PeopleSoft 8.00.01 eProfile PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

About This PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft eProfile. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAELr8SP1B 1200.

This section describes information you should know before you begin working with PeopleSoft applications and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS application line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

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

Because we assume you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals

The *PeopleSoft* eProfile *PeopleBook* provides you with implementation and processing information for your PeopleSoft eProfile system. However, there is additional, essential information describing the setup and design of your system that is contained in a companion volume of documentation called *PeopleSoft Application Fundamentals.*

PeopleSoft Application Fundamentals consists of important topics that apply to many or all PeopleSoft applications across the HRMS application line. Whether you are implementing only PeopleSoft eProfile some combination of applications within the application line (for example, PeopleSoft Benefits Administration, Stock Administration, Time & Labor, and Pension Administration), or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals* PeopleBook, we've included common information pertinent to all applications in the HRMS application line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals* and other PeopleBooks.

Below you'll find a list of those *PeopleSoft Application Fundamentals* sections that apply specifically to PeopleSoft eProfile.

Introduction to PeopleSoft HRMS introduces you to the basic concepts of PeopleSoft Human Resources and reviews the various activities involved in using the system, including setting up system-wide and HR information, performing daily processes, working with PeopleSoft Human Resources menus, and generating reports.

Regulating HRMS System Data reviews the Business Unit/SetID feature which enables you to organize your businesses by dividing them into logical units other than Companies and Departments, and also enables you to control how your organizational data is shared among those organizational units.

Processing Transactions Using Regulatory Regions discusses the Regulatory Region concept, how Regulatory Regions are set up in your PeopleSoft HRMS, and how to set up additional Regulatory Regions, if necessary.

Working With Currencies explains how to track personnel salaries and reimbursement amounts in multiple currencies, or in multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.

Working With Languages discusses PeopleSoft's language support features.

Setting Up Control Tables discusses the different ways you can run PeopleSoft Human Resources and helps you decide which way it should be used. Setting Up Controls Tables also instructs how to set up data that serves as the foundation of your organization's human resource system. These tables are the basis not only for Human Resources, but all your PeopleSoft HRMS applications.

E&G Setting Up Service Parameters is a section for Education and Government users that discusses how you set up methods to handle time duration for measuring accrued service for employees in public sector organizations.

USF Setting Up Your Work-In-Progress Management System is a section for U.S. Federal Government users that explains how to set up the system to automatically route a wide variety of requests directly to reviewing officials, and on to human resources, in the specific path that your organization chooses.

Administering Security reviews how to set up and maintain security for employee data by using a security tree. This enables you to view and update the reporting relationships among units and use this information to grant and deny user access to employee data. You can also choose to set up employee data security in other ways, if that is what you need.

Using Mass Change describes how you can select a particular set of employee records from the database, define the alteration you would like to perform on those records, and make those changes in the background, using scheduled processing.

Using Workflow discusses, at a high level, how workflow is used in HRMS and shows you how to set up approvals workflow for self-service transactions in collaborative applications such as PeopleSoft eRecruit and PeopleSoft eDevelopment. We also include detail information on some of the workflow processes delivered in Release 8.

Working With Multiple Components of Pay discusses how you use the system to tailor unique compensation packages for each of your employees or create default pay component packages that are consistent for jobs and salary steps throughout your organization.

Working With Multiple Jobs explains how several PeopleSoft HRMS applications enable you to process information for employees who hold multiple, concurrent jobs within an organization.

Working With Groups shows you how to use the Group Build functionality in HRMS, which gives you a standardized way to create groups of employees and non-employees. Once you've created a group using this feature, you can use it across several HRMS applications for a wide variety of purposes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of 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 delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.00.01 HRMS* and *PeopleTools 8.12 PeopleBooks,* SKU CD-SKU CD-HRB8SP1R0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft *8.00.01* Application Fundamentals for PeopleSoft HRMS
- PeopleSoft *8.00.01* Base Benefits
- PeopleSoft *8.00.01* Benefits Administration
- PeopleSoft *8.00.01* eBenefits
- PeopleSoft *8.00.01* eCompensation
- PeopleSoft *8.00.01* eCompensation Manager Desktop
- PeopleSoft *8.00.01* eDevelopment
- PeopleSoft *8.00.01* eEquity
- PeopleSoft *8.00.01* ePay
- PeopleSoft *8.00.01* eProfile
- PeopleSoft *8.00.01* eProfile Manager Desktop
- PeopleSoft *8.00.01* eRecruit
- PeopleSoft *8.00.01* eRecruit Manager Desktop
- PeopleSoft *8.00.01* eTime
- PeopleSoft *8.00.01* FSA Administration
- PeopleSoft *8.00.01* Global Payroll
- PeopleSoft *8.00.01* Human Resources
- PeopleSoft *8.00.01* Payroll for North America
- PeopleSoft *8.00.01* Payroll Interface
- PeopleSoft *8.00.01* Pension Administration
- PeopleSoft *8.00.01* Stock Administration

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.

PeopleSoft Internet site: http://www.peoplesoft.com/.

Telephone Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**

Email Email CPI at callcenter@conpub.com.

PeopleBooks Standard Page Element Definitions

Throughout our application documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions.

Field	***Definition***
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code 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.
City	Name of city for address.

Country	Country for address. Other address fields will be adjusted to reflect Country choice.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Description	Freeflow text up to 36 characters that describes what you are defining.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want 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 and batch processes that use the information use the current row. For more information about effective dates, see Using PeopleSoft Applications, "Working With Pages".
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Fax (also **Fax Number**)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or **Language Code**	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Name	Name of individual.

National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2***, or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	Identifies a report.
Report Manager	This button takes you to 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	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.
Run Control ID	Identifies specific run control settings for a page.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province**)	State (Province) for address.
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.
User ID	Identifies the individual that generated the transaction.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not 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 W.
Jump links	Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.

