheduling Options group box on the Common Installation Options page.
- New holidays are added to the holiday schedule and loaded using the Holiday Load Application Engine process (RS_HOLIDAY).

This program runs automatically for a resource when the resource's schedule changes. Run the program manually for all resources as required.

Select Create New or Update Existing.

Refresh Resource Organizational Unit Cache Select to update the Resource Organizational Unit Cache table (RS_WORKER_ORG) that stores organization information from the specified organization tree. The program is required when:

- Implementation occurs.
- Resources are created individually using the Establish Employee As Resource component (RS_WRKR_CREATE).
- A node or detail value changes on the organization tree.
- A new organization tree is implemented.
- A resource's organization unit value changes, such as the resource's department.

Run this program nightly.

Maintaining and Scheduling the Verity Index File Creation Process and the Cache Creation Process

Access the Maintain Search Index page.

Process Selection

Select the Maintain Search Index check box to create the search index as part of this Cache Administration run control.

Indexing Options

Select Create New to delete the existing index and create a new one. Use this option to replace the Verity index.

Select Update Existing to update the existing index without deleting it by inserting new documents and updating those that have been changed since the last time the update process ran.

Index Language

Specify whether the index should be created for all installed languages or a single language.

- Select All Installed Languages to create a collection for each installed language.
- Select Specific Language to specify a language, and enter the language for which you want to create index files in the adjacent drop-down list box.

Index

Specify a Search Type for the index creation.

Running the Optimization Cache Program

Access the Refresh Optimization Cache page.

Refresh Optimization Cache	Select to include the Refresh Optimization Cache Application Engine process (RS_DF) as part of this Cache Administration run control.

Running the Cache Administration Program

Access the Summary page.

Select any of the following check boxes to include the process in the run:

- Refresh Resource Organizational Unit Cache
- Refresh Resource Schedule Cache
- Refresh Current Eligible Resources
- Maintain Search Index
- Maintain Employee Data Cache
- Refresh Supply/Demand Cache
- Refresh Supply Category Cache

Run	Click this button to run the cache administration program.
Process Monitor	Click this link to review the status of the process scheduler job you initiated when you clicked the Run button.

Performing Searches

The five Staffing Front Office searches can be executed from different components:

- Order

  From this component users can run PeopleMatch.
- Opportunity Search

  From this component, users can perform the customer, contact, and order searches (opportunity search).
- A third component is provided to execute PeopleSearch.

  PeopleSearch is an impromptu search in that is not associated with any particular order.

  The PeopleSearch page enables you to define specific sets of qualifications and characteristics, and then search your database to locate employees and applicants that match the search criteria. You can save the searches that you create under different names and recall them for repeated searching.

This section describes how to:

- Use PeopleSearch to find resources.
- Use Opportunity Search to find positions.

Note. Your system administrator establishes the search criteria fields during implementation. If you want to search for additional characteristics, contact your system administrator.

Pages Used to Perform Searches

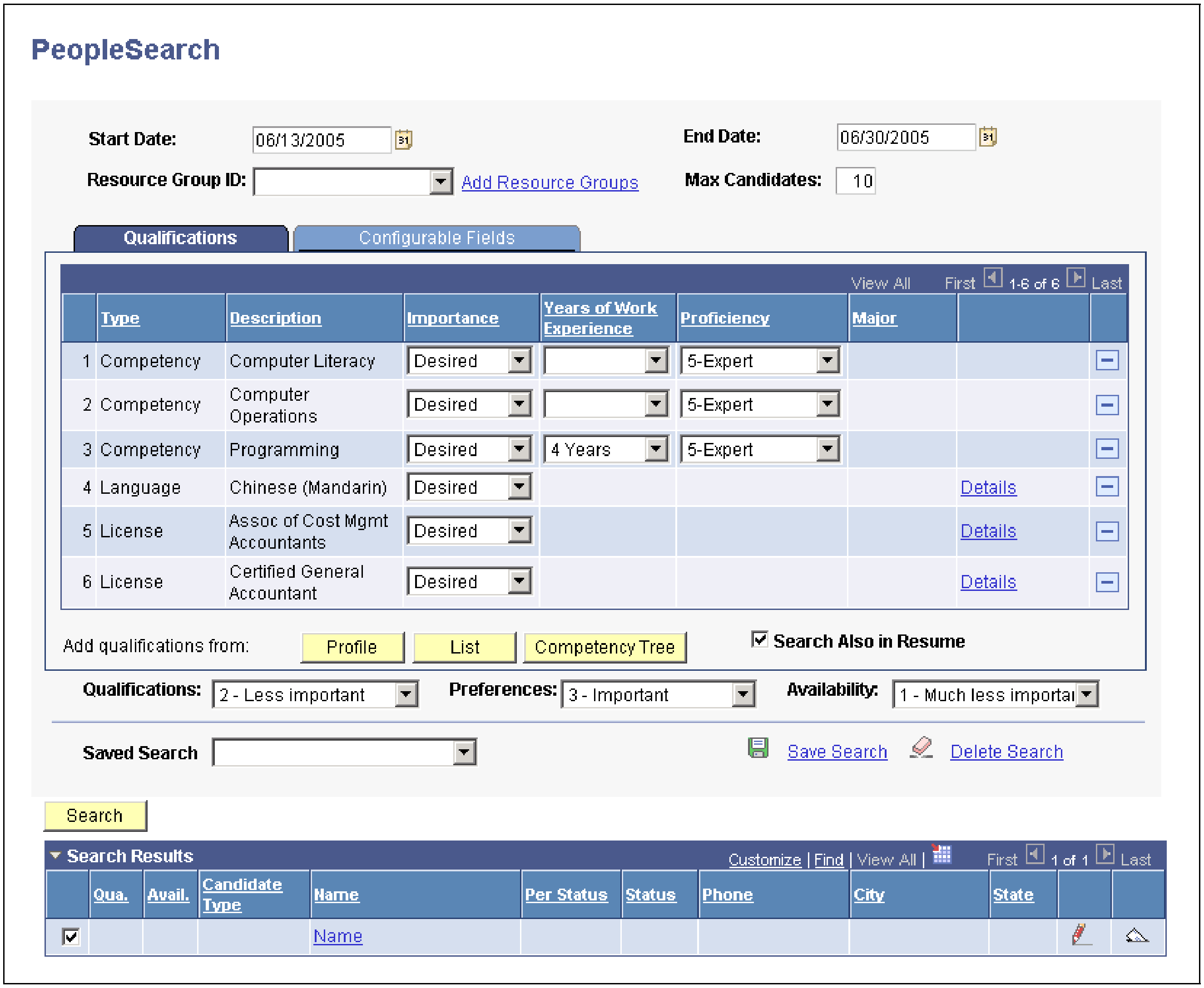
Page Name	Object Name	Navigation	Usage
PeopleSearch	FO_PEOPLESRCH	Staffing, Search, PeopleSearch	Search for applicants, employees, and contractors who possess particular qualifications.
Resource Group Definition - Resource Groups	RS_RESOURCE_GROUPS	Click the Add Resource Group link on the PeopleSearch page.	Add resource groups that can be used as criteria for your PeopleSearch.
Resource Group Definition - Resource Group Details	RS_RSRCGRP_ADD	Click the Add button on the Resource Group Definition - Resource Groups page.	Specify details about resource groups.
Qualification Detail: Language	RS_QUALIF_DETAILS	Click the Details link for Languages specified as qualification criteria on the PeopleSearch page.	Enter proficiency information for the language.

Page Name	Object Name	Navigation	Usage
Qualification Detail: License	RS_QUALIF_DETAILS	Click the Details link for Licenses specified as qualification criteria on the PeopleSearch page.	Enter location information for the license. **Note.** The other qualifications refer to flexible factors, but the flexible factors are only applicable to Resource Management and are not available to Staffing Front Office.
Resource Qualifications - Select Qualification Profile	RS_SELQUALPROFILE	Click the Profile button on the PeopleSearch page.	Add qualifications from a qualification profile. The functionality of this page is similar to that used when adding customers to the system. See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, “Maintaining General Customer Information,” Adding General Customer Information.
Resource Qualifications - Search for Qualifications	RS_QUALIF_SRCH	Click the List button on the PeopleSearch page.	Add qualifications from the qualifications list. The functionality of this page is similar to that used when adding customers to the system. See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, “Maintaining General Customer Information,” Adding General Customer Information.
Resource Qualifications - Select Competencies	RS_SO_COMP	Click the Competency Tree button on the PeopleSearch page.	Add qualifications from a competency tree. The functionality of this page is similar to that used when adding customers to the system. See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, “Maintaining General Customer Information,” Adding General Customer Information.

Page Name	Object Name	Navigation	Usage
Opportunity Search	FO_REVERSE_SRCH	Staffing, Search, Opportunity Search	Search among current customers, contacts, and orders for potential new placements for existing employees.

Using PeopleSearch

Access the PeopleSearch page.



PeopleSearch page

Start Date and **End Date** Enter the date range for which you want to check the resources' availability.

Note. These fields appear only if the search type is configured to use an availability algorithm.

Resource Group ID Select a group of resources on which to search.

Add Resource Groups Click this link to add resource groups to your search possibilities.

Max Candidates (maximum candidates) Enter the maximum number of candidates that you want to include in the search results.

Qualifications

Type and **Description** Displays the overall qualification type, such as Competency, Degree, or Language, and the more specific description of the qualification.

Importance Indicate the relative importance of the qualification, such as *Desired* or *Required.* Required criteria filter non-matching records from the search results. Desired criteria does not filter records from the search results, but does impact their score.

Years of Work Experience Enter the number of years of experience that the resource should have for the qualification.

Proficiency Enter the level of proficiency for the qualification, such as *0-None, 1-Little, 2-Fair, 4-Very Good,* or *5-Expert.*

Major The main field of study for degree qualification types.

Details Click this link to enter specific location and proficiency details about language and license qualification types.

Note. Other qualification types are not applicable to Staffing Front Office.

Profile, List, and **Competency Tree** Click a button to add qualifications to the search criteria.

The functionality of these buttons' destination pages is similar to those used when adding customers to the system.

See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

Search Also in Resume Select to have the system also search resumes for the qualifications.

Configurable Fields

Configurable fields enable users to search on criteria other than qualifications. The criteria is defined through system configuration and can include fields such as zip code, city, personnel status, date hired, and so on.

Saved Search Select a saved search to use, and click the Go! button to retrieve the search criteria previously saved.

Search Results

Qua. (qualifications score) Displays the percentage of the search criteria that the candidate matched.

Avail. (availability score) Displays the percentage of time that the candidate is available between the start and end dates specified in the search criteria.

Candidate Type Indicates whether the candidate is an applicant, or an employee or non-employee.

Name Displays the candidate's name. Click a link in this column to view the employee record.

Per Status (personnel status) Displays the candidate's personnel status: A (applicant), E (employee) or N (non-employee).

Status Displays the candidate's job status. Possible values include A (active) and T (terminated).

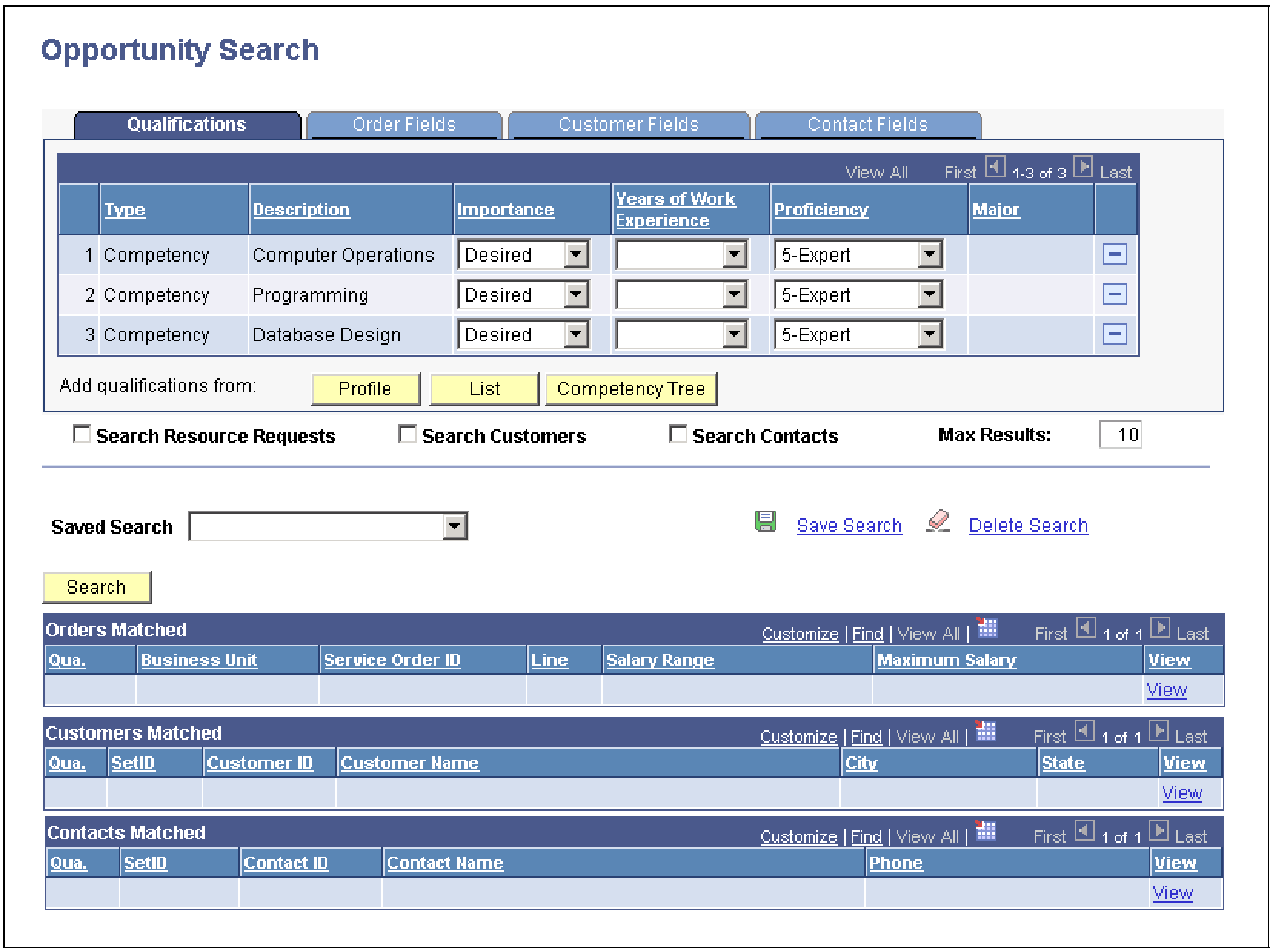
Phone Displays the candidate's phone number.

City Displays the candidate's city of residence.

State Displays the candidate's state of residence.

Using Opportunity Search

Access the Opportunity Search page.



Opportunity Search page

Qualifications

Profile, List,and **Competency Tree**

Add qualifications by clicking the appropriate button.

Note. The functionality of these buttons and their destination pages is the same as those that you use when adding customers to the system.

See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

Search Orders, Search Customers and **Search Contacts**

Select the appropriate check boxes to have the system search for resource requests, customers, and contacts that request the qualifications indicated in the opportunity search criteria.

Max Results (maximum results)

Enter the maximum number of records that you want to include in the search results.

Qualifications and **Preferences**

Enter the level at which the system weights these attributes.

Qua. (qualifications score)

The percentage of the qualification criteria specified in the search that the order, customer, or contact matched.

Business Unit

Business unit of the resource request found by the search.

Service Order ID

Service order ID of the resource request found by the search.

Line

Line number of the resource request found by the search.

View

Click the associated link to view additional information for the following:

- Orders Matched

  Displays resource requests (order lines) found by the opportunity search.
- Customers Matched

  Displays customers found by the opportunity search.
- Contacts Matched

  Displays contacts found by the opportunity search.

Customer ID and **Customer Name**

Displays the ID and name of the customer found by the opportunity search Click a View link to view the customer information in the customer component.

City,State, and **Postal Code**

These fields are related to the customer address.

Contact ID, Contact Name, and **Phone**

The ID, name, and phone number of the contact found by the opportunity search. Click the View link to view the contact information in the contact component.

Order Fields

The order fields are configurable and enable users to search on criteria other than qualifications. The criteria is defined through system configuration and can include fields such as business unit, service user, order status, and so on. For each field specified, indicate whether the criteria is Required or Desired.

Customer Fields

The customer fields are configurable and enable users to search on criteria other than qualifications. The criteria is defined through system configuration and can include fields such as zip code, city, state, and so on. For each field specified, indicate whether the criteria is Required or Desired.

Contact Fields

The contact fields are configurable and enable users to search on criteria other than qualifications. The criteria is defined through system configuration and can include fields such as phone number (for area code searches), contact owner, and so on. For each field specified, indicate whether the criteria is Required or Desired.

Selecting Required Versus Desired

Select the fields to be required by selecting the Required option next to the corresponding search criteria. These required fields narrow the result set. Items that do not meet these required criteria will not appear in the result set.

The Desired option does not exclude records from the result set. Rather, those items that match criteria marked as desired have a higher score than the records that do not match that criteria.

Note. Selecting the Desired option neither extends nor narrows the result set. It only increases or decreases the result displayed in the Score field accordingly.

How the System Scores Results

The system performs calculations and returns results based on three scores: qualifications, preferences, and availability (the availability score can only be calculated for PeopleSearch and PeopleMatch).

In the search pages, the user can define the weight that qualifications, preferences, and availability have in the consolidated score. Additionally, when configuring the searches, you can associate each factor with a weight within its factor family.

The system calculates scores differently based on how a user enters their search criteria. A weighted average is calculated for each row in the result set.

If a user enters search criteria for four fields, the system assigns 25 percent of the total score to each field. If in one of the fields the user enters a list of key words connected by *AND* or *OR,* the system assigns the results a fraction of the 25 percent total for the field following these rules:

- If a user enters the *Desired* and *AND* conditions for a search field, the system calculates the score based on the number of values that match. For example if they enter three values in the search criteria and the record matches only one value, the record receives a score of 33 percent of the 25 percent associated with the search field.
- If a user enters the *Desired* and *OR* conditions for a search field using three values in the search criteria and the record matches only one value , the record receives a score of 100 percent of the 25 percent associated with the search field.
- If a user enters the *Required* and *AND* conditions for a search field using three values in the search criteria, the system returns only those rows that meet all values and scores the record 100 percent of the 25 percent associated with the search field.
- If a user enters the *Required* and *OR* conditions for a search field using three values in the search criteria, the system returns all rows that meet at least one value and scores the record at 100 percent of the 25 percent associated with the search field.

Using Free Form Fields

Free form fields do not allow users to select a value from a prompt when entering search criteria. Examples of free form fields include descriptions, city, or keywords to search within resumes.

In the PeopleMatch and PeopleSearch search configuration, use the RESUME_TEXT field to search keywords within resume documents.

When entering values in free form fields, you can enter a value or a partial value.

Partial Values

To enter a partial value, use wildcards to define the value according to the following guidelines:

***	Specifies zero or more alphanumeric characters.
?	Specifies one alphanumeric character.

Here are three examples of wildcard usage:

- City: *New**

  In this example, the city must start with *New* (for example, *New York* or *New Orleans*).
- City: **Orleans**

  In this example, the city must contain *Orleans* (for example, *New Orleans*).
- Postal: *94???*

  In this example, the postal code must start with *94* and continue with three more alphanumeric characters (for example, *94111*).

Note. You determine whether your search is case-sensitive by the value you enter. For example, if you do not want to differentiate between New York, new york, and NEW YORK, enter *NEW YORK* or *new york* in the field. If you enter a string in sentence case (such as *New York*), the search on that field will be case sensitive.

Searching Using the Logical AND and OR

Within a particular search criterion, you can include multiple values and string them together with either an *OR* or an *AND.* If you string values together with an *AND* and you mark the criterion as required, then the system returns only search results that possess all of the criteria entered. No additional configuration is required to use this feature. You may not include *AND* and *OR* in the criteria for the same field. Also, the system does not support the use of parentheses.

Note. To search for the word *OR* or *AND* (for example, if you search for people living in *Oregon* and the state code is *OR*), enclose *OR* (which corresponds to the state abbreviation) within quotation marks to differentiate it from the logical *OR.*

Comparative Search

You can search for values that are greater than or less than the value entered. This is useful when searching on dates (such as checking for availability) or numbers (for example, number of assignments). To use this feature, you must establish the field as available for a comparative search when setting up your search configuration.

Note. Searching on a field using a comparative search results in lower performance.

Combination Search for Test Scores

Test scores are divided into two categories, based on the type of values that can be entered:

- Range:

  The values are divided in ranges that are presented as options when searching. No comparison operator is provided, and a rating of *better than* is the only option.

- Pass/Fail:

  Radio buttons indicate whether the person passed or failed the test.

A few fields are available on the search pages where you might want to search for a combination of values. For example, when a user is searching for applicants that obtained a certain score in a particular test, the user needs to specify not only the score, but also the test. This is called a *combination search* because a relationship exists between the two fields involved in the search. If these fields are included in the search configuration, the system displays two fields on the search page (one next to the other and separated by a comparison operator). In this example, the fields are Test and Score.

This functionality is limited in that Verity, which has a limitation of 256 fields per collection, counts each field value as a separate field.

For example, if the TEST field has 3 values (Typing, Filing, and Math), the system counts this as three fields towards the 256 field limitation for the collection. This means that the total number of fields in the search configuration, plus the total number of values for the first field of each search pair, must be fewer than 256.

Note. Including combination search fields in the search configuration, even when the number of fields remains below the Verity limitation, could adversely affect performance.

CHAPTER 7

Creating Applicant and Employee Records

The chapter provides an overview of creating applicant and employee records, lists common elements, and discusses how to:

- Enter data to create new applicant records.
- Match applicants and employees to customers and job orders.
- Hire applicants.
- Maintain employee and contractor records.
- Collect employee quality feedback information.
- View employee history.

Understanding Applicant and Employee Record Creation

You should be aware of the following Staffing Front Office processing rules for creating applicant and employee records:

- You can only enter individuals into Staffing Front Office as applicants.
- After you enter an individual into the system, you can convert them to an employee or contractor (non-employee) using the Applicant pages.
- Once you enter applicants into the system, you can search for candidates whose skills match open customer orders and place them on assignments.
- You cannot place an applicant on a temporary assignment, however, until the applicant goes through the hire process and is in the system as either an employee or a contractor.

Note. If you have Pay/Bill Management installed without Staffing Front Office, you still use the Applicant component to add employees to use in temporary orders. The individual (as a resource) must first be added as an applicant and then hired.

Common Elements Used in This Chapter

Assignments	Current or past placements for an employee or contractor.
Contractor	Individual who is associated with a third-party vendor and who can be placed on assignments.

Non-Employee	An individual, such as an outside contractor, who may not be directly employed by your company but who may be working on assignments filled by your company.

Entering Data to Create New Applicant Records

This section describes the direct data entry process for creating applicant records. A customer service representative completes the pages with information supplied by applicants. Once complete, a recruiter or supervisor can add additional information, like responses to interview questions, and move to other related pages from within the application by clicking the links on the various pages.

Applicants or customer service representatives, on behalf of the applicant, can use the pages in the self-service component to apply to the organization. The self-service component can be configured to show or hide the applicable pages.

This section discusses how to:

- Enter contact information.
- Enter personal information.
- Enter job information.
- Enter application information.
- Enter resume information.
- Enter qualifications information.
- Enter prior work experience information.
- Enter reference information.
- Enter recruiting source information.
- Collect additional information using forms.
- Reset applicant status.

Pages Used to Create Applicant Records

Page Name	Object Name	Navigation	Usage
Contact Information	FO_APP_PERS_DATA1	Staffing, Resources, Applicants, Applicants	Enter contact information.
Personal Data	FO_APP_PERS_DATA2	Staffing, Resources, Applicants, Applicants, Personal Data	Enter personal information.
Job Data	FO_APP_JOB_DATA	Staffing, Resources, Applicants, Applicants, Job Data	Enter job information.
Application	FO_APP_AVAIL	Staffing, Resources, Applicants, Applicants, Application	Enter placement information.

Page Name	Object Name	Navigation	Usage
Resume	FO_APP_RESUME	Staffing, Resources, Applicants, Applicants, Resume	Attach resume, or enter resume text.
Additional Attachments	FO_AP_ATTACH	Click the Additional Attachments link on the Resume page.	Attach additional items to the resume.
Qualifications	FO_APP_QUALIFS	Staffing, Resources, Applicants, Applicants, Qualifications	Add and update a range of qualifications.
Competencies	FO_APP_COMPS	Click the Update Competencies link on the Qualifications page.	Add and update qualifications competencies.
School Education	FO_APP_SCHOOL	Click the Update School Education link on the Qualifications page.	Add and update schooling qualifications.
Professional Education	FO_APP_EDUC	Click the Professional Education link on the Qualifications page.	Click the Update Professional Education link on the Qualifications page. Add and update professional education qualifications.
Licenses/Certificates	FO_APP_LIC	Click the Update Licenses link on the Qualifications page.	Add and update license and certification qualifications.
Languages	FO_APP_LANG	Click the Update Languages link on the Qualifications page.	Add and update language qualifications.
Memberships	FO_APP_MEM	Click the Update Memberships link on the Qualifications page.	Add and update membership qualifications.
Honors and Awards	FO_APP_HON	Click the Update Honors and Awards link on the Qualifications page.	Add and update honors and awards qualifications.
Test Results	FO_APP_TEST	Click the Update Test Results link on the Qualifications page.	Add and update test results qualifications.
Prior Work	FO_APP_PRIWRK	Staffing, Resources, Applicants, Applicants, Prior Work	Enter prior work experience information.
References	FO_APP_REF	Staffing, Resources, Applicants, Applicants, References	Enter reference information.
Source	FO_APP_SRC_DATA	Staffing, Resources, Applicants, Applicants, Source	Enter source information.

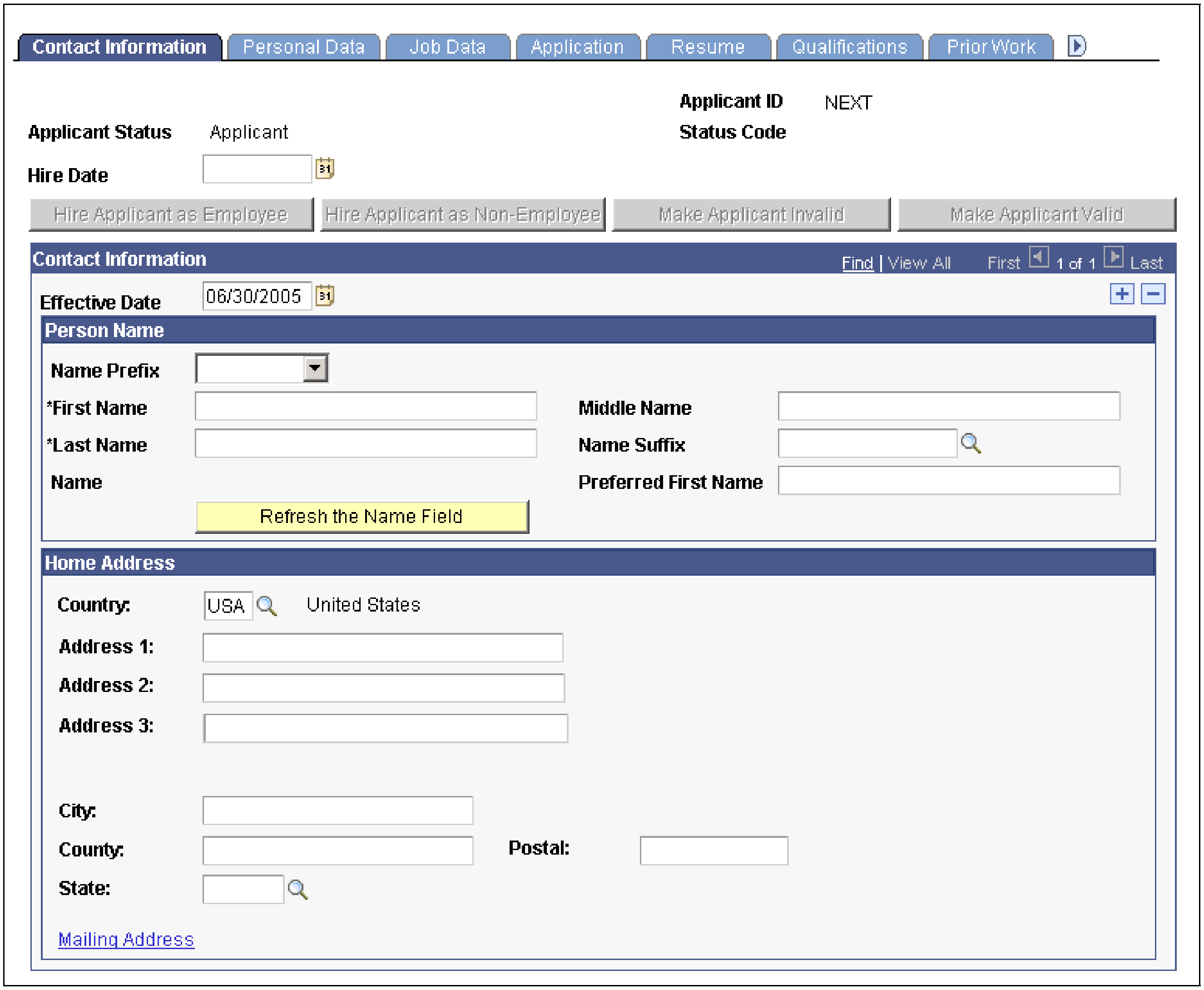
Page Name	Object Name	Navigation	Usage
Forms	FO_APP_FORMS	Staffing, Resources, Applicants, Applicants, Forms	Collect information about the applicant or employee.
Forms	FO_APP_FORM_DTL	• Click a View Form link on the Forms page. • Click the Add New Form button on the Forms page.	View and enter new forms and form details.
Reset Status	FO_APP_RESET_STAT	Staffing, Resources, Applicants, Applicants, Reset Status	Reset applicant status from *Hire Pending* to *Active.*

Entering Contact Information

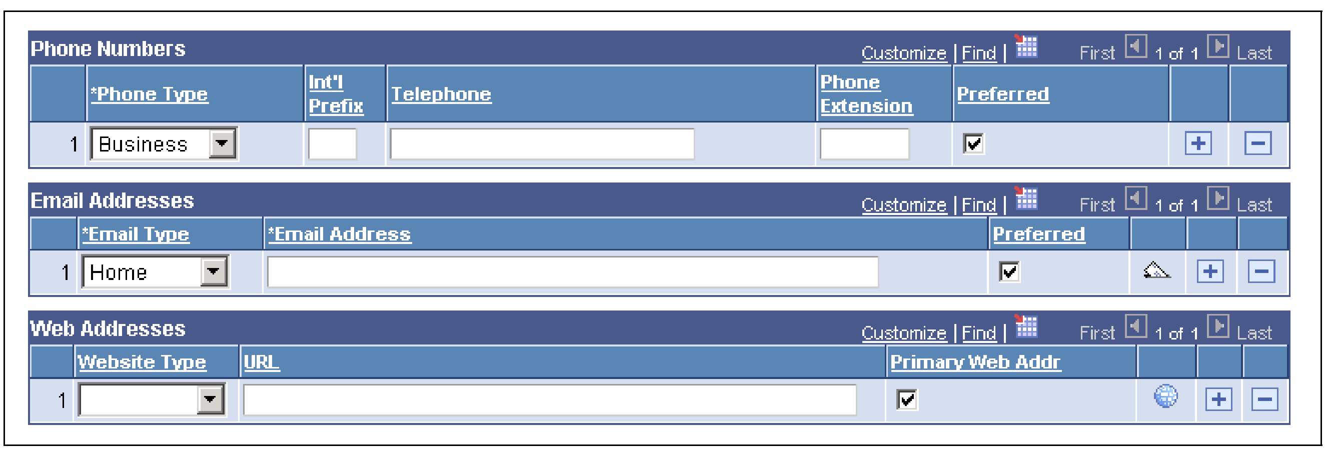
Access the Contact Information page.

