PeopleSoft 8.00.01 Human Resources PeopleBook

Managing Competencies

PeopleSoft 8.00.01 Human Resources PeopleBook: Managing Competencies

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MANAGING COMPETENCIES

This book provides the information you need for implementing and using the Manage Competencies module of PeopleSoft Human Resources. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAHRBr8SP1B 1200.

Setting Up Competencies and Accomplishments shows you how to establish the competency and accomplishments essential to your organization. It explains how to create rating models to measure proficiency.

Assigning Competencies and Accomplishments to Roles explains how to set up clusters of competencies and accomplishments and create competency profiles for roles in your organization.

Tracking Worker Competencies and Accomplishments describes the procedure for continuously updating information as your workforce acquires additional competencies. Precise evaluation of worker competencies then ensures that the most qualified people are assigned to positions at all levels.

Performing Gap and Match Analyses on Your Workforce discusses the tools available for finding the right person to fill any given position, as well as for finding the best position for a given worker.

Managing Competency Training describes how you set up training courses and training programs that help individual workers improve their competencies.

Managing Local Functionality for the UK describes the administration of National Vocational Qualifications for United Kingdom employees.

Running Manage Competencies Reports explains how to generate the Manage Competencies reports and summarizes the contents of the reports.

CHAPTER 1

Setting Up Competencies and Accomplishments

Before you can inventory and manage your workforce's accomplishments and competencies, or organize your hiring and career planning projects, you need to set up the competencies and accomplishments that you'll evaluate using the Manage Competencies Business Process in PeopleSoft Human Resources.

Overview of Accomplishments and Competencies

Before you begin designing your Manage Competencies system, it's important to understand the basic differences and similarities between accomplishments and competencies.

Accomplishments are tangible achievements. An accomplishment may be a degree, license, language, test score, honor or award, or membership of an employee. These tend to be static, one-time achievements.

Competencies are directly related to an employee's current position and may encompass a skill, ability, knowledge, or behavior. Unlike accomplishments, competencies are measured using a scale that you define. Competency is the most general term used in the Manage Competencies Business Process.

Your PeopleSoft Human Resources system stores the setup table data for skills and competencies in the installation record COMPETENCY_TBL. Accomplishments are maintained in the installation record ACCOMP_TBL.

Important! Requesting, granting, and tracking Federal Government agency monetary and non-monetary awards and bonuses as employee compensation are functions of Administering Your Workforce.

For more information about setting up, granting, and tracking your employees' performance-based awards and bonuses, see USF Administering Personnel Action Requests.

Before You Begin

You'll find all of the core and local country setup tables, pages, and functionality described in this section in the **Develop Workforce, Manage Competencies (GBL)** menu.

Some of these pages are included in other PeopleSoft Human Resources menus, such as Plan Careers, Plan Successions, Administer Training, and Recruit Workforce.

Use the Manage Competency menu that's appropriate for your implementation of PeopleSoft Human Resources. If you're not sure which of these menus you should use, ask your human resources project leader.

The procedures for accessing and entering information in these tables mirror those for updating any PeopleSoft table or page.

For more information**,** and for a quick refresher course about accessing and entering information in the pages, see the general tutorial in your PeopleBook, Using PeopleSoft 8 Applications.

Most of the Manage Competency tables are effective-dated, which means that you can chronologically track changes that you make to data. You won't lose any data history as it's all there for you to review.

When you create codes in these tables, be sure to enter effective dates that are *before* the effective dates of any recruit data that you process; if you don't, the system will not display all of the valid codes when you select from prompt lists in the Manage Competency pages. We recommend that you use a date such as January 1, 1980, to ensure that the effective date accounts for assignment history.

Make sure both the core and the relevant local country control tables are set up before you start working with the functionality described in this section.

For more information about the purpose and use of the control tables and effective-dating in PeopleSoft HRMS, see Setting Up Control Tables.

If you've implemented multiple business units and setIDs in your Human Resources system, the information that you use and create will be determined by how business unit and setID functionality has been set up for your operator ID.

For more information about how business unit and setID functionality impacts your HRMS system and regulates control table and prompt table values, see Regulating HRMS System Data.

Setting Up Competency Codes and Ratings

Before you can assign competencies to jobs or projects and track employee and applicant competencies within your organization, you must set up competencies, competency types, and rating models.

Overview of Setting Up Competencies

Enterprise Integration Points Related to Competencies

When you add, delete, or change information in the Competency records, the system automatically publishes the Competency EIP message to any other PeopleSoft or third party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the Competency Table, or Competency Type records.

For more information regarding the subscribers and technical details of the Competency Table and Competency Type EIPs, see Competency Table, and Competency Type in the EIP Catalog. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Resource Integration in Human Resources. For more information about enterprise integration points, see the Enterprise Integration PeopleBook.

To set up competencies:

1. Set up competency types (optional).

   Competency types are used to group competencies so that they are easier to find when creating competency profiles for roles and employees in your organization. Competencies can be of a certain type and also belong to a specific category. While it is not mandatory to set up competency types, they serve several useful purposes. For example, competency types are used on the competency profiling pages to help you identify the competencies that you want to evaluate. You also need to define competency types if you want to build and maintain competency trees for your organization. Alternatively, you may choose to use competency types to organize competencies and not use competency trees at all. Set up competency types using the Competency Type Table Setup Page.

2. Set up rating models.

   Ratings establish the desired skill or expertise level of a competency for a job, position, or project team. PeopleSoft supplies one rating model as the standard; however, you can define your own ratings using the Rating Model Table Setup Page.

For more information about ratings, see Setting Up Competency Ratings.

3. Set up competencies and assign competency types and rating models.

   Use the Competency Table Setup Page to set up competencies. From here, you assign the rating model that is used to measure each competency and then assign the competency to one or more competency types. For example, you could create a competency type called Comp (for Computer Skills), and a competency called COBOL, and link the two together. Furthermore, a competency can belong to one or more competency types. For example, COBOL could include computer language and business-oriented language types.

4. Set up descriptions of ratings for each competency (optional).

   To help reviewers evaluate employees' ratings, you can enter detailed descriptions of ratings for specific competencies on the Proficiency Descriptions Setup Page. Descriptions of ratings are useful when several people rate an employee.

5. Create a competency tree (optional).

   If you have a large number of competencies, or you want to structure your competencies into many different levels, you can create a competency tree using the Tree Manager.

   The Tree Manager uses Competency Types to organize competencies and build distinct branches of competencies in your Competency Tree. If you link a competency to multiple competency types, then it will appear in all the relevant competency type branches of the Competency Tree. For example, the competency, Decision Making, may be an important competency requirement for managers and senior technical engineers in your company. If you link the Decision Making competency to a type called *Management* and a type called *Technical*, then the competency appears under both the Management and Technical Branches of the tree hierarchy.

For more information about creating a Competency Tree, see Setting Up an Optional Competency Tree.

Depending on your organization's competency management requirements, you may need to set up a large number of competencies. To help you locate and review competencies quickly, we include a Competency Summary Setup Page in the Manage Competencies business process. Using this page, you can list the competencies within a selected competency type or category.

Setting Up Competency Ratings

When you track the competencies of employees within your organization, you can also include an evaluation of the employee's degree of expertise in a particular competency. To perform such rankings, you'll set up ratings for competencies in Manage Competencies.

Ratings establish the skill or expertise level of a competency for a job, position, or project team. You define ratings using the Rating Model Table Setup Page.

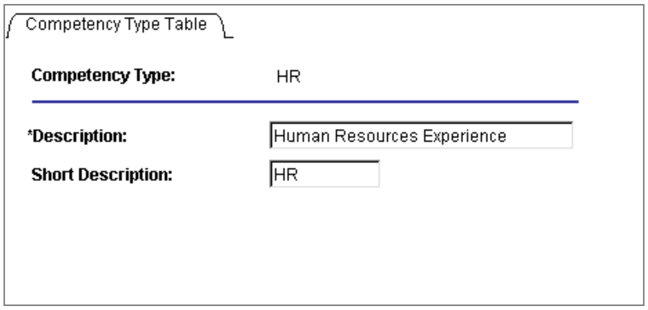
For example, an entry-level software programmer's position and a software development manager's position would both require programming language expertise; however, the degree of expertise required for a manager would be greater than that needed for an entry-level job. Likewise, to match a potential candidate with a position requirement, you evaluate and rank the employee's proficiency with computer programming languages against all other candidates for the team or position.

The Manage Competencies Business Process comes with the following PeopleSoft Competency Management Scale (PSCM) rating model. You can modify this rating model or create new ones according to your particular business needs.

Proficiency	***Description***	***Short Description***	***Strength/Develop***
0	None	None	Developmental
1	Little	Little	Developmental
2	Fair	Fair	Developmental
3	Good	Good	Strength
4	Very Good	Very Good	Strength
5	Expert	Expert	Strength

Competency Type Table Setup Page

Usage	Use the Competency Type Table setup page to create competency types, which are broad categories of competencies relevant to particular positions or projects in your enterprise. For example, you may set up categories for computer programming skills that you can attach to programming positions and projects in your organization. You need to define Competency Types if you want to build and maintain competency trees for your organization.
Object Name	CM_TYPE_TABLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Competency Type Table, Competency Type Table** • **Develop Workforce, Manage Competencies (USF), Setup, Competency Type Table, Competency Type Table**
Prerequisites	None.
Access Requirements	Enter a Competency Type code.

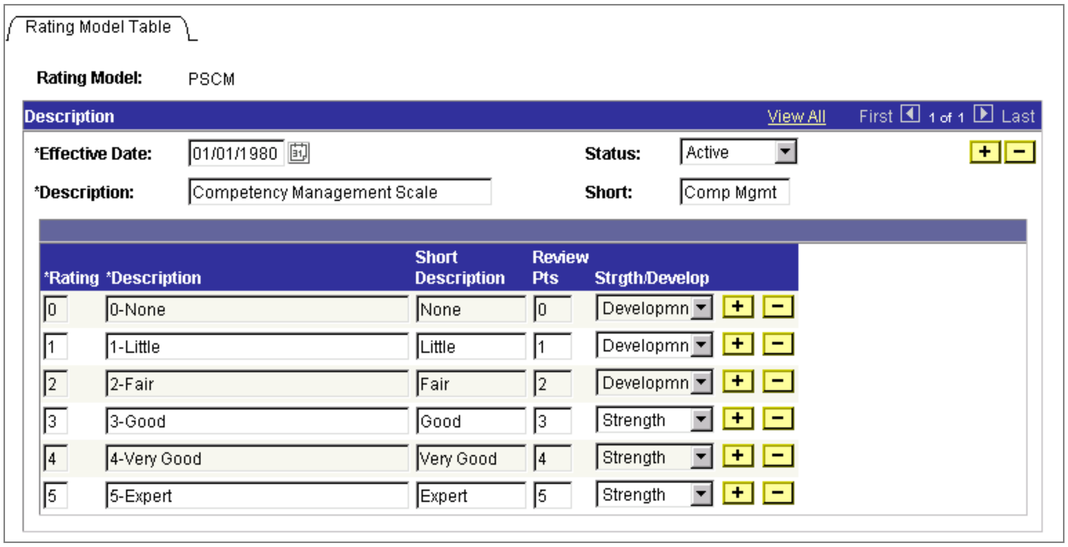


Competency Type Table setup page

Enter a **Competency Type Description** and a **Short Description.** The system displays these descriptions whenever you reference a **Competency Type** on other pages throughout your Human Resources system.

Rating Model Table Setup Page

Usage	Use the Rating Model Table setup page to define a set of alphabetic or numeric codes for ranking an employee's degree of expertise or experience in any given competency. You can define a single Rating Model for your entire organization or build multiple Ratings Models for different projects or for different branches of your organization.
Object Name	CM_REVW_RATING_TBL
Navigation	**Develop Workforce, Manage Competencies (GBL), Setup, Rating Model Table, Rating Model Table**
Prerequisites	None
Access Requirements	Enter a Rating Model ID.



Rating Model Table setup page

The system displays the **Rating Model** that you entered. This field is for information only.

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date** and **Status.**

Description	Enter a **Description** of the **Rating Model.**
Short	Enter a **Short** description of the **Rating Model.**

Defining Ratings

Rating	Enter an alphabetic or numeric code to represent the **Rating** that you are defining. You can add as many rows as necessary to define the ratings in your **Rating Model.**
Description	Enter a **Description** of the **Rating.**
Short Description	Enter a **Short Description** of the **Rating.**
Review Pts (points)	Enter a numerical value in the range 0-999 that is associated with this **Rating.** The system uses employee review points, when performing employee and team matches, in order to calculate how well employees meet the requirements of a role.

For more information about the Manage Competencies inquiries, see "Performing Gap and Match Analyses on Your Workforce".

Strgth/Develop (strength/development)

Select one of the following options from the drop-down list:

Developmnt (development): Use this option if the rating represents an area that needs more skill development, education, or training.

Strength: Use this option if the rating represents an area of strength.

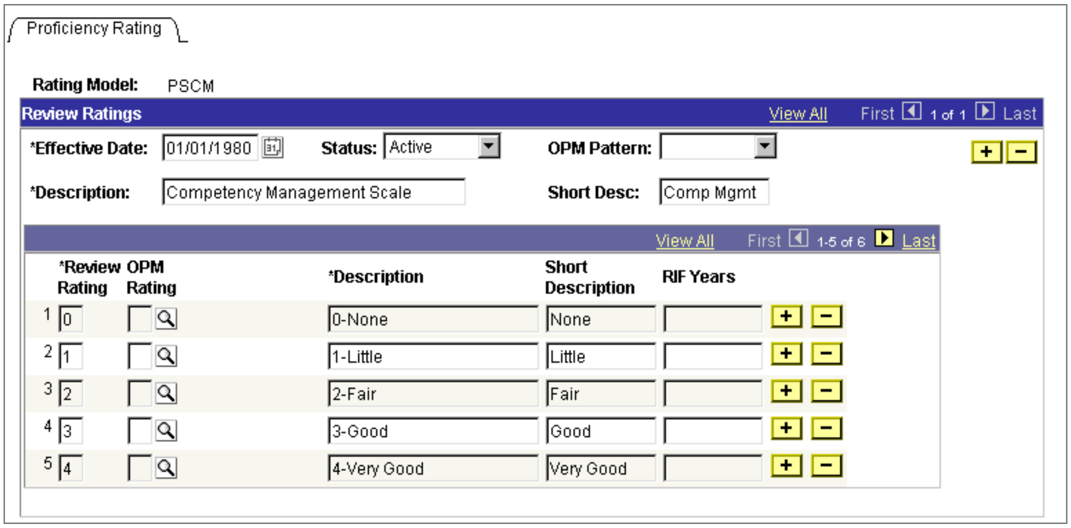
For example, the PSCM rating model supplied by PeopleSoft has ratings of 0–5, with 0–2 defined as ***Developmnt*** and 3–5 defined as ***Strength.***

The system uses this value when transferring competency profiles between the Manage Competencies and Plan Careers modules.

For more information about transferring employee competencies, see the "Tracking Worker Competencies and Accomplishments".

USF - Proficiency Rating Table Setup Page

Usage	Use the Proficiency Rating Table setup page to define a set of codes for ranking an employee's degree of expertise or experience in any given competency. You can define a single set of proficiency ratings for your entire organization or build multiple ratings for different projects or for different branches of your organization.
Object Name	GVT_REVW_RATIN_TBL
Navigation	• **Administer Workforce, Administer Workforce (USF), Setup, Rating Mdl Tbl, Proficiency Rating** • **Develop Workforce, Manage Competencies (USF), Setup, Proficiency Rating Table, Proficiency Rating** • **Administer Workforce, Manage Performance (USF), Setup, Review Rating Table, Review Rating Tbl**
Prerequisites	None.
Access Requirements	Enter a Rating Model ID.



USF - Proficiency Rating Table setup page

Select a **Status** of ***Active*** or ***Inactive*** for the Rating Model. These values are stored in the Translate Table. The system displays only Active Rating Models when you prompt for a rating in the Manage Competencies business process. Select an **OPM Pattern**, for example ***Lev 1-5,*** that corresponds to your agency's rating system.