Cross-references	The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:
	For more information**,** see Documentation on CD-ROM in *About These PeopleBooks:* Additional Resources.
• Topic list	Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents menu.
Name of Page	Opens a pop-up window that contains the named page. Click the button to display the page. Some screen shots may also appear inline (directly in the text).

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page Introductory Table

In the documentation, each page description in the application will include an introductory table with pertinent information about the page. Not all of the information will be available for all pages.

Usage	Describes how you would use the page or process.
Object Name	GIVES THE SYSTEM NAME OF THE PAGE OR PROCESS AS SPECIFIED IN THE PEOPLETOOLS APPLICATION DESIGNER. FOR EXAMPLE, THE OBJECT NAME OF THE DETAIL

	CALENDAR PAGE IS DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page or process.
Prerequisites	Specifies which objects must have been defined before you use the page or process.
Access Requirements	Specifies the keys and other information necessary to access the page. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a Note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by a E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

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

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

Or send comments by email to the authors of the PeopleSoft documentation at:

mailto:DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our application communications for you.

CHAPTER 1

eProfile Overview

Overview of eProfile

PeopleSoft eProfile collaborative applications consist of PeopleSoft transactions that provide your employees convenient access to information, using a browser. Access to information by all of your employees is flexible, convenient, and easy. For many people, these transactions provide an improved alternative to automated telephone prompting systems, and they can help ease the workload for internal support staff and customer service representatives.

In PeopleSoft eProfile, we produce several Web pages as templates. You can use PeopleSoft Application Designer to modify and configure the Internet pages, just as you would any application page.

For more information**,** see Using Application Designer.

The PeopleSoft eProfile collaborative application can be seamlessly integrated with PeopleSoft eProfile Manager Desktop, which provides a robust suite of Web-enabled transactions that enable your managers to update employee demographic information, as well as manage an employee's status within the organization. The transactions include managing location and job changes, promotions, terminations, retirements, and other status-related events.

For more information about PeopleSoft eProfile Manager Desktop, see PeopleSoft 8 eProfile Manager Desktop PeopleBook.

Components of eProfile

PeopleSoft eProfile is comprised of self-service Web applications that are designed to interface with the PeopleSoft Human Resources system. These applications enable employees to review, add, update, and delete (where appropriate) their professional profile information. The applications are:

- **Personal Information.** This application enables your employees to review, add, update, or delete personal information in the PeopleSoft database.
- **Request Federal Leave of Absence.** This application enables your federal employees to enter

a request for leave.

- **Request Federal Termination.** This application enables your federal employees to enter a request for termination.

Understanding Roles

PeopleSoft eProfile provides self-service Web pages for the roles of employee and manager. We deliver definitions and define a menu for each role.

Understanding Security

The user profile that you create for each individual who will access your self-service Web application determines the Web pages the user will have access to by default. You create user profiles on the Maintain Security page in the User Profile component. You assign a role to each user profile, which is linked to access control lists. Each access control list identifies the pages that individuals can access. To modify the access for specific Web pages for each role, you modify the access control list for the user's role.

You also define which data the user has access to, in the user profile.

For more information about user profiles, roles, and access control lists, see Understanding PeopleSoft Security

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Setting Up Approvals Workflow for Self-Service Transactions

Many self-service transactions are designed to take advantage of various PeopleSoft Workflow functions. The most common of these is approvals workflow. Approvals workflow handles situations where a request, such as a request for an employee transfer, is submitted into the system by an employee or manager.

Approvals workflow routes this request to one or more people, who must approve or deny the request. If an approver approves the request, the system routes the request to the next approver. If there are no other approvers, the system notes that the request has final approval, and it is routed to a person who will process the request further (such as a human resources administrator). If the request is denied, the request is not be routed any further, and the system notes that the request was denied.

Employees and managers can view the approval status of some types of requests, with the help of self-service transactions that have been designed to display this status (such as View Transfer Status).

For more information about workflow functionality in PeopleSoft HRMS applications, see Using Workflow. For more information about setting up approvals workflow for eRecruit transactions, see Setting Up Workflow Approval Functionality.

C H A P T E R 2

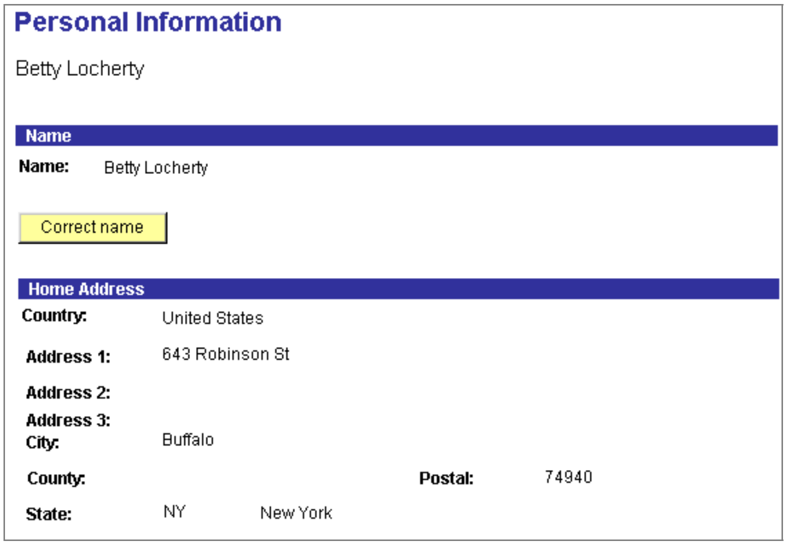
Using eProfile

Using eProfile Transactions to Review and Update Your Personal Information

Employees use the Employee Personal Information self-service transaction pages to review, add, update, or delete personal information in the PeopleSoft database. Employees can access each transaction individually or use the Personal Information page to review all personal information on one page. Buttons on the Personal Information page provide quick access to the various transactions that employees can use to make changes, if necessary.