Once you create and save the applicant record, the system automatically assigns the next applicant number in the sequence to the applicant. If the applicant becomes an employee, the system assigns an employee ID.

Warning! Although you can override the automatic numbering feature, we recommend that you either use the feature as designed or assign applicant ID numbers manually, but not both.



Contact Information page (1 of 2)



Contact Information page (2 of 2)

Applicant Status

Available statuses are:

- *Applicant:*

Applies to those individuals converted from a pending status or entered directly into the Applicant pages. This resource is only visible through the Applicant pages.

- *Employee* and *Non-Employee:*

  Apply to those individuals who have been hired. These resources are only visible through the Employee pages.

Status Codes

Available status codes are:

- *Active:*

  Applies to those individuals who should be currently considered for placement. This resource is only visible through the Applicants pages.

- *Hired:*

  Applies to those applicants who have been converted to either an employee or a non-employee. This resource is only visible through the Employees pages.

- *Hire Pending:*

  Applies to those applicants who are in the process of being converted to either an employee or a non-employee. In an integrated environment (where you have both Staffing Front Office and Pay/Bill Management installed), this could mean that the application messages are still being processed between the databases. This resource is only visible through the Applicants pages.

- *Invalid:*

  Applies to those individuals who should not be considered for placement for one reason or another. This resource is only visible through the Applicants pages.

- *Applicant (Pending):*

  Applies to those individuals entered through self-service. This status is only visible through the Applicants pages.

Hire Applicant as Employee

Enter the Hire Date and click this button to hire the applicant as an employee.

Note. This button is only available if the applicant has a status of *Active.*

Hire Applicant as Non-Employee

Enter the Hire Date and click this button to hire the applicant as a non-employee (or contractor).

Note. This button is only available if the applicant has a status of *Active.*

Make Applicant Invalid

For individuals with an *Active* or *Applicant Pending*status, click this button to change the status to *Invalid.* Once clicked, this button is unavailable and the Make Applicant Valid button becomes available.

Make Applicant Valid

For individuals with an *Applicant (Pending)* or *Invalid*status, click this button to change the status to *Active.* Once clicked, the button becomes unavailable, but two buttons to hire the applicant, as well as theMake Applicant Invalid button, become available.

Contact Information

Enter the Effective Date for the person information. Complete all the Person Name fields for which you have information.

If the applicant has a mailing address that is different from their home address, click the Mailing Address link, and then enter the mailing address.

Note. Because HRMS does not provide the *Use Home Address as Mailing* functionality, the system creates two addresses in HRMS during the hire process: one for home and one for mail. Once the employee is hired, the system hides the Mailing Address link and the Use Home Address as Mailing field to avoid conflicts with data changes in HRMS. Users must click the Edit Address button on the Employee page to view addresses in HRMS.

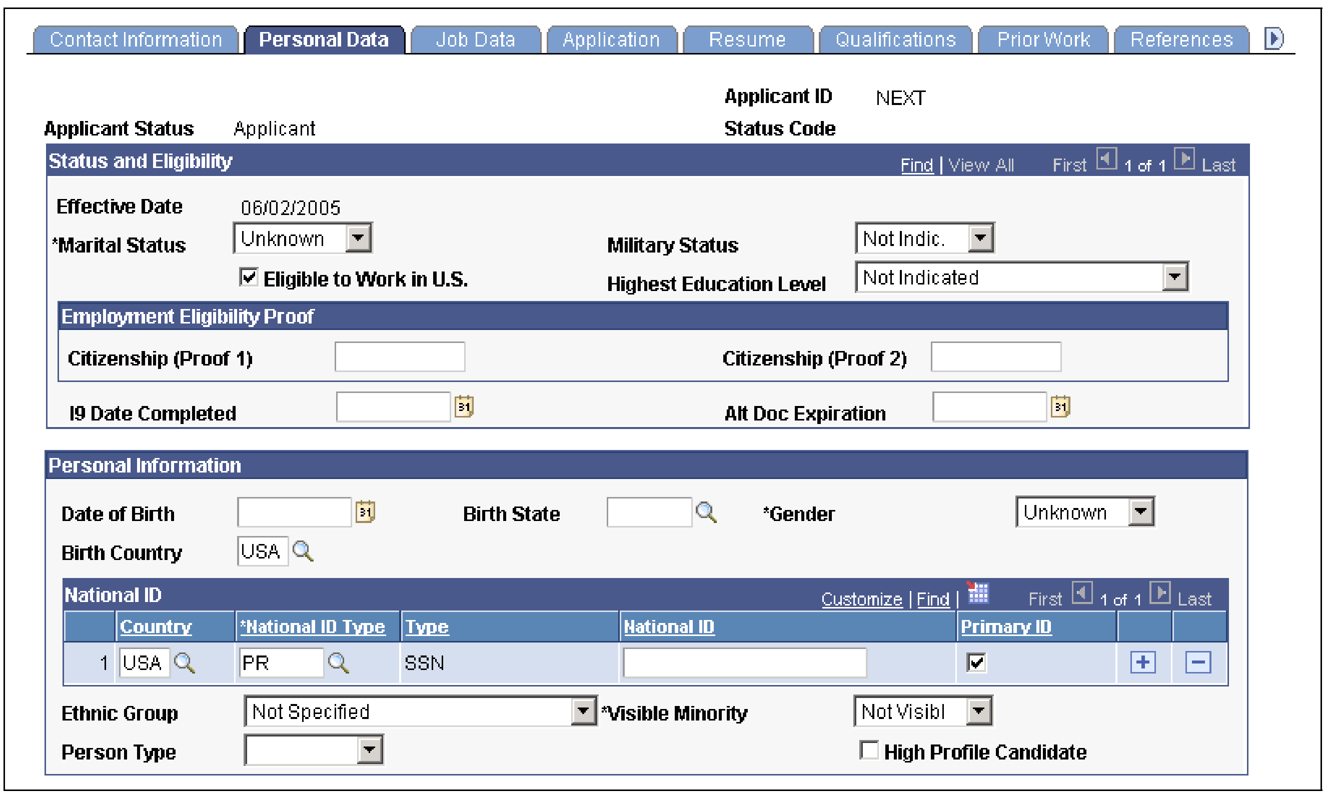
The Country field is automatically populated from the user's personal preferences. You can change it. Other address fields may change depending upon the country selected.

Phone Numbers, Email Addresses, and Web Addresses

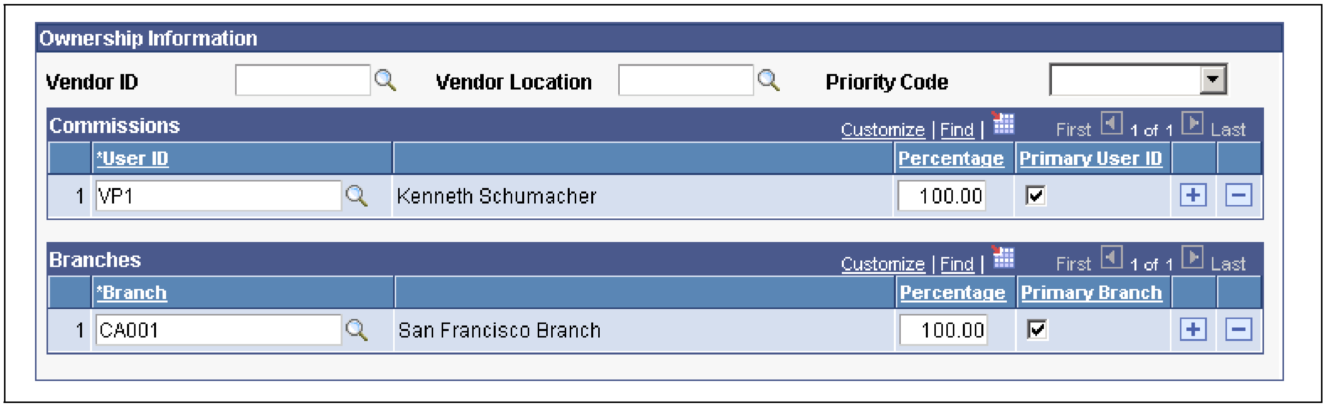
Complete the group box fields for which you have information.

Entering Personal Information

Access the Personal Data page.



Personal Data page (1 of 2)



Personal Data page (2 of 2)

Personal Information

Complete this section only if you are hiring the applicant and the person will be paid through the company payroll system. Complete all the payroll fields for which you have information.

Date of Birth Enter the applicant's date of birth.

Note. If you add someone under age 16, the system displays a warning message when you save the record.

Birth Country Enter the applicant's birth country.

Birth State Enter the applicant's birth state.

Note. Birth Country and Birth State are required if you are using PeopleSoft HRMS and entering a candidate with a national ID country of France or Belgium; otherwise they are optional.

Gender Select the applicant's gender.

Country Enter the country that issued the applicant's national ID.

National ID Type Enter the type of national ID issued to the applicant.

National ID Enter the applicant's national ID number. For example, for the United States it would be the person's Social Security Number. If a national ID is not entered for the applicant, the system displays a warning message. National ID is required when an applicant is hired

Primary ID Select this check box to indicate this is the primary ID for the applicant.

Ethnic Group, Visible Minority, Marital Status, and **Military Status** If your organization is subject to U.S. Affirmative Action or Equal Employment Opportunity laws and regulations, select the applicant's ethnic group. This may be required for reporting purposes. Selections include:

- *American Indian/Alaska Native*
- *Asian*
- *Black/African American*
- *Hispanic/Latino*
- *Native Hawaiian/Oth Pac Island*(native Hawaiian or other Pacific islander)

- *Not Specified*
- *White*

If the applicant's Country (national ID country) is *CAN,* select a value in the Visible Minorityfield. Selections include:

- *Black*
- *Chinese*
- *Filipino*
- *Indo-Pak*(Indonesian Pakistani)
- *Japanese*
- *Korean*
- *SE Asian*(southeast Asian)
- *W.Asn,Arab*(west Asian, Arab)
- *Other*
- *Not Visible*

If your organization does VETS-100 reporting, enter a selection in the Military Statusfield in the Status and Eligibility group box:

- *Actv Resv*(active reserve)
- *Inactv Resv*(inactive reserve)
- *No Mil Svc*(no military service
- *Not Indic.*(not indicated)
- *Other Vet*(other veteran)
- *Retired*
- *Viet Vet*(Viet Nam veteran)

Eligible to Work in U.S. Select this check box if the applicant can prove he or she is eligible to work in the United States.

Highest Education Level Enter the level that is most closely associated with the highest educational level that the applicant has achieved.

Citizenship (Proof 1) and **Citizenship (Proof 2)** Enter the types of proofs of citizenship, such as *DRIVER LIC* (driver's license) or *PASSPORT.*

I9 Date Completed Enter the date when the identifying documents required under the Immigration Reform and Control Act are provided by the applicant.

Alt Doc Expiration (alternate document expiration) Enter the date the employee's employment eligibility verification documentation expires. This field pertains to an employee's eligibility to work, and is applicable for both citizens and non-citizens.

Person Type This is used by the HRMS system to determine how to process the individual. This information is only necessary if the applicant is being converted to an employee in the HRMS system. Selections include:

- *Applicant*

- *Cobra Part* (Cobra participant)
- *GP Dep/Ben*(global payroll dependent/beneficiary)
- *Independnt*(independent contractor)
- *Leased Wrk* (leased worker)
- *Non HR EE* (non-HR administered employee)
- *Other NEE* (other non-employee)
- *Pen Payee* (pension payee)
- *Stock NEE* (stock non-employee)
- *Suc Candid* (succession candidate)
- *TLContrctr* Time and Labor contractor
- *TempWorker* (temporary worker)
- *Training*

High Profile Candidate Select this check box to indicate that the applicant is an exceptional candidate for placement on job assignments.

Ownership Information

Vendor ID and **Vendor Location** If this applicant is a contractor, enter the vendor information for this applicant.

Priority Code Select a priority that represents the applicant's status in terms of their ability to fill a job order. The system administrator can define the selections that appear in this drop-down list box.

Commissions Enter the User ID and the Percentage of the earned commission each user will receive. The commission percentages that you enter must add up to 100.

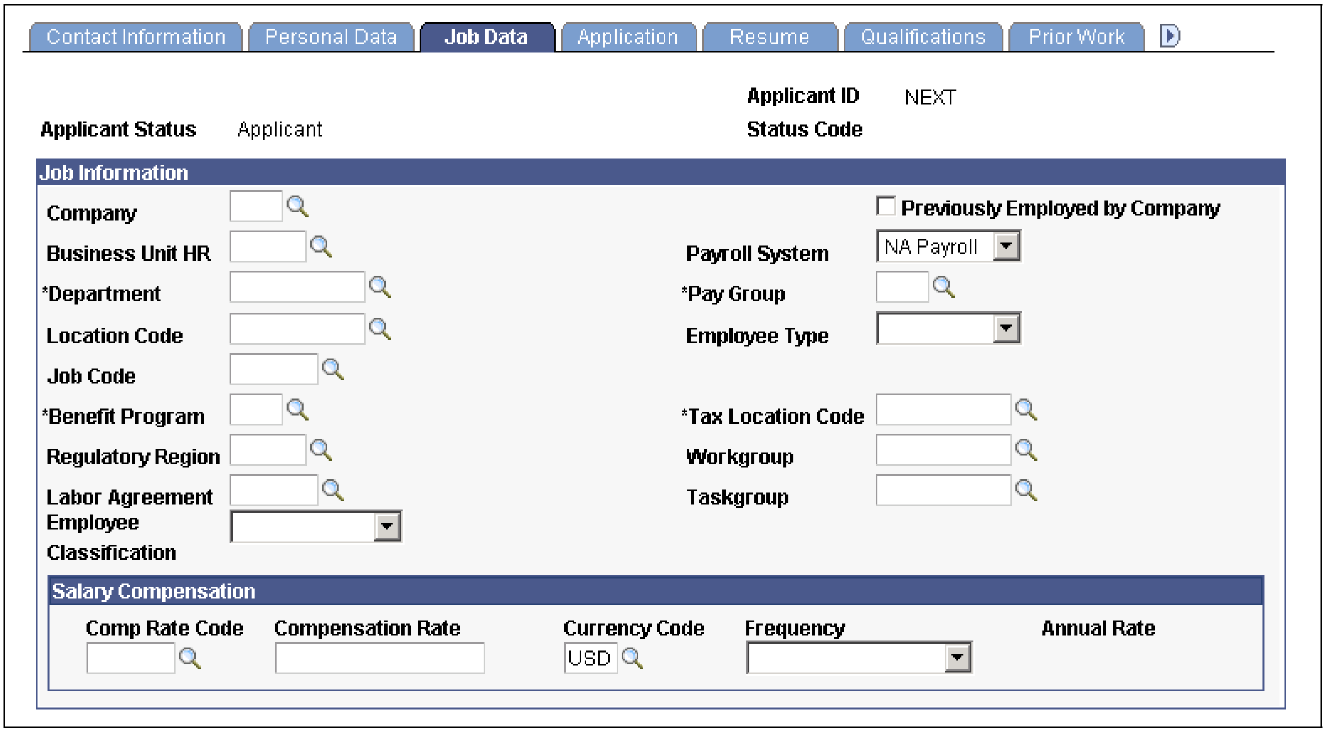
Select thePrimary User ID check box to indicate the user who will be primarily responsible for the applicant.

Branches Enter the Branch and the Percentage of the earned commission each branch will receive. The commission percentages that you enter must add up to 100.

Select thePrimary Branch check box to indicate the branch that manages the applicant.

Entering Job Information

Access the Job Data page.



Job Data page

Note. You do not need to enter information in most of these fields until you are about to hire the applicant. Many of the values on this page can populate by default based upon user preferences. Your system administrator can set up the defaults.

Job Information

Company	Enter the company with which the applicant or employee is associated. If a company is associated with a department, the company value will populate by default when the department is entered.
Previously Employed by Company	Select this check box if the applicant or employee was previously employed by the company.
Business Unit HR	Enter the HRMS business unit for this applicant.
Payroll System	Enter the payroll system that your organization that will use to process payroll, such as *NA Payroll*(North American Payroll) or *Global Pay.*
Department	Enter the department for this job.
Pay Group	Enter the pay group under which you want to classify the applicant or employee. Pay groups are associated with companies.
Location Code	Enter the location where the applicant or employee will be employed.
Employee Type	Enter the type that best represents the employee or applicant, such as *Hourly* or *Salaried.* This value may populate by default when you enter the pay group.
Job Code	Enter the job code most closely associated with the duties being performed by the applicant or employee.
Global Pay Group	If the applicant is paid using global payroll, enter a global pay group.

Note. This field appears only if Pay/Bill Management is installed. This field is required if you select *Global Pay* as the Payroll System value.

Benefit Program Enter the benefit program under which the applicant or employee will be covered.

Tax Location Code Enter the tax location from which the applicant or employee will be paid.

Regulatory Region Enter the regulatory region under which you want to classify the applicant or employee.

Workgroup Enter the workgroup under which you want to classify the applicant or employee for Time and Labor. This field appears only if Pay/Bill Management is installed.

Taskgroup Enter the task group under which you want to classify the applicant or employee for Time and Labor. This field appears only if Pay/Bill Management is installed.

Labor Agreement Enter an entry from the available options. Values originate in HRMS application and are linked to a country.

Note. This field appears only if Pay/Bill Management is installed.

Employee Classification Enter a classification for the employee, such as *Apprentice, Consultant,* or *Contractor.*

Salary Compensation

Comp Rate Code (compensation rate code) Enter the code that represents a pay component that will be used to calculate the employee's pay in the payroll system. For Staffing Front Office, this is normally the code associated with the employee's base pay.

Compensation Rate If the employee is to be paid a base salary, enter an amount in this field. If the employee is paid hourly per assignment, this data is entered on the assignment (or agreement item). In such cases, leave this field blank.

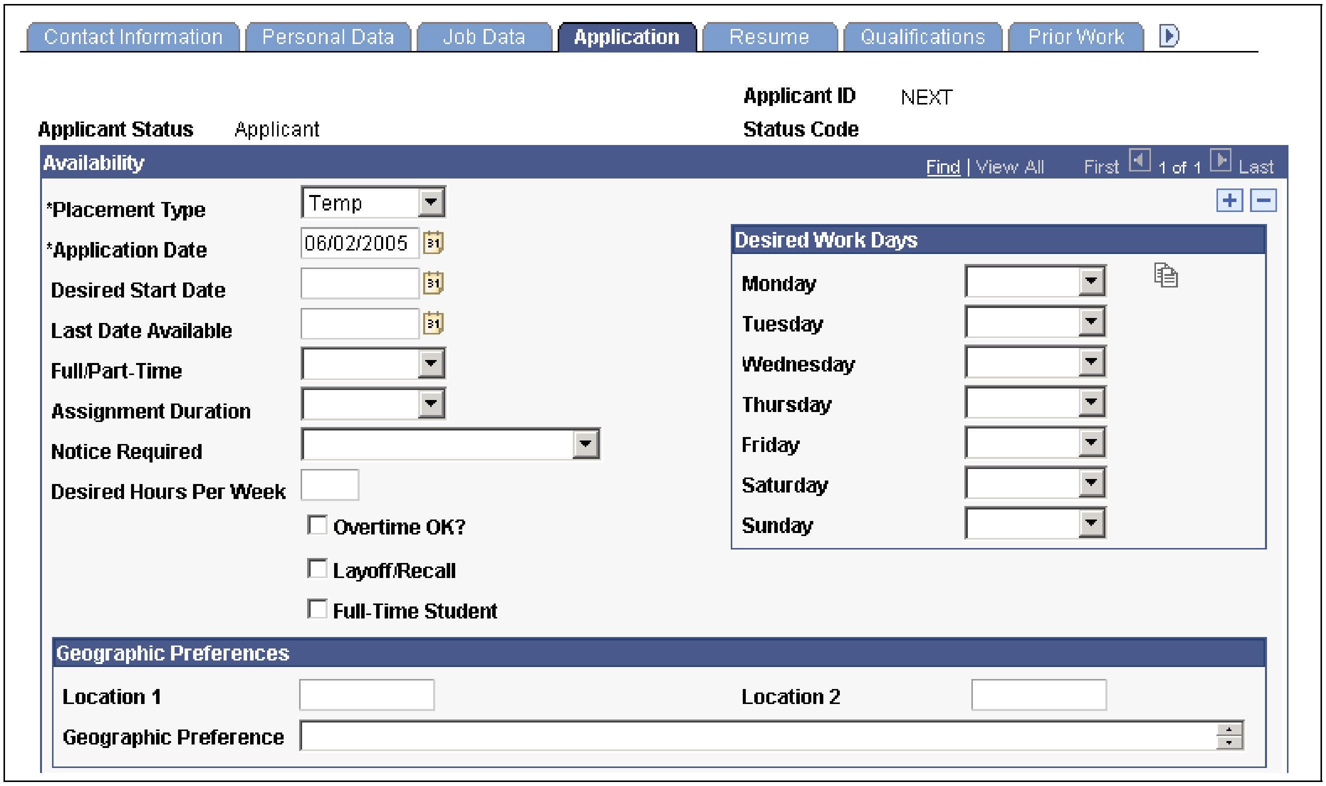
Currency Code Enter the currency in which the employee will be paid.

Frequency Select the frequency at which the employee's compensation rate is stated, such as *Hourly, Monthly,* or *Weekly.*

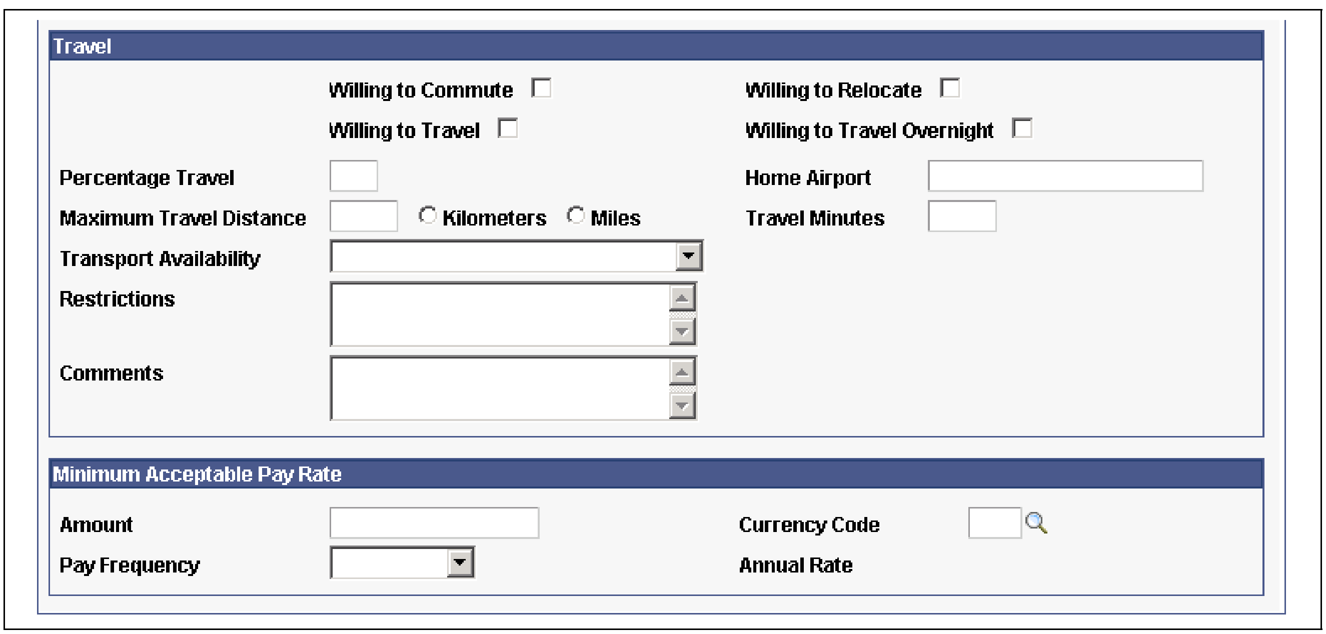
Annual Rate Displays the employee's annual rate of pay based on the entries in the Salary Compensation fields.

Entering Application Information

Access the Application page.



Application page (1 of 2)



Application page (2 of 2)

Availability

Placement Type Select the type of placement that the applicant prefers, such as *Career* or *Temp.*

Application Date Select the date that the applicant applied with your organization. The default value for this field is the current date.

Desired Start Date Select the first date that the applicant is available for an assignment.

Last Date Available	Select the last date that the applicant is available for an assignment.
	Note. The availability dates on this page are not affected by assignment status. You can search for and make offers to all active applicants and employees, even if they are already on assignment.
Full/Part-Time	Select *Either, Full-Time,* or *Part-Time.*
Assignment Duration	Select the duration of the assignment that is preferred by the applicant, such as *Long Term,Moderate,* or*Short Term.*
Notice Required	Select the type and length of notice that the applicant prefers when the employer terminates her or his assignment.
Desired Hours Per Week	Enter the number of hours per week that the applicant wants to work.
Overtime OK?	Select this check box if the applicant will work overtime.
Layoff/Recall	Select this check box if the applicant will work in a situation where there has been a layoff or recall.
Full-Time Student	Select this check box if the applicant is a full-time student.
Desired Work Days	For each day of the week, select the shift that the applicant wants to work: *First Shift, No Shift, Second Shift,* or *Third Shift.*
	Note. After you select a shift for Monday, you can use the Replicate icon to copy the same shift selection to Tuesday through Friday.

Geographic Preferences

Location 1and **Location 2**	Enter the top two locations preferred by the applicant.
Geographic Preference	Enter the region preferred by the applicant.

Travel

Willing to Commute, Willing to Relocate, Willing to Travel, and **Willing to Travel Overnight**	Select the Willing to Commute check box and then enter the number of Travel Minutes and Maximum Travel Distance that the applicant is willing to commute. Select Kilometers or Miles. SelectWilling to Relocate if the applicant is willing to relocate to secure a position. SelectWilling to Travel if the applicant is willing to travel, and enter the maximum Percentage Travel to which the applicant is willing to commit. SelectWilling to Travel Overnight if the applicant is willing to travel overnight.
Transport Availability	Select the availability of transportation used most often by the applicant.
Home Airport	Enter either the name of the airport or the abbreviation of the airport nearest the applicant, such as *SFO, JFK,* or *CHI.*
Restrictions	Enter any restrictions that the applicant may have regarding travel.
Comments	Enter any comments that you may have regarding the applicant's capacity for commuting or overnight travel.

Minimum Acceptable Pay Rate

Enter the minimum amount of pay for which the applicant is willing to work.