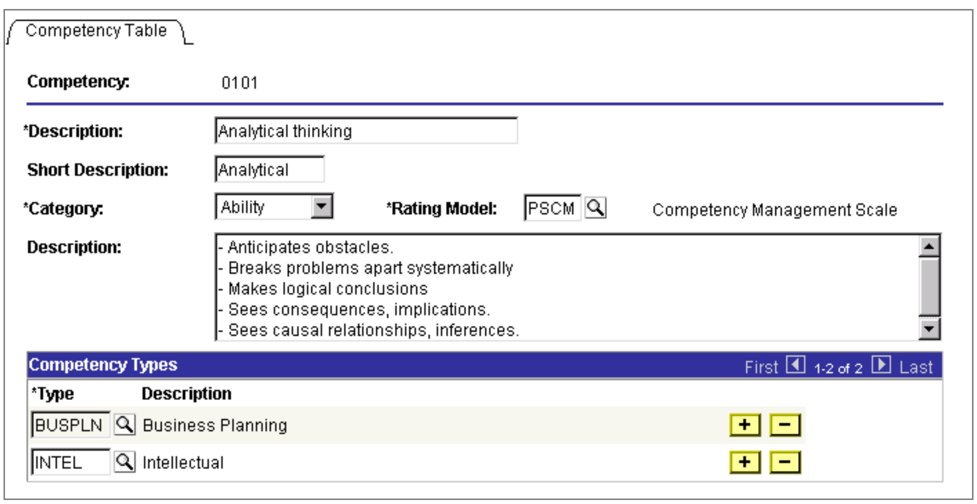
Enter a **Rating** number for each rating, such as ***1-5.*** Enter the corresponding **OPM Rating** from the list of valid values.

Enter a Rating **Description** and **Short Description** for each rating number that you have entered. Enter the **RIF years,** if any, this rating receives.

Competency Table Setup Page

Usage	Use the Competency Table setup page to record any employee skills, abilities, knowledge or behaviors pertinent to jobs in your organization, such as experience with office equipment, knowledge of specialized manufacturing processes, expertise with computer programming languages, or a background in financial planning. The codes can be as broad or detailed as you like and can represent any type of competency.
Object Name	COMPETENCY_TABLE
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, Competency Table, Competency Table** • **Develop Workforce, Administer Training (USF), Setup, Competency Table, Competency Table** • **Develop Workforce, Manage Competencies (GBL), Setup, Competency Table, Competency Table** • **Develop Workforce, Manage Competencies (USF), Setup, Competency Table, Competency Table**

	• **Administer Workforce, Plan Salaries (GBL), Setup, Competency Table, Competency Table** • **Develop Workforce, Recruit Workforce (GBL), Setup, Competency Table, Competency Table** • **Develop Workforce, Recruit Workforce (USF), Setup, Competency Table, Competency Table** • **Administer Workforce, Track Global Assignments (GBL), Setup, Competency Table, Competency Table** • **Administer Workforce, Track Global Assignments (USF), Setup, Competency Table, Competency Table**
Prerequisites	Before you can set up competency codes, you must define the competency categories using the Competency Type Table Setup Page. You also need to set up the rating models that will define how you measure a competency. Set up rating models on the Rating Model Table Setup Page.
Access Requirements	Enter a Competency Code.



Competency Table setup page

The system displays the **Competency** that you selected. This field is for information only.

Description	Enter a **Description** for the competency. The system displays this **Description** whenever you reference a competency within other pages in your Human Resources system.
Short Description	Enter an abbreviated description of the competency**.**

Category	Select a competency Category from the drop-down list: ***Ability, Knowledge, NVQ Unit, Other, Sal Plan (salary planning),*** and ***Skill.***
Rating Model	Select the **Rating Model** used to measure this **Competency** from the list of valid values. Set up Rating Models on the Rating Model Table Setup Page.
Description	Enter a detailed **Description** of the **Competency** for documentation purposes.

Competency Types

The **Competency Types** group box lists the **Competency Types** to which a **Competency** belongs.

Type	Select a Competency **Type** from the list of valid values. These values come from the Competency Type Table. You can add as many types as necessary by inserting additional rows.

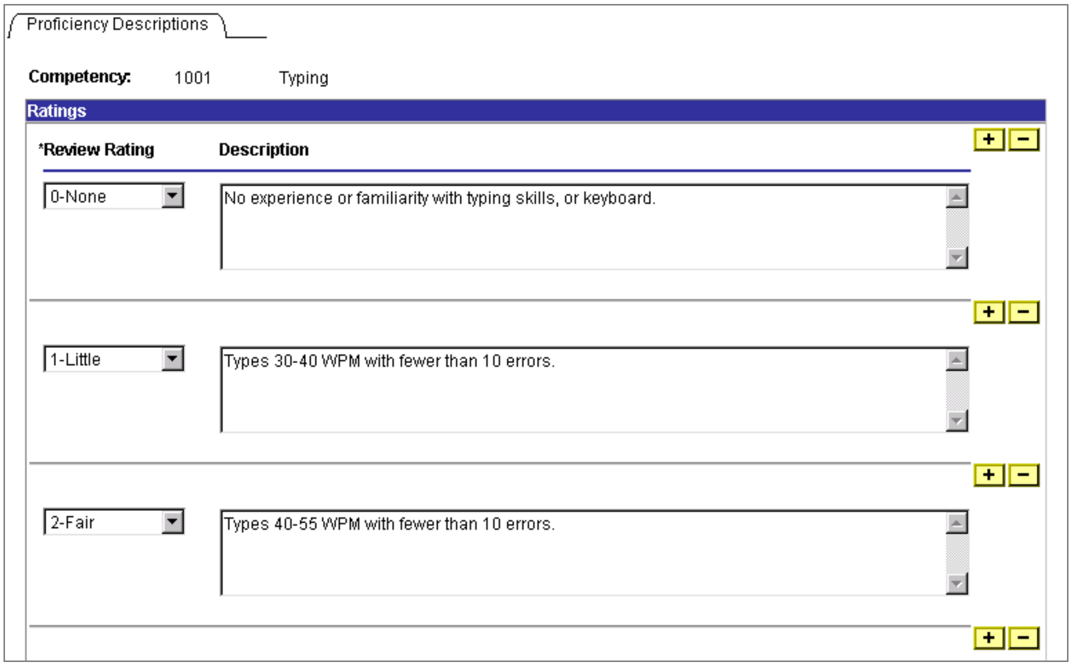
Note. If you decide to maintain competency hierarchies using a Competency Tree, the competency will appear in the branch for each **Type** that you indicate here.

Description	When you move out of the **Type** field, the system defaults to the type **Description** and makes the field unavailable for entry.

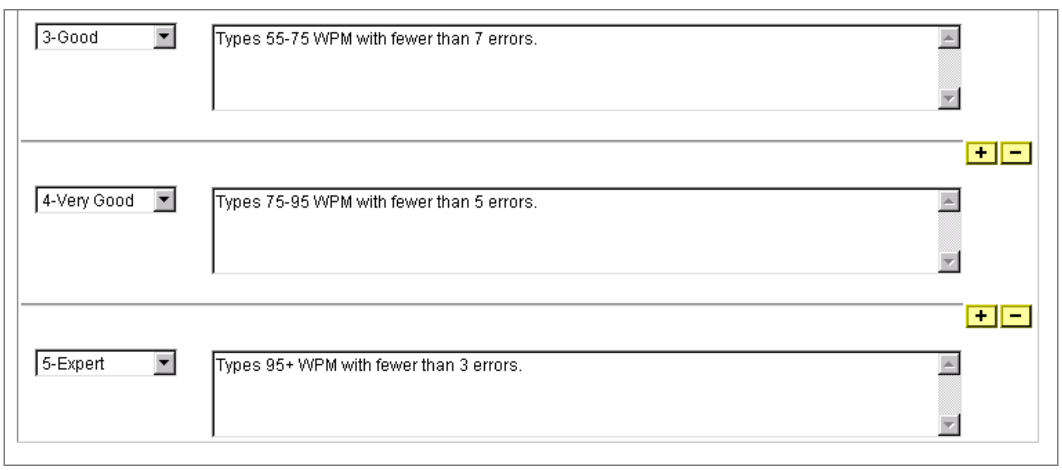
Proficiency Descriptions Setup Page

Usage	Use the Proficiency Description setup page to enter a description of the proficiency levels for a competency. For example, use this page to define what it means to be an *Expert* in conflict management (a 5 rating), or a *Very Good* in conflict management (a 4 rating). This definition method is most commonly used in 360 Feedback programs where several people rate one person on a list of competencies. This system enables everyone to use the same definitions when determining ratings.
Object Name	CM_RATING_DESCRS
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Proficiency Descriptions, Proficiency Descriptions** • **Develop Workforce, Manage Competencies (USF), Setup, Proficiency Descrs, Proficiency Descriptions**
Prerequisites	You must set up your competency codes before you can define proficiency descriptions for your competencies.

Access Requirements	Enter a competency code.



Proficiency Descriptions setup page (1 of 2)



Proficiency Descriptions setup page (2 of 2)

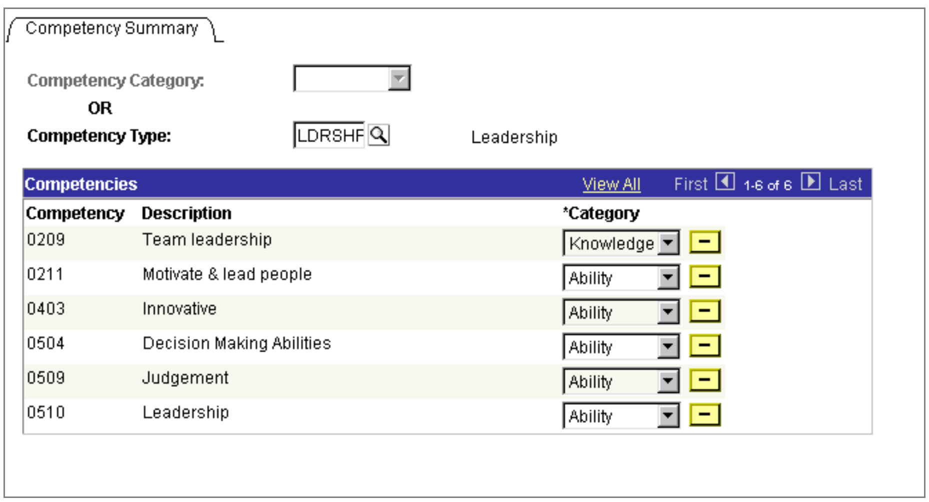
Select a **Review Rating** from the drop-down list. The system prompts against the rating model that you assigned to the competency on the Competency Table Setup Page.

When you move out of the **Review Rating** field, the system displays the short and full **Description** assigned to the **Review Rating** level. Add additional information to the **Description** if you want.

To modify ratings, use the Rating Model Table Setup Page.

Competency Summary Setup Page

Usage	Use the Competency Summary setup page to review the different competency categories or types that you've established in your PeopleSoft Human Resources system. You can also make changes to your competency categories and competency types using this page.
Object Name	CM_COMPETENCY_SUMM
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Competency Summary, Competency Summary** • **Develop Workforce, Manage Competencies (USF), Setup, Competency Summary, Competency Summary**
Prerequisites	You need to set up your competencies on the Competency Table Setup Page before you can use this page.
Access Requirements	Enter a competency category or competency type.



Competency Summary setup page

Use the Competency Summary page to search for competencies based on **Competency Category** or **Competency Type.** Remember, you assigned Competency Categories to competencies when you defined them on the Competency Table Setup Page. These values are stored on the Translate Table.

To perform a search, select a **Competency Category**, such as ***Knowledge,*** from the drop-down list or **Competency Type** from the list of valid types.

The page displays the competencies that match your selection criteria, sorted by Competency Code. If necessary, change the **Category** or **Type.** If you make changes, remember to save the page.

Any changes that you make on the Competency Summary page will update the Competencies Table.

Setting Up Educational Qualifications and Accomplishments

In order to keep complete records about your employees, you'll find it useful to track information about their background and accomplishments, such as educational qualifications, licenses or certifications they've obtained, professional memberships they hold, languages they speak, and any training courses or programs they've taken that are pertinent to their job or career.

Overview of Setting Up Accomplishment Codes

By setting up Accomplishment Codes on the Accomplishments Table, (ACCOMP_TBL), you can track an employee's educational background, skills, and accomplishments. You use a different setup page for each type of accomplishment:

License/Certification Table Setup Page. Use this page to define any licenses or certificates required for jobs in your organization.

Honor/Award Table Setup Page. Use the Honor/Award table to record the types of corporate awards and professional distinctions that are pertinent to your employees.

Language Table Setup Page. Use the Languages table to create the languages codes you use in order to track your employees' language skills.

Degree Table Setup Page Use the Degree table to define degree types that are relevant to your organization.

Membership Table Setup Page. Set up the Membership Table with codes for the professional organizations and associations that you want to track.

Test Table Setup Page. If your organization uses standard tests as part of your recruitment process, such as typing or programming aptitude, use the Test Table to create codes for these tests.

You'll also set up the School Type, Major and School codes that are stored on the School Type Table Setup Page, Major Table Setup Page, and School Table Setup Page respectively.

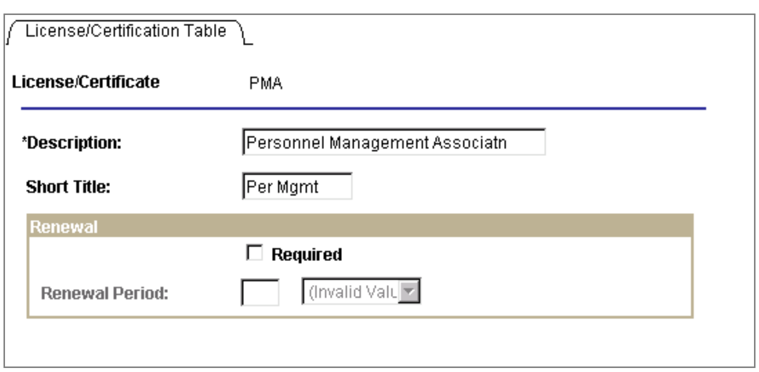
Many of these tables are also accessible from the Administer Training and the Recruit Workforce menus (you use the same accomplishment codes for tracking applicant accomplishments).

Whenever you add a code using one of the Accomplishment pages (except for the School Type, Major, and School codes), the system records the information on the Accomplishments Table. When you are adding a degree, a language, and so forth, the system prompts you for an Accomplishment Code. Based on the page that you use to add or update your accomplishment data, the system tags the Accomplishment Table data with the appropriate codes so that it knows, for example, the difference between a Degree code and a Language code.

Though all of these accomplishment types are stored in one table, when you prompt for a particular kind of code from anywhere in the system, the system displays only the appropriate values. For example, if you were to prompt for a Degree code on a PeopleSoft Human Resources page, only Degree codes and not Licenses, Honor/Award, or Membership data, appear in the prompt table.

License/Certification Table Setup Page

Usage	Use the License/Certification Table to define any required licenses or certificates for jobs in your organization. For example, if you're hiring a pilot to fly the company jet, you'll consider only employees and candidates who are licensed to fly aircraft. Similarly, if you're looking for a controller, you'll want people who have acquired accounting and financial certifications.
Object Name	LICENSE_CERTIF_TBL
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, License/Certification Table, License/Certification Table** • **Develop Workforce, Administer Training (USF), Setup, License/Certification Table, License/Certification Table** • **Develop Workforce, Manage Competencies (GBL), Setup, License/Certification Table, License/Certification Table** • **Develop Workforce, Manage Competencies (USF), Setup, License/Certification Table, License/Certification Table** • **Develop Workforce, Recruit Workforce (GBL), Setup, License/Certification Table, License/Certification Table** • **Develop Workforce, Recruit Workforce (USF), Setup, License/Certification Table, License/Certification Table**
Prerequisites	None.
Access Requirements	Enter a License/Certification Code.



License/Certification Table setup page

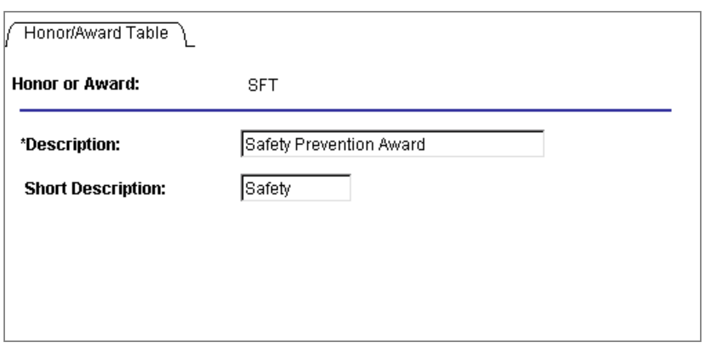
Type a **License/Certification Title** and a **Short Title** of the license or certification.

You may also track **Renewal** requirements for the license or certification. Indicate whether or not the **Renewal** is **Required,** and if so, the number of ***Days, Weeks, Months,*** or ***Years*** in the **Renewal Period.** If there is no **Renewal** requirement, the system makes the **Renewal Period** fields unavailable for entry.