Personal Information Page

Usage	Employees use the Personal Information page to review personal information in the PeopleSoft database. The user can review name, home and mailing addresses, phone numbers, emergency contacts, email addresses, and marital status information. The page provides buttons that take the user to the pages where the employee can review, add, update, or delete this information. The page also lists other personal information, such as employee identification number, hire date, and so on.
Object Name	HR_EE_PERS_INFO
Navigation	**Self Service, Employee, View, Personal Information**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.



Personal Information

Betty Locherty

Name

Name: Betty Locherty

Correct name

Home Address

Country: United States

Address 1: 643 Robinson St

Address 2:

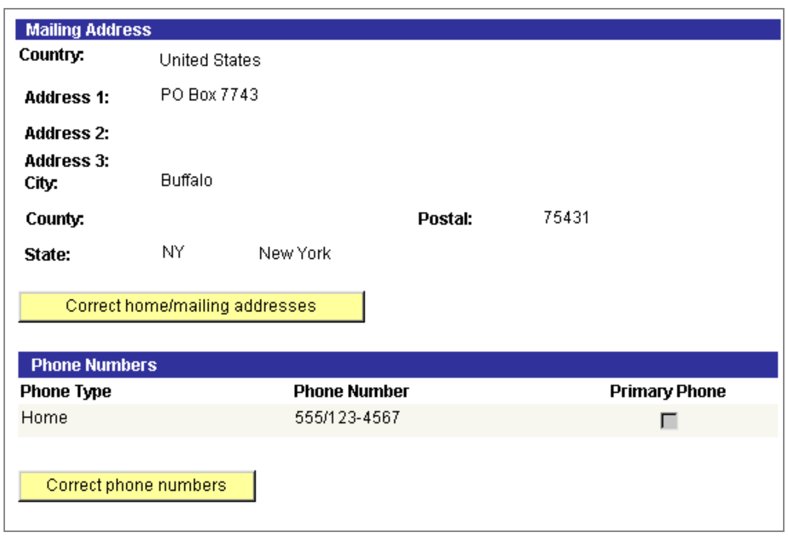
Address 3:

City: Buffalo

County: **Postal:** 74940

State: NY New York

Personal Information page (1 of 4)



Mailing Address

Country: United States

Address 1: PO Box 7743

Address 2:

Address 3:

City: Buffalo

County: **Postal:** 75431

State: NY New York

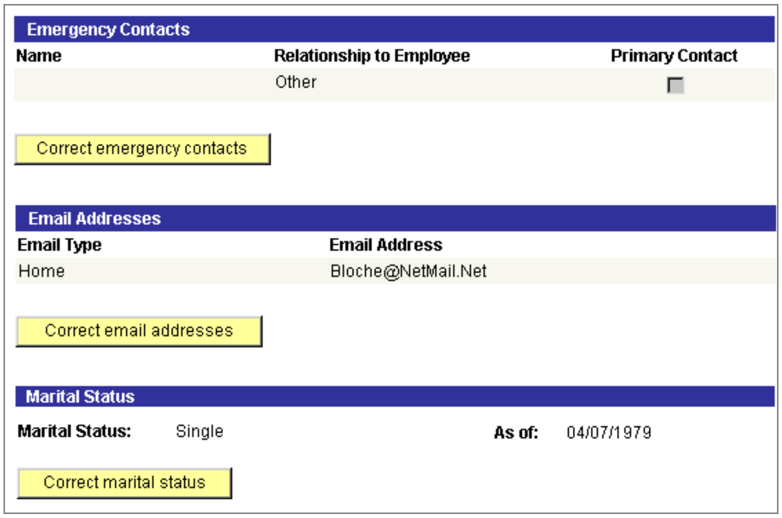
Correct home/mailing addresses

Phone Numbers

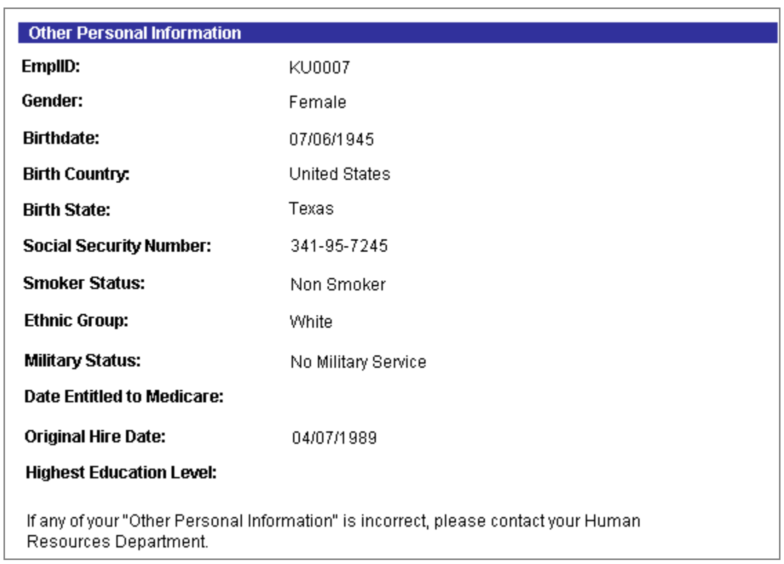
Phone Type	Phone Number	Primary Phone
Home	555/123-4567	

Correct phone numbers

Personal Information page (2 of 4)



Personal Information page (3 of 4)



Personal Information page (4 of 4)

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Name, Country, Address 1, Address 2, Address 3, City, County, Postal, State, Country,** and **EmplID.**

The system displays the name of the page and the employee's name.