Amount	Enter the minimum pay amount that the applicant will accept.
Currency Code	Enter the currency to use when calculating the annual rate.
Pay Frequency	Select the frequency that the amount represents. For example, an hourly rate, a monthly rate, or an annual rate. The frequency will also affect how the annual rate is calculated.
Annual Rate	Displays the annual rate of pay that the applicant or employee wants to be paid. The system uses the frequency table and assumes full-time employment when calculating the annual rate. The system calculates it based upon the amount and the frequency.

Entering Resume Information

Access the Resume page.

Applicants and employees can submit multiple resumes, each of which focuses on different skills and strengths. They can also include samples of their work, letters of reference, or documents explaining special circumstances, such as medical requirements. You associate multiple documents to one person, as well as track multiple documents for individual applicants or employees, by assigning a unique file name to each resume.

The Verity index creation occurs more rapidly when information has been pasted into the Resume Text field, as opposed to the information being in an electronic attachment.

Language Code	Enter the language in which the resume is composed.
Resume Text	Paste the body of the resume here.
Add Resume Attachment	Click to browse for and attach additional resume items.
Additional Attachments	Click to attach items to the applicant in addition to the resume.

Entering Qualifications Information

Access the Qualifications page.

This page displays a variety of qualification information about the applicant. You can add or update information for each of the categories in the first eight group boxes by clicking the respective update link and accessing specific update pages. For the last two categories—Jobtitles and Lines of Business—you can look up and add the information directly from the Qualifications page.

Competencies

Click the Update Competencies link. From the Competencies page (FO_APP_COMPS), enter the Competency Descriptionor a partial description, and click Search for the competency that you want to add. Select the check box for the Competency you want to add, and then click the Select button to add it to the Competencies group box at the bottom of the page. Select Proficiency and Interest Level from the drop-down list boxes. Enter the applicant's relevant information in the Year Acquired, Year Last Used, and Years of Work Experience fields. Repeat these steps to add additional competencies. When all the competencies are listed, click the OK button to add the list to the Qualifications page.

School Education

You can make multiple entries for each applicant, as well as add or delete a school. Staffing Front Office does not deliver the entries for the School Code field. Your system administrator must provide these during implementation. Staffing Front Office does deliver the values for the School Type and Level Achieved fields. Your system administrator, however, can modify them during implementation to reflect your requirements.

From the update page, enter the Country, School Type, Date Acquired, Average Grade, School Code, School Name, State, Area of Study, and Grade values, and then click the OK button to add the information to the Qualifications page.

School Type Enter the type of school.

Note. If school types have been entered into the system, but none appear when you search with the Lookup icon, you must add a TableSet ID matching the country.

Level Achieved Enter the highest level of study achieved.

Date Acquired Select the date that the applicant received the degree.

Average Grade Enter the applicant’s average grade using one decimal place, for example *4.0.*

Completed Select if the applicant completed the grade level.

School Code and **School Name** Select the school that the applicant attended.

Note. When you select a value from the School field, the description appears in place of the School Name field. If the school you are looking for is not on the list, enter the school name directly in the School Name field.

Country and**State** Enter the information for the school.

Area of Study and **Grade** Enter the subject area in which the applicant studied, and his or her grade point average.

Professional Education

From the update page, enter degree, major, and school information, and then click the OK button to add the information to the Qualifications page.

Degree Enter the degree the applicant earned.

Date Acquired Select the date that the applicant received the degree.

Average Grade Enter the applicant’s average grade using one decimal place, such as *4.0.*

Graduated Select if the applicant graduated from the degree program.

Major Code and **Major** Select the subject in which the applicant majored. If you select a value, the description appears in place of the Major field. If the correct value does not appear in the major list, you can enter the major in the Major Code field.

School Code and **School Name**	Enter the school that the applicant attended. **Note.** When you enter a value from the School Code field, the description appears in place of the School Name field. If the school you are looking for is not on the list, enter the school name in the School Code field.
Educator	Enter the name of the educator.
Country and **State**	Enter the information for the school.

Licenses

From the Licenses/Certificates update page (FO_APP_LIC), enter license, issue date, expiration date, and location information, and then click the OK button to add the information to the Qualifications page.

License or Certificate Code	Select the license or certificate code. If the code is missing, your System Administrator can add it to the system. The Description field is automatically populated.
Issue Date	Enter the date the license/certificate was issued.
License/Certification Number	Enter the license/certificate number.
Issued By	Enter the group that issued the license/certificate.
Expiration Date	Enter the expiration date of the license/certificate.
License Verified and **Renewal in Progress**	Select these check boxes to indicate the status of the license/certificate.
Country and **State**	Enter the information for the license/certificate.

Languages

From the update page, enter language and proficiency information, and then click the OK button to add the information to the Qualifications page.

Language Code	Select the appropriate language code. The Description field is automatically populated.
Native Language,Translator, and **Teacher**	Select all check boxes that apply
Speak, Read, and **Write**	Select the proficiency for each of these categories.
Evaluation Date	Enter the date on which the language proficiency was evaluated.

Memberships

From the update page, enter organization and mandate information, and then click the OK button to add the information to the Qualifications page.

Organization	Select the organization of which the applicant is a member. The Description field automatically populates.

Membership Date	Enter the date on which the applicant began his or her membership.
Mandate	Enter the mandate or purpose of membership.
Mandate Position	Enter the mandate position
Mandate Begin Date and **Mandate End Date**	Enter the begin and end dates of the mandate.

Honors and Awards

From the update page, enter award and grantor information, and then click the OK button to add the information to the Qualifications page.

Honor or Award	Select the honor or award.
Grantor	Enter the grantor of the award.
Issue Date	Enter the date the honor or award was issued.

Test Results

From the update page, enter test and score information, and then click the OK button to add the information to the Qualifications page.

Test and **Test Description**	Select the test from the predefined list. The Description field is automatically populated.
Test Date	Select the date that the test was administered.
Test Score	Enter the score that the applicant earned on the test.
Passed Test	Select this check box if the applicant or employee achieved a passing score on the test.

Job Titles

For each Job Category entry you add, enter a Job Title Code.

Note. The PeopleSoft system delivers an index of job categories and job titles at the time of installation. You may want to delete this list from the database, in all or in part, and use a job title index that meets your unique business requirements. If you are not satisfied with the job titles and job categories that are available to you, consult with your system administrator.

Lines of Business

Enter as many Lines of Business entries as appropriate.

Entering Prior Work Experience Information

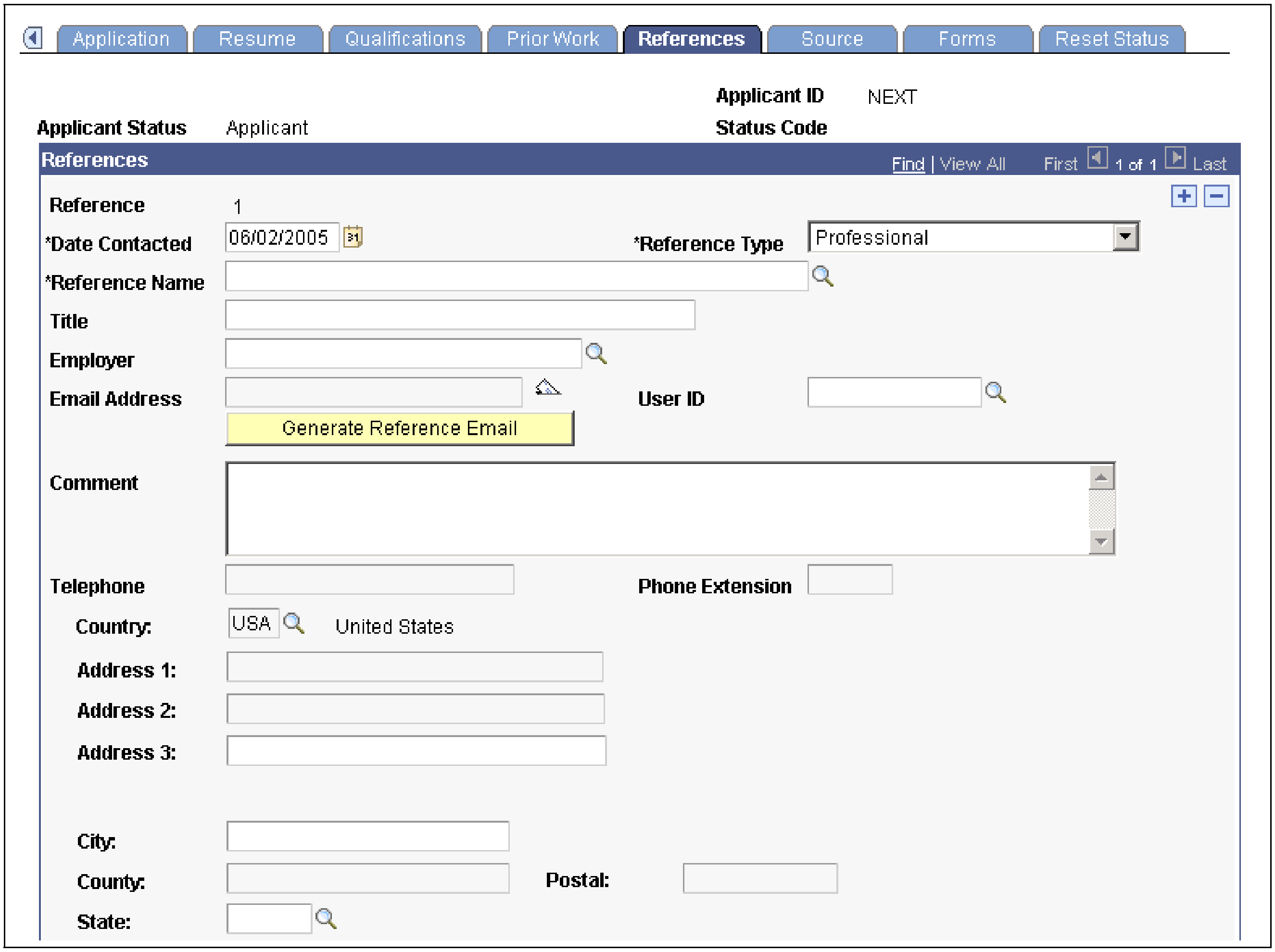
Access the Prior Work page.

Start Date and **End Date**	Select the dates that the applicant started and ended work for the employer.
Currency Code	Enter the currency in which the applicant or employee was paid.
Ending Pay Rate	Enter the applicant's rate of pay when the job ended.

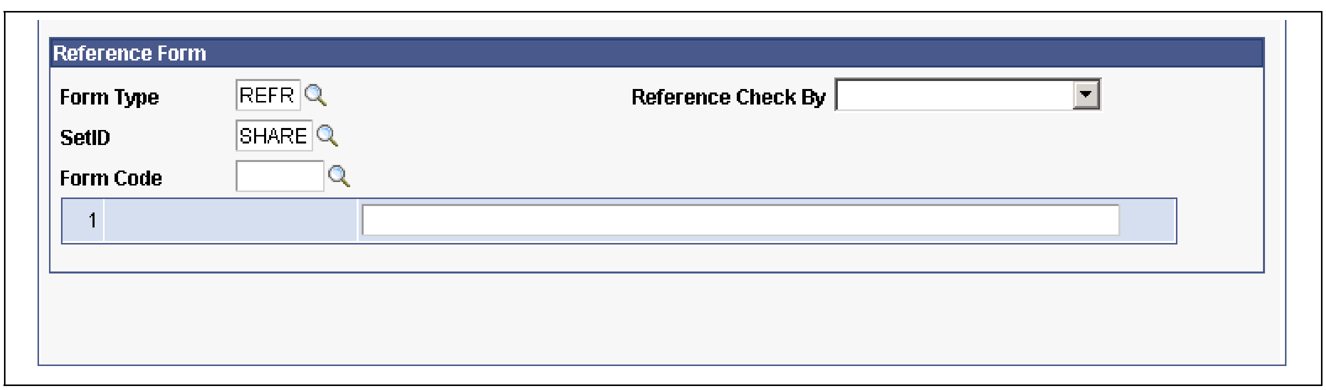
Pay Frequency	Select the frequency at which the applicant's pay rate is stated. This field is used to calculate the applicant's annual rate of pay.
Annual Rate	Displays the applicant's annual rate of pay based on their ending pay rate and the pay frequency.
Employer	Enter the employer name in the Employer field. If the employer is a customer of the staffing company, then enter the relevant information in the Customer SetID and Customer ID fields.
Country, City, State, and **Telephone**	Enter this information for the employer.
Job Description	Enter a brief description of the duties and responsibilities that are associated with the position. This is a free-form field. You can cut and paste descriptions directly into the field.
Ending Job Title	Enter the applicant's job title when he or she left the job.
Supervisor	Enter the name of the applicant's supervisor.
Termination Code	Select the entry that most closely describes the reason that the applicant separated from the employer.
Would Return to Employer	If the applicant or employee previously worked for an employer , and he or she would work for the employer again through your staffing organization, select this check box.
Customer SetID and **Customer ID**	Select the customer setID and customer for whom the applicant worked. If you select a customer ID, the customer name appears in the Employer field. If you do not select a customer ID, you can enter the name of the employer in the Employer field. **Note.** If you select a customer ID but then change the value in the Employer field, the system sets the Customer ID field to blank when you save the page.
Email Address	Enter the email address of the employer. Click *Send E-mail* to compose and send an email to the selected email address. **Note.** When entering a new email address, you must save the page before clicking theSend E-mail icon.
Company URL	Enter the website address that is associated with the employer. This is useful when you want to contact an employer to verify credentials on an applicant record. Click the URL button to launch a new browser window and display the website associated with the address entered in the field. **Note.** When entering a new website address, you will need to save the record before using the URL icon.
Full/Part Time	Select either *Full-Time* or *Part-Time.*
Comments	Enter comments about the applicant's job at the listed employer.

Entering Reference Information

Access the References page.



References page (1 of 2)



References page (2 of 2)

References

Reference Number The system generates this number automatically.

Date Contacted and **Reference Type**: Enter the date you obtained the reference information and a reference type: *Personal, Professional,* or *Both.*

Reference Name and **Title**: Enter the reference's name and his or her title. If the reference is a supervisor from a prior employer that was used on the Prior Work page, his or her name displays in the prompt list. If the reference is not from the prior work page, you can enter the name directly in the field.

Employer: Select a previous employer. The values for this field come from the Employer field on the Prior Work page. If the reference is not from a previous employer, you can enter the employer name directly in the field.

Note. If you add employers in the Prior Work page, you must save the applicant before you can see the employers on the References page.

E-mail Address: Enter the email address of the reference.

Note. When entering a new email address, you must save the page before using theSend E-mail icon.

User ID: Enter the user ID of the person performing the reference check. By default, the system displays the user ID of the person entering the information.

Generate Reference Email: Click this button to send a pre-formatted letter to the email address that is listed for the contact. Your system administrator can modify the letter for your specific requirements using Crystal Reports.

Comment: Enter any comments that you have about the applicant's reference information.

Telephone, Phone Extension, and **Country**: Enter the telephone number and phone extension of the reference, and enter the country and other address information as well.

Note. The address-related fields change depending on the country selected.

Reference Form

Form Type: Select the type of form that you want to add to the Reference page. The system is delivered with the form type *REFR* (references).

Reference Check By: Select *Customer, Recruiter,* or *Third-Party Service* to indicate how the reference was checked.

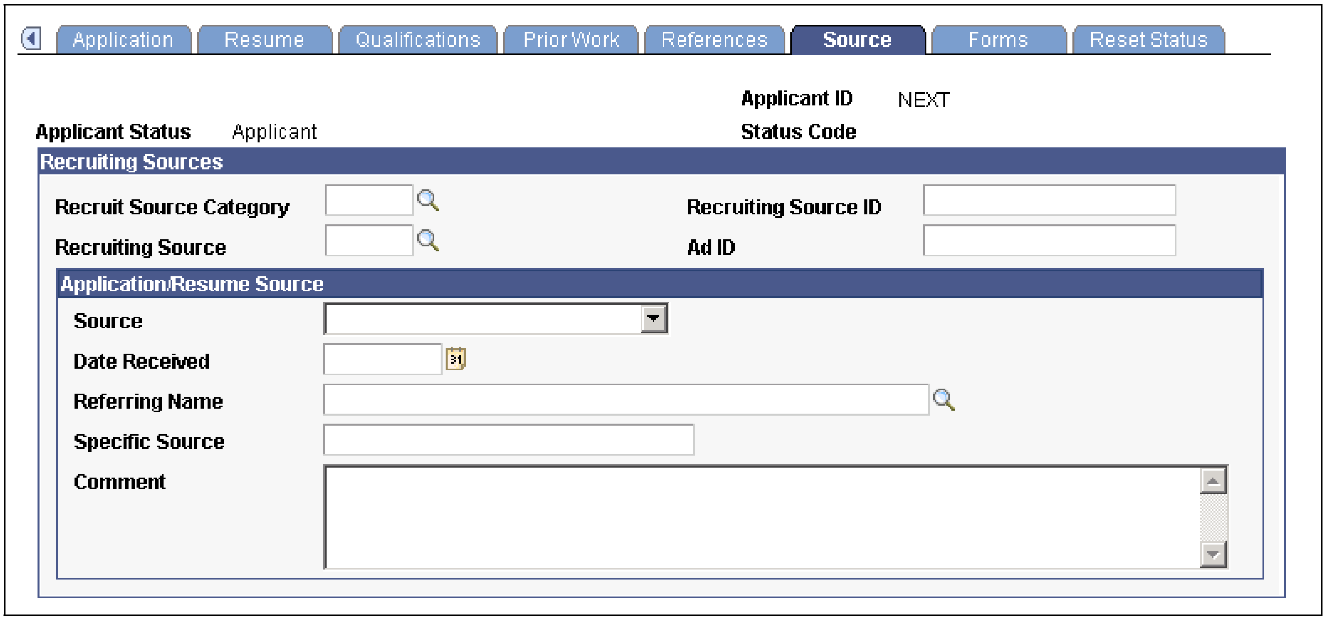
SetID: Select the setID from which to draw the Form Code. This is usually an organizational unit of your company, such as corporate headquarters or a branch.

Form Code: Select the form that you want to add to the page. For example, you can track the applicants' answers if you do multiple or different kinds of interviews. Selecting a specific form code returns a specific set of questions.

Forms are defined by the system administrator. To make any changes to the list of available forms or to the content of the forms, consult with your system administrator.

Entering Recruiting Source Information

Access the Source page.



Source page

Recruiting Sources

Recruit Source Category	Enter the category of the recruiting source. Examples include personal referrals, job fairs, and newspaper ads.
Recruiting Source ID	Enter the specific name or number for the recruiting source. This can be any relevant name or number.
Recruiting Source	Enter a recruiting source. For example, if the source category is a newspaper ad, select the name of the newspaper as the source. If the name of the source is not available from the prompt table, enter it directly into the field.
Ad ID (advertisement ID)	Enter the specific advertisement name or number for the recruiting source. This can be any relevant name or number.

Application/Resume Source

Source and **Date Received**	Select the method by which you received the applicant's application or resume, such as *Email* or *Web,* and the date you received it.
Referring Name	Enter the name of the person referring the applicant. The entry in this field can be other applicants or employees already in the system. If the person is not in the system, you can manually type in their name.

Note. If you manually enter a name, it must be in PeopleSoft format: lastname,firstname with no spaces in between (for example, *Smith,Jane*).

Specific Source	Enter the source that is associated with your entry in the Source field. For example, if you selected *Direct Hire* as the source, enter the name of the recruiter who first spoke with the person.

Comment Enter any comments related to how the applicant found out about your company or a specific position.

Collecting Additional Information Using Forms

Access the Forms page.

Most of the form setup activity occurs during implementation of the system. The PeopleSoft system delivers the following form types for the Applicant and Employee form pages: *Employee Credit Information, Employee General Information, Employee Interview Worksheet, Employee License Information,* and *Interview Summary General.*

You can select forms that include basic questions related to the application process. You can select multiple forms to track the employees application process. You define the form codes for these form types during implementation. To make any changes to the list of available forms or to the content of the forms, consult with your system administrator.

Click a View Form link to view details of a particular form.

To collect additional information about the applicant:

Click the Add New Form button to enter a new Form Type, SetID, Form Code, and Date. Each form has a different set of questions or fields. It is up to your organization to decide what information should be contained in these forms. Complete all the fields for which you have information.

Click the Form Summary link to return to the forms summary display.

Resetting Applicant Status

Access the Reset Status page.

Click the Reset button to reset an applicant's status from *Hire Pending* back to *Active.* The button will only be available if the applicant's status is *Hire Pending.*

Matching Applicants and Employees to Customers and Job Orders

The Verity Opportunity Search feature enables you to search on orders, customers, and contacts.

Once you establish applicants, employees and customers in your database, you can match the skills and job titles of applicants and employees to the skills and job titles being requested by your customers and contacts.

This section discusses how to view skills and job title matches of applicants and employees for customer, contact, and resource requests.

Page Used to Match Skills and Job Titles

Page Name	Object Name	Navigation	Usage
Matches found for <employee name>	FO_REVERSE_MTCH	Click an Opportunity Search link from any of the pages in the Applicants component.	View skills and job title matches.

Viewing Matches

Access the Matches found for <employee name> page.

After you display an applicant or an employee record and click the Opportunity Search link, the system attempts to match the skills and job titles of the candidate with the skills and job titles being requested by your contacts, by customers, or by orders that have been placed.

If there is a match, the system displays the names of the contacts. You can then click the View link on the line for the match to access the contact's record, the customer's record, or the order record and learn more about the types of job titles and skills they are requesting.

Hiring Applicants

Once you decide to hire an applicant as an employee or contractor, you must obtain certain information before you can place that employee on an assignment.

This section discusses how to hire an a applicant as an employee or a non-employee.

Note. If you integrate HRMS and Pay/Bill Management with your Staffing Front Office application, employees are hired into your HRMS system. You can continue to access employees from Staffing Front Office, but the system will direct you to HRMS when you need to update an employee's personal and job related data.

If you have Pay/Bill Management installed without Staffing Front Office, you must use the Applicants component to add your staffing employees. Only the Contact Information, Personal Data, and Job Data pages will be visible.

If you create a new employee in HRMS through the Administer Workforce component and enter a national ID, the system also stores the national ID in Staffing Front Office. If you attempt to hire that person through Staffing Front Office, the system validates the uniqueness of the national ID and checks for duplicates.

Warning! If you are using both the Staffing Front Office Applicant component and the HR Recruit Workforce component to hire employees, the applicant ID (APPLID) autonumbering ranges for both applications must not overlap.

Page Used to Convert Applicants to Employees

Page Name	Object Name	Navigation	Usage
Contact Information	FO_APP_PERS_DATA1	Staffing, Resources, Applicants, Applicants	Enter contact information, and hire applicants as employees or non-employees.

Converting Applicants to Employees

Access the Contact Information page.

Enter the Hire Date.

Click the Hire Applicant as Employee button or the Hire Applicant as Non-Employee button.

Note. When you convert an applicant to an employee, the system assigns an employee ID number.

Warning! If you integrate HRMS and Pay/Bill Management with your Staffing Front Office application, staffing non-employees should only be added through Staffing Front Office—not from HRMS.

Maintaining Employee and Contractor Records

This section presents an overview of maintaining employee and customer records and discusses how to:

- Update emergency contact information for active and inactive employees.
- Update tax information for active and inactive employees.

Understanding Employee and Contractor Record Updating

If you are using both Staffing Front Office and Pay/Bill Management, you must enter candidates as applicants in Staffing Front Office and then they hire them into HRMS as employees. Prior to being assigned to an order, the applicant must have a valid employee ID, as determined by HRMS.

Once the applicant becomes an employee, you can access employee data from Staffing Front Office. Use your HRMS application to update personal and job-related information. If you are using Staffing Front Office only, candidates are hired through the Staffing Front Office system, and all updating is done within Staffing Front Office.

Once you establish an employee or contractor in the system, you can use the pages in this section to periodically update information as needed.

The pages in the Employee component are nearly identical to the pages in the Applicant component, except for the Emergency Contacts page and the Tax Data page, which do not appear in the Applicant component. For a description of the Emergency Contacts page and the Tax Data page, refer to the following section. For descriptions of the other pages in the Employee component, refer to the descriptions of the pages in the Applicant component.

Note. Any employee that you enter directly into your HRMS application will not be available for assignment and update in Staffing Front Office unless you have made them eligible for Staffing Front Office.

Pages Used to Maintain Employee and Contractor Records

Page Name	Object Name	Navigation	Usage
Emergency Contacts	FO_EMERG_CNTCT	Staffing, Resources, Employees, Employees, Emergency Contacts	Enter emergency contact information for employees.
Tax Data	FO_EMP_TAX_DATA	Staffing, Resources, Employees, Employees, Tax Data	Enter tax information for employees.

Updating Emergency Contact Information for Active and Inactive Employees

Access the Emergency Contacts page.

Note. This page is applicable to Staffing Front Office standalone implementations only. If you have Pay/Bill Management installed, this page is not visible.

Contact Name Enter the full name of the emergency contact.

Relationship to Employee Select a description that most closely matches the emergency contact's relationship to the employee, such as *DPDaughter* (domestic partner daughter), *F Son* (foster son), *Roommate, Rec Child* (recognized child)

Same Address as Employee Select to indicate that the emergency contact lives at the same address as the employee.

Primary Contact Select to indicate that the emergency contact is the main contact for this employee.

Same Phone as Employee Select to indicate that the emergency contact has the same phone number as the employee.

Additional Phone Numbers Click this link to enter additional phone types and phone numbers for the contact.

Updating Tax Information for Active and Inactive Employees

Access the Tax Data page.

Note. This page is applicable to Staffing Front Office standalone implementations only. This page is informational only. There are no processes that utilize this data.

Select the Distribution Mail Option used to distribute paychecks.

Federal Tax

FWT Marital Status (federal withholding tax marital status)	Select a withholding tax status: *Married* or *Single.*
FWT Allowances	Enter the number of allowances the employee claims.
FWT Additional Amount	Enter the additional amount of tax the employee wants withheld.
FWT Estimated Amount	Enter the estimated amount of tax the employee wants withheld.
FWT Additional Percentage	Enter the additional percentage of tax the employee wants withheld.
EIC Status (earned income credit status)	Select the earned income credit status: *Mar Spc* (married without spouse filing),*Married*(married, both spouses filing),*N/A* (not applicable), or *Single* (single, or head of household).

W2 Information

Statutory Employee	Select to indicate employee is statutory and therefore can report income and expenses as a business. For example, someone who works at home.
Legal Representative	Select to indicate the employee has legal representation / is a legal representative.
Deceased	Select to indicate the employee has died.
Retirement Plan	Select to indicate the employee has a separate retirement plan.
Deferred Compensation	Select to indicate the employee has deferred compensation. Deferred compensation provides the employee an opportunity to voluntarily shelter a portion of his or her wages from federal income taxes while saving for retirement to supplement social security and pension benefits. Under such plans, federal income tax is not due on deferred amounts or accumulated earnings until the employee receives a distribution (payment) from their account.
Household Employee (942)	Select to indicate the employee will do such things as care for children, clean homes, cook, or provide other personal services, usually within a household.

Medicare Qualified Govt Emp

Select the Medicare Qualified Gov't Emp (Medicare qualified government employee) check box if the employee qualifies for Medicare coverage.

State Tax

Enter information similar to that you entered for federal tax, including the following:

SWT Marital/Tax Status (state withholding tax marital tax status)	Select *Married* or *Single.*
Special Tax Status	Select a special status: *Exempt, Maintn Grs* (maintain taxable gross), *N/R Alien* (non-resident alien), or *None.*

Resident	Select this check box if the employee is a resident of the State entered.

Local Tax

Enter information similar to that you entered for federal and state tax, including:

LWT Marital/Tax Status (local withholding tax marital tax status)	Select *Married* or *Single.*
Auto Calculate	Select this check box to indicate if the taxes will be automatically calculated. This is an informational field only.

Collecting Employee Quality Feedback Information

Use the Employee Feedback page to collect feedback from your employees about their employment experiences with your customers. This enables you to collect valuable information from employees that can be used by your staffing organization to improve the way business is conducted.

This section discusses how to enter employee feedback information.

Page Used to Collect Employee Feedback Information

Page Name	Object Name	Navigation	Usage
Employee Feedback	FO_EMP_QUAL_FDBK	Staffing, Resources, Employees, Provide Employee Feedback	Collect feedback from employees about their experiences with customers.

Entering Employee Feedback Information

Access the Employee Feedback page.

Enter the specific form that you want to use in the Form Code field.

The system re-displays the page with a set of fields that you can then fill in. Each form has a different set of questions or fields. It is up to your organization to decide what information should be contained in these forms.

Fill in all the fields for which you have information.

Viewing Employee History

This section presents an overview of employee history and discusses how to:

- View employee history.
- View employee history detail.

Understanding Employee History

The Review History page contains a record of the critical transactions that have transpired between you and your customers with regard to a particular employee. It includes data primarily from the agenda and assignment pages, because these pages generate the most transactions between your customers and your staffing service. You can, however, save many other types of records and events to the database and retrieve them through the normal search process.

The system generates a history item when a user completes an agenda item and clicks the Add History button. The system also generates a history item in real time after a user completes certain assignment functions, rather than generating the item when they schedule it as an agenda item.

Pages Used to View Employee History

Page Name	Object Name	Navigation	Usage
Review History	FO_HISTORY	Staffing, Resources, Employees, Review Employee History	View the assignment history for an applicant or employee.
History Detail	FO_HISTORY_DTL	Staffing, Resources, Employees, Review Employee History, History Detail	View the assignment history detail.