To view a complete list of all licenses and certificates defined within the system, generate the License/Certification Table report.

Honor/Award Table Setup Page

Usage	Members of your workforce may earn professional distinctions, corporate awards, competitions, and so forth. To track the awards and honors that your workers receive, enter Honors and Awards on the Honors/Awards Table.
Object Name	HONOR_AWARD_TABLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Honor/Award Table, Honor/Award Table** • **Develop Workforce, Manage Competencies (USF), Setup, Honor/Award Table, Honor/Award Table**
Prerequisites	None.
Access Requirements	Enter an Honor or Award Code.

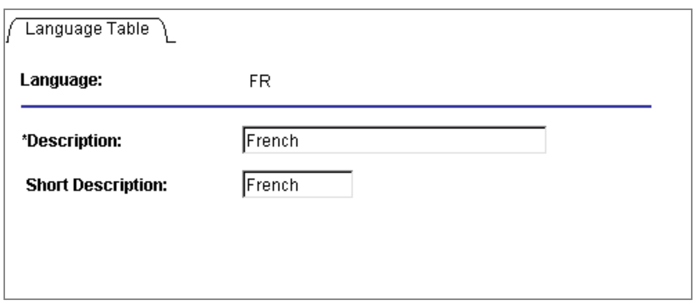


Honor/Award Table setup page

Enter a **Description** and a **Short Description** for the Honor or Award. The description that you enter here displays whenever you prompt for an honor or award in PeopleSoft Human Resources.

Language Table Setup Page

Usage	Use the Language Table setup page to define language codes that you use to track your employees' language abilities. In the global marketplace, many organizations find that language skills are increasingly important for success, both at home and abroad. By tracking worker language skills you'll be able to quickly match employee language skills with projects and positions.
Object Name	LANGUAGE_TABLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Language Table, Language Table** • **Develop Workforce, Manage Competencies (USF), Setup, Language Table, Language Table**
Prerequisites	None.
Access Requirements	Enter a Language Code.



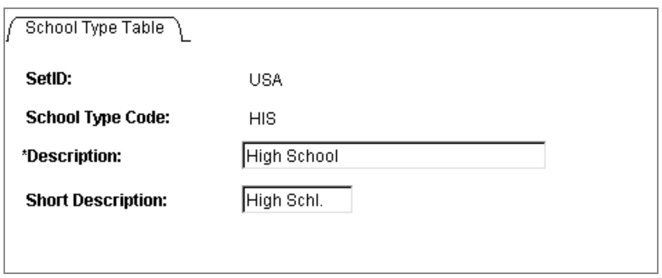
Language Table setup page

Enter a **Description** and **Short Description** for this Language Code. We include standardized language codes used by all PeopleSoft applications as part of the Language Codes stored in the Accomplishments Table. Add to or modify the language information according to your organization's specific requirements.

School Type Table Setup Page

Usage	Use the School Type Table page to set up codes for the various types of schools employees in your organization may attend – elementary schools, universities, or professional schools, for example. After you've defined School Types, use the School Table Setup Page to define codes for individual schools.
Object Name	SCHOOL_TYPE_TBL
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, School Type Table, School Type Tbl**

	• **Develop Workforce, Administer Training (USF), Setup, School Type Table, School Type Tbl** • **Develop Workforce, Manage Competencies (GBL), Setup, School Type Table, School Type Tbl** • **Develop Workforce, Manage Competencies (USF), Setup, School Type Table, School Type Tbl** • **Administer Workforce, Track Global Assignments (GBL), Setup, School Type Table, School Type Tbl** • **Administer Workforce, Track Global Assignments (USF), Setup, School Type Table, School Type Tbl**
Prerequisites	None
Access Requirements	SetID School Type Code



School Type Table setup page

The system displays the **SetID** and **School Type Code** that you entered to open the page.

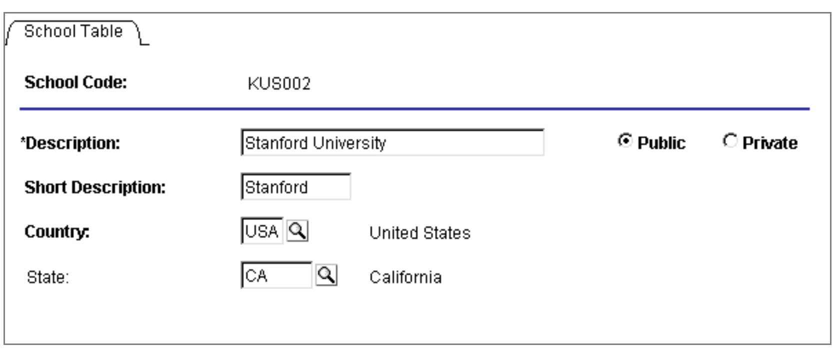
Description	Enter a free-form description of this School Type.
Short Description	Enter a short description of up to 10 characters. If you leave this field blank, the system populates it with the first 10 characters from the Description field when you save the page.

For more information about how Business Unit and SetID functionality affect your HRMS system, see Regulating your HRMS System Data.

School Table Setup Page

Usage	Use the School Table setup page to create codes for the schools you use to profile your workforce's educational accomplishments. The school

	codes you enter here are also available for tracking similar information either in Employee Data or in Training pages. For example, your employees might often take courses at several local colleges or universities, so you'll want to add school codes for them.
Object Name	SCHOOL_TABLE
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, School Table, School Table** • **Develop Workforce, Administer Training (USF), Setup, School Table, School Table** • **Develop Workforce, Budget Training (GBL), Setup, School Table, School Table** • **Develop Workforce, Manage Competencies (GBL), Setup, School Table, School Table** • **Develop Workforce, Manage Competencies (USF), Setup, School Table, School Table** • **Develop Workforce, Recruit Workforce (GBL), Setup, School Table, School Table** • **Develop Workforce, Recruit Workforce (USF), Setup, School Table, School Table** • **Administer Workforce, Track Global Assignments (GBL), Setup, School Table, School Table** • **Administer Workforce, Track Global Assignments (USF), Setup, School Table, School Table**
Prerequisites	None
Access Requirements	Enter a school code.



School Table setup page

Enter a school **Description** and **Short Description.** The system displays this information whenever you reference the School Code in PeopleSoft Human Resources.

Specify if this is a **Public** or **Private** school.

The Country codes are stored in the Country Table.

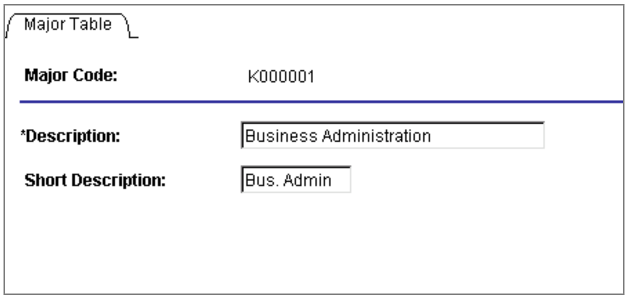
For more information about the Country Table, see PeopleSoft 8 Application Fundamentals for HRMS PeopleBook.

If you select a non-U.S. **Country** code after you've already selected a **State** code, the system will clear the value in the **State** field.

Select the **Minority Institution** check box if the selected school is designated a minority institution. The system only displays the **Minority Institution** check box if you are a United States Federal user.

Major Table Setup Page

Usage	Use the Major Table to include areas of study most commonly associated with school degrees or certificates.
Object Name	MAJOR_TABLE
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, Major Table, Major Table** • **Develop Workforce, Administer Training (USF), Setup, Instructional Program, Major Table** • **Develop Workforce, Manage Competencies (GBL), Setup, Major Table, Major Table** • **Develop Workforce, Manage Competencies (USF), Setup, Instructional Program, Major Table** • **Develop Workforce, Recruit Workforce (GBL), Setup, Major Table, Major Table** • **Develop Workforce, Recruit Workforce (USF), Setup, Instructional Program, Major Table** • **Administer Workforce, Track Global Assignments (GBL), Setup, Major Table, Major Table** • **Administer Workforce, Track Global Assignments (USF), Setup, Instructional Program, Major Table**
Prerequisites	None.
Access Requirements	Enter a major code.

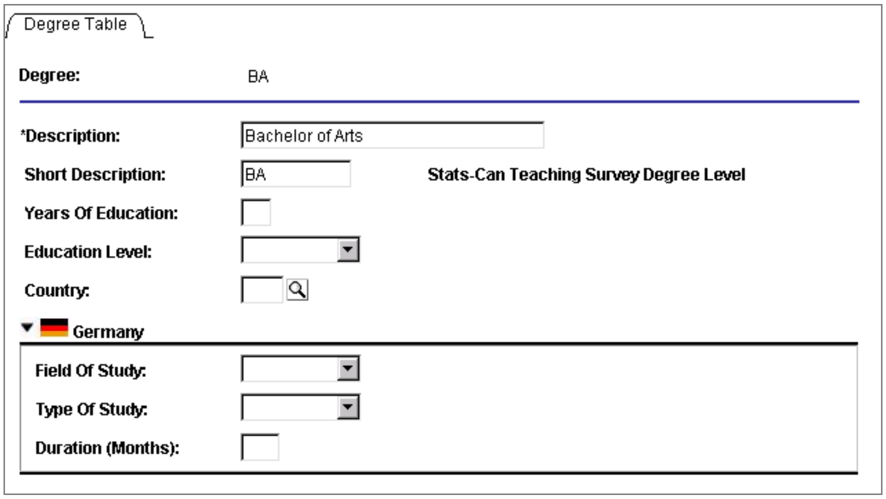


Major Table setup page

Enter a long **Description** and a **Short Description** of the major.

Degree Table Setup Page

Usage	Use the Degree Table to define degree types and the years of study associated with them. You'll use the values you enter in this table to track information about employee qualifications in the Education pages.
Object Name	DEGREE_TABLE_GBL
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, Degree Table, Degree Table** • **Develop Workforce, Administer Training (USF), Setup, Degree Table, Degree Table** • **Develop Workforce, Manage Competencies (GBL), Setup, Degree Table, Degree Table** • **Develop Workforce, Manage Competencies (USF), Setup, Degree Table, Degree Table**
Prerequisites	None.
Access Requirements	Enter a degree code.



Degree Table setup page

Description	Enter a long description of the degree.
Short Description	Enter a short description of the degree.
StatsCan Teaching Survey Degree Level (Statistics Canada Teaching Survey Degree Level)	For degree type accomplishments, select the corresponding **StatsCan Teaching Survey Degree Level** from the list of available options. The data in this field will be used on the Canada Academic Teaching Surveys. This field is intended for Canadian higher education degree granting institutions only.
Years of Education	Enter the number of years required to obtain the degree.
Education Level	Specify the **Education Level** achieved when the degree is earned. The codes classifying the **Education Level** types are available in the Translate Table.
Country	Indicate the **Country** where the degree is earned.

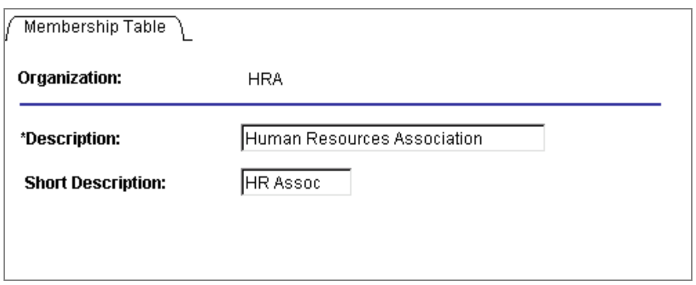
Germany

Field of Study	Select the field of study from the drop-down list. The valid options are: ***Commercial***, ***Industrial***, and ***Technical***.
Type of Study	Select the area of study from the drop-down list.
Duration	Enter the duration of the course in months.

Membership Table Setup Page

Usage	Use the Membership Table setup page to define codes for professional organizations, special clubs, or other associations that members of

	organization belong to. You'll want to track this information, particularly if it is relevant to position or project requirements.
Object Name	MEMBERSHIP_TABLE
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, Membership Table, Membership Table** • **Develop Workforce, Administer Training (USF), Setup, Membership Table, Membership Table** • **Develop Workforce, Manage Competencies (GBL), Setup, Membership Table, Membership Table** • **Develop Workforce, Manage Competencies (USF), Setup, Membership Table, Membership Table** • **Develop Workforce, Recruit Workforce (GBL), Setup, Membership Table, Membership Table** • **Develop Workforce, Recruit Workforce (USF), Setup, Membership Table, Membership Table**
Prerequisites	None.
Access Requirements	Enter an organization code.



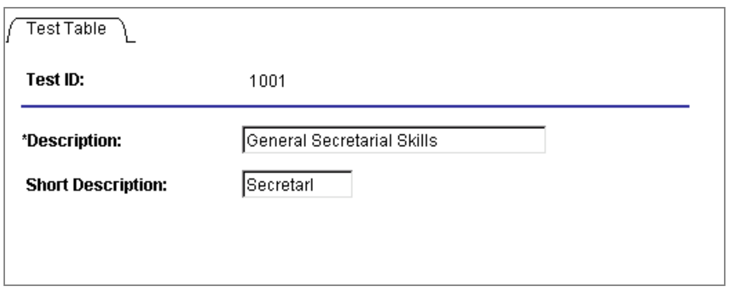
Membership Table setup page

Enter a **Description** and a **Short Description** for the organization.

Test Table Setup Page

Usage	Use the Test Table to create codes for standard tests, such as typing, programming aptitude, or mathematical tests, that you administer to job applicants or employees applying for positions within your organization.
Object Name	TEST_TABLE
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, Test Table, Test Table** • **Develop Workforce, Administer Training (USF), Setup, Test Table, Test Table**

	• **Develop Workforce, Manage Competencies (GBL), Setup, Test Table, Test Table** • **Develop Workforce, Manage Competencies (USF), Setup, Test Table, Test Table** • **Develop Workforce, Recruit Workforce (GBL), Setup, Test Table, Test Table** • **Develop Workforce, Recruit Workforce (USF), Setup, Test Table, Test Table**
Prerequisites	None.
Access Requirements	Enter a test code.



Test Table setup page
Enter a long **Description** and a **Short Description** of the test.

Setting Up an Optional Competency Tree

In the Manage Competencies Business Process, you can use the Competency Tree as a pictorial representation of the Competency Table.

Using the Competency Tree, you can organize your competencies into hierarchies based on Competency Types using. You organize your defined competency types into a meaningful hierarchy and reference specific competencies based on the hierarchy. This organization method can be helpful if you are working with and maintaining many competencies, or if your competencies are easily organized into definable hierarchies.

Building a Competency Tree works the same way as building a Department Tree or any other Tree using the PeopleTools Tree Manager. When building a department tree, you enter departments and the Tree Manager defines their relative hierarchical organization. The same is true when you build a Competency Tree: you enter Competency Types and the Tree Manager defines their relative hierarchical organization.

For more information about using the Tree Manager to create trees in PeopleSoft applications, see Using Tree Manager. You may also want to refer to Building and Modifying Security Trees.

Using a Competency Tree gives you extra flexibility to manage and maintain competencies. You can design your Competency Tree to be as shallow or as deep as you want, or you can choose not to use a tree at all. The Competency Tree does not require that you order Competency Codes into any special sequence. In other words, you don't need to set up your management level competencies in the range of 100 to 199, or your technical competencies in the range of 200 to 299.

You can build as many Competency Trees as you need. You can define only one Competency Tree for your organization, or you can maintain many competency trees, depending on your organization's number of competencies and competency management requirements.

Using a Competency Tree

To use the Competency Tree to organize and maintain your company's competencies, select **Go, PeopleTools, Tree Manager,** and then open the Competency Tree.

You can organize competencies under Competency Types, such as ***ADMIN, EXPER, MGMT,*** and ***TECH***. However, you can also maintain Competency Types within other Competency Types when they are related. The tree is flexible, and you can define competency trees to be as shallow or deep as you need.

To see the competencies in a Competency Type, use the dynamic detail feature of the Tree Manager. Dynamic Details are represented by the [ ] nodes in the tree. Select the [ ] node under a Competency Type, and the system displays a list of the competencies maintained under that Competency Type.

Select a Competency to see the Competency Table detail. You can make any changes or updates to the **Competency** as necessary. Any changes that you make here will update the Competency Table.

To see details about any Competency Type, double-click the Competency Type Node and the Competency Type Table is displayed.

For more information about creating, modifying, and using trees, see Using Tree Manager.

CHAPTER 2

Assigning Competencies and Accomplishments to Roles

Once you've set up your organization's competency and accomplishment codes, you can start to assign competencies, accomplishments, and competency clusters to positions and jobs, or roles, within your organization.