Name

Under **Name,** the system displays the employee's name and provides a link to a correction page.

Correct name	The employee clicks **Correct name** to access the Name Change Page.

Home Address

Under **Home Address,** the system displays the employee's home address.

Mailing Address

Under **Mailing Address,** the system displays the employee's mailing address and provides a link to a correction page for the home and mailing addresses.

Correct home/mailing addresses	The employee clicks **Correct home/mailing addresses** to access the Home and Mailing Address Change Page.

Phone Numbers

Under **Phone Numbers,** the system displays the employee's phone numbers and provides a link to a correction page.

Phone Type	In this column, the system displays the **Phone Type** that the employee entered on the Phone Numbers Page.
Phone Number	In this column, the system displays the **Phone Number** that the employee entered on the Phone Numbers Page.
Primary Phone	In this column, the system indicates whether this phone number is the employee's **Primary Phone** number**.**
Correct phone numbers	The employee clicks **Correct phone numbers** to access the Phone Numbers Page, to review, add, update, or delete phone numbers.

Emergency Contacts

Under **Emergency Contacts,** the system displays the employee's emergency contact information and provides a link to a correction page.

Name	In this column, the system displays the **Name** of the emergency contact.
Relationship to Employee	In this column, the system displays the relationship of the emergency contact to the employee.
Primary Contact	In this column, the system indicates whether the emergency contact is the **Primary Contact** for the employee.
Correct emergency contacts	The employee clicks **Correct emergency contacts** to access the Emergency Contacts Page, to review, add, update, or delete emergency contact information.

Email Addresses

Under **Email Addresses,** the system displays the employee's email information and provides a link to a correction page.

Email Type	In this column, the system displays the employee's **Email Type** defined on the Email Addresses Page.
Email Address	In this column, the system displays the employee's **Email Address** defined on the Email Addresses Page.
Correct email addresses	The employee clicks **Correct email addresses** to access the Email Addresses Page to review, add, update, or delete email addresses.

Marital Status

Under **Marital Status,** the system displays the employee's marital status and provides a link to a correction page.

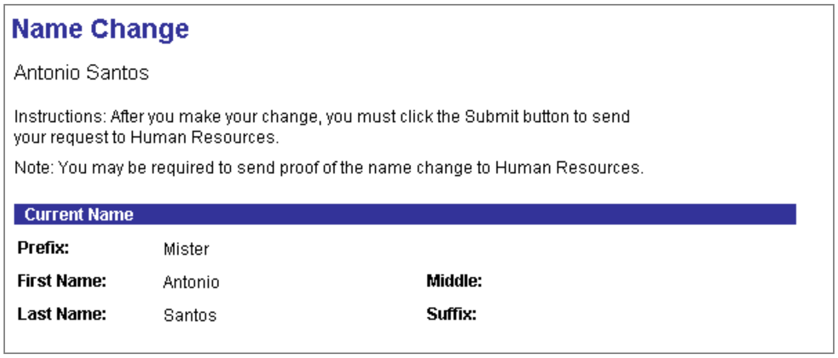
Marital Status	The system displays the employee's **Marital Status.**
As of	The system displays the effective date of the employee's current **Marital Status.** The employee can change this date using the Request Marital Status Change Page.
Correct marital status	The employee clicks **Correct marital status** to access the Request Marital Status Change Page, to change marital status.

Other Personal Information

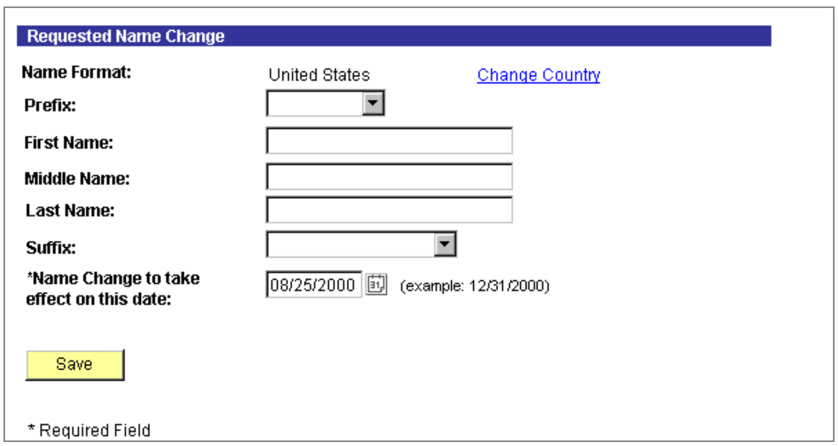
Under **Other Personal Information,** the system displays the following employee information: **EmplID, Gender, Birth Country, Birth State, National ID Number, Ethnic Group, Military Status, Original Hire Date,** and **Highest Education Level.** The system also displays: **Birthdate** (the date you were born), **Smoker Status** (whether you smoke), and **Date Entitled to Medicare** (the date you are eligible for Medicare benefits). **Date Entitled to Medicare** is displayed only for the U.S.

Name Change Page

Usage	Employees use the Name Change page to review and update their name in the PeopleSoft database.
Object Name	HR_EE_NAME
Navigation	**Self Service, Employee, Tasks, Name Change**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.



Name Change page (1 of 2)



Name Change page (2 of 2)

The system displays the title of the page and the name of the employee. The page displays the employee name, prefix, first name, middle name, last name, and suffix.

Format for Country	The system displays the country the employee lives in.
Change Country	The employee clicks this link to select a country. Depending on the country you select, certain fields are displayed, as shown in the table below.