Viewing Employee History

Access the Employee History page.

To view additional detail for a particular transaction, click its View History button.

Viewing Employee History Detail

Access the Employee History Detail page.

The layout of the history page is the same for all types of history records. Blank fields do not have any association to the history event.

See Also

Chapter 10, “Using the Agenda and History Functions,” Researching History, page 168

CHAPTER 8

Creating Records for Customers and Contacts

This chapter provides an overview of customer and contact information, and discusses how to:

- Enter customer feedback information.
- View customer history.
- View contact history.
- Review recent calls.

Understanding Customer and Contact Information

Staffing Front Office enables you to retrieve and update customer and contact information. You set up customers and contacts using the customer and contact pages described in the *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook.* You enter basic identifying information such as the customer's name and address, as well as information about credit profiles and billing profiles .

Staffing Front Office specific pages enable you to enter other important information such as:

- Target qualifications that are most commonly sought after by your customers and contacts.
- Target job titles for which your customers and contacts typically need staffing help.
- Peak recruiting seasons.

Use the data that you enter in these pages to match applicants and employees with customers and contacts.

See Also

PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook, "Maintaining General Customer Information," Adding General Customer Information

Entering Customer Contact Information

In Staffing Front Office, contacts are the people with whom you maintain relationships. Depending on the size and locations of a customer, you may have one or dozens of people listed as your contacts.

You set up contacts using the Customers component, which is described in the Maintaining Contacts chapter of the *Working with Customers and Orders PeopleBook.*

See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.

Entering Customer Feedback Information

This section discusses how to enter customer feedback information.

Understanding Customer Feedback Information

Depending on your organization's business rules and preferences, you can use the Customer Feedback page to store information about the success of a placement and the quality of an employee's work.

Before you enter information on this page, your implementation team must set up a single form or a group of forms with specific questions that address the information that you want to collect.

For example, you might want to set up a form with the following questions:

- How satisfied were you with the placement?
- Did the employee meet your expectations?
- Did this assignment meet your expectations?

Before you can access this page, you must have assigned an employee to a job order with the customer.

Customers can provide feedback any time during the assignment, not just at the end. Because feedback may be provided many times during an assignment, you can add as many rows of data as needed for the same assignment record.

Page Used to Enter Customer Feedback Information

Page Name	Object Name	Navigation	Usage
Customer Feedback	FO_CUST_QUAL_FDBK	Staffing, Customers and Contacts, Provide Customer Feedback	Enter feedback regarding the customer's experiences with your employees. Collect information about a specific placement and the quality of an employee's work.

Entering Customer Feedback Information

Access the Customer Feedback page.

To add feedback, select an assignment from the search page and insert a new row. You can also delete rows.

To enter customer feedback information:

1. Select the SetID from the list of available entries.
2. Select the Date of Entry on which you are entering the information.
3. Select the Qualified Match check box if the person who filled the order was qualified for the assignment.
4. Select the Form Type that you want to use to enter feedback information.
5. Select the specific form that you want to use from the Form Code field.

   The system re-displays the page with a set of fields that you can then fill in. Each form has a different set of questions or fields. Your organization decides what information these forms contain.
6. Complete all the fields for which you have information and click Save.

Viewing Customer History

This section discusses how to:

- View customer history.
- View customer history details.

Pages Used to View Customer History

Page Name	Object Name	Navigation	Usage
Review History	FO_HISTORY	Staffing, Customers and Contacts, Review Customer History	Review the most recent history items logged about a customer.
History Detail	FO_HISTORY_DTL	Staffing, Customers and Contacts, Review Customer History, History Detail	View details of a customer history item.

Viewing Customer History

Access the Review History page.

The Review History page contains a record of the critical interactions that have transpired between you and your customers. It includes data primarily from the agenda and assignment pages, because these pages generate the most transactions between your customers and your staffing service. However, you can save many other types of records and events to the database and retrieve them using the normal search process.

The system generates a history item when a user completes an agenda item or clicks the Add History button.

To access the History Detail page and view additional detail for a particular item, click the View Detail link that is associated with the item.

Viewing Customer History Details

Access the History Detail page.

The layout of the Review History page is the same for all types of history records.

See Also

Chapter 10, “Using the Agenda and History Functions,” Viewing and Entering History Detail, page 169

Viewing Contact History

This section discusses how to:

- View contact history.
- View contact history details.

Pages Used to View Contact History

Page Name	Object Name	Navigation	Usage
Review History	FO_HISTORY	Staffing, Customers and Contacts, Review Contact History	View all of the history items that are associated with a particular contact.
History Detail	FO_HISTORY_DTL	Staffing, Customers and Contacts, Review Contact History, Contact History Detail	View details of a contact history transaction.

Viewing Contact History

Access the Review History page.

The Review History page contains a record of the critical interactions that have transpired between you and your contacts. It includes data primarily from the Agenda and Assignment pages, because these pages generate the most transactions between your contacts and your staffing service. However, you can save other types of records and events to the database and retrieve them using the normal search process.

The system generates history items when agenda items are completed or a user clicks the Add History

To access the History Detail page and view additional detail for a particular transaction, click the View Detail link that is associated with the item.

Viewing Contact History Details

Access the History Detail page.

The layout of the history page is the same for all types of history records. Blank fields do not have any association to the history event.

See Also

Chapter 10, "Using the Agenda and History Functions," Viewing and Entering History Detail, page 169

Reviewing Recent Calls

This section discusses how to review recent calls to customers and contacts.

Page Used to Review Recent Calls

Page Name	Object Name	Navigation	Usage
Recent Call Report - Recent Calls	FO_RECENT_CALL_RPT	Staffing, Customers and Contacts, Review Recent Calls	Review recent calls to customers and contacts.

Viewing Recent Calls to Customers and Contacts

Access the Recent Call Report - Recent Calls page.

Use this read-only page to review recent calls to customers and contacts.

CHAPTER 9

Creating and Managing Orders and Assignments

This chapter lists common elements, provides an overview of creating orders and assignments, and discusses how to:

- Create orders for career and temporary placements.
- Make and schedule offers to candidates.
- Approve orders.
- View order history.
- Place candidates on assignments.
- View assignment history.

Understanding Orders

An order is a request for temporary or permanent workers. The processing of these orders is similar.

Setup tables (which are configured during implementation) define the values for many of the fields on the order pages. In addition, the setup of customers, employees, and applicants is also essential to the creation of orders.

To create an order, your implementation team must configure these setup tables properly. Users then select the proper values when entering information in the prompt fields on the order pages. Otherwise, you cannot enter data in some required fields or save the information to your database.

Staffing Front Office shares the Order and Assignment tables with Pay/Bill Management, providing seamless integration between these two applications.

Staffing Front Office also shares the order, assignment, and resource calendar tables with Resource Management. Sharing information in these tables facilitates availability information exchange when a resource is assigned using either application. However, orders and assignments added in Staffing Front Office are not visible in the Resource Management components and vice versa.

Common Elements Used in This Chapter

Assignment	The result of an order being filled by a candidate to perform a task for a prescribed time period or on a permanent basis.
Job Code	The type of position for which the customer is being billed.

Order A request by a customer of a staffing agency to find one or more people to perform work at the client site for a specific time period or in a permanent capacity.

Pay Grade Part of the job code configuration. The pay grade defines the pay and bill rates typically associated with a job code and can be used as a guideline when negotiating the assignment rates with your customer and your employee.

PeopleMatch Feature of the Staffing Front Office application used to search for available candidates and match those candidates to open orders.

Sales User An individual who is responsible for the customer who is utilizing your staffing organization to place the order. You define the sales user in the setup of the customer. The sales user can be overridden in the job order.

Service User Customer service representative on a specific order responsible for order fulfillment and other aspects of customer service. You define the service user in the setup of the customer. The service user can be overridden in the job order.

Creating Orders for Career and Temporary Placements

When you add an order in Staffing Front Office, you must select the user-defined order type that describes the transaction. Because user-defined order types map to one of two system-defined order types, a temporary order is really a user-defined order type that's mapped to a *temporary* system order type, and a career order is a user-defined order type that's mapped to a *career* system order type.

Career orders are requests for one or more people to perform work in a permanent capacity at a client of the staffing organization. Creating a new career order is similar to creating a temporary order, except for specific fields that pertain to the career aspects of the position, such as salary and prospective fees.

Temporary orders are requests for contingent workers for whom the client has no need for permanent positions. The customer can request one or more resources on the same order. Creating a new temporary order is similar to creating a career order, except for specific fields that pertain to the billing and payroll aspects of the position.

Career placement information applies to career and converted temp-to-hire orders, but not to temporary orders.

The same order may include several resource requests (order lines) specifying a distinct set of the qualifications for the different types of resources needed by the customer.

This section discusses how to:

- Record general information about an order.
- Manage resource requests.
- Enter tax information.
- Enter billing information.
- Enter salary and billing information.
- Enter PeopleMatch information.
- Add attachments.
- Add and view order history information.
- Collect additional information using forms.

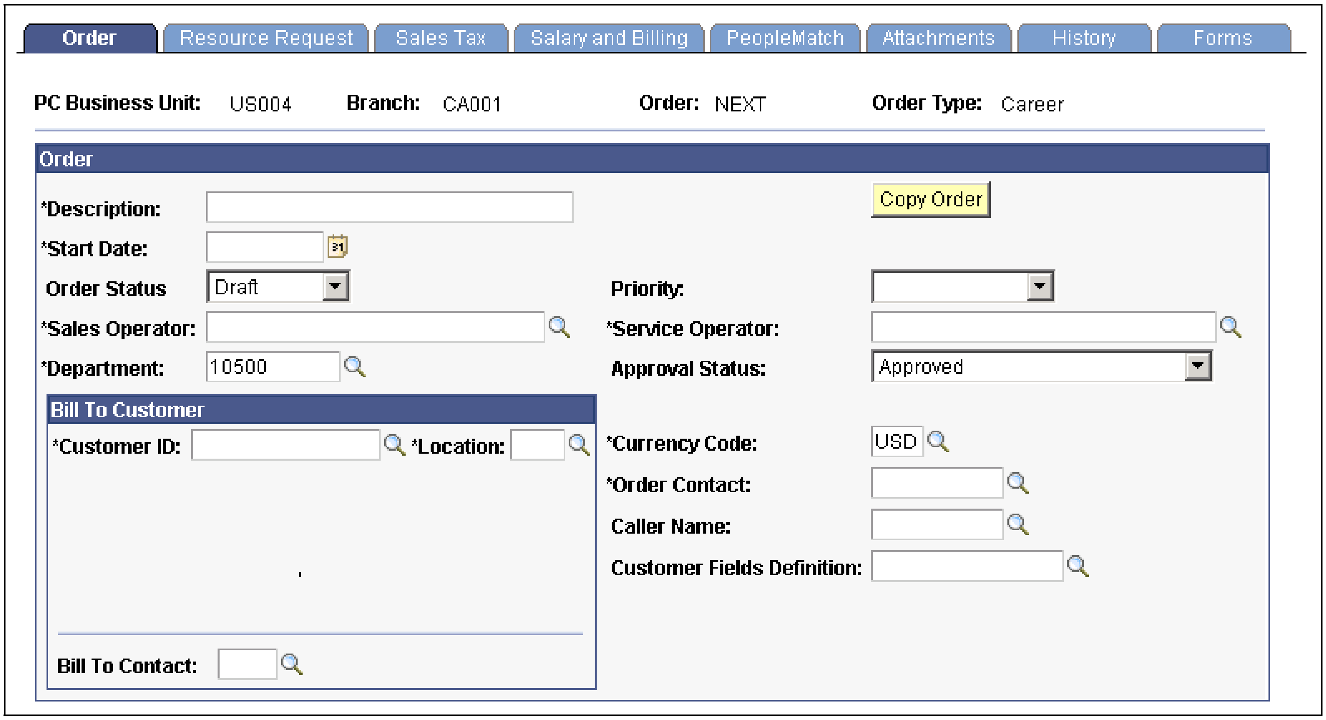
Pages Used to Create Orders

Page Name	Object Name	Navigation	Usage
Order	FO_ORDER_HDR	Staffing, Orders and Assignments, Add/Update Orders	Record general information about a job order for a permanent or a temporary employee.
Resource Request	FO_ORDER_REQ	Staffing, Orders and Assignments, Add/Update Orders, Resource Request	Enter resource request (order line) information.
Sales Tax	FO_ORDER_TAX	Staffing, Orders and Assignments, Add/Update Orders, Tax	Enter sales tax information to be used as defaults when creating the order assignments.
Salary and Billing	FO_ORDER_CAR_BILL	Staffing, Orders and Assignments, Add/Update Orders, Salary and Billing	Enter career placement information. **Note.** This page only displays for career order types.
Billing	FO_ORDER_TEMP_BILL	Staffing, Orders and Assignments, Add/Update Orders, Billing	Enter temporary placement information. **Note.** This page is only applicable to temporary order types.
PeopleMatch	FO_ORDER_MATCH	Staffing, Orders and Assignments, Add/Update Orders, PeopleMatch	This page captures the resource request target qualifications and the search criteria to match the skills of available candidates with the needs of your customers to fill open job orders.
Attachments	FO_SO_ATTACH	Staffing, Orders and Assignments, Add/Update Orders, Attachments	Add and view attachments for orders.
History	FO_ORDER_HISTORY	Staffing, Orders and Assignments, Add/Update Orders, History	View history items associated with the job order.
Order - Change Tracking	FO_SO_HIST_SEC	Click the Change Tracking Details link on the History page.	View and enter changes related to billing comments, service order priority, and service order status.
Forms	FO_SO_TEMPLTS	Staffing, Orders and Assignments, Add/Update Orders, Forms	View a list of the forms associated with the order, drill down to the form details, and associate a new form with the order.

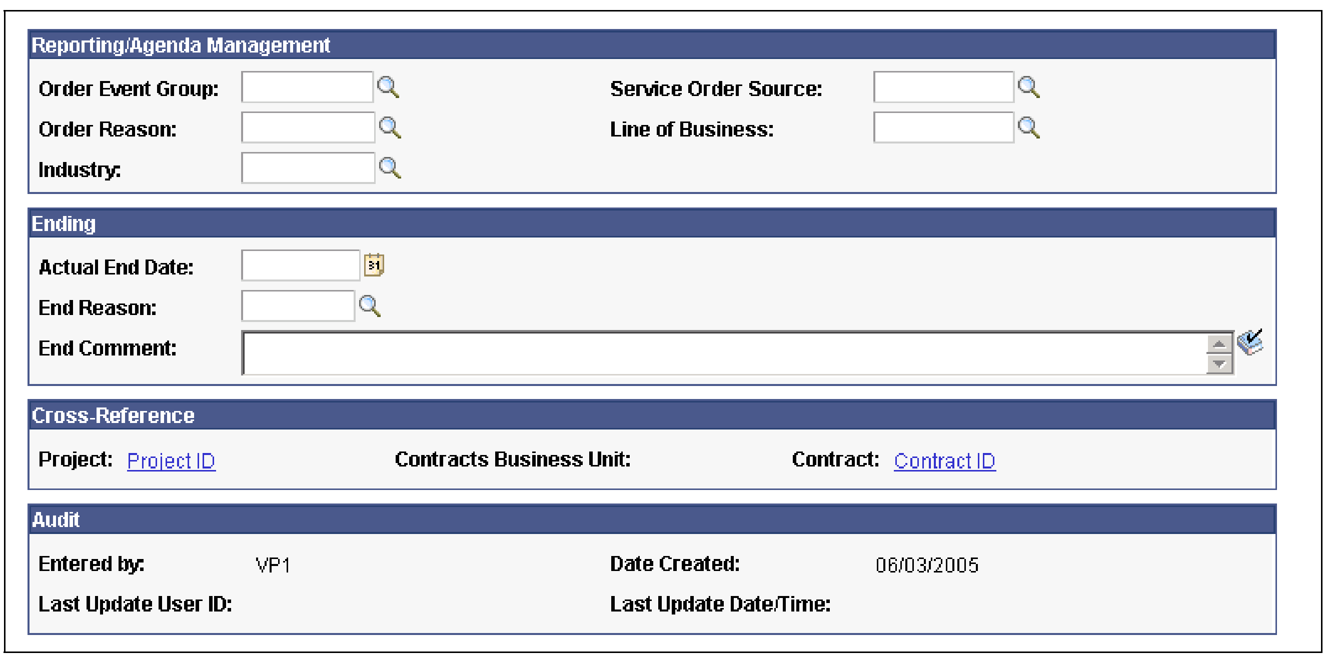
Page Name	Object Name	Navigation	Usage
Forms	FO_SO_TMPLT_DTL	Click the Add a New Form button or a View Form link on the Forms page.	Enter details for the order forms.

Recording General Information About a Job Order

Access the Order page.



Order page (1 of 2)



Order page (2 of 2)

Note. When you add an order, the order status defaults to *Draft.* Use this status while the contractual stipulations for the service have not yet been finalized with your customer. Most fields in the Order component can be changed when the order has this status. However, you cannot create assignments for draft orders. Once you confirm the contractual terms of the service with your customer, change the order status to *Unfilled.* If you have installed Staffing Front Office with Pay/Bill Management, once an order is saved with an *Unfilled* status, the system automatically creates a project and a contract and associates them with the order. At that point, several fields will no longer be enterable within the Order component. For example, note that you cannot change the Bill To Customer information after the status has changed to *Unfilled* and the order has been saved.

PC Business Unit (PeopleSoft Project Costing business unit)
Displays the Project Costing (PC) business unit associated with the order. Every Staffing Front Office order must be associated with a PC business unit even when the PC module is not used. When you add an order, you must specify which staffing branch owns the transaction. Staffing Front Office uses the staffing branch configuration to automatically determine the PC business unit to which the staffing branch belongs and associates the PC business unit with the order.

Branch
Displays the Staffing Front Office branch associated with the order.

Order
Displays the order ID number.

Order Type
Displays the user-defined order type that you selected when you initiated the order.

Staffing Front Office has user-defined order types and system-defined order types. When adding an order, you enter only the user-defined order type. The system associates user-defined order types with their system-defined order type.

There are two system-defined order types: temporary and career. You can create as many user-defined order types as you need, each always mapping to either a temporary or a career system-defined order type. When you add an order, depending on the user-defined type you choose and its associated system-defined type, the application captures different data elements and different system behaviors and validations occur.

Order

Description
Enter a description to represent the services being provided through the job order. If you installed Staffing Front Office with Pay/Bill Management, the order description is also used as the description of the project automatically created by Pay/Bill Management.

Copy Order
Click this button to duplicate the order displayed and create a new transaction. Update the information on the pages in the component and then click the Save button.

Start Date
Select the date when you anticipate the job to start or when the customer authorized it to start.

Order Status
Select a value that represents the state of the order:

- *Draft:* Indicates an interest in placing an order. Use this status while contractual agreements have not been finalized or the customer has not officially confirmed the service request. This is the default status.

- *Ended:* Indicates that you have closed the order due to completion of all assignments or due to cancellation. An order cannot be closed if it has open assignments.
- *Unfilled:* Indicates that you have placed the order but not filled it. If Pay/Bill Management is installed, the system automatically creates a project and a contract when the order is first saved with an *Unfilled* status. From that point on, a number of fields will no longer be editable.

Note. You can only create assignments against *Unfilled* orders.

- *Filled:* Indicates that you have placed the order, found all needed resources, and created all the necessary assignments.

Priority

Select a priority for the order as defined through system configuration. Examples of order priorities that you may want to configure in the system include: *CRITICAL,HIGH, LOW,* or *MEDIUM.*

Sales Operator

Enter the ID of the person most closely related to and responsible for acquiring the customer.

Service Operator

Enter the ID of the person most closely related to and responsible for servicing the customer's needs.

Department

Enter the department within your staffing organization for which the candidate would be working. Note that this is not the department within the customer's organization.

Note. When Pay/Bill Management is installed users have the option of using the Project Costing Organizations feature to generate accounting entries. The order department as well as the General Ledger business unit associated with the order's contracts business unit are used to create the project owning organization.

Approval Status

Select a status for the order: *Approved, Denied,* or *Pending.*Order approval security is granted through the staffing user preferences. Orders that have not been approved can only be saved with a *Draft* status.

Customer ID

Enter the Bill To Customer ID of the customer who will be billed for the services provided in the order.

Location

Enter the billing location of the Bill To Customer. The available selections are customer addresses that are also designated as both bill to and sold to locations.

Currency Code

Captures the currency in which the customer will be billed for the services provided through the order.

Bill To Contact

Enter the ID of the contact in the customer organization who will be the "attention to" person in the client's invoice.

Order Contact

Enter the ID of the contact in the customer organization responsible for the order. Customers are connected to contacts when the contacts are set up. The system displays the ID's of these contacts when you click the Lookup button. To view details for the contact, click the contact's name.

Caller Name Enter the ID of the contact who initiated the order. You can either select an ID from the list of contacts associated with the customer or enter a new name in the field.

Customer Fields Definition This field is only available to customers who license Pay/Bill Management. It captures the customer fields template to be used when capturing additional billing information for the job order. The system only displays those definitions that have been associated with the bill to customer in the customer setup.

Reporting/Agenda Management

Order Event Group Enter the type of agenda items that you want to automatically add to your agenda when assignments are made.

Service Order Source Enter the method by which you received the order.

Order Reason Enter the reason for originating the order.

Line of Business Enter the code that represents the line of business in which the candidate would be working.

Industry Enter the code that best represents the industry in which the customer operates.

Ending

Use this group box to enter information about the date an order ended, as well as the circumstance that led to the ending of the order.

Note. This information should be entered along with changing the order status to *Ended.* .

Actual End Date Select the date the order ended.

End Reason Enter the reason the order ended.

End Comment Enter any comments you have regarding the ending of the order.

 Click the spell check button to check the spelling in the End Comment field.

Cross-Reference

These fields display only when Pay/Bill Management is installed, and display information about the project and contract automatically created by Pay/Bill Management and associated with the order

Project Displays the ID of the project that Pay/Bill Management automatically created for the job order

Contracts Business Unit Displays the business unit of the contract that Pay/Bill Management automatically created for the job order

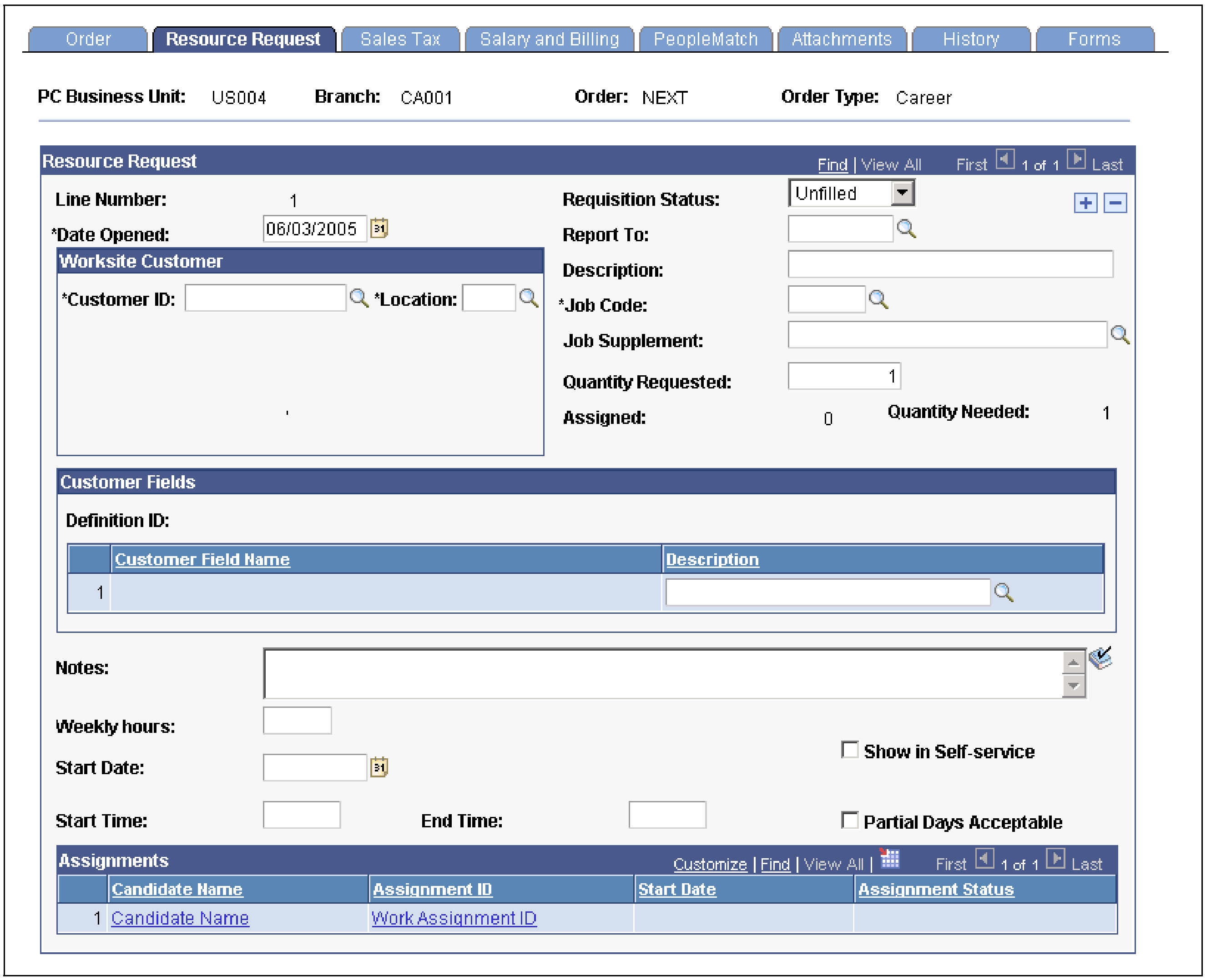
Contract Displays the number of the contract that Pay/Bill Management automatically created for the job order

Audit

Entered By, Date Created, Last Update User ID, and **Last Update Date/Time**
These are display-only fields that provide the user an audit record of who added and last updated the order, and when that occurred.

Managing Resource Requests

Access the Resource Request page.



Resource Request page

Note. An order may have multiple resource requests. Resource requests are the equivalent of order lines. Each may have its own stipulations in terms of resource qualifications, start and end dates, and work location. Some fields on this page appear conditionally, depending on the order type and whether you have Staffing Front Office installed, Pay/Bill Management installed, or both.

Resource Request

Line Number
Displays the order line number associated with the resource request.

Requisition Status	Displays where the individual resource request is in the process of being fulfilled. The system automatically updates the status based on fulfillment progress. When you submit an order, the resource request status is *Unfilled.* This field is visible only after you submit an order. Other valid statuses are *Ended* and *Filled.*
Date Opened	Enter the date that the customer made the specific resource request. This information can be used in custom reports to track the time it takes to fill an order.
Report To	Enter the ID of the contact in the customer organization who is responsible for this resource request.
Description	Enter a description for the request.
Job Code	Enter a code to define the resource's main function.
Temp To Hire	For temporary orders only. Select this check box if the order is a temporary position that could become a permanent position. **Note.** This field only displays on temporary orders.
Job Supplement	Select the job supplement that pertains to the order. Job supplements can contain information regarding the requirements of the job, are entered through the use of forms, and are attached to customers.
Quantity	Enter the number of resources needed in this particular resource request. For example, an order may have two requests: the first for a single DBA and the second for three programmers.
Active Count	Displays the number of assignments already created for the resource request. If the active count is equal to the quantity requested, the resource request has a *Filled* status. If the active count is less than the quantity requested, the request has an *Unfilled* status.
Qty Needed (quantity needed)	This field displays the difference between the quantity of resources requested and the number of active assignments. It corresponds to the number of assignments that still need to be created to fill the request.

Worksite Customer

Customer ID	Enter the ID of the customer where the work will be performed.
Location	Enter the customer's location where the work will be performed.

Customer Fields

Definition ID	This field appears only when your system is integrated with Pay/Bill Management. Select the customer fields definition that you want to use for this order. If a default definition was established for the customer, it automatically appears. The system displays the customer fields that you should enter for the order. Enter values according to the rules established on the definition. The customer field values entered on the resource request default on the assignment.

Note. Customer field definitions integrate with PeopleSoft Billing only for temporary orders.

Customer Field Name Displays the field name as defined by the customer fields template definition.

Description Displays the values of each field as defined in the customer fields template definition.

Enter any additional Notes regarding this request.

Weekly Hours Enter the number of hours that the customer requires from this resource per week.

Minimum Hours Waived Select this check box to waive any requirement for minimum weekly hours.

Start Date and **End Date** Select the work dates for the request.

Note. The End Date field only displays on temporary orders.

Show in Self-service Select this check box to have this resource request display in the self-service Open Resource Requests component. Candidates can search for open resource requests that have this check box selected.

Start Time and **End Time** Enter the start and end times for this request.

Partial Days Acceptable Select this check box to indicate that the customer will accept a resource who works partial days.

Assignments

This group box displays all the assignments created for this resource request. If there are no assignments, the group box is empty.

Candidate Name Name of the candidate assigned to the resource request.