You will assemble competency and accomplishment profiles for roles in order to establish the proficiency you require for each employee and potential employee. The competency and accomplishment profiles that you create are key components for performing gap and match analyses that you use for planning your employee's career and training needs, and for filling positions and team assignments.

The following are some of the basic elements found in Manage Competencies:

Role	The term *role* is an umbrella term for a Position, a Job Family, a Job Code, or a Job Task.
Position	A Position is uniquely identified by a position number.
Job Family	A Job Family is identified by a Job Family code.
Job Code	A Job Code is identified by the setID and the Job Code.
Job Task	A job task is identified by the setID and Job Task.

During some of the gap analysis and matching, rather than compare an employee to an individual Job Code, often you are required to compare an employee to a Job Code within a business unit. On most of these analysis and matching pages, a Job Code and Job Task will be identified by a corresponding business unit. However, this is not applicable to Positions and Job Families.

Overview of Clusters

Before you begin assigning competencies and accomplishments to roles within your organization, you need to consider whether it makes sense to set up clusters to profile roles. A cluster is a group of competencies and accomplishments that you assemble. By assigning the cluster to a position or project, you automatically assign all of the individual competencies and accomplishments to that project or position.

For example, you may establish a cluster called Technical Professionals for a group and then assign competencies and accomplishments required for a network administrator position. You can create another cluster called HR Clerks and assign to this group the competencies and accomplishments required to fill these kinds of positions in your organization. For example, you may associate an HR role with Negotiator, Facilitator and Technical clusters.

You can combine clusters with individual competencies and accomplishments. For example, you can create a management cluster that you assign to all management roles and then assign individual competencies and accomplishments to create a profile for a particular management position.

While every organization has its own unique requirements and reasons for using clusters or individual competencies and accomplishments, the following section discusses some of the more common scenarios.

Positions Sharing Common Competencies

Individual competencies can be assigned to roles; however, there may be some jobs, positions, or projects in your organization that share a grouping of competencies. For instance, all the middle level management positions in the accounting and finance department in your organization might require a group of the same competencies at the same proficiency and importance levels. These competencies may be leadership, motivation, planning, communication, and so forth.

In this case, even though individual roles would have competencies that may not be shared with other groups, they still may have some competencies in common. It is much easier to assign a cluster with these shared competencies to the role or the group, rather than assigning the competencies individually.

Team-Based Environments

Another reason to use competency clusters stems from organizations that break down projects into group tasks. This method for managing competencies had its original use in assembly-line environments where each team was responsible for producing a product that required a number of technical skills, as well as other competencies.

If your organization has this type of team-based environment, you need to ensure that team members are cross-trained in all required functions and periodically improving their skills. In this case, the team breaks down their deliverable tasks to mini-projects that require certain skills and competencies. During a defined period determined by the group, the team members are assigned to perform the tasks of each cluster. For example, team members responsible for creating car doors may rotate from a two-month period on the welding mini-team before moving to the window insertion team for the next two months.

Skill-Based Pay Environments

In skill-based pay environments such as medical outpatient clinics, individuals may be required to demonstrate proficiency in and perform a subset of the total task clusters assigned to their job. For example, operating room nurses need to be certified and licensed and have the competencies to perform their job. However, some operating room nurses may also choose customer service as another cluster for which they want certification. That skill may include being able to retrieve someone's account on the PC, use the phone system, and so forth. In such situations, workers move from a specialist only status to a more general status, even though they still have the competencies required for the specialty. Also, in these environments, overall tasks are broken down into clusters; therefore, the individuals usually have to be certified in a subset of the required clusters.

Setting Up Clusters

Use the Cluster Table to create clusters for your organization. The Cluster Table has two pages: Cluster Competencies, for assigning competencies to the cluster and Cluster Accomplishments, for assigning accomplishments to the cluster.

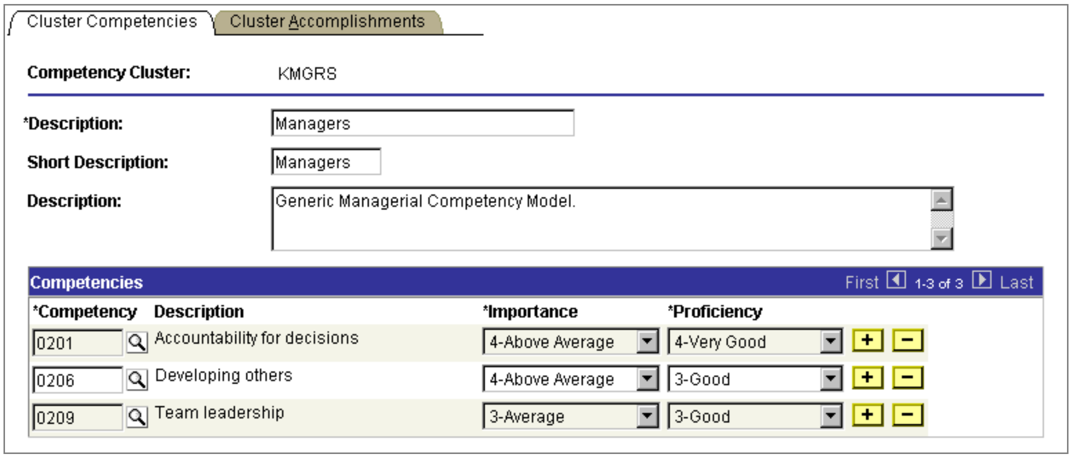
Enterprise Integration Points (EIP) Related to Cluster Table Records

When you add, delete, or change information in the Cluster Table records, the system automatically publishes the Competency Cluster and Accomplishment Cluster EIP messages to any other PeopleSoft or third party application that subscribes to those messages. These messages supply the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes these messages regardless of which component or page is the source of the update to the Cluster Table records.

For more information regarding the subscribers and technical details of the Competency Cluster and Accomplishment Cluster EIPs, see either Competency Cluster or Accomplishment Cluster in the EIP Catalog. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration.

Cluster Table - Cluster Competencies Page

Usage	Use the Cluster Competencies setup page to define the competencies included in a selected cluster.
Object Name	CM_CLST_COMP_TABLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Cluster Table, Cluster Competencies** • **Develop Workforce, Manage Competencies (USF), Setup, Cluster Table, Cluster Competencies**
Prerequisites	Before you can define a cluster, you must set up the competencies for the cluster. Define competencies on the Competency Table Setup Page.
Access Requirements	Enter a Competency Cluster code.



Cluster Table - Cluster Competencies page

The system displays the **Competency Cluster** code you selected. This field is for information only.

Description	Enter a **Description** that briefly explains the use of the cluster. The **Description** you give the cluster appears wherever you refer to the cluster in the Manage Competencies business process.
Short Description	Enter a **Short Description** for the cluster.
Description	Enter a full **Description** of the cluster in the scrolled region.

Competencies

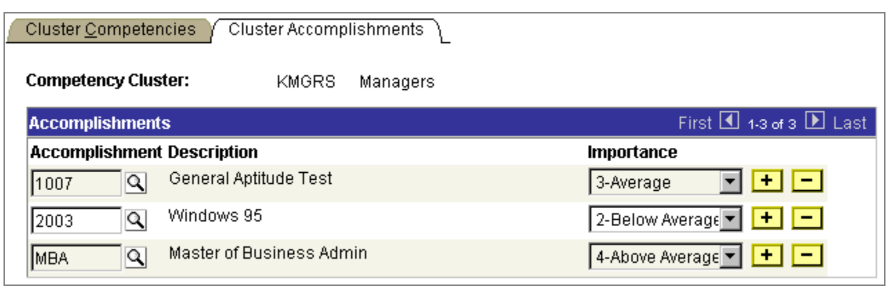
Competency	Select a **Competency** from the list of valid values. The competencies in the list come from the Competency Codes that you defined on the Competency Table Setup Page. Insert as many rows as necessary to add further competencies to the cluster.
Description	When you move out of the **Competency** field, the system defaults the competency **Description** from the Competency Table and makes this field unavailable for entry.
Importance	Select an **Importance** level that indicates how important this competency is in relation to the other competencies within the cluster. The system defaults to an ***Average*** **Importance** level.

Proficiency

Select the rating required for this competency from the list of valid values. Ratings are a measure of the level of expertise in a competency. Define rating models on the Rating Model Table Setup Page and assign rating models to competencies using the Competency Table Setup Page.

Cluster Table - Cluster Accomplishments Page

Usage	Use the Cluster Accomplishments setup page to define the accomplishments included in a selected cluster.
Object Name	CM_CLST_ACMP_TABLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Cluster Table, Cluster Accomplishments** • **Develop Workforce, Manage Competencies (USF), Setup, Cluster Table, Cluster Accomplishments**
Prerequisites	Before you assign accomplishments, you must set up your accomplishments. For more information about setting up accomplishments, see “Setting Up Competencies and Accomplishments”.
Access Requirements	Enter a Competency Cluster code.



Cluster Table - Cluster Accomplishments page

The system displays the **Competency Cluster** code you selected. This field is for information only.

Accomplishments

Accomplishment	Select an **Accomplishment** from the list of valid accomplishments. These accomplishments are stored on the Accomplishments table.
Importance	Select an **Importance** level that indicates how important this **Accomplishment** is in relation to the other accomplishments within the cluster. The system defaults to an ***Average*** **Importance** level.

Setting Up Job Families

Just as you can group together competencies into competency clusters, you can also group individual jobs or positions together within your organization to make it easier to manage competencies. If you want to assign a competency or a competency cluster to similar jobs, or if the jobs are grouped together in a job family, assigning competencies becomes a one-step process.

For example, you might group a trust analyst and an operations analyst into a Job Family called *Analyst*. You use the Job Families that you establish here when you group Job Codes together on the Job Code Table. You also use these Job Families when you assign competencies to broader job categories.

Enterprise Integration Points (EIP) Related To Job Family Records

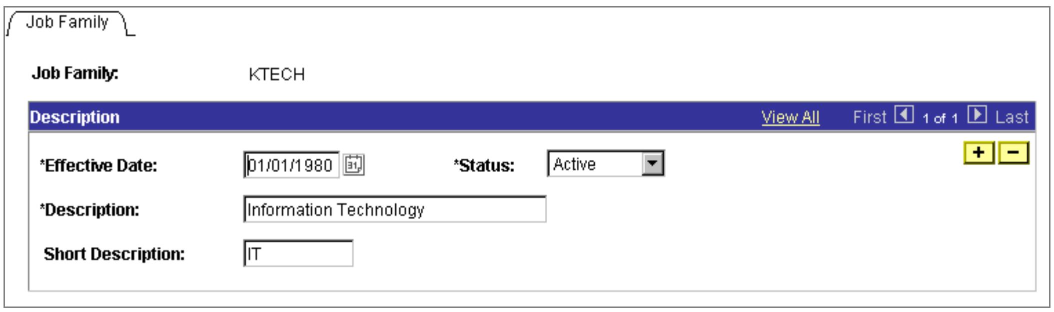
When you add, delete, or change information in the Job Family records, the system automatically publishes the Job Family EIP messages to any other PeopleSoft or third party application that subscribes to those messages. These messages supply the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes these messages regardless of which component or page is the source of the update to the Cluster Table records.

For more information regarding the subscribers and technical details of the Job Family EIPs, see Job Family in the EIP Catalog. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration.

Job Family Page

Usage	Use the Job Family page to group jobs or positions together into a job family. This makes it easier for you to assign a competency or

	competency cluster to a set of similar jobs within your organization.
Object Name	JOB_FAMILY_TABLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Job Family Table, Job Family** • **Develop Workforce, Manage Competencies (USF), Setup, Job Family Table, Job Family**
Prerequisites	None.
Access Requirements	Enter or add a Job Family code.



Job Family page

Enter an **Effective Date** for this **Job Family** and indicate its **Status** as ***Active*** or ***Inactive.*** Only Job Families with an ***Active*** status display when you prompt the system for Job Families.

Important! The Job Family Effective Date needs to be effective as of the relevant Job Codes Effective Dates.

Enter a **Description** and a **Short Description** for this **Job Family.** The system displays these descriptions wherever you refer to this **Job Family** in your PeopleSoft Human Resources system.

Assigning Clusters to Roles

Once you've established competencies, accomplishments, and clusters, you are ready to assign these competencies and accomplishments to roles within your organization. You can assign any combination of clusters and individual competencies and accomplishments. Use the Role Cluster component to assign clusters to a role and rank the relative importance of each cluster.

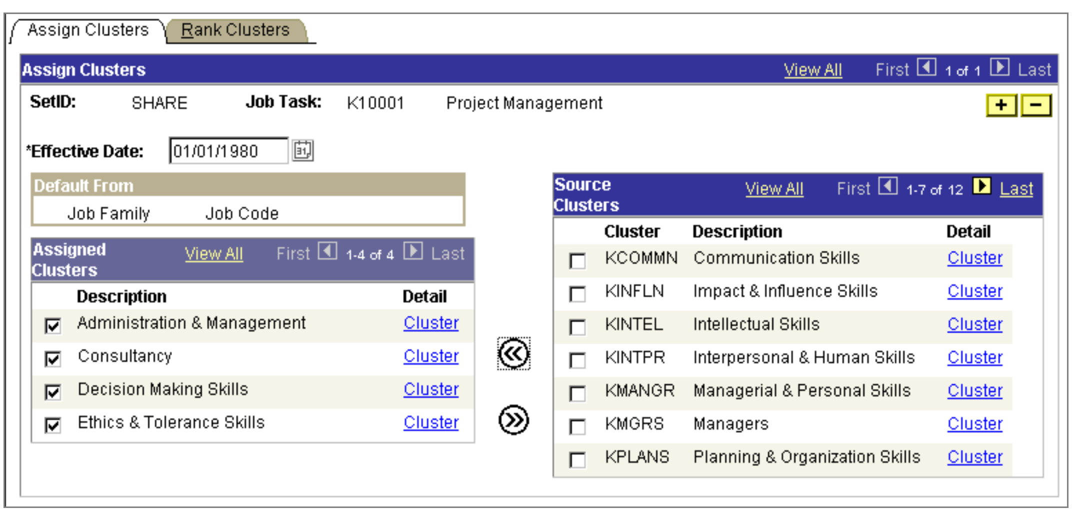
Enterprise Integration Points (EIP) Related To Role Cluster Records

When you add, delete, or change information in the Role Cluster records, the system automatically publishes the Role Cluster, Role Competencies, and Role Competency/Accomplishment EIP messages to any other PeopleSoft or third party application that subscribes to those messages. These messages supply the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes these messages regardless of which component or page is the source of the update to the Role Cluster records.

For more information regarding the subscribers and technical details of the Role Cluster, Role Competencies, and Role Competency/Accomplishment EIPs, see the Role Cluster, Role Competencies, Role Competency/Accomplishment sections of the EIP Catalog. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration.

Role Cluster - Assign Cluster Page

Usage	Use the Assign Clusters page to assign clusters to a selected role.
Object Name	CM_ROLE_CLST_ASGN
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Role Cluster, Assign Clusters** • **Develop Workforce, Manage Competencies (USF), Use, Role Cluster, Assign Clusters** • **Develop Workforce, Plan Successions (GBL), Use, Position Cluster, Assign Clusters**
Prerequisites	Before you can assign clusters to a role, you must set up the clusters in the Cluster Table.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role Cluster - Assign Cluster page

The system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected. These fields are for information only.

Effective Date	Enter an **Effective Date** for the cluster assignment for the selected role.

Default From

Click **Job Family** or **Job Code** to populate the role clusters automatically:

Job Family	Click **Job Family** to display a list of the default clusters assigned to the **Job Family.** The system makes this button available if you selected a position or a **Job Code.** If you selected a **Job Family** or **Job Task,** the system makes the button unavailable.
Job Code	Click **Job Code** to display a list of the default clusters assigned to the **Job Code.** The system makes this button available if you selected a position. If you selected a **Job Family, Job Task,** or **Job Code,** the system makes the button unavailable.

Assigned Clusters

The **Assigned Clusters** group box lists the clusters assigned to the selected role.

To add more clusters to the role, select them in **Source Clusters** and click the **Add** button. To remove clusters from the role, select the check box next to the clusters and click the **Delete** button.

Cluster	Click **Cluster** to display the Cluster Detail page where you can view a list of the competencies and accomplishments assigned to the cluster.
Descr (description)	The system displays the description of the cluster. This is for information only.

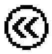
Source Clusters

The **Source Clusters** group box lists the clusters on the Cluster Table that are *not* assigned to the role.