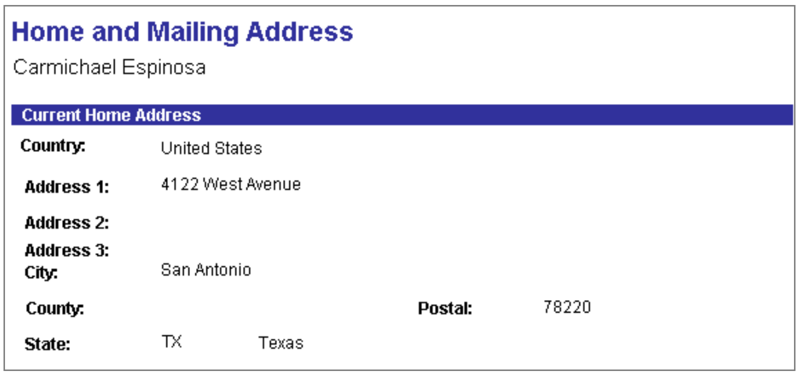
Country Selected	***Fields Displayed***
Belgium	**Title, Preferred First Name**
Germany	**Title, Royal Prefix, Royal Suffix**
Italy	**Title**
Netherlands	**Title, Royal Prefix, Initials, Preferred First Name**

Country Selected	*Fields Displayed*
Spain	**Second Last Name**
Switzerland	**Title**

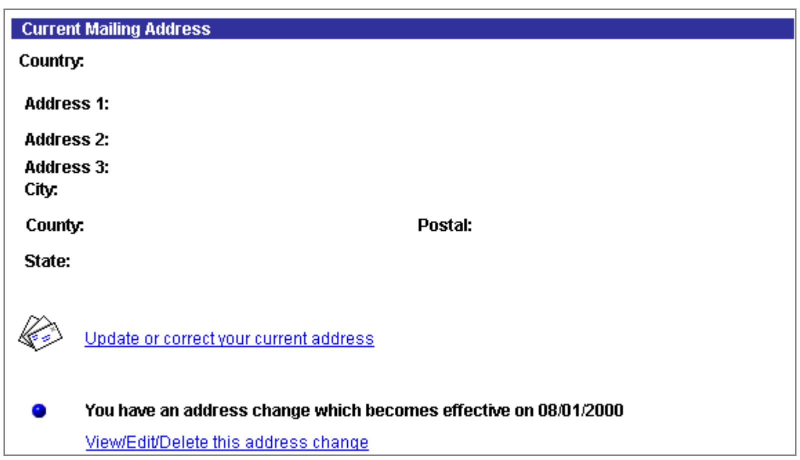
Royal Prefix	The employee selects a **Royal Prefix**. Values are: ***am, den, in,*** and ***van.***
Title	The employee selects a **Title**. Values are: ***Baron, Baroness, Duchess,*** and ***Duke.***
Prefix	The employee selects a **Prefix**. Values are: ***Dr, Miss, Mr, Mrs,*** and ***Ms.***
First Name	The employee enters the correct **First Name.**
Middle	The employee enters the correct **Middle** name.
Last Name	The employee enters the correct **Last Name.**
Second Last Name	The employee enters the correct **Second Last Name.**
Preferred First Name	The employee enters the correct **Preferred First Name.**
Initials	The employee enters the correct initials.
Suffix	The employee selects the correct name **Suffix.** Values are: ***Jr.*** and ***Sr.***
Royal Suffix	The employee selects the correct name **Royal Suffix.** Values are: ***Baron, Earl,*** and ***Marquis.***
Name Change to take effect on this date	The employee enters the date the name change is effective.
Save	The employee clicks the **Save** button to submit a request for a name to change as the employee enters it. The request is subject to review, and the HR administrator enters the revised name into the system.

Home and Mailing Address

Usage	Employees use the Home and Mailing Address page to review home and mailing addresses in the PeopleSoft database.
Object Name	HR_HOME_MAILING
Navigation	**Self Service, Employee, Tasks, Home and Mailing Address**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.



Home and Mailing Address (1of 2)



Home and Mailing Address (2 of 2)

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Country, Address 1, Address 2, Address 3, City, County, Postal,** and **State.**

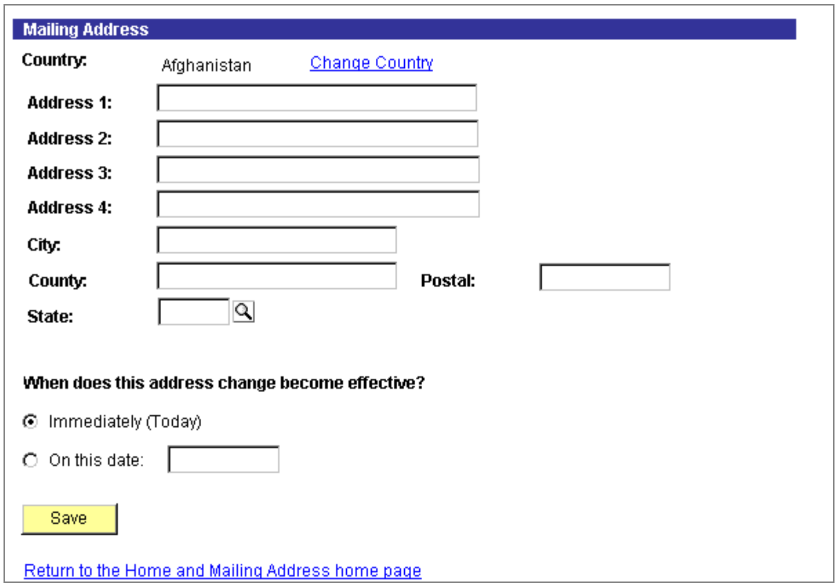
The system displays the title of the page, the employee's name, and the employee's current home and mailing address.

Update or correct your current address	The employee clicks **Update or correct your current address** to access the Home and Mailing Address Change Page.
View/Edit/Delete this address change	When an employee selects a future date for an address change to take effect, this link appears for each future (pending) address change for the employee. The employee clicks this link to access the Home and Mailing Address Change Page, where the employee can view, edit, or delete the pending address change.