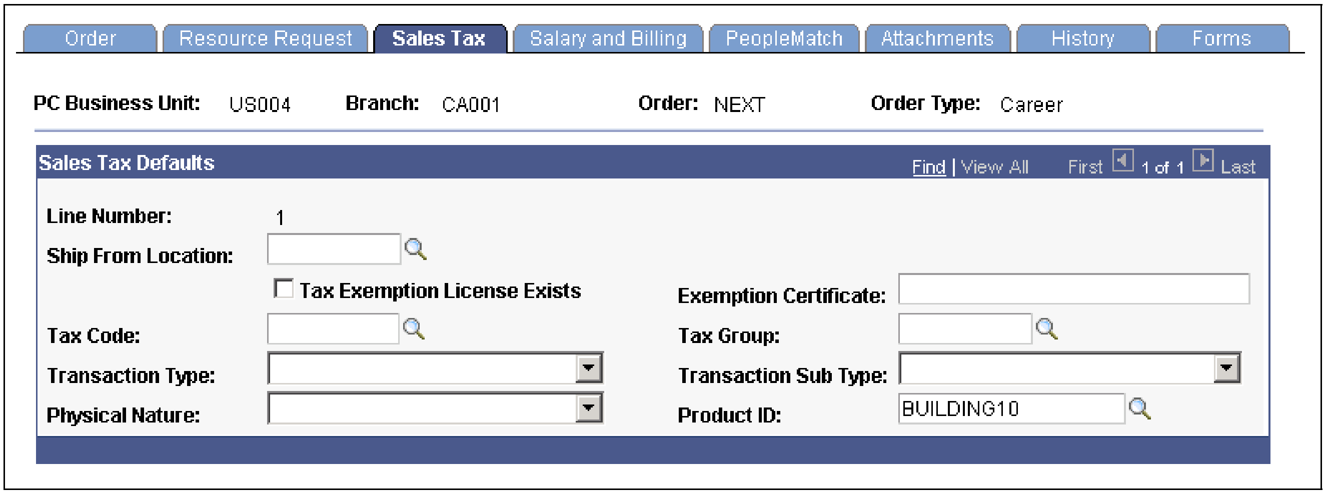
Assignment ID The ID of the assignment associated with the resource request.

Start Date The date that the assignment starts.

Assignment Status The status of the assignment.

Entering Tax Information

Access the Sales Tax page.



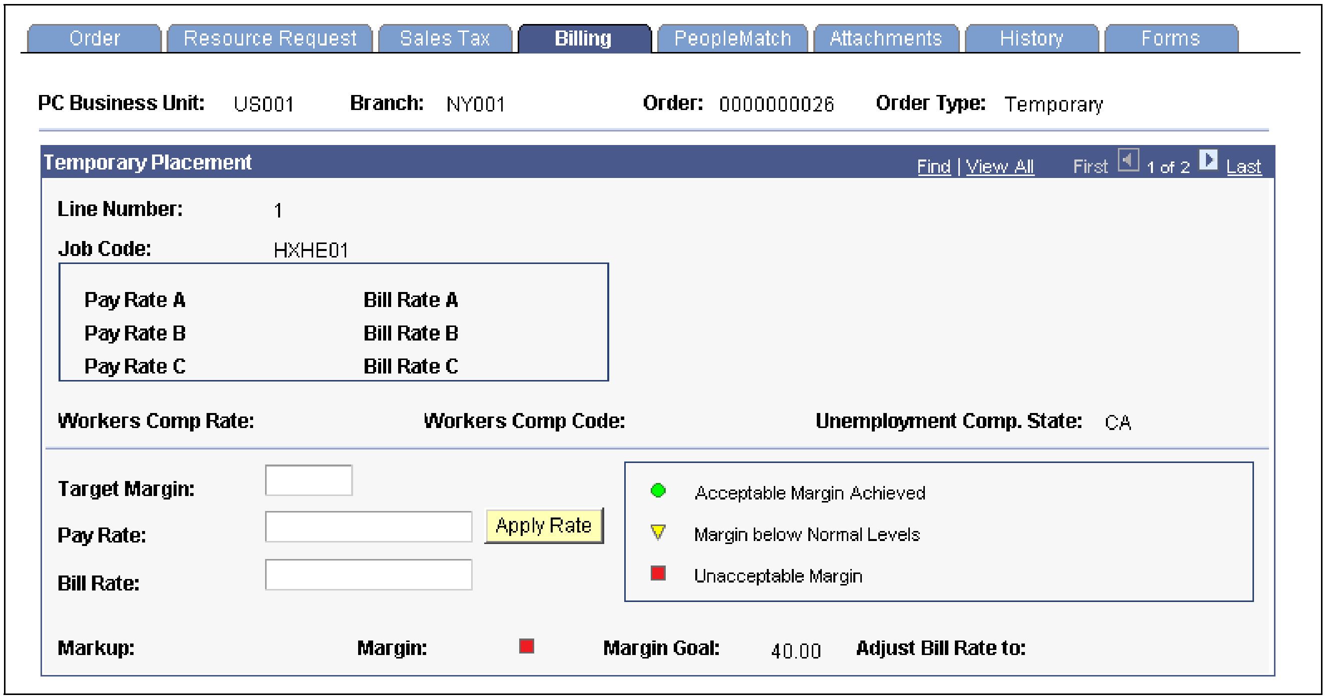
Sales Tax page

Note. This page is only available when Pay/Bill Management is installed.

Line Number	Displays the resource request line number.
Ship From Location	Enter the staffing branch location from which the request is originating.
Tax Exemption License Exists	Select this check box to indicate that a tax exemption certificate exists for this customer.
Exemption Certificate	Enter the exemption certificate number.
Tax Code and **Tax Group**	Enter a tax code and group for this request.
Transaction Type and **Transaction Sub Type**	Enter a type to describe the nature of the transaction, such as *Service,* and a sub type, such as *Service* or *Misc.*
Physical Nature	Select a value to indicate whether the request involves services or goods.
Product ID	Enter an ID for this request. This information will default from the contract profile. Only rate-based products can be selected for temporary orders, and only amount-based products can be selected for career orders.

Entering Billing Information

Access the Billing page.



Billing page

Note. This page is only available for temporary order types. For career orders, you enter billing information in the Salary and Billing page instead.

Line Number

This field displays the number for this temporary order.

Job Code

This field displays the job code that describes the work to be performed in this temporary order.

Pay Rate A, B, C and **Bill Rate A, B, C**

Defined as part of the job code, pay and bill rates are purely informative. It provides the user a guidance for the normal payroll and billing bands for the job code specified.

Workers Comp Rate

This field displays the workers comp rate associated with the job code in the state where the work is to be performed.

Workers Comp Code

Displays the workers compensation code that is associated with the job code and state of the site location for the order. These fields are used by USA customers only.

Unemployment Comp. State (unemployment compensation state)

Displays the state in which unemployment compensation is determined.

Target Margin

Displays the margin percent that your organization would like to achieve with the assignments associated with this resource request. It reflects the bill rate less the pay rate and any additional costs over the bill rate.

The calculation is:

```
Bill Rate - (Pay Rate + Additional Costs)/Bill Rate.
```

Pay Rate

Enter the amount per hour you will pay employees for the work they perform at your customer's site for this request.

Apply Rate Click this button to calculate the bill rate. The system multiplies the pay rate and the target margin to get this rate when you first begin. If rates are adjusted, you may click this button to apply the new rates to the margin and markup calculations below.

Bill Rate Enter or view the amount per hour you will bill your customer for the work your employees perform at your customer's site for this order.

Note. The Pay Rate and Bill Rate fields are used for calculation and estimation purposes. Actual assignment rates are determined at the time of the assignment.

Markup Displays, as a percentage, the difference between the pay rate and the bill rate:

```
(Bill Rate - Pay Rate)/Pay Rate.
```

Margin Displays, as a percentage, the difference between the pay rate plus costs and the bill rate. The calculation is:

```
Bill Rate - (Pay Rate + Additional Costs)/Bill Rate.
```

Note. There are two types of costs included in *additional costs.* They are general overhead or fixed costs established in the staffing branch configuration and workers' compensation costs associated with the job code and state.

Margin Goal Displays the margin goal established by your organization for the job code.

Adjust Bill Rate to If you do not meet margin goals, the system recommends adjusting the bill rate to a higher level to meet the margin requirements for the position. It is possible to adjust the pay rate downward exclusive of, or in addition to, the upward adjustment of the bill rate.

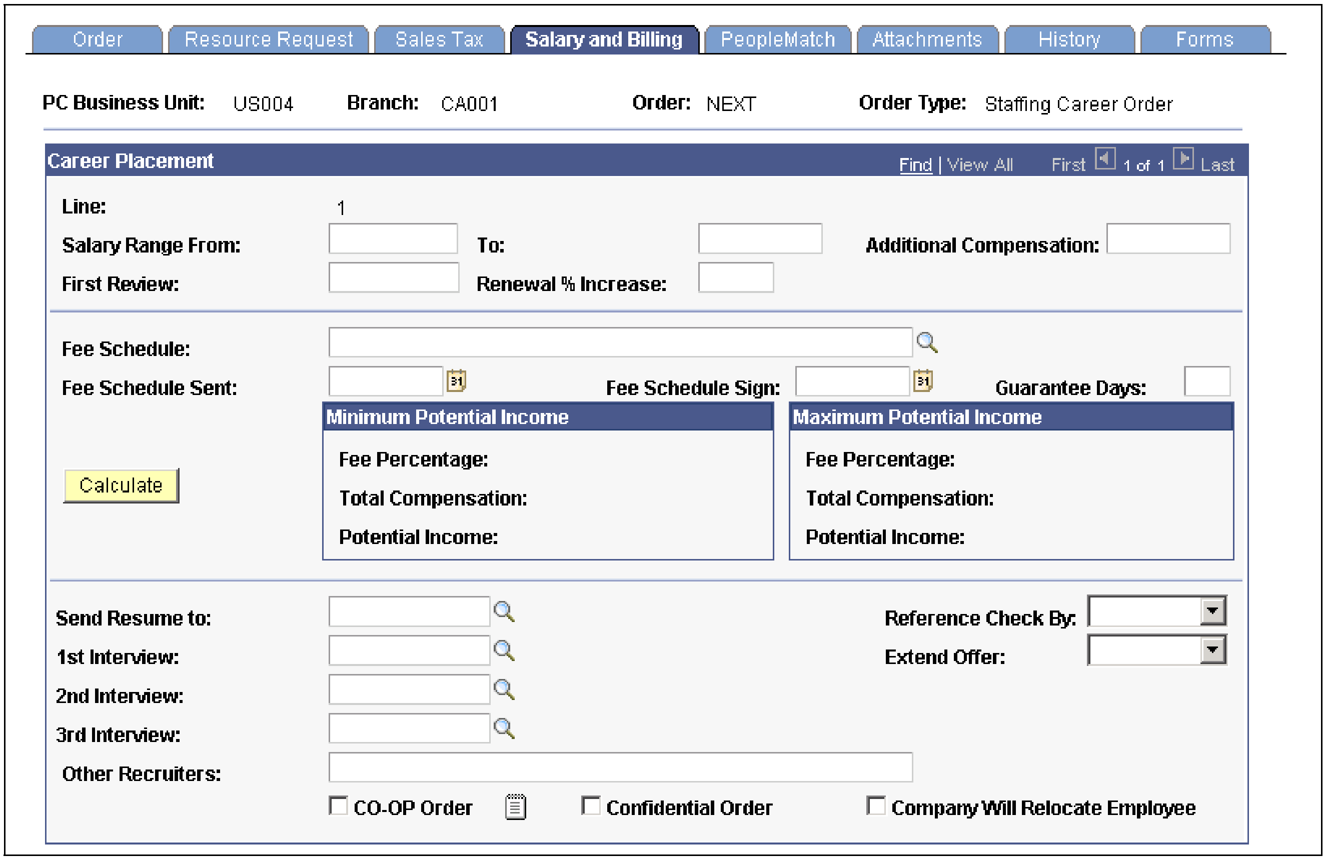
See Also

Chapter 9, "Creating and Managing Orders and Assignments," Entering Candidate Events, page 145

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Customer Field Definitions

Entering Salary and Billing Information

Access the Salary and Billing page.



Salary and Billing page

Note. You enter salary and billing information for career order types.

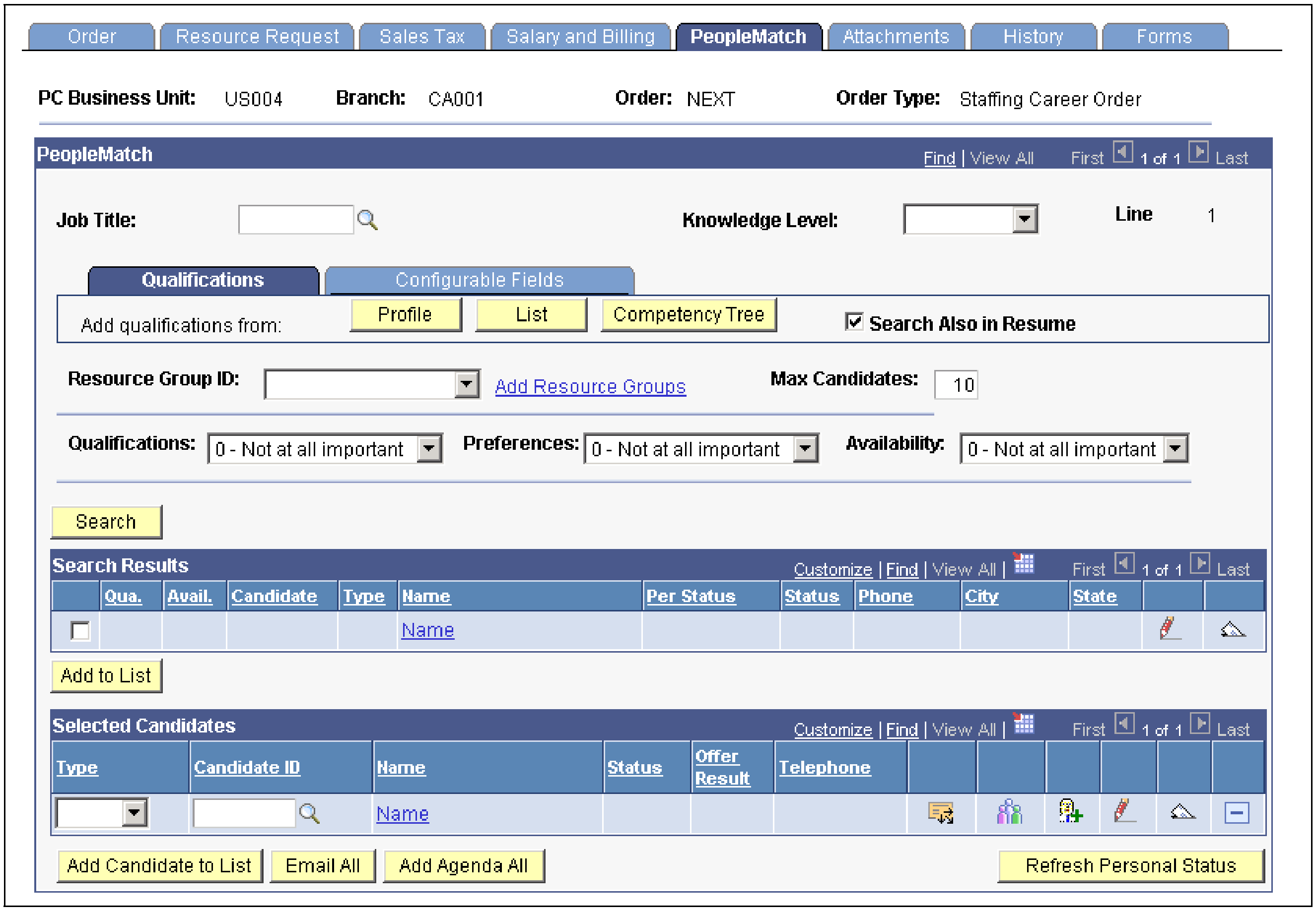
Career Placement

Salary Range From and **To**	Enter the salary range for the placement: the amount the customer is willing to pay for the position. This is not necessarily the salary range for the position in the marketplace.
Additional Compensation	If the pay for the position includes a base salary plus any additional monetary compensation or its equivalent, enter the value of that additional compensation.
First Review	Enter the date when the first candidate performance review is expected.
Renewal % Increase	Enter the percent of salary increase the candidate receives at review time.
Fee Schedule	Enter the fee schedule code, to indicate how fees will be calculated based on the candidate’s salary.
Fee Schedule Sent	Select the date the fee schedule was sent to the customer.
Fee Schedule Sign	Select the date the fee schedule was signed by the customer.
Guarantee Days	Enter the number of days that the customer is entitled to fee reimbursement in case the candidate is terminated or resigns.
Calculate	Click this button to calculate the maximum and minimum potential incomes and display them on the page.

Fee Percentage	Displays the minimum and maximum fee percentage that your organization will bill from the order.
Total Compensation	Displays the minimum and maximum salary range that you entered and adds to that number the amount (if any) you entered in the Additional Compensation field.
Potential Income	Displays the minimum and maximum potential income range associated with the resource request. The system calculates potential income as a percentage of the total compensation granted to the employee who fills the order. The system determines the percentage by the fee schedule specified on the resource request. For instance, the Salary Range might be *40,000 USD* to *50,000 USD.* Assuming a fee percentage of 12 percent, the low end of the potential income range is 4,800 USD and the high end is 6,000 USD.
Send Resume to	Enter the contact in the customer organization who should receive candidate resumes.
1st Interview	Enter the contact in the customer organization who will conduct the first candidate interview. Do the same for 2nd Interview and 3rd Interview if applicable.
Other Recruiters	Enter the name of the individual or organization also doing recruiting work.
Reference Check By	Select the party responsible for verifying the candidate's references: *Customer, Recruiter,* or *Th. Party* (third party).
Extend Offer	Select an entity that will extend the job offer to the candidate: *Customer, Recruiter,* or *Th. Party* (third party).
CO-OP Order	Select this check box to indicate that your organization will fill the order in cooperation with another staffing organization.
Confidential Order	Select this check box to indicate that the order should remain confidential.
Company Will Relocate Employee	Select this check box to indicate that the customer is offering a paid relocation package with this position.

Entering PeopleMatch Information

Access the PeopleMatch page.



PeopleMatch page

PeopleMatch searches are identical for temporary and career orders.

Note. You can search for applicants but you cannot create temporary assignments until the applicant is hired as an employee or non-employee. If you installed Pay/Bill Management, the system sends a message to HRMS to retrieve an employee ID (EMPLID). Because there may be a delay in the time the databases receive and respond to the message, the employee record is set to pending within the PeopleMatch search results. Once you complete the hire process, the system changes the personnel status to *Employee* or *Non-Employee.* You can then complete the assignment process. Career assignments may be filled by either applicants or employees.

You must run the Index Creation process to incorporate any changes to employees and applicants that can affect matching.

PeopleMatch

Job Title

Enter the job title code that best describes the work to be performed by the candidate.

Note. The job title entered in this field is not used by the system as search criteria. To search based on job title, include this field in the PeopleMatch search configuration and enter the job title value as search criteria on the Configurable Fields tab.

Knowledge Level Select a knowledge level required for the job title: *Advanced, Beginner, Intermed* (intermediate), or *Not Invest* (not investigated). The system does not use the information entered in this field as automatic search criteria.

Job Supplement Job supplements are customer specific job descriptions configured as part of the customer setup. Enter the customer job supplement that applies to this resource request. The system does not use the information entered in the Job Supplement field as automatic search criteria.

The functionality of the buttons, fields, and destination pages on the Qualifications and Configurable Fields tabs, and in the Search Results group box, is the same as those you use when adding customers to the system, and when searching for applicants, employees, and contractors who possess particular qualifications.

See Chapter 6, "Searching Staffing Front Office," Using PeopleSearch, page 81.

See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

Selected Candidates

This group box contains those candidates that are being considered for placement.

Note. You can move resources from the PeopleMatch Search Results to the Selected Candidates group box by selecting the check box to the left of his or her name, then clicking the Add to List button. Alternatively, you can manually add an individual candidate who is not in the Search Results by inserting a row in the Selected Candidates group box by using the Add Candidate to List button.

Type Select *Appl* (applicant) or *Empl* (employee).

Candidate ID Enter the candidate's applicant or employee ID.

Name Displays the name of the candidate. Click a candidate name link in this column to access the Candidate Overview page. This page provides basic personal data about the candidate, as well as job related information such as skills, references and prior assignments. To view the candidates resume, click View Resume. To view the candidates employee data, click View Candidate Details.

Status Indicates the resource's status if they are an applicant, or whether they are an employee or non-employee. The valid values are: *Active, Hire Pending, Invalid, Pending, Employee,* and *Non Employee.*

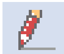
Offer Result Displays the candidate's offer status for the resource request, such as *Considering, Declined, Other, Accepted,* or *Assigned.*

Telephone Displays the candidate's telephone number.

 Click the Go To Order Manager icon to make an offer, add and view agenda items, add or view historic event information regarding the open order for a candidate that appeared in your search.

 Click the Express Assignment icon to create an assignment for this candidate without using Order Manager.

 Click the Hire Candidate icon to hire an applicant prior to placing him or her on a temporary assignment. Only employees and non-employees can be placed in temporary assignments.



Click the Add An Agenda Item icon to enter a reminder in your agenda about a candidate.

Click the Send Email icon to email the candidate.

Add Candidate to List Click this button to add another row in the Selected Candidates group box.

Email All Click this button to send email to all the candidates in the Selected Candidates group box. All candidates in the Selected Candidates group box receive the email, regardless of whether they are applicants or employees. You manually enter the email text.

Add Agenda All Click this button to enter a reminder in your agenda about all the candidates in the Selected Candidates group box.

Refresh Personal Status Click this button to refresh the applicant and employee status. For example, let's say a candidate is an applicant and not an employee and you want to place the person in a temporary assignment. However, only employees and non-employees can be assigned to temporary orders (applicants cannot). Thus, even though you hire the person, that person still appears as an applicant. Clicking the Refresh Personal Status button will change the person's candidate type from Applicant to Employee and the Candidate ID from Applicant ID to Employee ID.

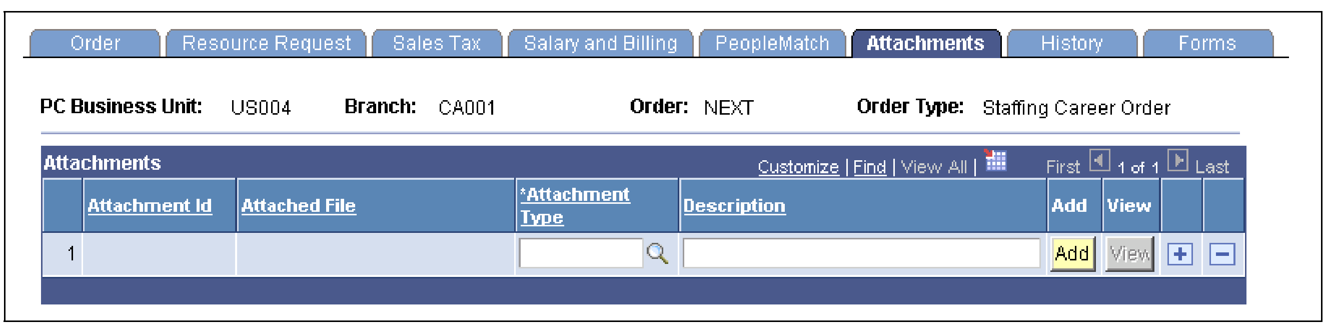
See Also

Chapter 10, "Using the Agenda and History Functions," Working with Your Agenda, page 163

Chapter 6, "Searching Staffing Front Office," page 71

Adding Attachments

Access the Attachments page.



Attachments page

Attachment ID Displays the ID that the system automatically derived for the file attachment.

Attached File Displays the name of the file attached to the order.

Attachment Type Attachment types are defined through system configuration.

Attachments can include resumes, letters of reference, order-related documents, notes related to the order, signed fee schedules, and so on. Enter the type that best categorizes the file attachment.

Description Enter a description indicating the contents of the file attachment

Add and **View**

Click the respective buttons to add the Attachment to the order, or to view the attachment.

If you click Add, you can then browse, open, and upload an attachment to add to the order.

Adding and Viewing Order History

Access the History page.

Note. This page displays all history items that reference this job order. If no history items were added for the order, the History Transactions group box will not have data.

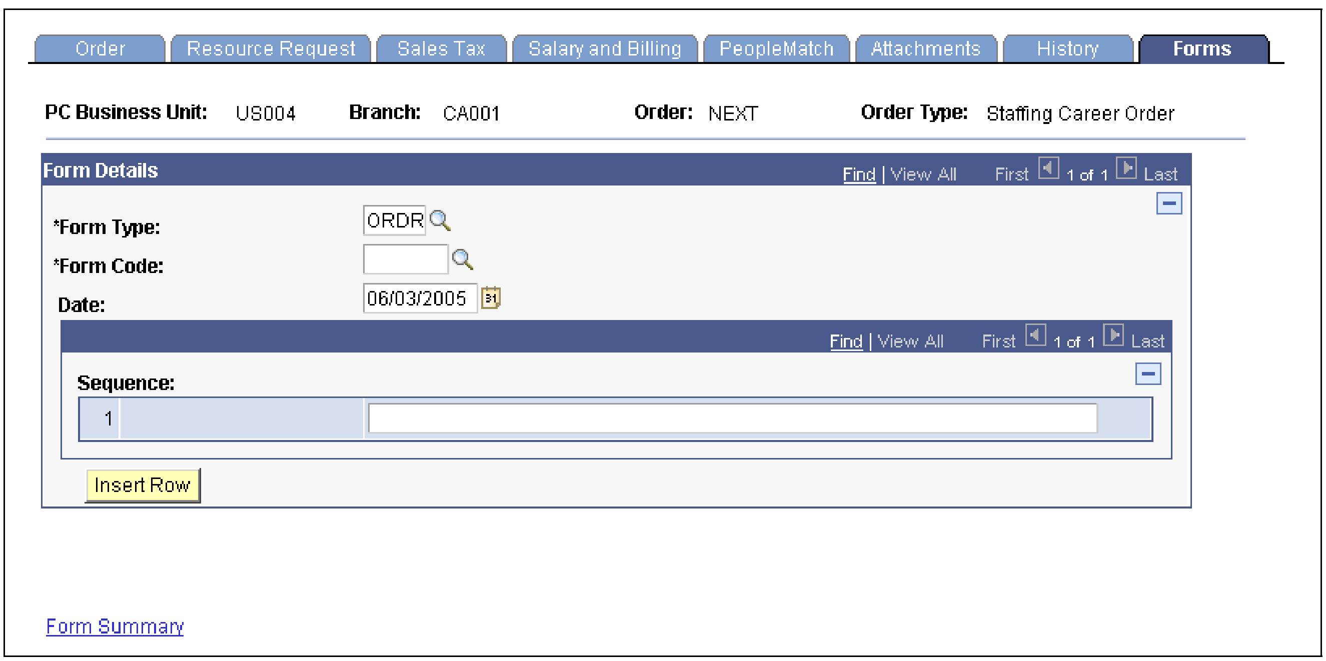
Change Tracking Details

Click this link to view and enter change tracking details for billing, service order priority, and service order status information.

To access the Order History Detail page and view additional detail for a particular transaction, click the View History link associated with the item.

Collecting Additional Information Using Forms

Access the Forms page.



Forms page

Add New Form

Click this button to add a new form to the order.

Form Type

The system value of *ORDR* (order form) defaults in this field.

Form Code

In the Form Details group box, enter the specific template that you want to use.

The system re-displays the page with a set of fields that you can then complete. Each template has a different set of questions or fields. Your organization decides what information should be contained in these forms.

Note. Your implementation team sets up forms during implementation of the system. To make any changes to the list of available forms or to the content of the forms, contact your system administrator.

Sequence Displays the sequence number that the system associates with each form added to the job order.

Insert Row Click this button to add another form having the same form code but a different sequence number. .

Form Summary Click this link to view a summary of the forms added to your job order.

View Form Click this link to view details of a particular form attached to the order.

Making and Scheduling Offers to Candidates

The assignment process involves selecting a candidate from your PeopleMatch results, offering him or her the position defined on the resource request, and the candidate accepting the offer. The Candidate Events page details the agenda items associated with the offer, including the date and time the offer was extended as well as when it was accepted or rejected. The Contact Events page details the agenda items associated with the acceptance as they relate to the order contact person. The information on this page is display only.

This section discusses how to:

- Enter candidate events.
- View candidate details.
- Make offers to candidates.
- Add agenda items.
- Add history items.
- View contact events.

Pages Used to Enter Event Information and Make Offers

Page Name	Object Name	Navigation	Usage
Candidate Events	FO_ORDR_MGR_CNDTE	 Click an Order Manager button on the PeopleMatch page.	Review and enter candidate information related to an open job order.
Candidate Overview	FO_EMPL_OVW	Click the View Candidate Overview link on the Candidate Events page.	View a candidate's personal data and job related information.
Candidate Events make offer	FO_MAKE_OFFER	Click the Make Offer button on the Candidate Events page.	Make an offer to a candidate.
Agenda Detail	FO_AGENDA_DETAIL	Click the Add Agenda button on the Candidate Events page.	Add agenda items to an order.
History Detail	FO_HISTORY_DTL	Click the Add History button on the Candidate Events page.	Add history items to an order.
Contact Events	FO_ORDR_MGR_CNTCT	Click the Order Manager button on the PeopleMatch page. Select the Contact Events tab.	Review contact information related to an open job order.

Entering Candidate Events

Access the Candidate Events page.

Branch,Order,Line, and **Order Type** — Displays order information.

Candidate — Displays candidate information.

Cust. Name (customer name) and **Contact Name** — Displays the customer and the contact for this order.