Cluster	Click the **Cluster** link to display the Cluster Detail page where you can view a list of the competencies and accomplishments assigned to the cluster.
Descr (description)	The system displays the **Description** of the cluster. This is for information only.

Adding and Removing Clusters

Use these buttons to assign clusters to the role (those listed in the **Assigned Clusters** group box) and remove assigned clusters.

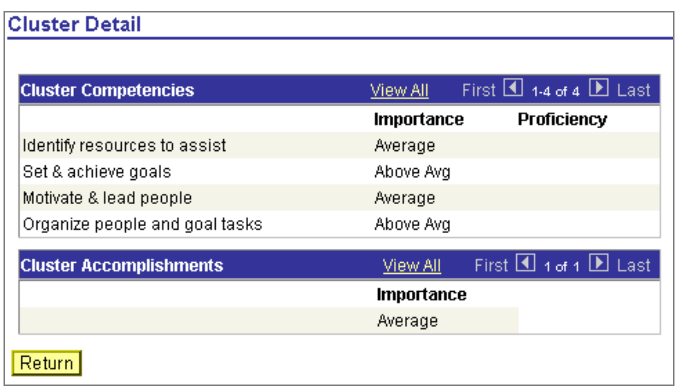


Click the **Add** button to assign clusters to the role. Any clusters you have selected in **Source Clusters** are moved to **Assigned Clusters.**

Click the **Delete** button to remove clusters from the role. Any clusters you have selected in **Assigned Clusters** are moved back to **Source Clusters.**

Cluster Detail Page

Usage	Use the Cluster Detail page to view the details of a cluster. The page shows the competencies and accomplishments assigned to the cluster and the relative importance of each one. For competencies, you can also see the proficiency level required.
Object Name	CM_CLUSTER_SEC
Navigation	To access the Cluster Detail page, click **Cluster** on the Assign Clusters page.



Cluster Detail page

Cluster Competencies

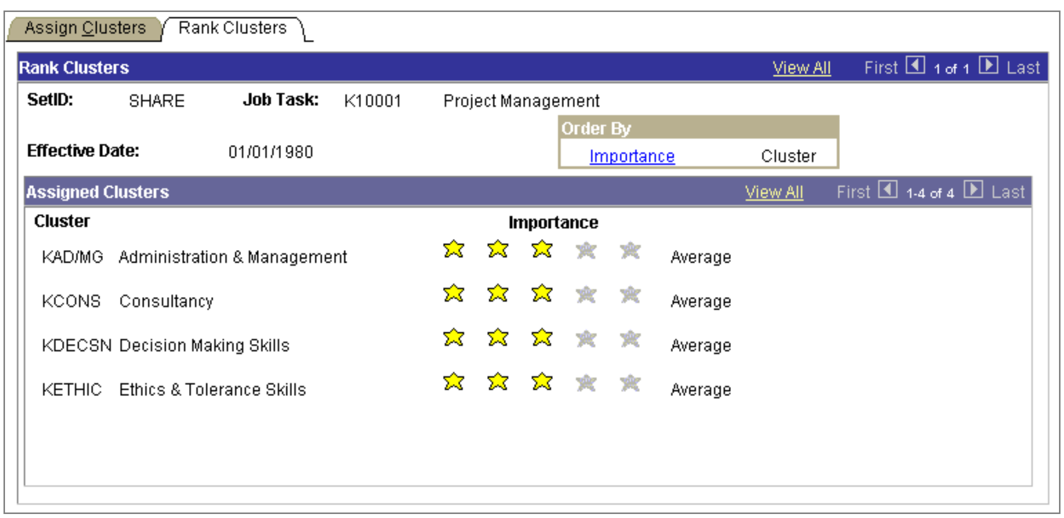
The **Cluster Competencies** group box lists the competencies in the cluster. The system defaults the following data from the Cluster Table - Cluster Competencies Page competency description, **Importance,** and **Proficiency.** These fields are for information only.

Cluster Accomplishments

The **Cluster Accomplishments** group box lists the accomplishments in the cluster. The system defaults the following data from the Cluster Table - Cluster Accomplishments Page: accomplishment description and **Importance.** These fields are for information only.

Role Cluster - Rank Cluster Page

Usage	Use the Rank Cluster page to allocate an importance level to each cluster assigned to a selected role.
Object Name	CM_ROLE_CLST_IMP
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Role Cluster, Rank Clusters** • **Develop Workforce, Manage Competencies (USF), Use, Role Cluster, Rank Clusters** • **Develop Workforce, Plan Successions (GBL), Use, Position Cluster, Rank Clusters**
Prerequisites	You must assign clusters to the selected role using the Assign Cluster page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role Cluster - Rank Cluster page

The system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected and the **Effective Date.** These fields are for information only.

Order By

Use these links to reorder the cluster list.

Importance Click **Importance** to list the clusters in order of importance, from highest importance level to lowest.

Cluster Click **Cluster** to list the clusters in alphabetical order.

Assigned Clusters

Cluster The system lists the clusters you assigned to the role on the Role Cluster - Assign Cluster Page. The system displays the cluster code and the cluster name.

Importance Click one of five importance buttons to assign an **Importance** level to a cluster. The **Importance** level shows how important the cluster is for the selected role. **Importance** is represented by stars, with one star indicating an importance of ***Low*** and five stars indicating an importance of ***High.***

Importance increases as you move from left to right, starting with the **Low** button (the left most button) to assign an importance of ***Low,*** across to the **High** button (the right most button) to assign an importance of ***High.***

Assigning Competencies to Roles

Use the Role Competency pages to assign competencies to a role:

Role Competency - Assign Competencies Page. Use this page to assign individual competencies to a role.

Role Competency - Rank Competencies Page. Use this page to rank the relative importance of each competency for the selected role.

Role Competency - Rate Competencies Page. Use this page to define the level of expertise (rating) required for each competency.

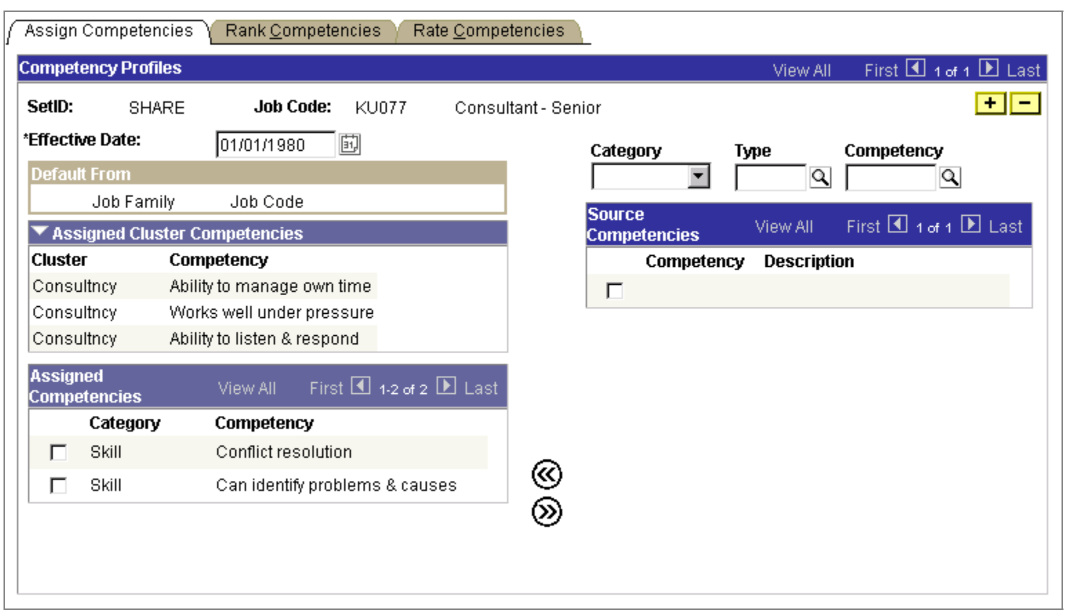
Enterprise Integration Points (EIP) Related To Role Competency Records

When you add, delete, or change information in the Role Cluster records, the system automatically publishes the Role Cluster and Role Competencies EIP messages to any other PeopleSoft or third party application that subscribes to those messages. These messages supply the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes these messages regardless of which component or page is the source of the update to the Role Cluster and Role Competency records.

For more information regarding the subscribers and technical details of the Role Cluster and Role Competencies EIPs, see the Role Cluster and Role Competencies sections of the EIP Catalog. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration.

Role Competency - Assign Competencies Page

Usage	Use the Assign Competencies page to assign individual competencies to a selected role.
Object Name	CM_ROLE_COMP_ASGN
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Role Competency, Assign Competencies** • **Develop Workforce, Manage Competencies (USF), Use, Role Competency, Assign Competencies** • **Develop Workforce, Plan Successions (GBL), Use, Position Competency, Assign Competencies**
Prerequisites	Before you can assign competencies, you must set up your Competency Codes on the Competency Table Setup Page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role Competency - Assign Competencies page

The system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected. These fields are for information only.

Effective Date	Enter an **Effective Date** for the competency assignment for the selected role.

Default From

Click **Job Family** or **Job Code** to populate the role competencies automatically:

Job Family	Click **Job Family** to display a list of the default competencies assigned to the Job Family. The system makes this button available if you selected a position or a **Job Code.** If you selected a **Job Family** or **Job Task,** the system makes the button unavailable.
Job Code	Click **Job Code** to display a list of the default competencies assigned to the **Job Code.** The system makes this button available if you selected a position. If you selected a **Job Family, Job Task,** or **Job Code,** the system makes the button unavailable.

Assigned Cluster Competencies

The **Assigned Cluster Competencies** group box lists the competencies that you assigned to the selected role as part of a cluster. These fields are for information only.

Cluster	The system displays the name of the **Cluster** that includes the competency.
Competency	The system displays the name of the **Competency** that is assigned to the role.

For more information about assigning clusters, see Assigning Clusters to Roles.

Assigned Competencies

The **Assigned Competencies** group box lists the competencies assigned to the selected role.

To add competencies to the role, select them in **Source Competencies** and click the **Add** button. To remove competencies, select the check box next to the competencies and click the **Delete** button.

Description	The system displays the **Description** of the competency assigned to the role. This field is for information only.

Searching for Competencies

To add new competencies to the role, search for competencies using a combination of **Category, Type,** or **Competency.** When you complete these fields, the system displays the matching competencies in **Source Competencies.**

Category

Select a **Category** from the available options to display a list of competencies in that category.

Type

Select a **Type** from the list of valid values to display a list of competencies of the selected type.

Competency

Select a **Competency** from the list of valid values or enter part of the Competency Code.

Source Competencies

The **Source Competencies** group box lists the competencies that matched the selections you made in the **Category, Type,** and **Competency** fields.

Competency

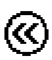
The system defaults the Competency Code from the Competency Table and makes this field unavailable for entry.

Description

The system defaults the competency **Description** from the Competency Table and makes this field unavailable for entry.

Adding and Removing Competencies

Use these buttons to assign competencies to the role (those listed in the **Assigned Competencies** group box) and remove assigned competencies.



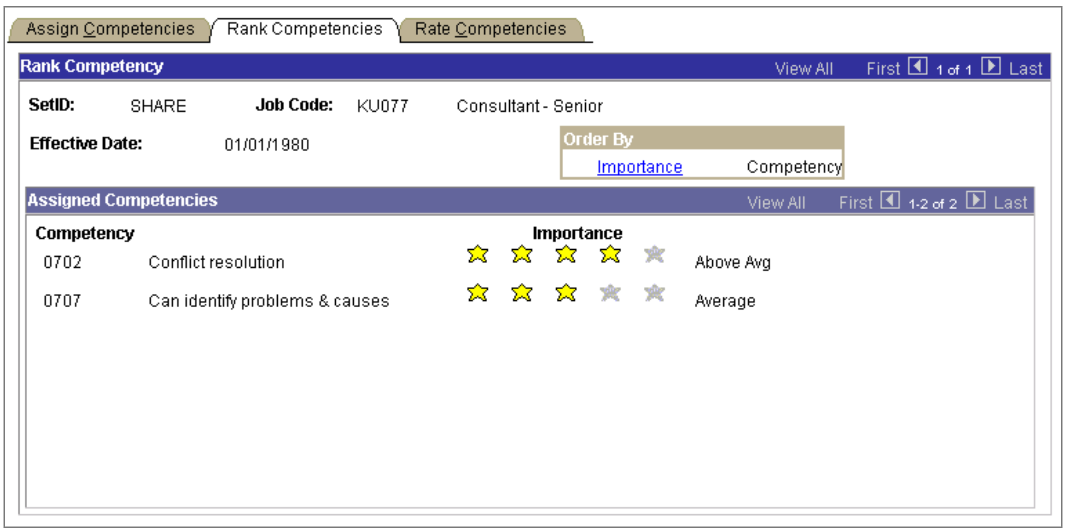
Click the **Add** button to assign competencies to the role. Any competencies you have selected in **Source Competencies** are moved to **Assigned Competencies.**

Click the **Delete** button to remove competencies from the role. Any competencies you have selected in **Assigned Competencies** are moved back to **Source Competencies.**

Role Competency - Rank Competencies Page

Usage	Use the Rank Competencies page to allocate an importance level to each competency assigned to a selected role.
Object Name	CM_ROLE_COMP_IMP

Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Role Competency, Rank Competencies** • **Develop Workforce, Manage Competencies (USF), Use, Role Competency, Rank Competencies** • **Develop Workforce, Plan Successions (GBL), Use, Position Competency, Rank Competencies**
Prerequisites	You must assign competencies to the selected role using the Assign Competencies page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role Competency - Rank Competencies page

The system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected and the **Effective Date.** These fields are for information only.

Order By

Use these to change the order in which competencies are listed.

Importance	Click **Importance** to list the competencies in order of importance, from highest importance level to lowest.
Competency	Click **Competency** to list the competencies in alphabetical order.

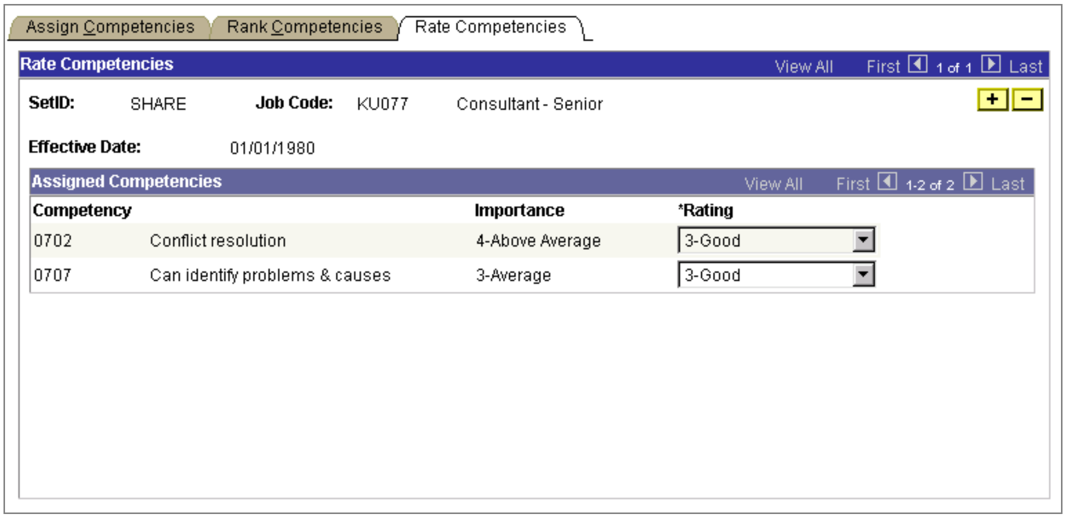
Assigned Competencies

In the **Assigned Competencies** group box, the system lists the competencies you assigned to the role on the Role Competency - Assign Competencies Page. Use the Cluster Competencies page to view the ranking of competencies that are assigned to the role as part of a cluster.

Competency	The system defaults the Competency Code and name from the Competency Table.
Importance	Click one of five importance buttons to assign an **Importance** level to a competency. The importance level shows how important the competency is for the selected role. **Importance** is represented by stars, with one star indicating an importance of ***Low,*** and five stars indicating an importance of ***High.*** **Importance** increases as you move from left to right, starting with the **Low** button (the left most button) to assign an Importance of ***Low,*** across to the **High** button (the right most button) to assign an importance of ***High.***

Role Competency - Rate Competencies Page

Usage	Use the Rate Competencies page to define the proficiency level required for each competency assigned to a selected role.
Object Name	CM_ROLE_COMP_PROF
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Role Competency, Rate Competencies** • **Develop Workforce, Manage Competencies (USF), Use, Role Competency, Rate Competencies** • **Develop Workforce, Plan Successions (GBL), Use, Position Competency, Rate Competencies**
Prerequisites	You must assign competencies to the selected role using the Assign Competencies page and assign importance levels using the Rank Competencies page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role Competency - Rate Competencies page

The system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected and the **Effective Date.** These fields are for information only.