Home and Mailing Address Change Page

Usage	Employees use the Home and Mailing Address page to view and/or update home addresses and mailing addresses in the PeopleSoft database. Future (pending) address changes can also be viewed, updated, or deleted on this page.
Object Name	HR_BOTH_ADDRESS
Navigation	**Self Service, Employee, Tasks, Home and Mailing Address**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.

Home and Mailing Address: Change Home and Mailing Address page (1 of 2)



Home and Mailing Address: Change Home and Mailing Address page (2 of 2)

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Country, Address 1, Address 2, Address 3, City, County, Postal,** and **State.**

The system displays the employee's current home and mailing address in editable fields.

Change Country — The employee clicks this link to select a country.

When does this address change become effective? — The employee selects the answer to this question from the following values:

Immediately (Today)

On this date: Enter the date the change becomes effective.

Save — The employee clicks **Save** to save the information changes or additions on this page.

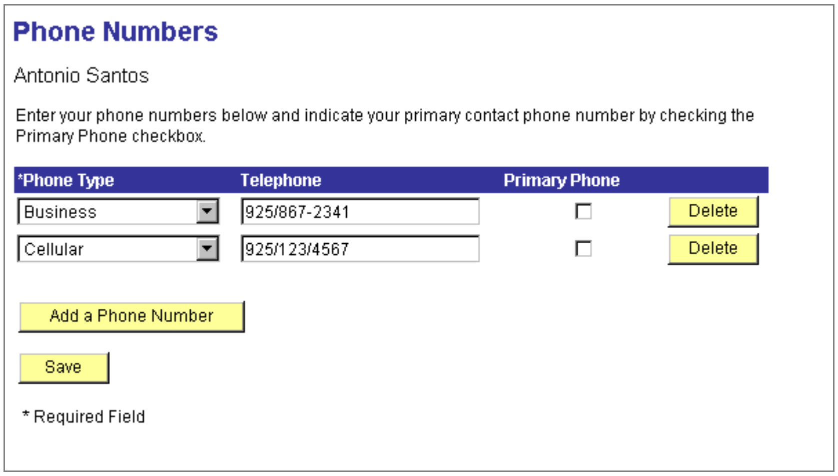
Delete — If the employee is viewing a pending address change that has already been entered, the **Delete** button is displayed. Clicking **Delete** deletes the pending address change from the system.

Return to the Home and Mailing Address home page — The employee clicks this link to access the Home and Mailing Address.

Phone Numbers Page

Usage	Employees use the Phone Numbers page to review, add, update, or delete personal phone numbers in the PeopleSoft database.

Object Name	HR_PERSONAL_PHONE
Navigation	**Self Service, Employee, Tasks, Phone Numbers**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.



Phone Numbers page

The system displays the page title and the employee's name.

Phone Type

In this column, the employee selects the **Phone Type**. Values are: ***Home, Cellular,*** and ***Business.***

Telephone

In this column, the employee enters or corrects phone numbers.

Primary Phone

The employee selects this check box if this phone number is a **Primary Phone** number.

Delete

The employee clicks the **Delete** button to delete a phone number. The system displays a confirmation page before deleting the phone number.

Add a Phone Number

The employee clicks this button to **Add a Phone Number.**

Save

The employee clicks **Save** after entering a phone number.

Emergency Contacts Page

Usage	Employees use the Emergency Contacts page to review, add, update, or delete emergency contact information in the PeopleSoft database.
Object Name	HR_EMERGENCY_CNTCT
Navigation	**Self Service, Employee, Tasks, Emergency Contacts**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.

Emergency Contacts page

The system displays the title of the page and the employee's name.

Contact Name In this column, the system displays employee contact names. If the user clicks on one of these names, the system displays the Emergency Contact Detail Page. On this page, the employee can view an emergency contact's address and phone information.

Relationship to Employee In this column, the system displays the contact's relationship to the employee.

Edit The employee clicks the **Edit** button to access the Emergency Contact Detail Page. On this page, the employee can review, edit, and save information for an emergency contact.

Delete The employee clicks the **Delete** button to delete an emergency contact. The system displays a page confirming the deletion before it takes place.

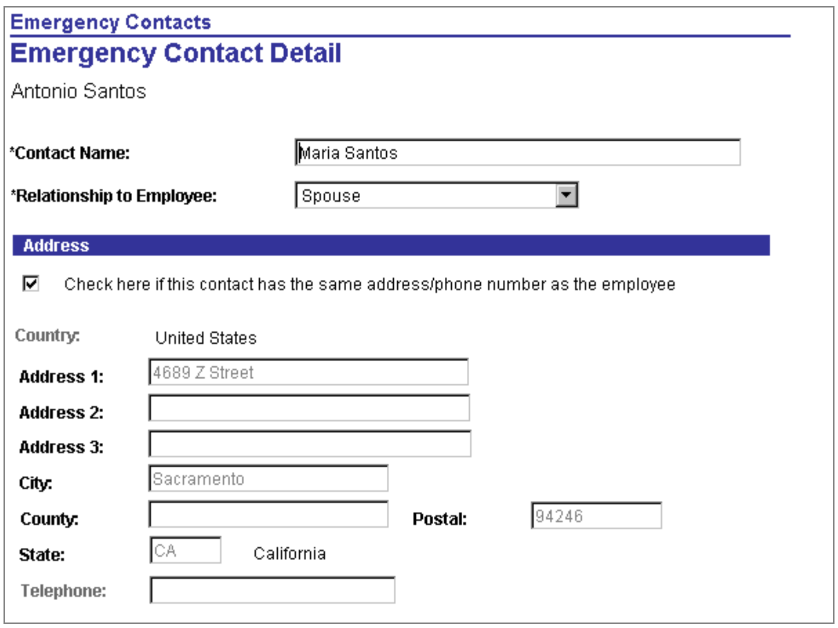
Add an Emergency Contact The employee clicks **Add an Emergency Contact** to access the Emergency Contact Detail Page. On this page, the employee can add an emergency contact.