View Other Phone Numbers and **View Other Email Addresses** — Click these links to view the candidate's contact information.

View Resume — Click this link to view the candidate's resume.

> **Note.** The resume must have previously been uploaded through the Applicant or Employee component.

View Candidate Overview — Click this link to view the candidate's personal data, competencies, and job related information.

View Candidate Details — Click this link to view the candidate's employee data.

Make Offer — Click this button to make an offer to the candidate.

Note. This button becomes the Update Offer button if the candidate is considering the offer.

Assign	Click this button to assign the candidate to a resource request.

Note. The candidate must have accepted the offer and be hired before he or she can be assigned to a temporary order. Candidates do not need to be hired in order to be assigned to a career order.

Add Agenda	Click this button to add an agenda item.
Add History	Click this button to add history items to an order.
Send Email	Click this button to send an email to the candidate about this resource request.
This Order Only and **All Orders**	Select the respective radio button options to view agenda or history events for the current order or for all orders associated with this candidate.
Show Completed Agenda Items and **Hide Completed Agenda Items**	Click the respective button to display or hide agenda items for the order that have been marked complete.

Viewing Candidate Details

Access the Candidate Overview page.

Here you can view details about the candidate's Availability, Competencies, Tests, References, Assignments, Job Titles, and Lines of Business. Each section is expandable.

Making Offers to Candidates

Access the Make Offer to Candidate page.

Start On Dateand **Start Time**	Select the date and enter the time of day the candidate is to start the job.
Offer Result	Select the candidate's response to the offer: *Accepted, Considering, Declined,* or *Other.* If the candidate *Accepted* the offer, when you click OK the system transfers you to the assignment pages to enter the details of the assignment.

Note. For temporary orders, candidates must be hired before they can be placed in assignments.

Comment Text	Enter any comments about the offer or the job.

Note. You can also use the *Other* status when an offer is made to a candidate, but it is neither accepted nor declined. When you select the *Other* status, the system displays the Other Reason field. You can then select a reason such as *Phone Busy* or *No Answer.* The system records the *Other* status along with the reason as a history item.

Adding Agenda Items

Access the Agenda Detail page.

Fill in all the fields that apply to the event you are adding, and click the OK button.

The system returns you to the Candidate Events page. If an agenda item is completed, select its Completed check box.

This page is discussed in the Using the Agenda and History Functions chapter of this PeopleBook.

See Also

Chapter 10, "Using the Agenda and History Functions," Entering Agenda Details, page 165

Adding History Items

Access the History Detail page.

Fill in the fields that apply to the event you are adding, and click the OK button.

The system returns you to the Candidate Events page and displays the item in the History group box.

Viewing Contact Events

Access the Contact Events page.

Use the Contact Events page to view history and agenda items associated with the acceptance or rejection of an assignment as they relate to the contact person on the order.

To view agenda or history events for all orders associated with the contact person, select the All Orders option in the appropriate section.

Approving Orders

The Order Approval page lists all orders for a specific staffing branch that needs approval. It gives managers the ability to approve multiple orders that users have entered into the system. Orders are visible on the Approve Orders page, ready to be approved or denied, when the approval status is *Pending.*

Order approval status is granted through the user preferences configuration. Users who do not have order approval status can only save orders with approval status of *Pending.* Orders with approval status of *Pending* can only be saved with *Draft* or *Ended* order status. Users who have order approval status can approve orders in the Order component itself or in the Order Approval component.

This section discusses how to approve orders.

Page Used to Approve Orders

Page Name	Object Name	Navigation	Usage
Approve Orders	FO_ORDR_APRVL_INQ	Staffing, Orders and Assignments, Approve Orders	Approve orders.

Approving Orders

Access the Approve Orders page.

Approve Orders

Approval Status	Order ID	Description	Service User
Approved	0000000032	test	VP1

Approve Orders page (1 of 2)

Customize | Find | View All | First 1 of 1 Last

Description	Customer
Kenneth Schumacher	New World Outdoor Equipment, Inc.

Approve Orders page (2 of 2)

Approval Status

Select a value that represents the approval status:

- *Approved:* The order is dropped from the list once you save the page and navigate to another page.
- *Denied:* The order is dropped from the list once you save the page and navigate to another page.
- *Pending:*The order remains on the list.

Order ID

Displays the ID associated with the order. Click the link to go to the pages associated with the order.

Customer

Displays the customer's ID number. Click the link to go to the pages associated with the customer.

Viewing Order History

The Order History page contains a record of the interactions that have occurred between you and your customers and that you have previously logged in the system. The system generates a history item when a user completes an agenda item and when the user clicks on the Add History buttons and links throughout the application. Only the history items that reference the current order ID display on this page.

This section discusses how to:

- View order history information.
- View order history detail.

Pages Used to View Order History

Page Name	Object Name	Navigation	Usage
Review History	FO_HISTORY	Staffing, Orders and Assignments, Review Order History	View a summary of past events related to an order that were saved automatically by the system or manually by a user.
History Detail	FO_HISTORY_DTL	Staffing, Orders and Assignments, Review Order History, History Detail	View details of an order history transaction.

Viewing Order History Information

Access the Review History page.

Use this page to view the transactions associated with a particular order.

Click the View History button at the end of a row to view history details for the item.

Viewing Order History Detail

Access the History Detail Page.

The layout of the history page is the same for all types of history records.

See Also

Chapter 10, "Using the Agenda and History Functions," Viewing and Entering History Detail, page 169

Placing Candidates on Assignments

Use the Assignment pages to capture the details required to place candidates on an assignment.

Staffing organizations often provide a number of guarantee days associated with career assignments. When the candidate resigns or is terminated within this guarantee period, the customer may be entitled to a credit or a refund in what the industry calls a *fall off.*

The billing schedule is used with career assignments only. The total amount included in schedules must equal the placement fee agreed upon with the customer.

Having the system create additional jobs is applicable only when you have Pay/Bill Management installed with Staffing Front Office. If only Staffing Front Office is installed, the concept of additional jobs is not used and all assignments are created with EMPL_RCD zero.

Note. To enable multiple jobs for Staffing Front Office, on the PeopleTools Options page, in the General Options group box, select the Multiple Jobs Allowed check box.

Refer to the Setting Installation Options for PeopleSoft Applications chapter in the *PeopleSoft Application Fundamentals PeopleBook.*

See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, “Setting Installation Options for PeopleSoft Applications”.

This section discusses how to:

- Enter assignment details.
- Enter fall offs.
- Enter billing information.
- Enter initial payroll setup information.
- View cross-reference information.
- Enter commission information.
- Designate additional job record creation.
- Enter additional information with forms.
- Enter tax information.
- Attach files to the assignment.

Pages Used to Place Candidates on Assignments

Page Name	Object Name	Navigation	Usage
Assignment Header	FO_ASGN_HDR	• Staffing, Orders and Assignments, Assignments • Click Assign on the Candidate Events page after a candidate has accepted an offer. • Click the Express Assignment button on the PeopleMatch page for an order.	Enter the details required to place a candidate on an assignment.
Fall Off	FO_ASGN_FALL_SEC	Click the Fall Off button on the Assignment Header page.	Enter fall off information for the candidate. **Note.** Fall offs apply to career assignments only.
Assignments - Initial Payroll Setup	FO_ASGN_HCM	Staffing, Orders and Assignments, Assignments, Initial Payroll Setup	Enter payroll information for the assignment. **Note.** This applies to temporary assignments only.
Assignments - Billing	FO_ASGN_BILLING	Staffing, Orders and Assignments, Assignments, Billing	Enter billing information that is specific to the assignment. **Note.** You can view and enter customer-specific fields based on the definition established on the order.

Page Name	Object Name	Navigation	Usage
Assignments - Cross Reference	FO_ASGN_XREF	Staffing, Orders and Assignments, Assignments, Cross Reference	Access and view PeopleSoft Project Costing and PeopleSoft Contracts cross-reference information. **Note.** This applies only when Pay/Bill Management is installed.
Assignments - Additional Jobs	FO_ASGN_ADDTL	Staffing, Orders and Assignments, Assignments, Additional Jobs	Enables power users to force the system to create an additional job for an assignment. **Note.** This applies only for temporary assignments and when Pay/Bill Management is installed.
Assignments - Commissions	FO_ASGN_COMMISION	Staffing, Orders and Assignments, Assignments, Commissions	Enter commission information.
Assignments - Forms	FO_ASGN_TMPLTS	Staffing, Orders and Assignments, Assignments, Forms	Enter additional information that you want to track about the assignment using the assignment forms that you defined through system configuration.
Assignments - Tax Information	FO_ASGN_SALES_TAX	Staffing, Orders and Assignments, Assignments, Tax Information	Enter sales tax information for the assignment.
Assignments - Attachments	FO_ASGN_ATTACH	Staffing, Orders and Assignments, Assignments, Attachments	Attach files to the assignment.

Entering Assignment Details

Access the Assignment Header page.

A majority of the information on this page is populated from the order.

Note. The assignment start date defaults from the Start On field on the Make Offer to Candidate page.

PC Business Unit The PeopleSoft Projects business unit that owns the order. In Staffing Front Office, assignments can only be created for pre-existing orders.

Branch The staffing office that manages the assignment.

Assignment ID The unique identifier of the assignment record.

Order The order ID to which the assignment belongs. In Staffing Front Office, assignments can only be created for preexisting orders.

Order Type The user-defined order type associated with the order according to the options defined through system configuration. For example, *TMP* (temporary) or *CAR* (career).

Res Req # (resource request number)	The order line number for which the assignment is being created.
Description	Enter a description to reflect the type of assignment, such as *Facilities Manager.*
Status	Select a status for the assignment: *Canceled, Ended,* or *Open.*
Name	The name of the resource placed for the assignment.
Candidate Type	The type of candidate: *Employee* or *Applicant.* **Note.** The candidate type of *Employee* is used to distinguish from non-hired resources (applicants) and it includes both employees and non-employees.
EmplID (employee ID)	The ID number of the employee.
Per Status (personnel status)	Indicates whether the person is an employee or a non-employee.
Empl Rec # (employee record number)	PeopleSoft HRMS allows employees to have multiple jobs with the same company. In those situations, the person has a single employee ID but has multiple employee record numbers, one for each job. Staffing Front Office—when used in conjunction with Pay/Bill Management—leverages this functionality. This field on the Assignment page indicates which employee job record number is being used to pay the employee for this assignment. When Pay/Bill Management is not installed, all assignments are created using employee record number *0* (zero). This field only displays for temporary orders.
Job Status	Current status of the job. Possible values include *Active, Leave of Absence, Terminated,* and so on. **Note.** Refer to the HRMS PeopleBooks for a complete list of all possible job status codes.
Add Agenda	Click this link to add an agenda event for this assignment.
Add History	Click this link to add history details to the assignment.
View Monthly Schedule	Click this link to open a new window to view the schedule for the employee.
Permanent Hire	This field only appears for temporary orders when Temp to Hire is selected on the corresponding resource request line. Click to convert the transaction from a temporary to a career assignment. This feature can be used when the client permanently hires an employee who was originally placed on a temporary basis. Clicking this button causes the system to create a new assignment record which captures the salary and placement fee information. The system maintains the cross-reference between the temporary and career assignments.

Work Site

Customer ID	The work (ship to) customer ID associated with the assignment. The work location affects sales and payroll taxes, workers' compensation, and unemployment insurance.

Location	The customer address sequence number where the work will be performed. The work location affects taxation. The system does not automatically determine the tax codes. However, tracking the work location in addition to the billing address provides you with the information needed to manually enter the most appropriate tax codes.
Contact	The individual within the customer organization designated as the main contact for the assignment.

Assignment Details

Currency	The currency in which the customer will be billed for the services.
Job Code	Select the job code that is most appropriate for the assignment.
WC Code (workers' compensation code)	The workers' compensation code that applies to this assignment based on the job code and work state.
Replac Asgn (replacement assignment)	Because candidates sometimes need to be replaced after the assignment is created, you can manually cross-reference the original assignment with the assignment that replaces it. In the original assignment, enter the ID of the new assignment that replaces the original assignment. In the new assignment, enter the ID of the original assignment that was replaced. This field is used for information purposes only and does not have any processing impact in the system.
Assigned To	Enter the user ID assigned to manage the assignment.

Estimated Time

Start Date and **End Date**	Select the start date and estimated end date for the employee to begin and end work. The estimated End Date appears only for temporary orders. **Note.** For career orders, only the Start Date field displays.
Extension	Select this check box to indicate the work date range specified is an extension of the work date range originally planned.
Hours	Enter the expected number of hours that the employee will work each day.
Start Time and **End Time**	Enter the start and end work time, if known. End Time appears only for temporary orders.
Comments	Enter any comments related to the assignment.

For each day of the week, such as Tuesday, select the respective check box to indicate that the employee will be working on the assignment that day.

Exceptions

This group box displays the same information as the Estimated Time group box, but applies only to date ranges within the assignment period when the resource will not be working.

Note. In the staffing installation options, you can specify whether or not to populate the resource calendar when assignments are created. If you choose this option, once the assignment is saved, entries will be created for the date ranges specified and the week days selected. Entries will not be created for the date ranges specified in the Exceptions group box. Using the resource calendar will allow the system to compute resource availability scores in PeopleMatch and PeopleSearch.

Rates

The system displays this group box for temporary orders only.

After you enter the required pay and bill rates, the system displays your profitability or margin for the assignment.

Note. When creating an assignment the system defaults the rate elements that display here from the rate profile configuration. When Pay/Bill Management is not installed, only four profiles can be configured in the system per setID depending on the type of employee being placed: North America Payroll Hourly Employee, North America Payroll Salaried Employee, Global Payroll Employee, or Non-Employee. Based on the person being assigned, the system retrieves the proper profile and defaults its rate elements in the page. When Pay/Bill Management is installed, the system defaults the rate elements based on the rate profile specified in the Contract profile for the type of employee being placed.

Effective Date	Select the date when the rates are to be effective. The first effective date must not be after the start of the assignment.
Last Upd User (last update user)	Displays the ID of the last user that updated the page.
Last Upd DtTm (last update date and time)	Displays the date and time the last user updated the page.
Applies to, Pay Rate, Bill Rate, Default Rate, and **Apply Rate**	Depending on which Applies to option you select (Bill Rate or Pay Rate), enter either the bill rate or the pay rate in the Default Rate field, and then click the Apply Rate button. The system calculates the selected rates in the rates grid based on the standard multipliers established on the rate element configuration. You may recalculate rates as many times as you want. After you enter data in the Pay Rate and Bill Rate fields, the system fills in the Target Bill Rate, Markup %, Margin %, and Caution fields. For the system to display the Caution field correctly, your implementation team must define margin caution in the job code.
Insert Rate	Click this button to add another type of rate in the Main tab. Click the Delete row button to delete any rate not necessary for the assignment.
Target Margin and **Apply Margin**	Enter the percent of margin that you want to achieve, and then click the Apply Margin button. Based on your selections for bill rate or pay rate, the system calculates the other set of rates in the fields in the Main tab according to the margin specified. You may recalculate margins as many times as you want.
Detail No (detail number)	Displays an auto-sequenced number for each type of rate captured for the assignment. This field is informational only.
Rate Element	Displays the rate element code that corresponds to the type of rate being captured. Rate elements are defined through system configuration. For example, you may define pay and bill rate elements to capture regular time rates for North American Hourly Employees, bill-only rate elements to capture

bill rates for North American Salaried Employees, and markup rate elements to capture markup factors to apply to miscellaneous expense reimbursements.

Pay Rate

Enter the amount per hour you will pay employees for the work they are performing at the customer's site for the assignment.

This field is only available for rate elements configured with a rate action of Pay and Bill or Pay Only.

Bill Rate

For Pay and Bill or Bill Only rate elements, enter the amount per hour you will bill your customer for the work the employee is performing at the customer's site for the assignment. For markup rate elements, enter the markup factor to apply to expense items needed before billing the client. The markup factor defaults from the rate element configuration but can be overridden at the assignment level˙.

This field is only available for rate elements configured with a rate action of Pay and Bill or Bill Only or Markup.

Target Bill Rate

Displays the bill rate that you should target to meet margin requirements for the assignment.

Markup % (markup percentage)

Displays, as a percentage, the difference between the pay rate and the bill rate:

```
(Bill Rate - Pay Rate)/Pay Rate.
```

Margin % (margin percentage)

Displays, as a percentage, the difference between the pay rate plus costs and the bill rate:

```
Bill Rate - (Pay Rate + Additional Costs)/Bill Rate.
```

Note. There are two types of costs included in additional costs. They are general overhead or fixed costs established at the staffing branch level and workers' compensation costs associated with the job code and state in the workers compensation configuration tables.

Margin Target

When margin rates are within or outside acceptable levels, the system uses the following indicators to tell you whether you are achieving acceptable or unacceptable margin rates:

- *Acceptable Margin Achieved:* If you meet margin requirements, the system displays a green diamond next to this field.
- *Margin below Normal Levels:* If the margin falls below the caution margin established for the job code, the system displays a yellow triangle next to this field.
- *Unacceptable Margin:* If the margin falls below the critical margin established for the job code, the system displays a red square next to this field.

Your implementation team configures the values that the system uses in margin calculation. Your organization bases these calculations on the costs associated with filling a position, as well as the expected profit that is generated when you fill the order. You can save an order with any of these indicators.

Rate Purpose

Displays the general purpose of the rate element:

- *R:* Regular time.

- *O:*Overtime, which is also used for double time.
- *T:* Other, such as miscellaneous expense reimbursements, bonus, drug-screening costs, background checking costs, and so on.

The rate purpose is used by Pay/Bill Management to determine how overtime pay rates should be handled according to FLSA stipulations. For Payroll for North America employees who are non-exempt and belong to paygroups configured as FLSA-required, the overtime pay rates captured are only an estimate because Pay/Bill Management will rely on Payroll for North America to apply the earnings code multiplier factors to the regular time pay rate in order to compute the overtime premium.

Rate Action Displays how this type of rate should be captured:

- *A* (Pay and Bill): Capture both pay and bill rates.
- *B*(Bill only): Capture only bill rates.
- *P* (Pay only): Capture only pay rates.
- *M:* Capture markup factors.

Time Reporting Code Displays the time reporting code (TRC) that is used in Time and Labor to determine the rules that apply to the hours, as well as the earnings codes used in payroll.

Salary

The system displays this group box for career assignments only or for temp-to-hire assignments that have been converted.

Fee Schedule Select the fee schedule that applies to the assignment. A default fee schedule appears if it is defined in the Career Master page on the customer record or on the Salary and Billing page on the order's resource request.

Guarantee Days Starting from the date a candidate first begins a new position, enter the total number of days after which you will no longer offer a refund of the placement fee or a credit. Your organization's business processes dictate how to use this field.

Schedule Sent Select the date you sent the fee schedule to the customer.

Schedule Sign Select the date the customer signed the fee schedule.

Base Salary Enter the actual salary that the candidate accepted.

Default Fee Pct (default fee percentage) The default fee percentage is calculated based on the fee schedule selected and the salary that was entered.

Additional Compensation Enter any additional compensation for which the candidate may be eligible, such as bonus plans.

Override Pct (override percentage) To override the default fee percentage, enter a percentage here. To recalculate the placement fee, click Calculate.

Total Compensation Displays the sum of the Base Salary and the Additional Compensation.

Calculate Click to calculate your staffing organization's fee for placing the candidate with the customer.

Career Placement

The system displays this group box for career orders only.

Placement Fee Displays the fee your staffing organization will receive from the placement based on the candidate's compensation and the fee percentage you established with the customer.

Career Rev Department(career revenue department) Displays the department that will receive the revenue associated with the career placement fee. When Pay/Bill Management is installed this information is used to generate accounting entries in the Contracts module.

Fall Off Select this check box to indicate that the candidate resigned or was terminated prior to the expiration of the guarantee period. Fall off functionality is only available when Pay/Bill Management is installed in addition to Staffing Front Office.

Fall offs are for career order assignments or converted temp-to-hire assignments only. You use the Fall Off page to enter billing information and determine how much the customer is due.

Fall Off Click this button to enter fall off information in case the candidate is terminated or resigns prior to the expiration of the guarantee period. Once the fall off information is entered, the system automatically selects the Fall Off check box to document the occurrence of that event and to prevent fall offs, credit, and refund information from being entered twice.

Ending

Use this section to document when an assignment has ended. Set the Status field at the top of the page to *Ended* when an assignment has ended.

Actual End Date Select the date that the assignment actually ended. Do not populate this field ahead of time based on an estimated end date.

End Reason Select a reason why the assignment ended, such as *Credit* or *Filled.* .

End Comment Enter any comments associated with the ending of the assignment.

Audit

Expand this section.

Entered by Displays the ID of the user who created the assignment.

Date Time Entered Displays the date and time the assignment was created.

Last Upd User (last update user) Displays the ID of the last user to update the page.

Last Update Date/Time Displays the date and time the last user updated the page.

See Also

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Project Profiles

Entering Fall Offs

Access the Fall Off page. This page is only available when Pay/Bill Management is installed in addition to Staffing Front Office.

Fall Off Code — Select the code that best describes the fall off reason, such as *Q* (quit).

Placement Fee — Displays the fee the customer paid your staffing organization for the placement.

Guarantee Days — The number of days your staffing company guaranteed the placement. The guarantee days determine how long your staffing company guarantees the placement.

Days Worked — Enter the number of days the candidate worked for the customer on the assignment.

Pct (percent) — The percentage of the placement fee that your staffing organization is returning to the customer.

Calculate — Click this button to calculate the amount your staffing organization will refund the customer for the fall off.

Fall Off Amount — Displays the amount your staffing organization should return to the customer. For the system to calculate the return amount, you must enter values in the Fall Off Code, Guarantee Days, Placement Fee, and Days Worked fields. Guarantee days and placement fee default from the Assignment page.

Fall Off Credit Date — Enter the date to be used in the credit transaction being generated for the customer. Once you click the OK button, Pay/Bill Management will automatically generate a credit for the customer in the Billing application.

Entering Billing Information

Access the Assignments - Billing page.

Define Events By

This group box displays for career assignments or converted temp-to-hire assignments only.

Amount and **Percent** — Select an option by which the system will define events:

- Amount: If you select Amount, you will enter the amounts to be billed for each installment.
- Percent: If you select Percent, the system will enable you to split the placement fee to be billed to the client in installments by entering the percentage of the total fee to be billed in each installment.

Billing Schedule

This group box displays for career assignments or converted temp-to-hire assignments only.

Event Occurrence — Displays an auto-generated sequence number for each billing installment.

Event Date — Select the dates you would like to bill the customer for the placement fee.

Percentage — Enter the percentage or amount of the placement fee to be billed for each date.

Comments — Enter any comments you have regarding the billing of this assignment.

Purchase Order

This group box displays for temporary orders only.

Note. This information is sent to Pay/Bill Management for use with Billing to expedite payment on your bills. The PO tracking feature is used with temporary orders only when Pay/Bill Management is installed.

Business Unit — This field is only editable if you select the Use PO Tracking check box. Enter the Contracts business unit of the customer purchase order against which this assignment should be billed.

Use PO Tracking (use purchase order tracking) — Select this check box in order to have the system use purchase order balance tracking for this assignment.

If you are tracking your billing activity against customer purchase orders, you may associate a purchase order number to the assignment. If this check box is not selected, you can still enter a customer purchase order ID in the free form Customer PO field, but the system will not track the PO balance as the customer is billed for hours posted against this assignment.

PO Tracking ID (purchase order tracking ID) — This field is only editable if you select the Use PO Tracking check box. Enter the tracking ID of the customer purchase order against which hours for this assignment should be billed. The system will track the balance of the PO as the customer is billed. The PO tracking functionality is only available for temporary assignments.

Customer PO (customer purchase order) — This field is only editable if you do not select the Use PO Tracking check box. Enter the customer’s purchase order number for this assignment. Purchase order information entered in this manner does not allow or require PO balance tracking.

Customer Fields

This group box only displays when Pay/Bill Management is installed.

Effective Date — Enter an effective date for each Definition ID template you specify.

Definition ID — Displays the customer definition template ID associated with the assignment. This field defaults from the order and cannot be overridden.

Customer Field Name and **Description** — Each Customer Field Name is automatically populated by the system from the customer fields definition template as defined in Pay/Bill Management configuration. Examples include *Customer Cost Center* and *Customer Supervisor Name.* Enter the value of each customer field in the Description field. For example, if the Customer Field Name is equal to *Customer Supervisor Name* you can enter *Carol Smith* in the Description field.

For temporary assignments, Pay/Bill Management passes the values of these fields to the Billing application, where they can be used for invoice printing or reporting purposes.

Pre Approval Flag — This check box is only available when Pay/Bill Management is installed. Select this check box to indicate whether a billing worksheet should be generated and approved prior to charges being sent to the Billing application.

Entering Initial Payroll Setup Information

Access the Assignments - Initial Payroll Setup page.

This page displays for temporary assignments only. It captures information specifying how an employee should be paid for this assignment. When Pay/Bill Management is installed, the system uses this information to decide whether or not an additional job record should be created in HRMS for this assignment.

Company	Select the HR company that will pay the employee for hours worked in this assignment. If the selected department is associated with a company, the company will be populated by default and will be display only.
Department	Select the HR department that will pay the employee for hours worked in this assignment. The department may appear by default from the employee or the order, depending on the project profile configuration.
Pay Group	Select the pay group from which the employee should be paid for hours worked in this assignment. The pay group prompt is dynamic depending on the pay system definition on the employee job record (North America or Global Payroll). Entries in this field appear by default from the employee, or from the user preferences depending on the setup of the project profile.
Workgroup and **Taskgroup**	These fields are only available when Pay/Bill Management is installed. Select a value for each to indicate how you want to process the employee within PeopleSoft Time and Labor. Entries in these fields appear by default from the employee or from the user preferences depending on the setup specified in the project profile.
Location Code	Enter a location code associated with the staffing branch for this assignment.
Business Unit HR	Enter the human resources business unit that will pay for the hours worked by the employee in this assignment.
Tax Location Code	Select a value to indicate the North America payroll taxing jurisdictions that apply to this assignment.

Note. You cannot change any of the fields on this page in Pay/Bill Management after you create the assignment. However, you can change these fields directly in the HRMS and Time and Labor systems.

Viewing Cross Reference Information

Access the Assignments - Cross Reference page.

Cross-Reference

PC Business Unit	Displays the Project Costing business unit for this assignment. The system obtains this value from the Branch Mapping table.
Project	When Pay/Bill Management is installed, this field displays the ID of the project that was automatically created when the order was saved. Click to access the associated project in the Project Costing application.
Activity	When Pay/Bill Management is installed, this field displays the ID of the activity that was automatically created when the assignment was saved. Click to access the associated activity in the Project Costing application.

Contracts Business Unit Displays the Contracts business unit for this assignment. The system obtains this value from the Branch Mapping table.

Contract When Pay/Bill Management is installed, this field displays the number of the contract that was automatically created when the order is saved. Click to access the associated contract in the Contracts application.

Contract Line When Pay/Bill Management is installed, this field displays the contract line number that was automatically created when the assignment is saved. Click to access the associated contract line in the Contracts application.

Entering Commission Information

Access the Assignments - Commissions page.

User ID Select the ID of the person who is receiving a commission for the placement.

Percentage Enter the percent of the commission the person is receiving. If there is more than one person receiving a commission for the placement, enter a new row, add his or her User ID and then enter a Percentage. The total combined percentage for all commissions on the assignment must be equal to 0 or 100.

Designating Additional Job Creation

Access the Assignments - Additional Jobs page.

This page displays for temporary orders only and is only available when Pay/Bill Management is installed and the Allow forcing additional jobs check box is selected on the Staffing - Job Data page.

Select the Force Additional Job Creation check box in order to have the system always create an additional job record each time a new assignment is created, thus overriding the system logic that re-uses job records across assignments.

Entering Information with Forms

Access the Assignments - Forms page.

The functionality of this page is identical to that of the Forms page in the Order component.

See in this chapter, aboveCollecting Additional Information Using Forms

Entering Tax Information

Access the Assignments - Tax Information page.

The functionality of this page is identical to that of the Tax page in the Order component.

See Chapter 9, "Creating and Managing Orders and Assignments," Entering Tax Information, page 134.

Attaching Files to the Assignment

Access the Assignments - Attachments page.

The functionality of this page is identical to that of the Attachments page in the Order component.

See Chapter 9, "Creating and Managing Orders and Assignments," Adding Attachments, page 142.

Viewing Assignment History

You can view records of the critical events that occurred and events that you logged in association with each assignment. The system generates a history item when a user completes an agenda item or when the user clicks the Add History button on several components throughout the application. Only the history items associated with this assignment show on this page.

See Also

Chapter 9, "Creating and Managing Orders and Assignments," Viewing Order History, page 148

Chapter 10, "Using the Agenda and History Functions," Viewing and Entering History Detail, page 169

Pages Used to View Assignment History

Page Name	Object Name	Navigation	Usage
Review History	FO_HISTORY	Staffing, Orders and Assignments, Review Assignment History	Review the most recent events logged and associated with a particular assignment.
History Detail	FO_HISTORY_DTL	Staffing, Orders and Assignments, Review Assignment History, History Detail	View details of assignment history events.

CHAPTER 10

Using the Agenda and History Functions

This chapter provides an overview on using the agenda functions in Staffing Front Office and discusses how to:

- Work with your agenda.
- Research history.