Assigned Competencies

In the **Assigned Competencies** group box, the system lists the competencies you assigned to the role on the Role Competency - Assign Competencies Page. Use the Cluster Competencies page to view the rating of competencies that are assigned to the role as part of a cluster.

Competency
The system defaults the Competency Code and name from the Competency Table.

Importance
The system defaults the **Importance** from Role Competency - Rank Competencies Page.

Proficiency
Select a rating from the list of valid values. When you move out of the field, the system displays the description of that proficiency.

The proficiency levels vary according to the Rating Model used to measure the competency.

For more information about Rating Models, see "Setting Up Competencies and Accomplishments".

Assigning Accomplishments to Roles

Use the following pages to assign accomplishments to a role:

Role Accomplishment - Assign Accomplishments Page. Use this page to assign individual accomplishments to a role.

Role Accomplishment - Rank Accomplishments Page. Use this page to rank the relative importance of each accomplishment for the selected role.

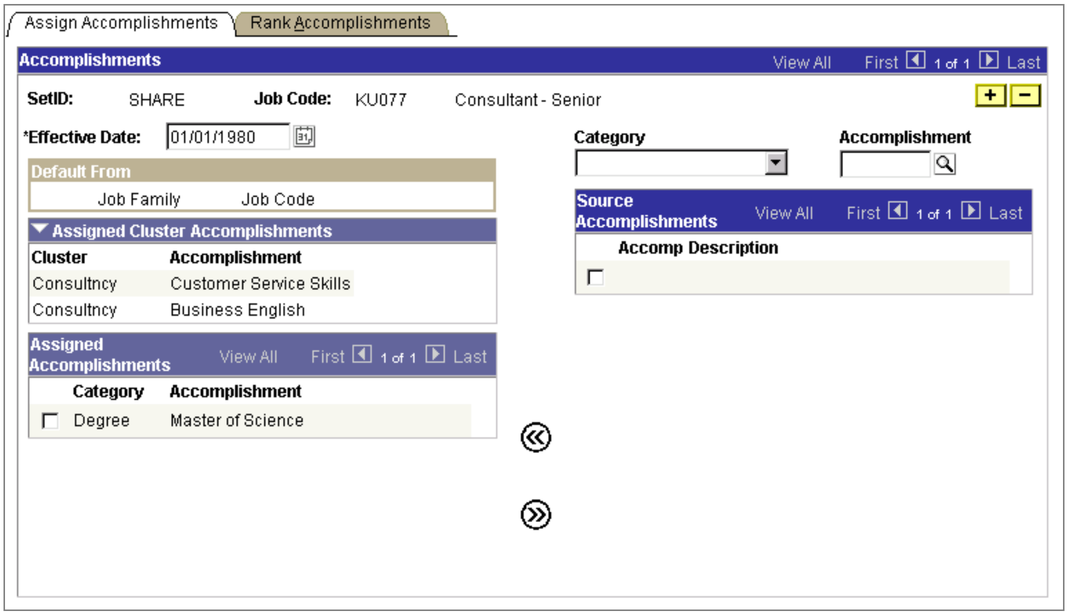
Enterprise Integration Points (EIP) Related To Role Accomplishment Records

When you add, delete, or change information in the Role Accomplishment records, the system automatically publishes the Role Accomplishments and Role Competency/Accomplishment EIP messages to any other PeopleSoft or third party application that subscribes to those messages. These messages supply the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes these messages regardless of which component or page is the source of the update to the Role Competency/Accomplishment records.

For more information regarding the subscribers and technical details of the Role Competency/Accomplishment EIPs, see Role Accomplishments and Role Competency/Accomplishment in the EIP Catalog. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration.

Role Accomplishment - Assign Accomplishments Page

Usage	Use the Assign Accomplishments page to assign individual accomplishments to a selected role, such as language skills, professional memberships, or licenses.
Object Name	CM_ROLE_ACMP_ASGN
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Role Accomplishment, Assign Accomplishments** • **Develop Workforce, Manage Competencies (USF), Use, Role Accomplishment, Assign Accomplishments** • **Develop Workforce, Plan Successions (GBL), Use, Position Accomplishment, Assign Accomplishments**
Prerequisites	Before you can assign accomplishment to a role, you must set up the accomplishment codes.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role Accomplishment - Assign Accomplishments page

The system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected. These fields are for information only.

Effective Date Enter an **Effective Date** for the accomplishment assignment for the selected role.

Default From

Click **Job Family** or **Job Code** to populate the role accomplishments automatically:

Job Family button Click **Job Family** to display a list of the default accomplishments assigned to the **Job Family.** The system makes this button available if you selected a position or a **Job Code.** If you selected a **Job Family** or **Job Task,** the system makes the button unavailable.

Job Code button Click **Job Code** to display a list of the default accomplishments assigned to the **Job Code.** The system makes this button available if you selected a position. If you selected a **Job Family, Job Task,** or **Job Code,** the system makes the button unavailable.

Assigned Cluster Accomplishments

The **Assigned Cluster Accomplishments** group box lists the accomplishments that you assigned to the selected role as part of a cluster. These fields are for information only.

Cluster The system displays the name of the **Cluster** that includes the accomplishment.

Accomplishment	The system displays the name of the **Accomplishment** that is assigned to the role.

For more information about assigning clusters, see Assigning Clusters to Roles.

Assigned Accomplishments

The **Assigned Accomplishments** group box lists the accomplishments assigned to the selected role.

To remove accomplishments, select the check box next to the accomplishments and click the **Delete** button. To add accomplishments to the role, select them in **Source Accomplishments** and click the **Add** button.

Category	The system displays the **Category** of the accomplishment assigned to the role. This field is for information only.
Description	The system displays the **Description** of the accomplishment assigned to the role. This field is for information only.

Searching for Accomplishments

To add new accomplishments to the role, search for accomplishments using a combination of **Category** or **Accomplishment.** When you complete these fields, the system displays the matching accomplishments in **Source Accomplishments.**

Category	Select a **Category** from the available options to display the accomplishments in the **Category.**
Accomplishment	Select an **Accomplishment** from the list of valid values or enter part of the accomplishment code.

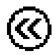
Source Accomplishments

The **Source Accomplishments** group box lists the accomplishments that matched the selections you made in the **Category** and **Accomplishment** fields.

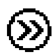
Accomp (accomplishment)	The system defaults the **Accomplishment** code from the relevant accomplishment table and makes this field unavailable for entry.
Description	The system defaults the accomplishment **Description** from the relevant accomplishment table and makes this field unavailable for entry.

Adding and Removing Accomplishments

Use these buttons to assign accomplishments to the role (those listed in the **Assigned Accomplishments** group box) and remove assigned accomplishments.



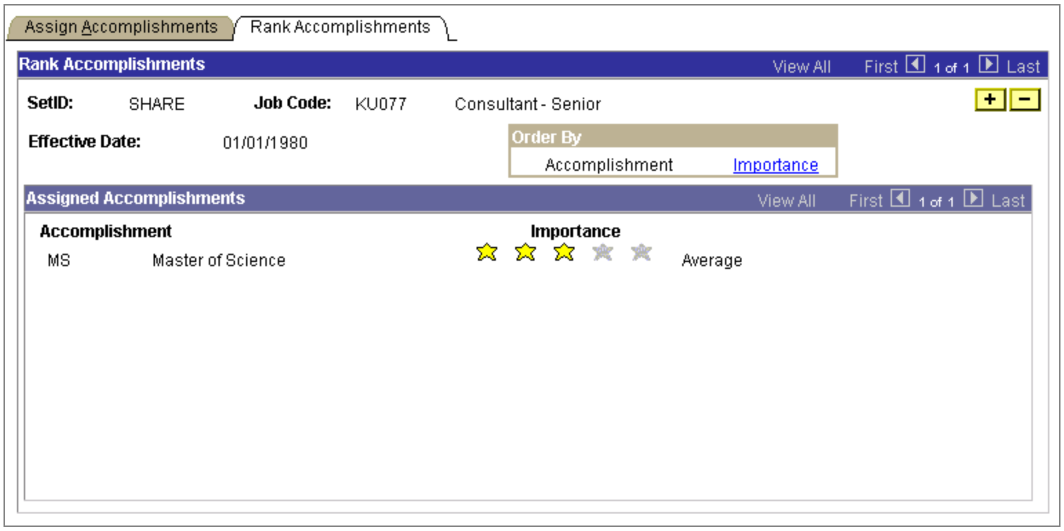
Click the **Add** button to assign accomplishments to the role. Any accomplishments you have selected in **Source Accomplishments** are moved to **Assigned Accomplishments.**



Click the **Delete** button to remove accomplishments from the role. Any accomplishments you have selected in **Assigned Accomplishments** are moved back to **Source Accomplishments.**

Role Accomplishment - Rank Accomplishments Page

Usage	Use the Rank Accomplishments page to allocate an importance level to each accomplishment assigned to a selected role.
Object Name	CM_ROLE_ACMP_IMP
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Role Accomplishment, Rank Accomplishments** • **Develop Workforce, Manage Competencies (USF), Use, Role Accomplishment, Rank Accomplishments** • **Develop Workforce, Plan Successions (GBL), Use, Position Accomplishment, Rank Accomplishments**
Prerequisites	You must assign accomplishments to the selected role using the Assign Accomplishments page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role Accomplishment - Rank Accomplishments page

The system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected and the **Effective Date.** These fields are for information only.

Order By

Use these to change the order in which accomplishments are listed.

Importance	Click **Importance** to list the accomplishments in order of importance, from highest importance level to lowest.
Accomplishment	Click **Accomplishment** to list the accomplishments in alphabetical order.

Assigned Accomplishments

In the **Assigned Accomplishments** group box, the system lists the accomplishments you assigned to the role on the Role Accomplishment - Assign Accomplishments Page. Use the Cluster Accomplishments page to view the ranking of accomplishments that are assigned to the role as a part of a cluster.

Accomplishment	The system defaults the **Accomplishment** code and name from the Accomplishment Table.

Importance

Click one of five importance buttons to assign an **Importance** level to a cluster. The **Importance** level shows how important the cluster is for the selected role. **Importance** is represented by stars, with one star indicating an importance of ***Low*** and five stars indicating an importance of ***High.***

Importance increases as you move from left to right, starting with the **Low** button (the left most button) to assign an Importance of ***Low,*** across to the **High** button (the right most button) to assign an importance of ***High.***

CHAPTER 3

Tracking Worker Competencies and Accomplishments

In every organization, workers have a rich variety of backgrounds, competencies, and accomplishments. You can use this information to maximize your organization's resources and to help your workers realize their full career potential.

You can also compare your workers' competencies and accomplishments to your organization's project and team planning needs, so that you have the right people in the right places in your enterprise, in order to keep up with ever-evolving business needs. This section explains how you can record competency information for your workforce.

Overview of Tracking Worker Competencies and Accomplishments

In PeopleSoft Human Resources, you can maintain information on the competencies and accomplishments of employees, non-employees, and applicants. You can use this information to help your workers make decisions on their professional development, or you can determine who in the company possesses particular experiences or specific knowledge that might qualify them for other projects and positions. For applicants, you can determine if they have the necessary credentials to be considered for a job.

When you enter competencies and accomplishments information in the Recruit Workforce pages for job applicants, the data will automatically become part of the person's employee record when you hire an applicant.

Once you enter this information for applicants or employees, you can search PeopleSoft Human Resources for those individuals who possess certain skills or credentials. For example, if your company is planning to expand to the Pacific Rim, you may want to find out which employees or applicants speak an Asian language, such as Japanese or Chinese.

For more information about tracking applicant competencies and accomplishments, see Managing Applicants.

Enterprise Integration Points Related to Competencies

When you add, delete, or change information in the Competency records, the system automatically publishes the Competency EIP message to any other PeopleSoft or third party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to Person Competency, Person Education, Rating Description, or School Table records.

For more information regarding the subscribers and technical details of Person Competency, Person Education, Rating Description, and School Table EIPs, see Person Competency, Person Education, Rating Description, and School Table in the EIP Catalog. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Resource Integration in Human Resources. For more information about enterprise integration points, see Enterprise Integration PeopleBook.

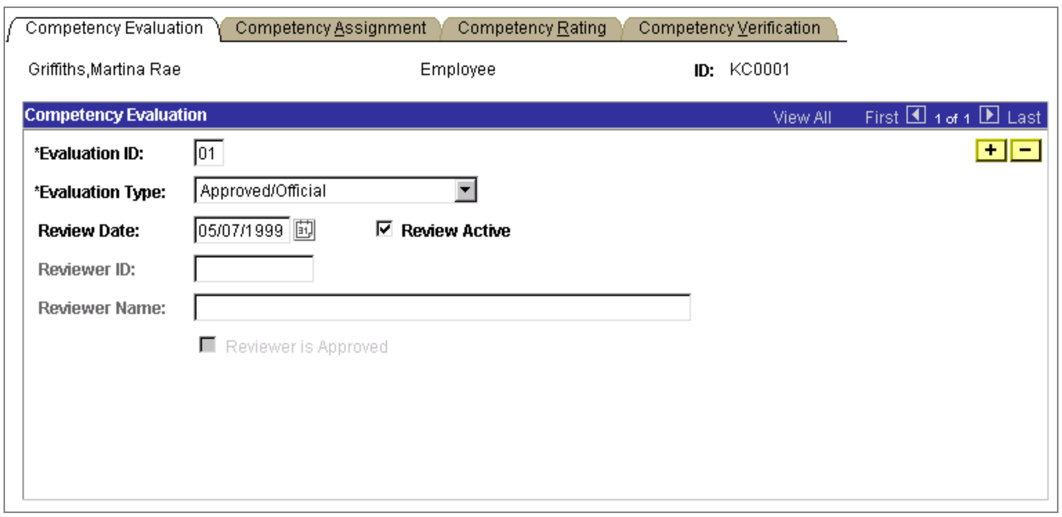
Entering Employee Competencies

Use the Competencies pages to enter information on the competencies in which workers are proficient, particularly those pertinent to their jobs or to your industry. The types of competencies you enter might range anywhere from knowing a computer language to pipe fitting.

Competencies - Competency Evaluation Page

Usage	Use the Competency Evaluation page to establish Evaluation IDs and then assign competencies to the worker based on these Evaluation IDs. You can use the evaluations entered on this page for match analysis reference. Use this page to track 360 Degree Feedback if your organization uses this evaluation method. In 360 Degree Feedback, several people evaluate a worker on the competencies specified by their particular role in your organization.
Object Name	CM_COMPETENCY_EVL1
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Evaluation** • **Develop Workforce, Administer Training (USF), Use, Competencies, Competency Evaluation** • **Develop Workforce, Manage Competencies (GBL), Use, Competencies, Competency Evaluation** • **Develop Workforce, Manage Competencies (USF), Use, Competencies, Competency Evaluation** • **Develop Workforce, Plan Careers, Use, Competencies, Competency Evaluation** • **Develop Workforce, Plan Successions (GBL), Use, Competencies,**

	Competency Evaluation • **Develop Workforce, Plan Successions (USF), Use, Competencies, Competency Evaluation** • **Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Evaluation** • **Administer Workforce, Track Global Assignments (USF), Use, Competencies, Competency Evaluation**
Prerequisites	None
Access Requirements	Enter an Employee ID.



Competencies - Competency Evaluation page

The system displays the employee's name and the employee ID you selected. These fields are for information only.

Competency Evaluation

Evaluation ID

You can enter an **Evaluation ID** manually or the system will assign one for you. The system assigns **Evaluation IDs** in sequence.

When you add a new **Evaluation ID,** the system automatically assigns the next number in the sequence. If you want to override it, you can do so. We recommend that you either consistently assign them manually or that you consistently have the system assign them.

Note. If you use Manage Competencies to administer National Vocational Qualifications (NVQs) for your employees in the United Kingdom, the system generates an NVQ evaluation when you enroll an employee and updates the evaluation on completion of NVQ units. NVQ administration is explained in Managing Local Functionality for the UK.

Evaluation Type

Select the **Evaluation Type** from the following options:

Approved/Official

Customer

Executive Committee

Mentor

Peer

Self

Subordinate

Supervisor/Manager

If you want a manager to review your competency evaluations, use ***Approved*** to indicate approved or official competencies that are assigned to a worker.