Primary Contact The system displays the employee's **Primary Contact.**

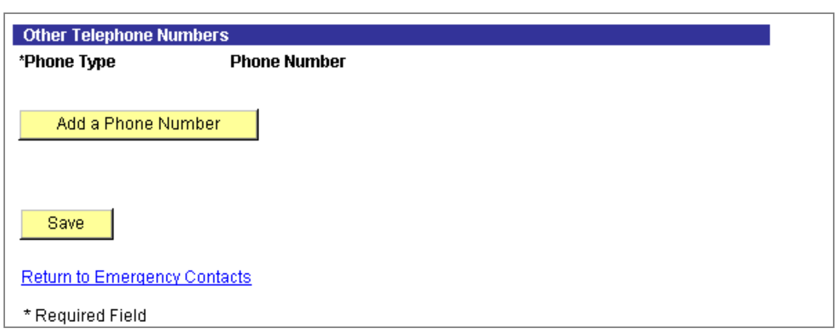
Change the primary contact	The employee clicks **Change the primary contact** to access the Emergency Contacts Change Primary Contact Page.

Emergency Contact Detail Page

Usage	Employees use the Emergency Contacts: Emergency Contact Detail page to review emergency contact address and telephone information.
Object Name	HR_EMERG_CNTCT_DET
Navigation	The employee clicks the Edit button, the Add an Emergency Contact button, or the Contact Name on the Emergency Contacts Page.



Emergency Contacts: Emergency Contact Detail page (1 of 2)



Emergency Contacts: Emergency Contact Detail page (2 of 2)

The system displays the title of the page and the employee’s name.

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Country, Address 1, Address 2, Address 3, City, County, Postal, State,** and **Telephone.**

If the employee enters this page by clicking on an emergency contact name on the Emergency Contact page, this page is a display-only page.

Contact Name	The system displays the **Contact Name.** The employee can add or change information in this field.
Relationship to Employee	The system displays the contact's relationship to the employee. The employee selects a relationship. Values are: ***Friend, Father,*** and ***Spouse.***
Check here if this contact has the same address/phone number as the employee	The employee selects this check box if this contact shares the same address and phone number with the employee.
Phone Type	The employee selects a **Phone Type** for telephone numbers. Values are: ***Home, Cellular,*** and ***Business.***
Phone Number	The system displays the contact's **Phone Number.** The employee can add or change information in this field.
Delete	The employee clicks **Delete** to delete a specific phone number. The system does not delete the phone number until the employee clicks **Save.**
Add a Phone Number	When the employee clicks **Add a Phone Number,** the system provides fields to enter a new phone number. The system saves the new phone number when the employee clicks **Save.**
Save	The employee clicks **Save** to save additions or changes in the PeopleSoft database.
Return to Emergency Contacts	The employee clicks this link to return to the Emergency Contacts Page.

Emergency Contacts Change Primary Contact Page

Usage	Employees use the Emergency Contacts: Change Primary Contact page to changetheir emergency primary contact.
Object Name	HR_PRIMARY_CONTACT

Navigation	The employee clicks Change the primary contact on the Emergency Contacts Page.

Emergency Contacts: Change Primary Contact page

The system displays the title of the page and the employee's name.

Primary Contact The employee selects a **Primary Contact** from the list of contacts that are currently in the system for this employee.

Save The employee clicks **Save** for the system to save a **Primary Contact.**

Return to Emergency Contacts The employee clicks this link to return to the Emergency Contacts Page.

Email Addresses Page

Usage	Employees use the Email Addresses page to review, add, update, or delete email addresses in the PeopleSoft database. Please note that employees cannot delete business email addresses. Only the system administrator who maintains email addresses can delete business email addresses.
Object Name	HR_EMAIL_ADDRESSES
Navigation	**Self Service, Employee, Tasks, Email Addresses**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.

Email Addresses page

The system displays the title of the page and the employee’s name.

Email Type

This column displays the **Email Type** for an email address in the second column. The employee selects an option. Values are: ***Business, Campus, Dorm, Home,*** and ***Other.***

Email Address

This column displays the employee’s email addresses. The employee can correct email information for all email types other than business email.

Delete

The employee clicks the **Delete** button to delete an **Email Address.**

Note. The employee cannot delete a business email address. A system administrator generates and maintains employee email addresses.

Add an Email Address

The employee clicks the **Add an Email Address** button, and the system displays an **Email Type** field and an **Email Address** field so that the employee can add a new email address.

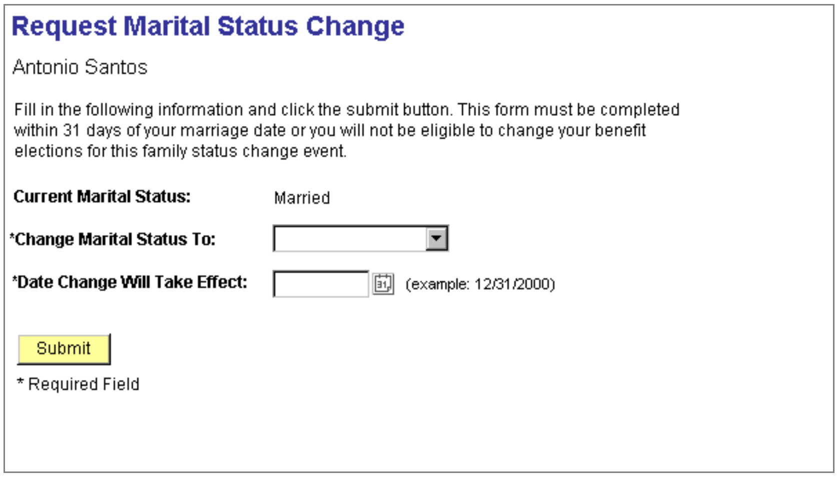
Save

The employee clicks the **Save** button for the system to save changes.