Understanding the Agenda

Use the agenda to organize future tasks. In the course of a day, you are likely to access many different applicant, employee, customer, order, and assignment records. In doing so, you might have to contact several individuals. The agenda helps track what you need to do in the immediate and near future and helps you manage time, contacts, and future work.

Working With the Agenda Function

The agenda is your personal to-do list. Agenda items can be added to your list a number of ways:

- You can manually place items on your agenda from many pages in the application by using the Add Agenda link.
- The system can automatically place items such as the confirmation call, arrival call, and follow-up call on the agenda when a candidate accepts an offer.

Working with Your Agenda

This section discusses how to:

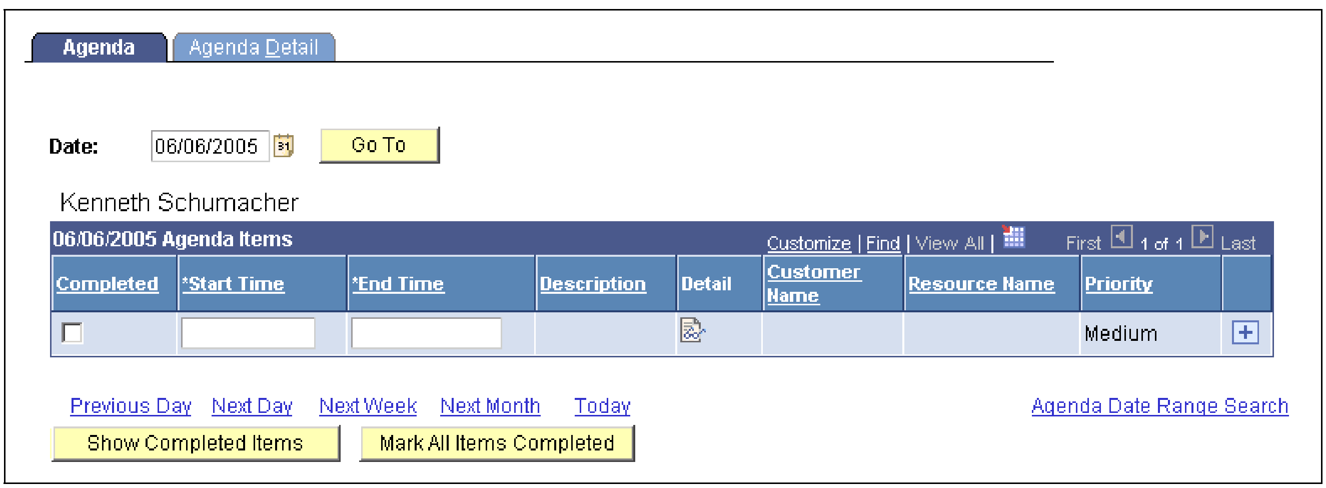
- Use the agenda features.
- Enter agenda details.
- Review agenda details.

Pages Used to Work with Your Agenda

Page Name	Object Name	Navigation	Usage
Agenda	FO_AGENDA	• Staffing, Agenda and History, View/Update My Agenda • Staffing, Agenda and History, Add/Update Manager Agenda	Keep track of action items that you want to schedule for completion on a particular day.
Agenda Detail	FO_AGENDA_DETAIL	• Staffing, Agenda and History, View/Update My Agenda, Agenda Detail • Staffing, Agenda and History, Add/Update Manager Agenda, Agenda Detail	View additional information about an item or update information for an existing item
Review Agenda	FO_AGENDA_INQUIRY	• Click the Agenda Date Range Search link on the Agenda page. • Staffing, Agenda and History, Review Agenda	Recall and search for agenda items by event type, setID, order, date range, and so on.

Using the Agenda Features

Access the Agenda page.



Agenda page

Completed After you complete the action associated with an agenda item, select the associated check box to mark the item as completed, after which it becomes unavailable for entry and updates. .

Start Time and **End Time** Enter the beginning and ending times for the agenda item.

Description The agenda event type.

Detail Click the icon in the Detail column to view more information for the agenda item. On the Agenda Detail page, you can review (or change) all information about the agenda item. You can also copy or transfer an agenda item to another user by entering *Copy* or *Reassign* in the Change User field, and saving the page. The reassign function transfers the item to the appropriate user's list and removes it from the current user's list upon saving. If you are using the copy function, the system adds the item to the appropriate user's list and does not remove it from the current user's list.

To reschedule an item, change the Date, Start Time or End Time fields on the Agenda Detail page. When you reschedule an item, the system automatically reschedules it to the new date and removes it from the list for the date on which it was originally scheduled.

Customer Name

Name of the customer for whom the item is scheduled (if applicable).

Resource Name

The name of the applicant, employee, or non-employee for whom the item is scheduled (if applicable).

Priority

You can change this value on the Agenda Detail page.

Click the Add button to add a new item. Enter the Start Time and End Time,and then click the Detail button. On the Agenda Detail page, enter all information that is relevant to the agenda item, including the event type and contact method.

Note. Both times default as *AM* so you may need to manually enter *PM,* or enter the time in military time when relevant. For example, enter *1300* to represent 1:00 PM.

Previous Day, Next Day, Next Week, Next Month, and **Today**

Click these links to view your agenda items for the respective time period.

Click the Agenda Date Range Search link to search more specifically for agenda items.

Show Completed Items and **Hide Completed Items**

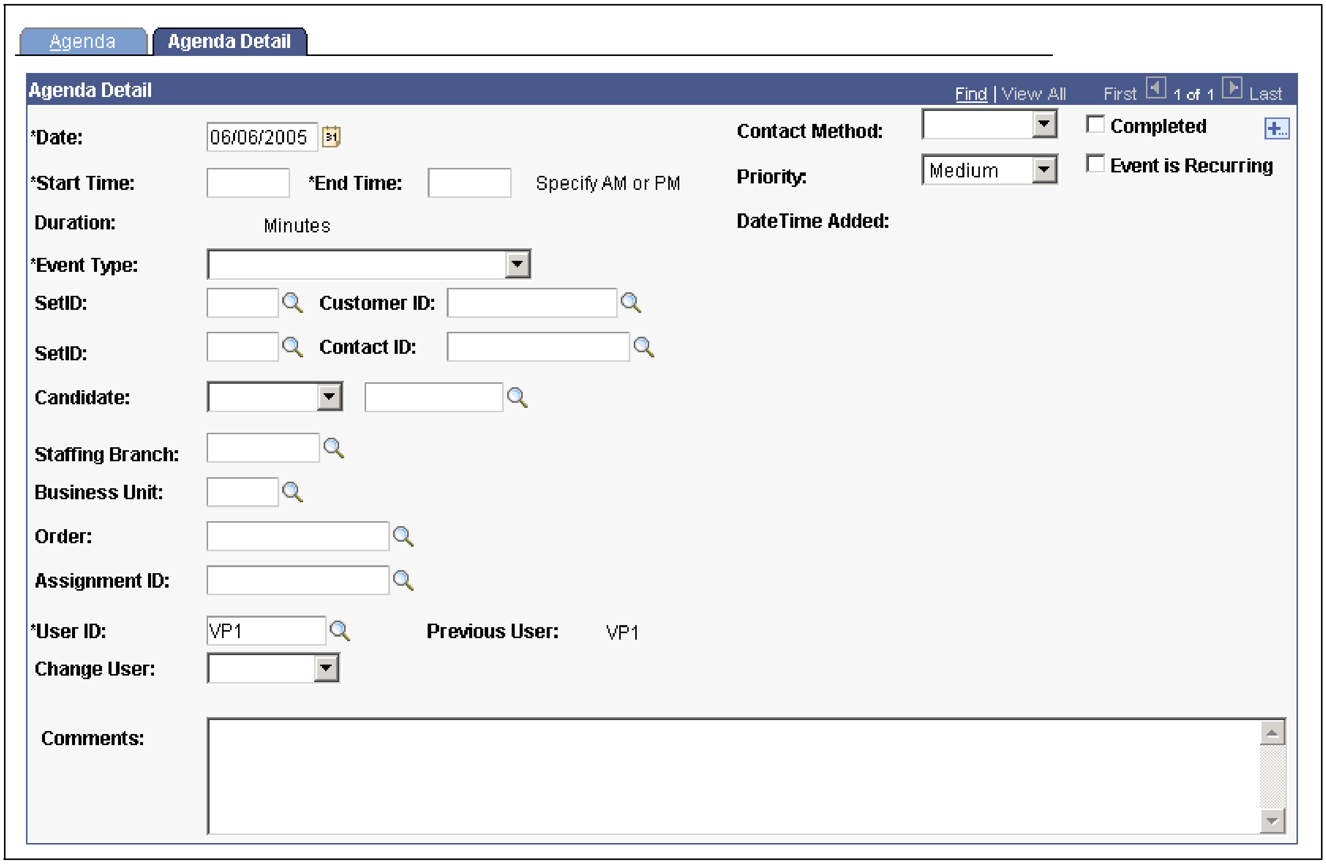
Completed items remain on the agenda for that day as part of the history of that record. However, you can click theHide Completed Agenda Items button to remove the items from view; and you can click theShow Completed Agenda Items button to display them.

Mark All Items Completed

Click this button to select all check boxes in the Completed column.

Entering Agenda Details

Access the Agenda Detail page.



Agenda Detail page

Date Enter the date on which the item is scheduled.

Contact Method Enter the method of contact for the item: *Call, Email, In-Person, Verbal,* or *Written.*

Completed Select this check box when you complete the item. After you do so and save the record, you can hide the item.

Start Time and **End Time** Indicates the scheduled start and end time for the item.

Priority Indicate the priority level of the item: *High, Low,* or *Medium.* This is useful when sorting through long lists of items on the Agenda page.

Event is Recurring Select this check box to have the system schedule the item for a future date after this occurrence has been completed.

On the Contact component, Staffing Information page, you can specify a default number of recurring event days. When you create an agenda item, you can set the item to be recurring. When you complete the item, the system creates a new item for the specified number of days after the original.

Note. To trigger the creation of the next item, you must first complete the current item. The system then displays the Next Event Date field.

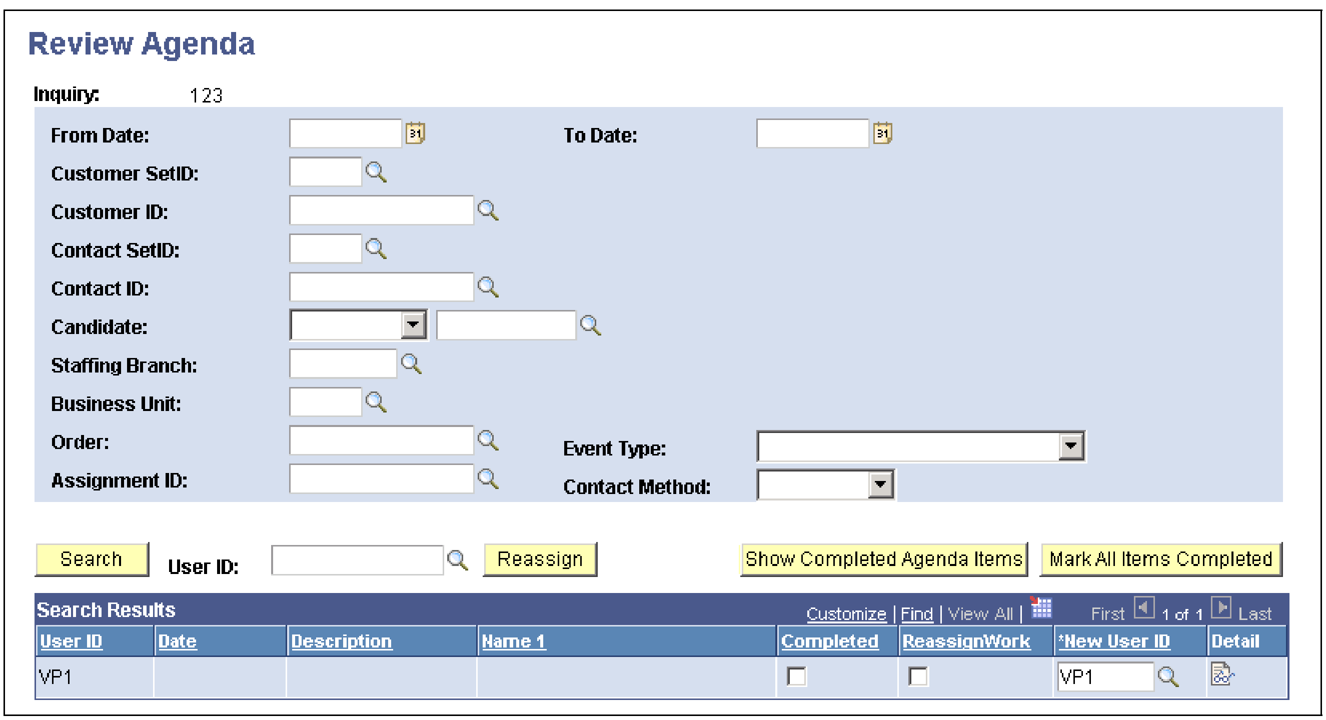
Duration Calculates the duration of the item based on the start and end time values.

Date Time Added Indicates the date and time that you added the item.

Event Type	Enter the type of event associated with the agenda item, such as *Availability* or *Call.* You define event types as part of your Staffing Front Office configuration.
SetID and **Customer ID**	Enter the ID of the customer associated with this agenda item (if applicable). Click the adjacent customer name link to open and view the customer's information on the Customer General Information page in a new window.
SetID and **Contact ID**	Enter the ID of the contact associated with this agenda item (if applicable).
Candidate	Select *Appl* (applicant) or *Empl* (employee or non-employee) to designate the status of the candidate associated with this agenda item (if applicable), and then enter the person's ID in the adjacent field.
Staffing Branch, Business Unit, Order, and **Assignment ID**	Enter the branch and PC business unit with which the agenda is associated, and, if applicable, the order and assignment IDs.
User ID	Enter the ID of the person associated with the agenda record.
Change User	Enter *Copy* to send a duplicate of the item to another user's agenda. Enter *Reassign* to transfer the item to another user's agenda.
Comments	Enter additional information about the agenda item.

Reviewing Agenda Details

Access the Review Agenda page.



Review Agenda page

To search for agenda items, in the top part of the page enter the field values for which you want the system to search. The more information that you enter the more specific the search is. To view details for an item, click the detail icon at the end of the item's row.

You can save each inquiry's criteria as a unique name to be accessed at a later time. For example, you can save an inquiry that you want to run each week.

Completed, Reassign Work, and **New User ID**

Click the check box next to an item that you want to reassign, enter the user ID of the person to whom you want to transfer the item, and click the Reassign button.

When you save the page, the system transfers the item to the appropriate user's list and removes it from the current user's list.

Researching History

Use the history functions in Staffing Front Office to help keep track of tasks you completed in the past.

In Staffing Front Office, you can view, update, and save information about transactions or conversations that have already occurred. These include many of the events in which an employee has been involved, such as past orders and assignments. The system automatically saves some events to history. However, you can add other items at your discretion.

To add history, use the Add History link found on many pages in the application. There is no limit to the number of history rows that you can add to a record. However, you may periodically have to purge history records to reduce volume, increase storage capacity, and improve your system performance.

This section discusses how to:

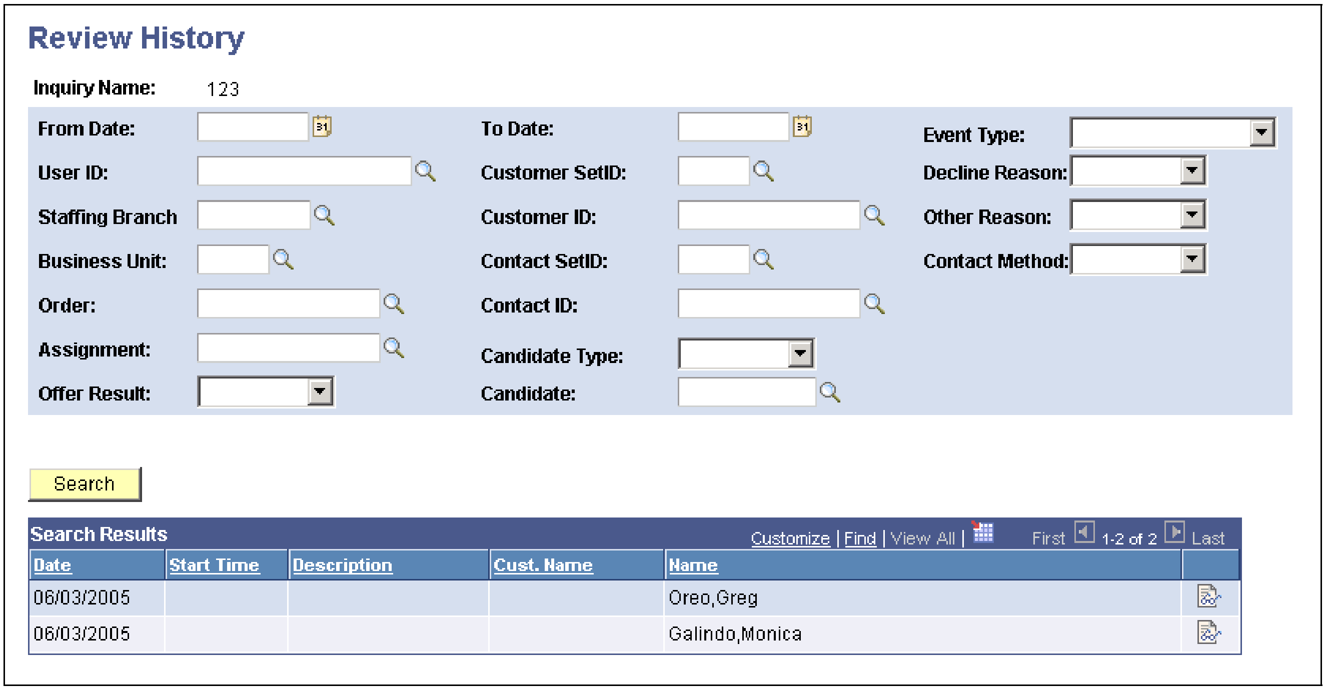
- Use the history review features.
- View and enter history detail.

Pages Used to Research History

Page Name	Object Name	Navigation	Usage
Review History	FO_HISTORY_INQ	Staffing, Agenda and History, Review History	Recall and perform predefined history searches.
History Detail	FO_HISTORY_DTL	Click a View History button on the Review History page.	View, update, and save records of transactions that have already occurred.

Using the History Review Features

Access the Review History page.



Review History page

You can view history records across specific dates, users, or history types. You can also create history inquiries and save them.

This page functions similar to the Review Agenda page, but includes three additional fields.

See Chapter 10, "Using the Agenda and History Functions," Reviewing Agenda Details, page 167.

To view the details about a specific row of information, click its View History button.

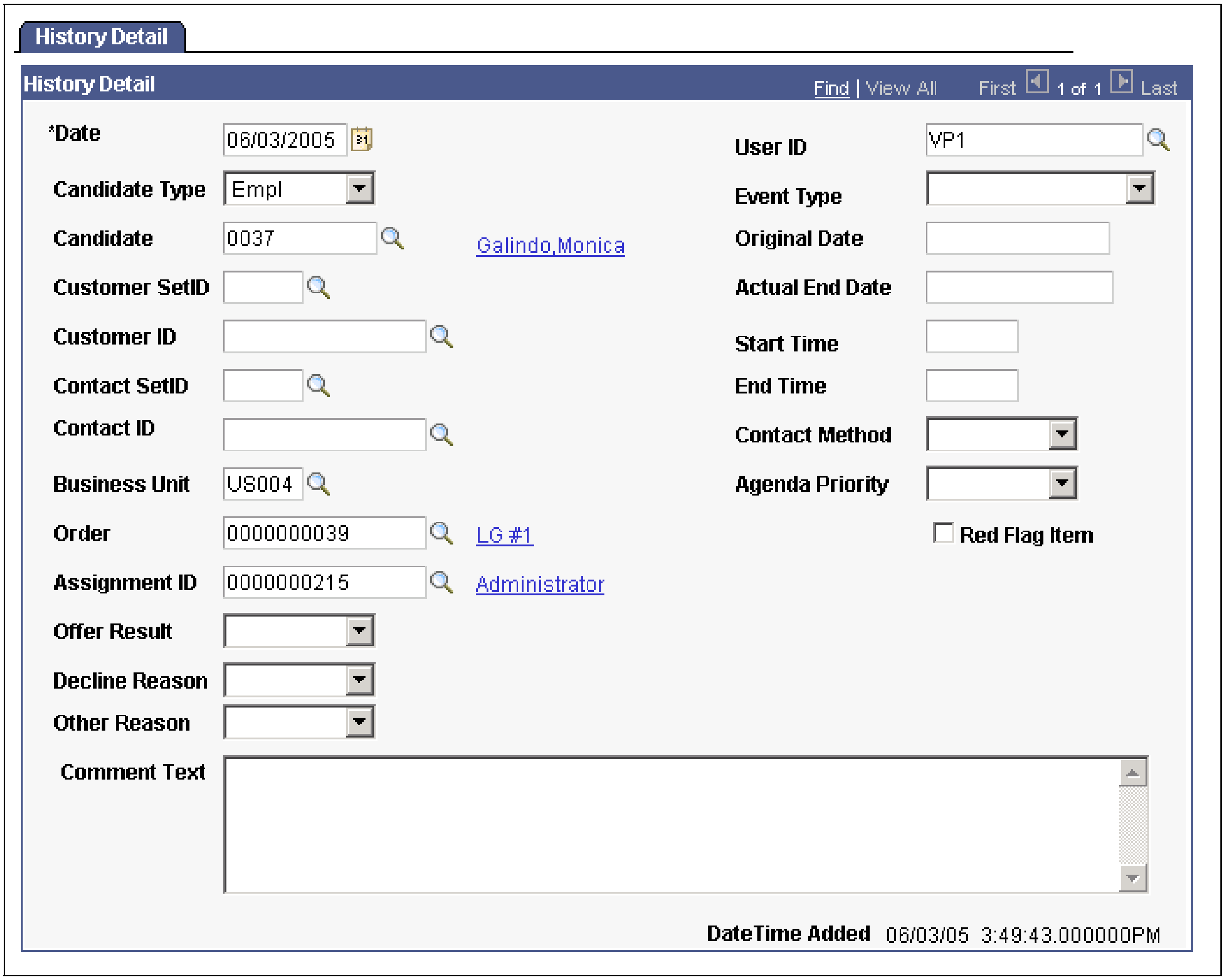
Offer Result — Enter a candidate's decision to take or not an assignment to further narrow your search, such as *Accept,Assign, Consider, Decline,* or *Other.*

Decline Reason — Enter a candidate's reason for declining an assignment to further narrow your search, such as *Benefits, Hours,* or*Pay.*

Other Reason — Enter the other reason status, such as *No Answer,* or *Phone Busy.*

Viewing and Entering History Detail

Access the History Detail page.



History Detail page

The layout of the history page is the same for all types of history records. The only difference is the type of history that the system retrieves. History items can be added using this page, or through links in the Applicant, Employee, Order, Assignment, Customer, and Contact components.

Actual End Date	Indicates the date on which the history item was completed.
Red Flag Item	Select this check box to indicate that the history item is of significant importance.
Date	Displays the date for which the history item was scheduled.
Event Type	Classifies the history item based on an event category, such as *Availability* or *Call.* Event types are defined as part of your Staffing Front Office configuration.
Start Time and **End Time**	Indicates the scheduled start and end time for the history item.
Contact Method	Indicates the method of contact for the item, such as *Call* or *Verbal.*
Agenda Priority	Indicates the priority of the item when it was scheduled in the agenda. Priority is useful when you are sorting long lists of agenda items.

Customer SetID, Customer ID, Contact SetID, Contact ID, Order, and **Assignment ID**	These enable cross-referencing history items with customers, contacts, orders, and assignments.
Offer Result	This field only applies to history items associated with the creation of assignments. It indicates the result that best represents why the applicant or employee accepted or declined a position.
Decline Reason	This field only applies to history items associated with the creation of assignments. I indicates the reason why the employee declined the position or assignment.
Other Reason	This field only applies to history items associated with the creation of assignments. It indicates the reason for an offer result of *Other*.
Comments	Enter additional information about the history item.
Date Time Added	Indicates the date and time that a user added the history record.

CHAPTER 11

Working With Self-Service Functionality

This chapter lists common elements, provides an overview of the self-service functions in Staffing Front Office, and discusses how to:

- Search for open resource requests.
- Create applicant records online.
- Create temporary and career orders online.

Understanding Self-Service Functionality

Staffing Front Office gives you the ability to make the following self-service functions available to your customers, employees, and applicants:

- Open Resource Requests: You can make the Open Resource Requests functionality available to both employees and applicants. These pages give internal employees and prospective applicants a view of currently available positions. Employees and applicants can then use the contact information listed on the page to learn more about positions from the recruiter assigned to the order.
- Apply Online: You can make the Apply Online pages in Staffing Front Office available to applicants over the internet. Authorized users at your staffing organization can then review the record and potentially turn the pending applicant into an active applicant or an employee. Records submitted by the applicant have a personnel status of *Applicant (Pending).* An authorized user can decide to change the status to *Active* after reviewing the pending record.
- Customer Self Service: Customers can view and create temporary or career orders using the self-service functionality built into Staffing Front Office. Once a customer submits a new order, an authorized user in your staffing organization can review it for missing data or to update existing data.

Searching for Open Resource Requests

Your company can allow others to search for open resource requests and view contact information about how to apply for a job. After someone locates a job, that person can send an email message to the recruiter expressing interest in the job and supply the necessary contact information and resume.

This section discusses how to:

- Search for resource requests.
- Create a message to a recruiter.

Pages Used to Search for Open Resource Requests

Page Name	Object Name	Navigation	Usage
Open Resource Request	FO_ORDER_PUB	Employee Self-Service, Open Resource Requests	View detailed information about open resource requests.
Contact recruiter electronically about this opportunity	FO_ORDER_PUBEMAIL2	Click the Contact recruiter electronically about this opportunity link on the Open Resource Request page.	Send an email message to the recruiter to express an interest in a particular job and to provide contact information and a resume.

Searching for Open Resource Requests

Access the Open Resource Requests page.

Contact recruiter electronically about this opportunity Click this link to enter a message and send an email to a representative within the staffing organization.

Create your Applicant Record Click this link to begin the online application process.

Creating a Message to a Recruiter

Access the Contact recruiter electronically about this opportunity page.

User Order Type Displays the type of order.

Job Title Code Displays the code for the job title associated with the resource request.

Service Order ID Displays the ID of the order the applicant wants to inquire about.

Line Number The resource request line number.

First Name, Last Name, Address Line 1, City, State, and **Postal Code** Enter your name and address information in the appropriate fields.

Telephone Enter your telephone number, including the area code or international code as necessary.

Email Enter your email address.

EmplID (employee ID) Enter your employee ID, if applicable.

Email Subject Displays *Candidate Inquire about Open Resource Request.*

Comment Text Enter the email text to accompany the resume that you attach.

Send Click this button to send your message and any attached files to the recruiter.

Cancel Click this button to cancel the message.

Add Attachment Click this button, then click the Browse button to locate your resume file on your local computer. Once you locate it, click the Open button. The system displays the file path to your resume. Click the Upload button. When you then click the Send button, the system uploads your resume and sends it to the recruiter, along with your cover letter and contact information.

Creating Applicant Records Online

Prospective applicants can log on to your designated staffing website to use the Online Application functionality and enter their personal information directly into the system. The system marks the record as *Applicant (Pending).* Once a staffing representative reviews the record, he or she can change the status of the record from *Applicant (Pending)* to *Active.*

This section discusses how to:

- Initiate the online application process.
- Enter general information.
- View the temporary branch assignment.
- Enter contact information.
- Enter availability information.
- Enter education information.
- Enter competencies information.
- Add resumes and other files to the applicant record.
- Enter job titles and lines of business information.
- Submit the application.

Pages Used to Create Applicant Records Online

Page Name	Object Name	Navigation	Usage
Welcome to our Online Application	FO_APP_SS_WELCOME	• Employee Self-Service, Staffing Apply Online • Click the Create your Applicant Record link on the Open Resource Request page.	Begin the process that enables applicants to enter their information.
Name and Address	FO_APP_SELF_SERV	Click Next on the Welcome to our Online Application page.	Enter name and address information.
Staffing Branch	FO_APP_SS_BRANCH	Click Next on the Name and Address page.	Use the prompt to select the staffing branch to which you want to apply.
Contact Information	FO_APP_SS_CONTACT	Click Next on the Staffing Branch page.	Enter contact information, such as telephone, email, and website information.

Page Name	Object Name	Navigation	Usage
Availability	FO_APP_SS_AVAIL	Click Next on the Contact Information page.	Enter information about availability, such as desired start date, shift preference, and full-time or part-time status. Applicants use this page to enter information about their availability.
Education	FO_APP_SS_EDUC	Click Next on the Availability page.	Enter educational information. Applicants can use this page to enter their primary educational credentials. They can make multiple entries for each school they attended.
Competencies	FO_APP_SS_COMPS	Click Next on the Education page.	Enter information about the candidate competencies, proficiency, and interest level.
Resume	FO_APP_SS_RESUME	Click Next on the Competencies page.	Add resumes and other files to the applicant record. Alternatively, paste the resume text in the field provided.
Job Titles and Lines of Business	FO_APP_SS_JTITLES	Click Next on the Resume page.	Enter information about the candidate lines of business and job titles. Lines of business are broad categories of job sectors, such as *Health Care, Technology, Legal,* or *Clerical.* They are useful for indicating the experience that applicants have in a particular field. Applicants with a work history will have job titles for positions that they have held. Customers will often request the services of employees and use a job title to refer to the work performed.
Submit Information	FO_APP_SS_SUBMIT	Click Next on the Job Titles and Lines of Business page.	Submit the application.