Note. If you are not using 360 Degree Feedback or will not have multiple evaluations of a person, use the ***Approved*** Evaluation Type. Remember that there can be only one ***Approved*** Evaluation Type.

Review Date

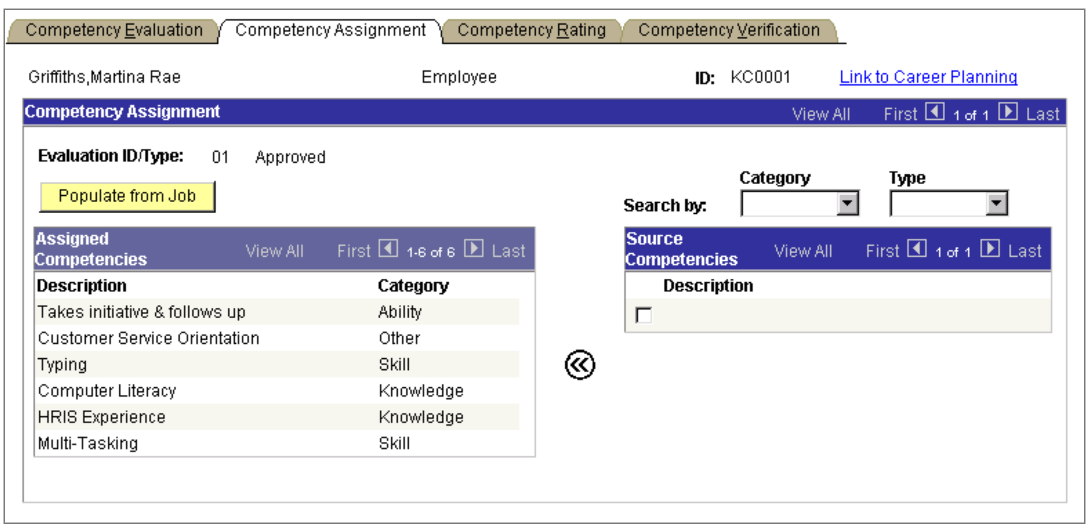
Enter the date the review took place.

Review Active	Select the **Review Active** check box if this is a current evaluation. The system only considers active evaluations when performing inquiries such as the person to role match and competency search. For more information about the inquiries, see "Performing Gap and Match Analyses on Your Workforce".
Reviewer ID	If the reviewer is an employee, select the employee ID from the list of valid values. If the reviewer is not an employee, leave this field blank and complete the **Reviewer Name** field instead. The system makes this field unavailable for entry if you have selected an **Evaluation Type** of ***Approved*** or ***Self.***
Reviewer Name	If the reviewer is not an employee, enter the reviewer's name in this field. When you move out of the field, the system makes the **Reviewer ID** field unavailable for entry. The system makes this field unavailable for entry if you have selected an **Evaluation Type** of ***Approved*** or ***Self.***
Reviewer is Approved	Select the **Reviewer is Approved** check box if the reviewer is approved. If you have selected an evaluation type of ***Approved,*** the system makes this check box unavailable for entry.

Competencies - Competency Assignment Page

Usage	Use the Competency Assignment page to enter an employee's competencies. If you have set up competency profiles for your Job Codes or Positions, you can use these profiles to populate the employee's competencies. With PeopleSoft Human Resources you can add employee competency data in both the Manage Competencies business process and the Plan Careers business process. In order to keep the competency data consistent between these business processes, you can transfer competency information between them.
Object Name	CM_PERS_COMP_ASGN
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Assignment** • **Develop Workforce, Administer Training (USF), Use, Competencies, Competency Assignment** • **Develop Workforce, Manage Competencies (GBL), Use,**

	Competencies, Competency Assignment • **Develop Workforce, Manage Competencies (USF), Use, Competencies, Competency Assignment** • **Develop Workforce, Plan Careers, Use, Competencies, Competency Assignment** • **Develop Workforce, Plan Successions (GBL), Use, Competencies, Competency Assignment** • **Develop Workforce, Plan Successions (USF), Use, Competencies, Competency Assignment** • **Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Assignment** • **Administer Workforce, Track Global Assignments (USF), Use, Competencies, Competency Assignment**
Prerequisites	Before you assign competencies, you must set up your competency codes on the Competency Table.
Access Requirements	Enter an Employee ID.



Competencies - Competency Assignment page

The system displays the employee's name and the employee ID you selected. These fields are for information only.

Link to Career Planning	Click **Link to Career Planning** to display the Plan Careers / Manage Competencies Link Page where you can view the competencies included in the employee's career plan and transfer competencies between these business processes.

Populate from Job Click **Populate from Job** to populate employee competencies based on the employee's current job. The system defaults competencies assigned to the employee's Job Code. If you use position management, the system also displays any competencies assigned to the employee's position.

Assigned Competencies

The **Assigned Competencies** group box lists the competencies that you have assigned to the employee. To add competencies, select them in **Source Competencies** and click the **Competency Add** button.

If you have added a competency in error, remove the competency from the Competencies - Competency Rating Page.

Description The system defaults the competency **Description** from the Competency Table and makes this field unavailable for entry.

Category The system displays the **Category** to which the competency belongs.

Searching for Competencies

To assign competencies to the employee, search for competencies using a combination of **Category** and competency **Type.** When you complete these fields, the system displays the matching competencies in **Source Competencies.**

Category Select a **Category** from the available options to display the competencies in the category.

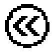
Type Select a **Type** from the list of valid values to display a list of competencies of the selected type.

Source Competencies

The **Source Competencies** group box lists the competencies that matched the selections you made in the **Category** and **Type** fields. Select the check box next to the competencies that you want to assign to the employee.

Description The system defaults the competency **Description** from the Competency Table and makes this field unavailable for entry.

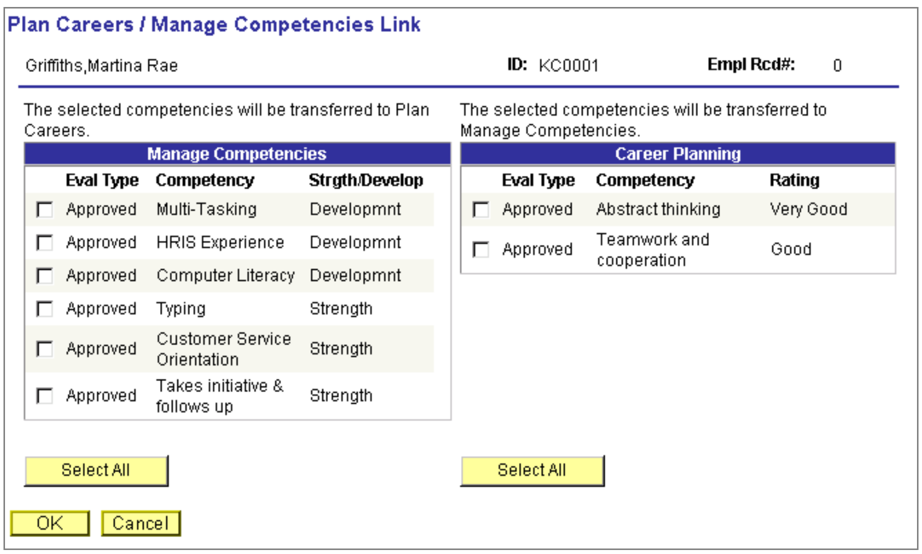
Adding Competencies



Click the **Add** button to assign competencies to the employee. Any competencies you have selected in **Source Competencies** are moved to **Assigned Competencies.**

Plan Careers / Manage Competencies Link Page

Usage	Use the Plan Careers / Manage Competencies Link page to synchronize competency data between the Plan Careers and the Manage Competencies business processes.
Object Name	COMP_STRDVLP_SEC
Navigation	To access this page, click **Link to Career Planning** on the Competency Assignment page.



Plan Career / Manage Competencies Link page

The system displays the employee's name, **ID,** and **Empl Rcd#** (employee record number). These fields are for information only.

Manage Competencies

The **Manage Competencies** group box lists the competencies that you have assigned to the employee from the Competencies - Competency Assignment Page. The data is for information only and covers the following:

Eval Type (evaluation type)

Competency

Strgth/Develop (strength/development area)	The system indicates if the competency represents an area of strength or development for the employee based on the rating assigned to the employee from the Competencies - Competency Rating Page. Each rating is designated a strength or development area on the Rating Model Table.
Select All	Click the **Select All** button to select all the competencies in the **Manage Competencies** group box. When you click the button again, the system cancels the selections.

Select the competencies that you want to transfer to the employee's career plan and click **OK** to start the transfer.

Career Planning

The **Career Planning** group box lists the competencies that you have assigned to the employee's career plan from the Plan Careers / Manage Competencies Link Page. The data is for information only and covers the following:

Eval Type (evaluation type)

Competency

Rating

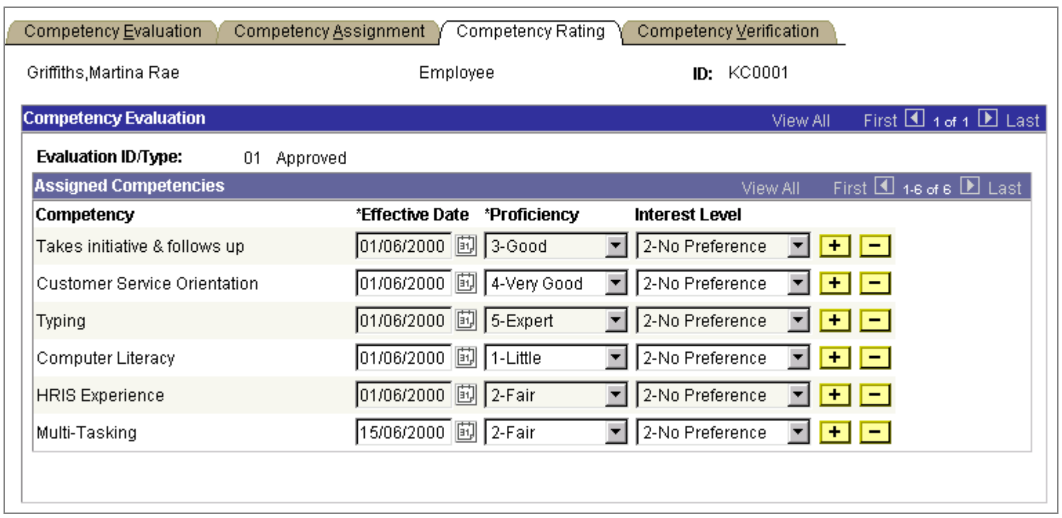
Select All	Click the **Select All** button to select all the competencies in the **Career Planning** group box. When you click the button again, the system cancels the selections.

Select the competencies that you want to transfer to the employee's competency profile in **Manage Competencies** and click **OK** to start the transfer.

Competencies - Competency Rating Page

Usage	Use the Competency Rating page to record employees' level of expertise for each competency assigned to them and to record their interest in developing each competency.
Object Name	CM_PERS_COMP_PROF
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Rating** • **Develop Workforce, Administer Training (USF), Use, Competencies, Competency Rating** • **Develop Workforce, Manage Competencies (GBL), Use, Competencies, Competency Rating**

	• **Develop Workforce, Manage Competencies (USF), Use, Competencies, Competency Rating** • **Develop Workforce, Plan Careers, Use, Competencies, Competency Rating** • **Develop Workforce, Plan Successions (GBL), Use, Competencies, Competency Rating** • **Develop Workforce, Plan Successions (USF), Use, Competencies, Competency Rating** • **Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Rating** • **Administer Workforce, Track Global Assignments (USF), Use, Competencies, Competency Rating**
Prerequisites	You must assign competencies on the Competency Assignment page.
Access Requirements	Enter an Employee ID.



Competencies - Competency Rating page

The system displays the employee's name and **ID** that you entered.

Assigned Competencies

The **Assigned Competencies** group box lists the competencies that you assigned to the employee from the Competency Assignment page.

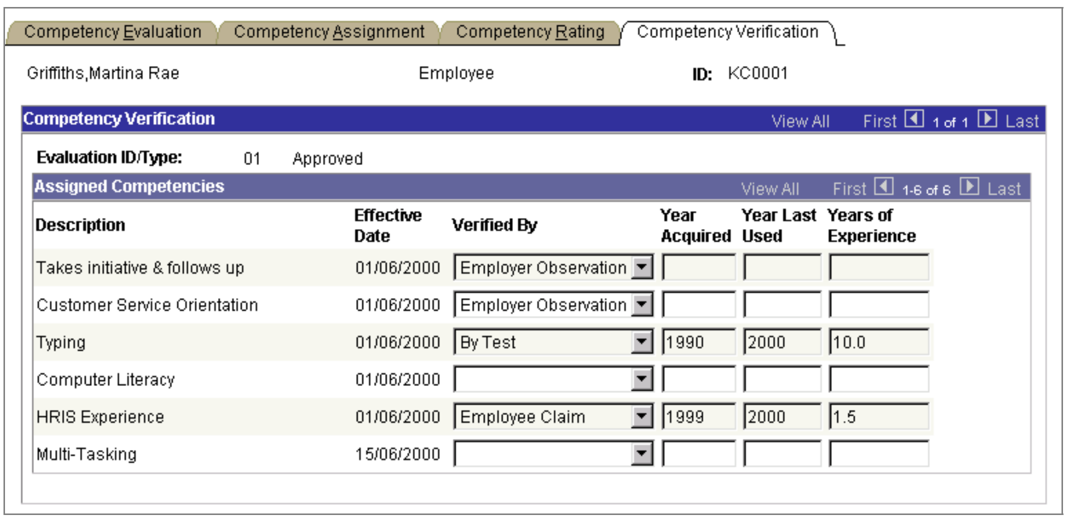
Competency	The system defaults the competency description from the Competency Table and makes the field unavailable for entry.

Effective Date	Enter an **Effective Date** for your modification to the employee's competency assignment. If you want to track the history of an employee's proficiency or interest level for an assigned competency, insert a new row for that competency with a new **Effective Date.**
Proficiency	Select a rating from the list of valid values that represents the employee's level of expertise for the assigned competency. You define ratings in the Rating Model Table and assign Rating Models to competencies in the Competency Table.
Interest Level	Select an **Interest Level** from the following options that indicates how keen the employee is to develop the selected competency: ***Very desirable*** ***Desirable*** ***No preference.*** This is the default value. ***Undesirable*** ***Very undesirable***.

Competencies - Competency Verification Page

Usage	Use the Competency Verification page to track how you verified the competencies assigned to employees. You also use this page to record when employees acquired the competencies assigned to them, how recently they used each competency, and their total experience of developing each competency.
Object Name	COMPETENCIES
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Verification** • **Develop Workforce, Administer Training (USF), Use, Competencies, Competency Verification** • **Develop Workforce, Manage Competencies (GBL), Use, Competencies, Competency Verification** • **Develop Workforce, Manage Competencies (USF), Use, Competencies, Competency Verification** • **Develop Workforce, Plan Careers, Use, Competencies, Competency Verification** • **Develop Workforce, Plan Successions (GBL), Use, Competencies, Competency Verification**

	• **Develop Workforce, Plan Successions (USF), Use, Competencies, Competency Verification** • **Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Verification** • **Administer Workforce, Track Global Assignments (USF), Use, Competencies, Competency Verification**
Prerequisites	You must assign competencies on the Competencies - Competency Assignment Page and rate the competencies on the Competencies - Competency Rating Page.
Access Requirements	Enter an Employee ID.


Competency Evaluation | Competency Assignment | Competency Rating | Competency Verification

Griffiths,Martina Rae Employee ID: KC0001

Competency Verification View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

Assigned Competencies View All First 1-6 of 6 Last

Description	Effective Date	Verified By	Year Acquired	Year Last Used	Years of Experience
Takes initiative & follows up	01/06/2000	Employer Observation			
Customer Service Orientation	01/06/2000	Employer Observation			
Typing	01/06/2000	By Test	1990	2000	10.0
Computer Literacy	01/06/2000				
HRIS Experience	01/06/2000	Employee Claim	1999	2000	1.5
Multi-Tasking	15/06/2000				

Competencies - Competency Verification page

The system displays the employee's name and **ID** that you entered.

Assigned Competencies

The **Assigned Competencies** group box lists the competencies that you assigned to the employee from the Competency Assignment page.

Description The system defaults the competency description from the Competency Table and makes the field unavailable for entry.

Effective Date The system defaults the **Effective Date** from the Competency Rating page and makes the field unavailable for entry.