Request Marital Status Change Page

Usage	Employees use the Request Marital Status Change page to review current marital status and to submit a request to update marital status in the PeopleSoft database.
Object Name	HR_EE_MAR_STATUS
Navigation	**Self Service, Employee, Tasks, Marital Status Change**

Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.



Request Marital Status Change page

The system displays the title of the page and the employee's name.

Current Marital Status The system displays the employee's marital status.

Change Marital Status To The employee selects a new marital status. Values are: ***Common-Law, Divorced, Hd Hsehld*** (head of household), ***Married, Separated,*** and ***Single.***

Date Change Will Take Effect The employee enters the date of the marital status change.

Submit The employee clicks the **Submit** button to submit a request for the marital status to change, as the employee enters it. The request is subject to review, and the HR administrator enters the revised status into the system.

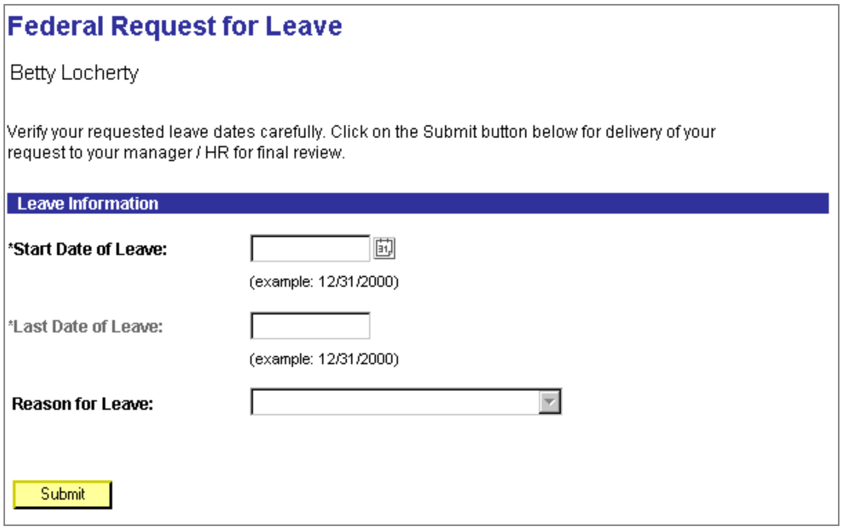
Requesting Federal Leave of Absence

Employees use the Federal Request for Leave self-service transaction to enter a request for leave. The system then routes the request through the personnel action request process approval cycle.

Federal Request for Leave Page

Usage	The Federal Request for Leave page enables users to enter a request for leave of absence.
Object Name	FG_EE_LEAVE_REQ
Navigation	**Self Service, Employee, Tasks, Request Leave of Absence**

Access Requirements	Users must have an Employee ID. The system displays information that is specific to the user.



Federal Request for Leave page

The system displays your name at the top of the page, beneath the title.

Leave Information

Start Date of Leave	Enter the requested **Start Date of Leave.**
Last Date of Leave	Enter the requested **Last Date of Leave.**
Reason for Leave	Select the **Reason for Leave.**
Submit	Click the **Submit** button to deliver your request to your manager / HR for final review.

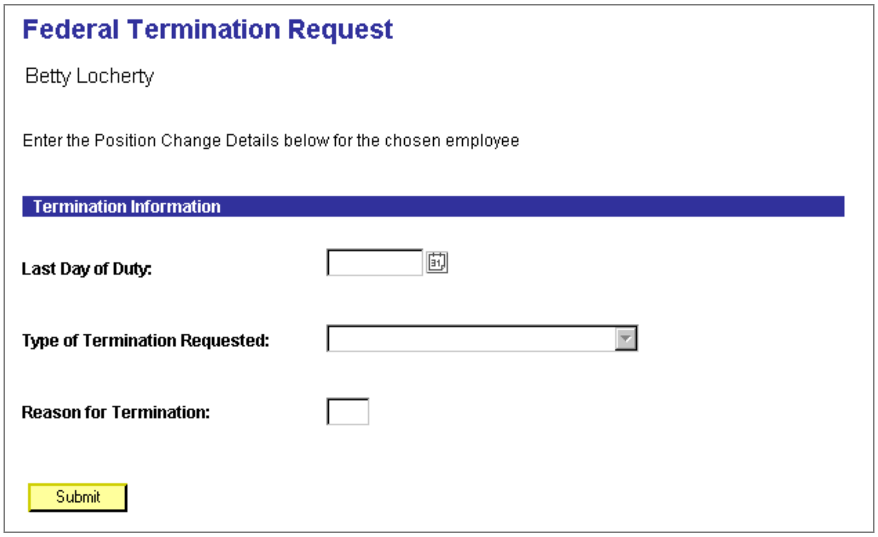
Requesting Federal Termination

Employees use the Request for Federal Leave self-service transaction to enter a request for termination, such as a resignation. The system then routes the request through the personnel action request process approval cycle.

Federal Termination Request Page

Usage	The Federal Termination Request page enables users to enter a request for termination.
Object Name	FG_EE_TERMINATION
Navigation	**Self Service, Employee, Tasks, Request Termination**
Access	Users must have an Employee ID. The system displays information that

Requirements	is specific to the user.



Federal Termination Request page

The system displays your name at the top of the page, beneath the title.

Termination Information

Last Day of Duty	Enter the date the termination would take affect.
Type of Termination Requested	Enter the **Type of Termination Requested.**
Reason for Termination	Select the **Reason for Termination.**

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