Initiating the Online Application Process

Access the Welcome to our Online Application page.

Note. During implementation, you can modify this page to fit your needs. Applicants must view every page in the series. However, not all pages have required fields on them.

Click Next to access the Name and Address page.

Note. There is no search page for this apply online section. The page is add only. The system automatically generates an applicant ID number.

Entering General Information

Access the Name and Address page.

Enter your name and address information.

Country	This value defaults from the Operator Preferences table and is specific to the adjacent address. The mailing address can be associated with a separate country and still be valid.
Mailing Address	Click this link to enter address information where documents, including paychecks and other payroll correspondence should be sent.

National ID (Optional)

Country	Enter the country associated with your national ID.
National ID Type	Enter your ID type.
National ID	Enter your national identification number.
Primary ID	Select to make this ID your primary ID.

Viewing Your Temporary Branch Assignment

Access the Staffing Branch page.

Select the staffing Branch to which you want to apply from the prompt.

Entering Contact Information

Access the Contact Information page.

Phone Numbers

Phone Type and **Telephone**	Enter phone number information, including the type of phone number, such as *Business, Cellular,* or *Home.*

Email Addresses

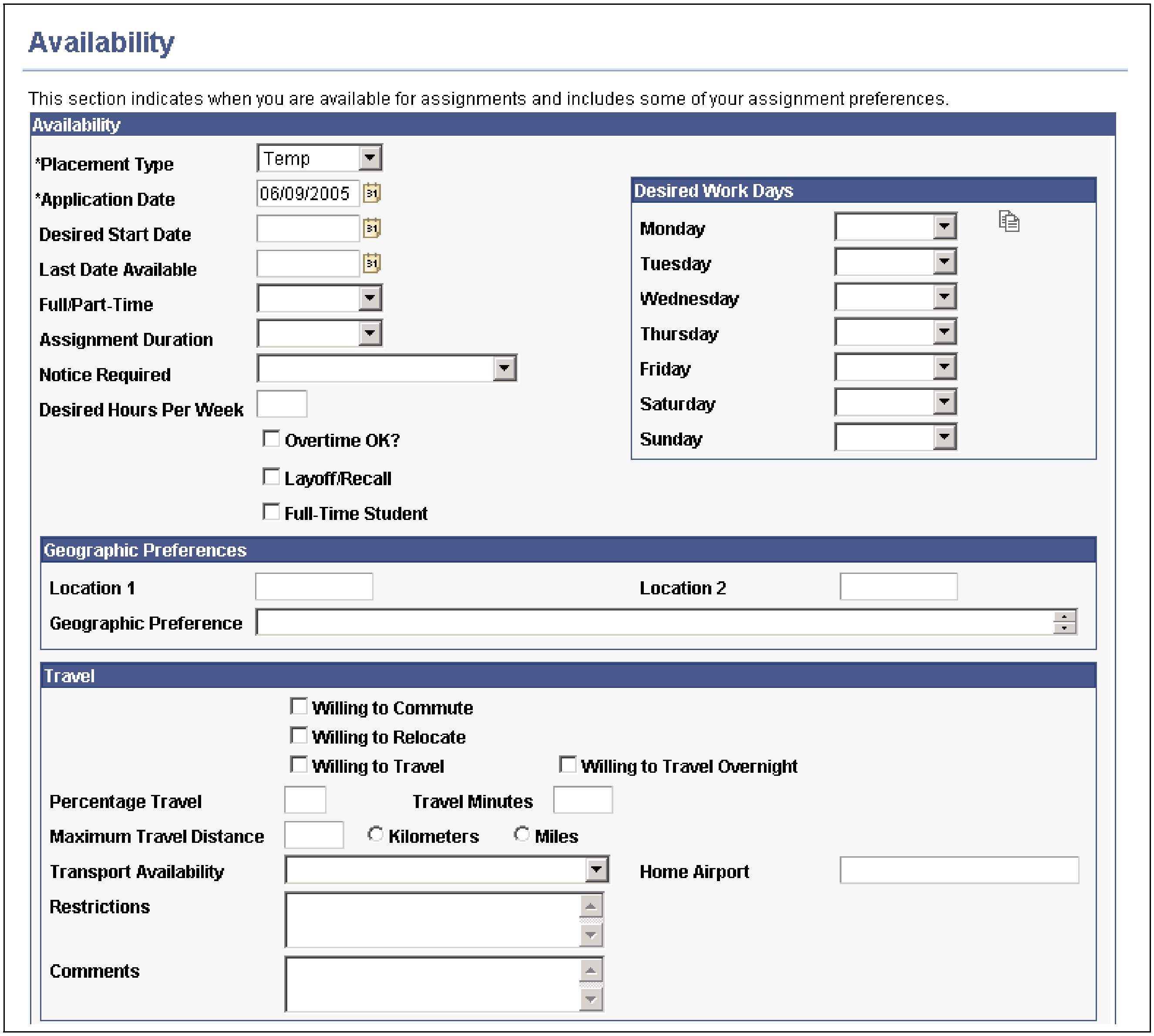
Email Type and **Email Address**	Enter email address information. You can add additional addresses.

Web Addresses

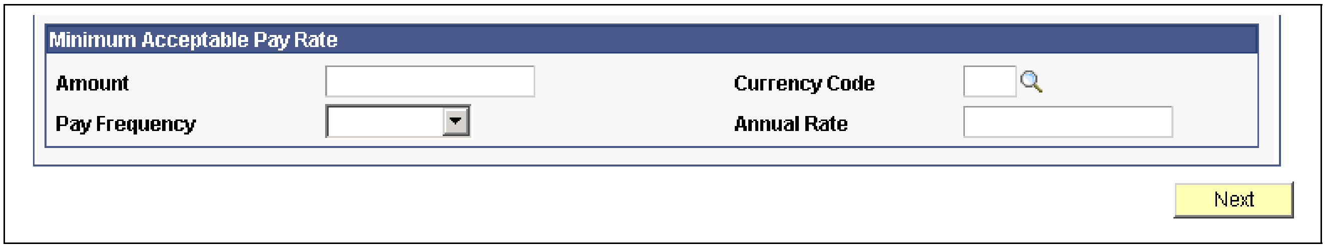
Website Type and **URL**(uniform resource locators)	Enter website information. These can be examples of work, personal home pages, and so on.

Entering Availability Information

Access the Availability page.



Availability page (1 of 2)



Availability page (2 of 2)

Availability

Placement Type
Select the placement type you prefer: *Both, Career, Contract, Leasing, Payrolling,* or *Temp* (temporary).

Application Date, Desired Start Date, and **Last Date Available**
Enter the date you are applying, and enter availability dates. The availability start and end dates on this page are not affected by assignments created in the system.

Desired Work Days
In addition to each of the days of the week an applicant might be available to work, he or she can select any of the three standard 8-hour shifts during a 24-hour period: *1st Shift, 2nd Shift, 3rd Shift,* or *No Shift.* Your system administrator can change these values to reflect your unique requirements.

Note. To replicate your selection for Monday for the remainder of the work week, click the Replicate button.

Geographic Preferences

Location 1 and **Location 2**
Enter specific locations, and enter your more general Geographic Preference as well.

Travel

Willing to Commute, Willing to Relocate, Willing to Travel, and **Willing to Travel Overnight**
Select any of these check boxes to indicate your commute and travel preferences.

Restrictions
Enter comments to track limitations on an applicant's travel. .

Also enter the Percentage Travel you are comfortable with, your maximum Travel Minutes and Maximum Travel Distance, and your Transportation Availability.

Minimum Acceptable Pay Rate

Amount, Currency Code, and **Pay Frequency**
Use these fields to indicate the candidate's minimum desired compensation. Enter the amount of pay, the currency in which the amount should be paid, and the frequency at which you want to calculate the pay rate. The system does not base payroll cycles for temporary staff on the frequency chosen here. Frequency is simply a tool that calculates pay using familiar factors. Often, customers and employees quote pay annually or hourly.

Entering Educational Information

Access the Education page.

School Education

Country, School Type, and **Date Acquired**	Enter the country in which the school is located, select the type of school, such as *High School, Trade School,* or *University,* and select the date you earned the education.
Average Grade and **Completed**	Enter your average grade, and select the check box to indicate that you completed your education at the school.
School Code	Select a code from the list of available schools.
School Name	If the school is not available from the School Code field, enter it here.
State	Enter the location of the school.
Area of Study and **Grade**	Enter the area of concentration and the grade received.

Professional Education

Degree	Select the type of degree obtained at the school.
Date Acquired	Select the date that the school awarded the degree.
Average and **Graduated**	Enter the average grade point, and select the check box if you graduated.
Major Code and **Major**	Enter the code and major field of study at the school attended.
School Code and **School Name**	Enter the code and name of the school attended.
Educator, Country, and **State**	Enter the name of the primary instructor, and the country and state in which the instruction took place.

Entering Competencies Information

Access the Competencies page.

Enter information about the candidate competencies, proficiency, and interest level.

Adding Resumes and Other Files to the Applicant Record

Access the Resume page.

Select the Language Code, and paste your resume in the Resume Text field.

Click the Add Resume Attachment button to add your resume as an attachment.

Entering Job Titles and Lines of Business Information

Access the Job Titles and Lines of Business page.

Enter a Line of Business to indicate a business category with which you have experience.

Enter a Job Category title that you have had and the titles you may be qualified to fill, and enter a Job Title Code.

Note. We deliver an index of job titles at the time the system is installed. You can delete this list from the database in all or in part and use a job title index that more closely matches your business requirements.

Submitting the Application

Access the Submit Information page.

Click the Submit button to submit your information and begin the application process.

The system assigns an identification number and displays the following message:

```
Your application has been submitted. Thank You!
```

Creating Temporary and Career Orders Online

Your customers can use the Staffing Front Office self-service functionality to view and create orders for temporary and career assignments online. Once a customer submits a new order, an authorized user at your staffing organization can review the pages and add any missing data or update the existing data.

Note. To access the Customer portal, you may need to first log in and immediately log out. Then in the URL replace the word *EMPLOYEE* with *CUSTOMER* and the word *LOGOUT* with *LOGIN.* Then click the Go button on your browser.

We recommend that you configure the customer self-service OPRID without order approval security so that self-service individuals can only save orders with a status of *Draft* and *Pending Approval.* A staffing agent with order approval security can then review the order, change its status to *Approved* and from *Draft* to *Unfilled.*

The pages used by your customers to create these orders online in self-service mode are similar to those used to create regular orders.

Refer to the order pages for description of the following pages.

Note. You must configure the default customer for each operator in the security setup. Select PeopleTools, Security, User Profiles, User Profiles. Enter the customer's user ID and then click Search. Select the ID tab. In the ID Type field select *Customer* and then select values for the SetID and Customer ID fields. These values appear on the Order Self Service page in the customer portal. In addition, associate the SETID and CONTACT_ID with the OPRID.

See Also

Chapter 9, "Creating and Managing Orders and Assignments," Creating Orders for Career and Temporary Placements, page 126

Pages Used to Create Temporary and Career Orders Online

Page Name	Object Name	Navigation	Usage
Order	FO_CST_ORDER_HDR	Staffing Orders, Add/Update Orders	Enter a new temporary or career order.
Resource Request	FO_CST_ORDER_REQ	Staffing Orders, Add/Update Orders, Resource Request	Enter the general details about each resource request in the order.
Billing	FO_CST_ORDER_TEMP	Staffing Orders, Add/Update Orders, Billing	Enter placement information for the order.
Target Qualifications	FO_CST_ORDER_MATCH	Staffing Orders, Add/Update Orders, Target Qualifications	Enter job title and required knowledge level information for each resource request.
Forms	FO_SO_TEMPLTS	Staffing Orders, Add/Update Orders, Forms	Add forms to the new order.

APPENDIX A

Calculating Margin and Markup

This appendix presents an overview of margin and markup and discusses how to:

- Set up margin indicators.
- Configure margin.

See Also

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, “Configuring Your PeopleSoft Pay/Bill Management System,” Setting Up Job Code Margin Indicators

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, “Creating Staffing Orders,” Defining Assignments

Understanding Margin and Markup

This section discusses:

- Margin statuses.
- How margin and markup are calculated.
- Determining related costs for margin markup calculations.

Margin Statuses

The following lists the available statuses for margins. These statuses are listed for temporary orders on the Order - Billing page and the Assignment page.

(Green = acceptable)	Acceptable margin achieved. The calculated margin is above the cautionary margin established for the specified job code. If you meet margin requirements, a green diamond appears next to the field.
(Yellow = caution)	Margin below normal levels. The calculated margin is above the critical margin, but falls at or below the cautionary margin established for the specified job code. A yellow triangle appears next to the field to indicate that the ratio is not within margin requirements.
(Red = critical)	Unacceptable margin. If the calculated margin falls at or below the critical margin established for the specified job code, a red box appears next to this field.

Note. Margin and markup functionality are applicable to temporary orders only.

How Margin and Markup are Calculated

When a bill and pay rate is entered on the order, the margin and markup calculations are dependent upon your prior margin configuration. This section discusses calculations for margin and markup.

Calculating Margin

The margin calculation on the Order - Billing page subtracts costs from the bill rate and then divides by the bill rate, taking into consideration the pay rate, overhead costs (fixed cost margin), and workers compensation premiums.

```
Margin = ((Bill Rate - Cost) / Bill Rate) * 100
```

Calculating Markup

The markup calculation on the Order - Billing page subtracts the pay rate from the bill rate and then divides by the pay rate.

```
Markup = ((Bill Rate - Pay Rate) / Pay Rate) * 100
```

Determining Related Costs for Margin Markup Calculations

This section discusses how to determine margin and markup calculations for:

- Fixed cost.
- Workers' compensation cost.
- Cost.

Determining Fixed Cost

The fixed cost depends on the fixed cost margin and pay rate. Fixed cost is the additional cost (overhead) that is incurred for every hour of employee pay, excluding workers' compensation.

```
Fixed cost = Pay Rate * (Fixed Cost Margin / 100)
```

Determining Workers' Compensation Cost

The workers' compensation cost is calculated based on the rate type selected on the Workers' Comp Rates page.

If the workers' compensation rate type = *percentage,* then

```
Workers Compensation cost = Pay Rate * (Base Rate / 100) * Modifier
```

If the workers' compensation rate type = *per hour,* then

```
Workers Compensation cost = 1 hour * (Base Rate)
```

Determining Cost

You must calculate the cost prior to determining the markup or margin.

```
Cost = Pay Rate + Fixed Cost + Workers Compensation Cost
```

See Also

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, “Configuring Your PeopleSoft Pay/Bill Management System,” Setting Up Workers’ Compensation

Setting Up Margin Indicators

This section discusses how to set up margin indicators.

Page Used to Establish Margin Indicators

Page Name	Object Name	Navigation	Usage
Billing Calculation	FO_JOB_BILLING	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Jobcodes, Billing Calculation	Enter margin indicators.

Entering Margin Indicators

Access the Billing Calculation page.

Caution Enter a margin percentage at which the system triggers a caution warning for an order. This indicates that the margin is below normal levels and changes the order to a *Yellow* status.

Critical Enter a margin percentage at which the system triggers a critical warning for an order. This indicates that the margin is at an unacceptable level and changes the order to a *Red* status.

Configuring Margin

The margin calculation requires configuration prior to entering orders and calculating margins based on pay and bill rates. Your implementation team configures the values that the system uses in the margin calculation. Your organization bases these calculations on the costs associated with filling a position as well as the expected profit that is generated when you fill the assignment.

This section discusses how to configure margin.

Page Used to Configure Margin

Page Name	Object Name	Navigation	Usage
Staffing Branch	FO_BRANCH_TBL	Setting Up Financials/Supply Chain, Product Related, Staffing, General, Branch/BU Mapping	Configure margin.

Configuring Margin

Access the Staffing Branch page.

Fixed Cost Margin

Enter the margin for the system by branch.

The fixed cost margin is the percentage of cost that is incurred for every hour of employee pay. Enter the figure as a number (not percent) with a maximum of two decimal places. For example, if the burden rate is 12.98 percent, enter the margin estimator at *12.98.*

1. Establish fixed costs by branch.
2. Establish workers' compensation policy and rates.

   For Staffing Front Office standalone (Pay/Bill Management not installed), select Set Up Financials/Supply Chain, Product Related, Staffing, Payroll. Select either Workers' Comp Company Setup, Workers' Comp State Codes, Workers' Comp State Rates, or Workers' Comp by Job Code.

Note. If you have Pay/Bill Management installed as well, you establish workers' compensation policy and rates in HRMS; the information is then synchronized with Financials using application messaging.

See Also

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up and Mapping Branches

PeopleSoft Enterprise Pay/Bill Management 8.9 PeopleBook, "Configuring Your PeopleSoft Pay/Bill Management System," Setting Up Workers' Compensation

Appendix B

Staffing Front Office Web Libraries

This appendix provides an overview of web libraries and discusses Staffing Front Office web libraries.

Understanding Web Libraries

A web library is a derived or work record whose name starts with WEBLIB_. PeopleSoft embeds all internet scripts (iScripts) in records of this type. An iScript is a specialized PeopleCode function that generates dynamic web content. Administrators must make sure that users have the proper access to web libraries. For example, the default navigation system for PeopleSoft Enterprise Pure Internet Architecture users is implemented by using a web library. If users do not have the proper authorization to the web library and its associated scripts, then they won't have proper access to the system. If users are not authorized to a particular web library or iScript, then they can't invoke it. After you add a web library, you set the access for each script function individually. Invoking an iScript requires the assembly of a URL. Developers assemble the URL by using PeopleCode.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleCode API Reference

Enterprise PeopleTools 8.45 PeopleBook: Security Administration

Enterprise PeopleTools 8.46 PeopleBook: Internet Technology

Staffing Front Office Web Libraries

This table lists the web libraries that are used and delivered with Staffing Front Office:

Web Library Name	Description
WEBLIB_FO_PB	Staffing Front Office web library.
WEBLIB_IB	Generates PeopleSoft Integration Broker functions.
WEBLIB_MSGWSDL	This is the record behind the page for the enterprise integration point (EIP) Web Services Description Language (WSDL) generation.

Web Library Name	Description
WEBLIB_PORTAL	Contains the following six fields with FieldFormula iScript PeopleCode, each of which relate to a functional area of the portal: PORTAL_HOMEPAGE: Support for homepage runtime interaction, including the homepage version of the menu navigation. PORTAL_NAV: Main support routines for navigation. PORTAL_HEADER: Support for the header portion of the page and some generic routines. PORTAL_DYN_TEMP: Support for the dynamic template. PORTAL_PGLT_PREV: Support for the pagelet preview functionality.
WEBLIB_PT_NAV	Contains iScripts for the menu pagelet and left-hand navigation for transaction pages.
WEBLIB_RPT	Contains iScript for the Run report to window output option. Supports access to the new browser window.
WEBLIB_XMLLINK	Generates PeopleSoft Business Interlinks XML functions.

APPENDIX C

Staffing Front Office Reports

This appendix provides an overview of Staffing Front Office reports and enables you to view summary tables of all reports.

For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Staffing Front Office Reports: General Descriptions

This table lists the Staffing Front Office reports, sorted alphanumerically by report ID. The reports are all Crystal Reports. This section includes:

- Customer reports.
- Order reports.
- Assignment reports.
- Agenda reports.
- Employee reports.

Customer Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOCM001 New Customers	Provides a list of new customers between the range of dates specified. Displays the customer name, address, the date they became a customer, the sales person, and the service person.	Staffing, Reports, Customers, New Customers	RUN_FOCM001
FOCM006 Active Customers	Provides a list of active customers. Displays customer name, address, sales person, and service person.	Staffing, Reports, Customers, Active Customers	RUN_FOCM006

Report ID and Report Name	Description	Navigation	Run Control Page
FOCM008 Customer Credit	Details credit information for new customers. Displays customer name, ID, date they became a customer, risk code, credit limit, credit limit date, next credit review date, credit dispute status, and collection status.	Staffing, Reports, Customers, Customer Credit	RUN_FOCM008
FOCM009 New Customer Accounts	Details projected hours, billing, and career placement fees for new customer accounts between the date range specified. The results are grouped by month, sales user, and setID	Staffing, Reports, Customers, New Customer Accounts	RUN_FOCM009
FOCM013 Customer Estimated Billing	Provides the customer name, address and estimated billings for assignments with start dates between the date range specified. The results are grouped by sales user and setID.	Staffing, Reports, Customers, Customer Estimated Billing	RUN_FOCM013
FOCM014 Customer Sales	Displays the customer name, estimated billings, estimated billing percent, and estimated margin for assignments with start dates between the range of dates specified. The results are grouped by sales user and setID.	Staffing, Reports, Customers, Customer Sales	RUN_FOCM014
FOCM015 Customer Assignment Mix	Summarizes by service area (line of business) and customer the estimated hours, estimated billings, and career order income for assignments with start dates between the range of dates specified. The results are grouped by sales user and setID.	Staffing, Reports, Customers, Customer Assignment Mix	RUN_FOCM015
FOCM017 Inactive Customers	Identifies customers who have not placed an order since a specified date. Displays the customer name, address, date of last order, number of orders, sales person, and service person.	Staffing, Reports, Customers, Customers Without Orders	RUN_FOCM017

Report ID and Report Name	Description	Navigation	Run Control Page
FOCR001 Call Summary	Details customer communications that are classified as call reports. Displays the customer name, date of the call report, contact name, and contact method. The results are grouped by agenda operator ID.	Staffing, Reports, Customers, Customer Call	RUN_FOCR001
FOPM003 Quality Assurance	Prints customer quality feedback information for a particular date range. Displays the appraisal information and the specific feedback details. The results are grouped by staffing branch and service user.	Staffing, Reports, Customers, Quality Assurance	RUN_FOPM003
FOQL001 Customer Feedback Survey	Generates survey forms that are sent to customers to evaluate employees.	Staffing, Reports, Customers, Customer Feedback Survey	RUN_FOQL001

Order Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOOA010 Career Placement Summary	Lists information about the career placements that have an assignment start date between the date range specified. Information printed includes the employee name, customer name, final salary, actual fee percentage and amount, order contact, and the position title. The report is organized by staffing branch, customer ID, and service user.	Staffing, Reports, Orders and Assignments, Career Placement Summary	RUN_FOOA010
FOOM001 Temporary Orders	Lists the order ID, order type, customer name, order start and end dates, total number of assignments, job code, order bill and pay rates, estimated weekly hours, and estimated weekly billings for temporary orders within a particular date range. The results are grouped by operator ID and staffing branch.	Staffing, Reports, Orders and Assignments, Temporary Orders	RUN_FOOM001

Report ID and Report Name	Description	Navigation	Run Control Page
FOOM004 Unfilled Orders	Lists the customer name, order ID, order duration, quantity of people needed, quantity of people short, job code, estimated total hours, estimated hours short, and estimated lost income for orders that are currently unfilled. The report is organized by staffing branch and by service user. For career orders, total hours and hours short do not apply and will have values of zero. Also, estimated loss for career orders is based on the maximum potential placement fee multiplied by the quantity of people short.	Staffing, Reports, Orders and Assignments, Unfilled Orders	RUN_FOOM004
FOOM005 Last Order Placed	Lists the customer name, count of orders, date last order placed, start date of last order placed, and person who placed the last order. The report is organized by staffing branch and order service user.	Staffing, Reports, Orders and Assignments, Last Order Placed	RUN_FOOM005
FOOM010 Career Orders	Lists the order ID, order type, department, customer name, job title on the order, fee schedule code, date fee scheduled was signed, guarantee days, minimum and maximum salary, and fee information for career orders created within a particular date range. The results are grouped by operator ID and staffing branch. This report only shows career orders that have one or more candidates assigned to it and a fee schedule specified.	Staffing, Reports, Orders and Assignments, Career Orders	RUN_FOOM010

Assignment Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOAE001 Employee Assignments	Lists the employee name, national ID, address, phone, and total assignment count for employees belonging to the primary staffing branch specified.	Staffing, Reports, Orders and Assignments, Employee Assignments	FO_RUN_CNTL_EA
FOOA003 Completion Reason Analysis	Summarizes by assignment the completion reason code, assignment count, and percentage. Selects all assignments meeting the parameters that have an actual end date between the dates provided. The results are grouped by the service user.	Staffing, Reports, Orders and Assignments, Completion Reason Analysis	RUN_FOOA003
FOOA004 Pending End Dates	Lists employees who are in assignments where the assignment estimated end date is less than or equal to the date parameter provided in the report. Information printed includes customer name, supervisor, supervisor phone, employee name, and estimated assignment end date. The report is organized by staffing branch, customer, and service user.	Staffing, Reports, Orders and Assignments, Pending End Dates	RUN_FOOA004
FOOA005 Active Assignments	Lists the customer ID, name, job code, start and end dates, bill and pay rates, estimated hours, and estimated billings for assignments that have a start date before or equal to the start date parameter and end date greater or equal to the end date parameter. Results are grouped by staffing branch and service user.	Staffing, Reports, Orders and Assignments, Active Assignments	RUN_FOOA005
FOOA009 New Assignment Bill and Hire	Lists all assignments that started within the date range specified. Displays customer name, employee name, estimated billing amount, pay rate, bill rate, estimated weekly hours, and estimated gross profit. The report is organized by staffing branch, customer, and service user.	Staffing, Reports, Orders and Assignments, New Assignment Bill and Hire	RUN_FOOA009

Agenda Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOAG003 Current Agenda Listing	Lists open agenda items within the date range provided for the specified user. Shows the customer name and phone, contact name and phone, employee name and phone, agenda item date and time, and the agenda event type.	Staffing, Reports, Agenda, Current Agenda Listing	RUN_FOAG003

Employee Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FOEM004 Missing or Expired I-9	Displays the name, emplID (employee ID), national ID, I-9 completed date, employment eligibility proof, and alt. doc. expiration date (alternative documentation expiration date) for applicant and employee records where required I-9 information is either missing or expired as of the date specified. The results are grouped by staffing branch.	Staffing, Reports, Resources, Missing or Expired I-9	RUN_FOEM004
FOEM005 New Employees	Provides the name, address, employee ID, personnel status, recruiting source, and hire date of employees whose records were created within a particular date range. The results are grouped by staffing branch.	Staffing, Reports, Resources, New Employees	RUN_FOEM005
FOEM007 Inactive Employees	Provides the employee ID, name, address, personnel status, and employee status of employees who are classified as inactive. The results are grouped by staffing branch.	Staffing, Reports, Resources, Inactive Employees	RUN_FOEM007
FOEM010 Recruiting Source Analysis	Provides a pie chart plus a list of the total number and percentage of employees, by recruiting source, within a particular date range. The results are grouped by staffing branch.	Staffing, Reports, Resources, Recruiting Source Analysis	RUN_FOEM010

Report ID and Report Name	Description	Navigation	Run Control Page
FOEM011 Active Employees	Provides the name, address, employee ID, country, personnel status and department of currently active employees and applicants. The results are grouped by staffing branch.	Staffing, Reports, Resources, Active Employees	RUN_FOEM011
FOEM013 Employee Assignment Summary	Lists employees with temporary assignments active as of the date specified. Displays the employees, the count of assignments per employee, the average assignment pay and bill rates for the employee, and the average margin. The results are grouped by staffing branch and operator ID.	Staffing, Reports, Resources, Employee Assignment Summary	RUN_FOEM013
FOEM015 Active Employee Statistics	Lists all active employees and applicants. Provides a competencies count, job titles count, and count of all active assignments to date, and indicates whether the employee is currently assigned. The results are grouped by staffing branch and operator ID.	Staffing, Reports, Resources, Active Employee Statistics	RUN_FOEM015
FOEM016 Assignment Count by Department	Lists a count of assignments, assignment percentages, average bill rate, average pay rate, and average margin. The report is organized by employee primary staffing branch, employee primary user ID, and order department.	Staffing, Reports, Resources, Assignment Count by Department	RUN_FOEM016
FOOA008 Employee Availability	Lists the name, employee ID, phone number, and competencies of employees who are available within a particular date range. The results are grouped by staffing branch.	Staffing, Reports, Resources, Employee Availability	RUN_FOOA008
FOQL002 Employee Feedback Survey	Generates the survey forms sent to employees to evaluate customers.	Staffing, Reports, Resources, Employee Feedback Survey	RUN_FOQL002

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging
PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist
Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan
In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule
In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class
An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair
In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience
In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server
A server that is set up to verify users of the system.

base time period
In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job
In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

billing career
In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief
In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book
In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch
A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only
An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check
In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control
In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost-plus contract line A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class.*

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term
In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item
A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund
In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap
In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type
In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table
In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit
Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template
Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process
Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group
In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object
In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation

process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations.

You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI
An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file
Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group
In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components
In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment
In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history
In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping
You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section
In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section
In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable
In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS
Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load
In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also *3C engine*.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

plan In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

portal registry In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type — In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category — In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group — In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition — Process definitions define each run request.

process instance — A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job — You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request — A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control — A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product — A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

product category — In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family — A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line — The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs — In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log — In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction — In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft system.

For example, processes that import data from Microsoft Project into PeopleSoft applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock
In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access
In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable
In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration
Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order
In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker
A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

X