Verified By Select a **Verified By** value that indicates how the competency was verified:

	Employee Claim
	Employer Observation
	On the Job Training
	By Test: Use this option if you tested the employee.
	Not verified
	NVQ Authority
Year Acquired	Enter the year that the employee was assigned the competency.
Year Last Used	Enter the year that the employee last used the competency.
Years of Experience	Enter the number of years that the employee has been actively using the competency. Do not include any period since acquiring the competency in which the employee's role did not require the competency. Use this field to show the number of years the competency has been relevant to the employee's performance.

Entering Employee Accomplishments

To record employee accomplishments, use a different page for each type of accomplishment:

If you use the PeopleSoft Human Resources commercial application, use the Education pages (School Education page and the Professional Ed and Training page) to enter details of an employee's education and training. However, if you are a United States Federal user, you track education on the USF – Education page.

Use the License/Certification page to track any licenses or certificates employees have obtained that are pertinent to their role.

Use the Memberships page to track any professional organizations and associations to which your employees belong.

Use the Languages page to track your employees' language skills.

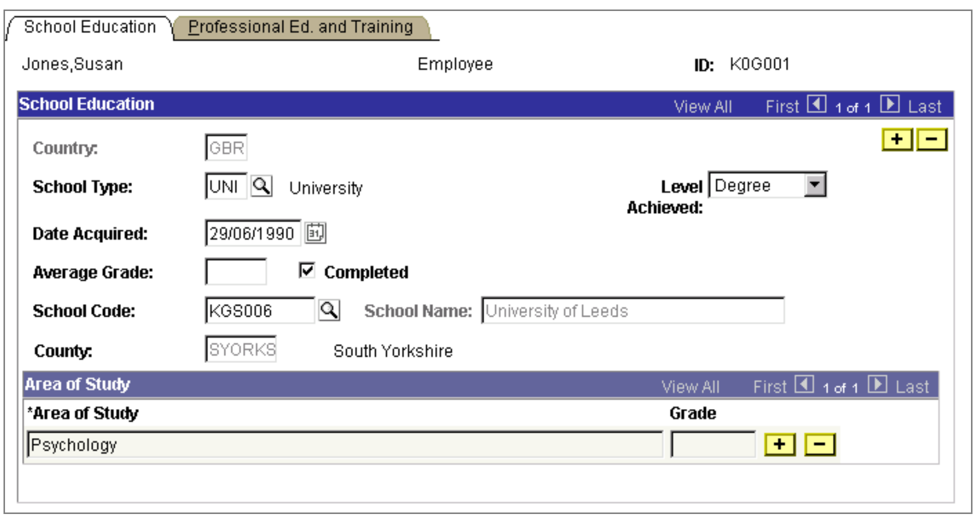
Use the Honors and Awards page to record any corporate awards and professional distinctions that your employees have received.

Use the Significant Special Projects page to track projects an employee has completed that benefit your organization or their own professional standing.

Use the Test Results page to record the results of standard tests that your organization uses as part of the recruitment process, such as typing or programming aptitude.

Education - School Education Page

Usage	Use the Education pages to document information on an employee's educational background. This information is helpful for producing complete employee profiles and for career planning to determine employee abilities and training needs.
Object Name	SCHOOL_EDUCATION
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Education, School Education** • **Develop Workforce, Manage Competencies (GBL), Use, Education, School Education** • **Develop Workforce, Plan Careers, Use, Education, School Education** • **Develop Workforce, Plan Successions (GBL), Use, Education, School Education** • **Administer Workforce, Track Global Assignments (GBL), Use, Education, School Education**
Prerequisites	You must set up School Types on the School Type Table before you can use this page.
Access Requirements	Enter an Employee ID.



Education - School Education page

This section is for users of the PeopleSoft Human Resources commercial application and is not intended for United States Federal users. Federal users track education on the USF - Education Page.

Country	Select the **Country** where the school is located from the available options.
School Type	Select the type of school the employee attended from the available options. You track **School Types** on the School Type Table.

Indicate the education **Level Achieved.** Enter the **Date Acquired.** Specify an **Average Grade,** using letters or numbers. If this program has been completed, select the **Completed** check box.

For additional education, such as university attendance, enter the **School Code.** The system populates other related fields. If the system doesn't enter these, enter the **School Name** and **State.**

Select a **School Code;** valid values are in the School Table. Enter a **School Code** or, if no code exists, enter the **School Name.** When you move out of this field, the system automatically completes the **School Name** and **State.**

In the **Area of Study** group box, enter the major **Area of Study** and the **Grade** in that area.

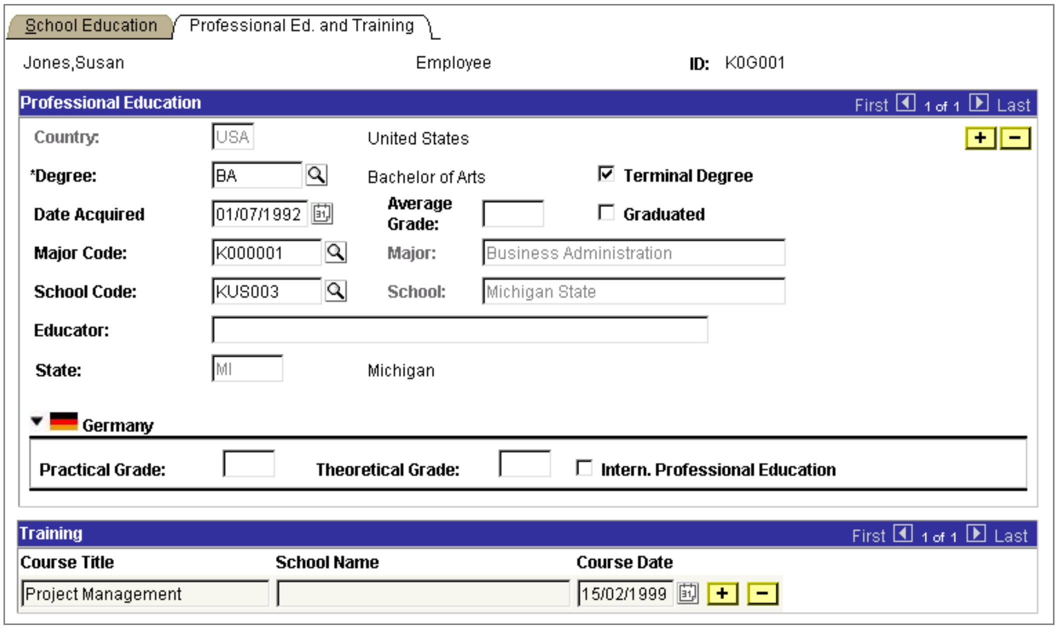
To add additional information in the **Area of Study** field, insert new data rows.

For information about using the School Education page in tenure, see Tracking Events: Education - School Education Page.

Education - Professional Ed. (Education) and Training Page

Usage	Use the Professional Education and Training page to record details of employees' educational qualifications and other training they have completed.
Object Name	EDUCAT_TRAIN_GBL
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Education, Professional Ed. and Training** • **Develop Workforce, Manage Competencies (GBL), Use, Education, Professional Ed. and Training** • **Develop Workforce, Plan Careers, Use, Education, Professional Ed. and Training** • **Develop Workforce, Plan Successions (GBL), Use, Education, Professional Ed. and Training** • **Administer Workforce, Track Global Assignments (GBL), Use, Education, Professional Ed. and Training**
Prerequisites	You must set up your degree codes, major codes, and school codes before you can use this page.

Access Requirements	Enter an Employee ID.



Education - Professional Ed. and Training page

This section is for users of the PeopleSoft Human Resources commercial application and is not intended for United States Federal users. Federal users track training in Administer Training (USF).

Select the **Degree** that the person has earned. Enter the **Date Acquired** and **Average Grade,** and select the **Graduated** check box if the employee has graduated. Select the **Terminal Degree** check box if the degree is the final qualification required. The system displays the **Terminal Degree** check box only if you are a public sector user. Users of the PeopleSoft Human Resources commercial application do not see this check box.

Select a **Major Code;** valid values are in the Major Table. When you select a **Major Code,** the system automatically completes the corresponding **Major** and makes the field unavailable for entry. If you want to enter a **Major** that doesn't have a code, simply leave the **Major Code** blank and type in the description.

Select a **School Code;** valid values are in the School Table. Enter a **School Code** or, if no code exists, enter the **School** name. When you click tab to move out of this field, the system will automatically complete the **School** name, **State,** and **Country.**

If you select another Country Code after you've already selected a State Code, the system will clear the value in the **State** field.

To add additional degrees, insert new data rows.

For more information about using the Professional Ed. and Training page in tenure, see Education - Professional Ed. and Training Page.

Germany

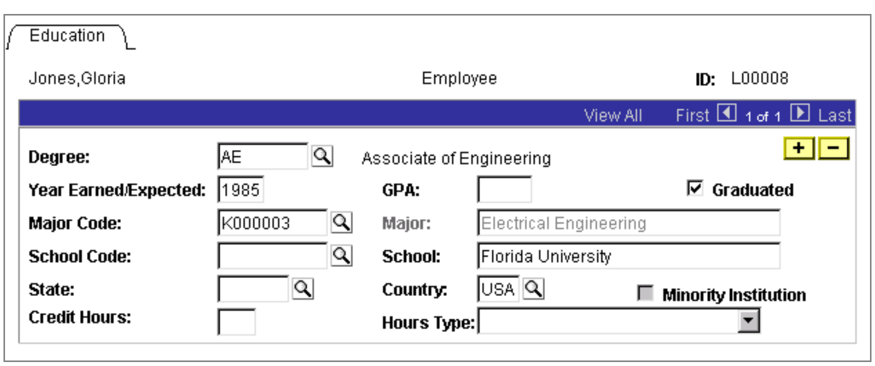
If this data is for an **Intern. Professional Education,** select the check box. Enter the **Practical Grade** and the **Theoretical Grade.**

Training

If the employee has completed any other professional training courses, enter the **Course Title**, the **School Name**, and the **Course Date** when the employee completed the course.

USF - Education Page

Usage	Use the Education page to indicate the degrees, dates acquired, and other education information for your employees.
Object Name	GVT_EDUCATION
Navigation	• **Develop Workforce, Administer Training (USF), Use, Education, Education** • **Develop Workforce, Manage Competencies (USF), Use, Education, Education** • **Develop Workforce, Plan Successions (USF), Use, Education, Education** • **Administer Workforce, Track Global Assignments (USF), Use, Education, Education**
Prerequisites	None
Access Requirements	Enter an employee ID.



USF- Education page

> This section is for United States Federal users. Users of the PeopleSoft Human Resources commercial application track education on the Education - School Education Page.

Select the **Degree** from the available options and enter the **Year Earned/Expected**. Enter the employee's grade point average in **GPA.**

If the employee has already graduated, select the **Graduated** check box.

Select the **Major Code** from the list of valid options. When you move out of this field, the system automatically completes the **Major** field and makes it unavailable for entry. You set up major codes on the Major Table.

Select the **School Code** from the list of valid options. When you move out of this field, the system automatically completes the **School**, **State**, **Country**, and **Minority Institution** and makes them unavailable for entry. You set up school codes on the School Table.

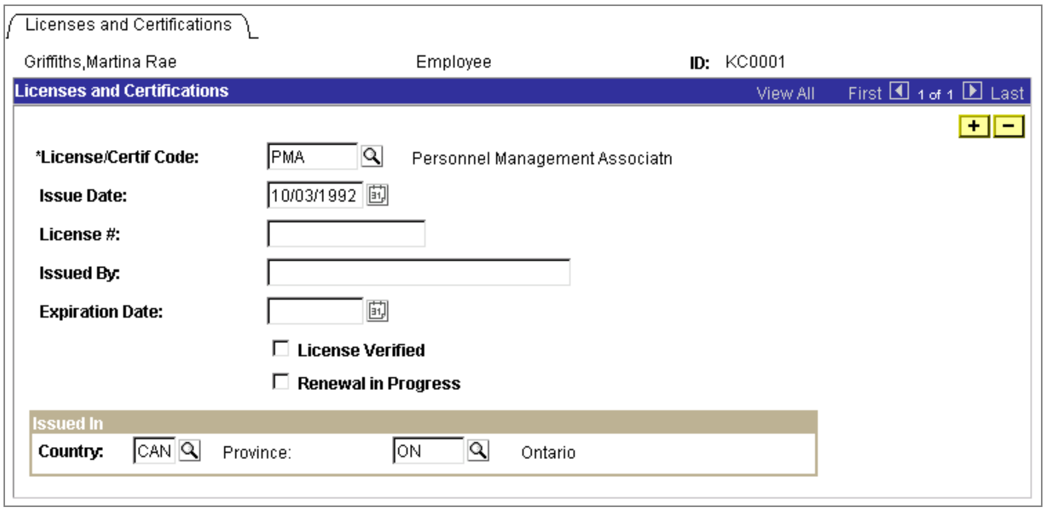
*If the school does not report the number of study hours in semester format, enter the **Credit Hours.** You can convert the number of credit hours to semester hours to decide if the employee has the competency required for positions in your organization.*

Select the **Hours Types** from the available options.

Licenses and Certificates Page

Usage	Use the Licenses and Certificates page to record licenses or certificates members of your workforce receive that are pertinent to their jobs. For example, if an employee in your Finance and Accounting department has a CPA license, you can enter the information here.
Object Name	LICENSES_CERTIFS
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Licences and Certifications, Licenses and Certifications** • **Develop Workforce, Administer Training (USF), Use, Licenses and Certifications, Licenses and Certifications** • **Develop Workforce, Manage Competencies (GBL), Use, Licenses and Certificates, Licenses and Certifications** • **Develop Workforce, Manage Competencies (USF), Use, Licenses and Certificates, Licenses and Certifications** • **Develop Workforce, Plan Careers, Use, Licenses and Certificates, Licenses and Certifications** • **Develop Workforce, Plan Successions (GBL), Use, Licenses and Certificates, Licenses and Certifications** • **Develop Workforce, Plan Successions (USF), Use, Licenses and Certificates, Licenses and Certifications**

Prerequisites	You must set up your License/Certification codes on the License/Certification Table before you can use this page.
Access Requirements	Enter an Employee ID.



Licenses and Certificates page

Select the **License/Certif Code** (license/certification code) for the license or certificate that the employee earned. You enter these codes into the system from the License/Certification Table. Enter the **Issue Date.**

Enter the **License #** (license number) of the license or certificate, if any. Indicate the person or organization the license or certification is **Issued By.** If the license or certificate is temporary and will expire at some point, enter the **Expiration Date.**

If you have confirmed that this employee holds the license or certificate, select the **License Verified** check box. Also, select **Renewal in Progress** if the person is currently renewing the license or certificate.

Issued In

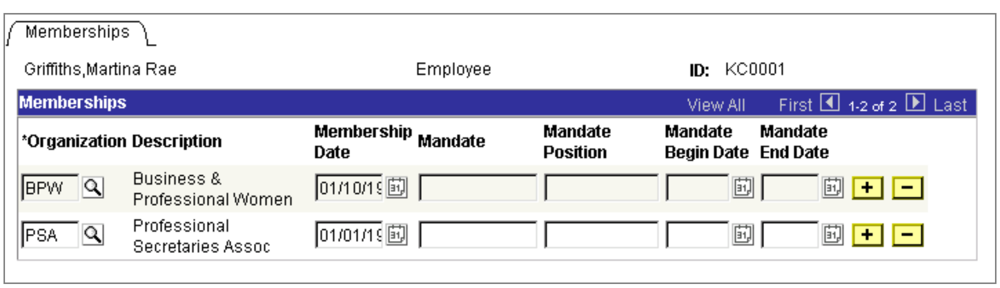
Indicate the **Country** and **State** the license or certification was **Issued In.** The **Country** Code defaults to the country from the user's preferences. Though it's not required, you can select the **State** in which the license was issued. When you select a different Country Code after you've already selected a State Code, the system will clear the value in the **State** field.

User Preferences are set up on the Primary Permission List Preferences page which is accessed from the Define General Options menu.

For more information about tracking licenses and certificates for tenure, see Tracking Events: Tracking Licenses and Certificates.

Memberships Page

Usage	Use the Memberships page to record employees' membership of professional organizations pertinent to their jobs.
Object Name	MEMBERSHIPS
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Memberships, Memberships** • **Develop Workforce, Administer Training (USF), Use, Memberships, Memberships** • **Develop Workforce, Manage Competencies (GBL), Use, Memberships, Memberships** • **Develop Workforce, Manage Competencies (USF), Use, Memberships, Memberships** • **Develop Workforce, Plan Careers, Use, Memberships, Memberships** • **Develop Workforce, Plan Successions (GBL), Use, Memberships, Memberships** • **Develop Workforce, Plan Successions (USF), Use, Memberships, Memberships**
Prerequisites	You must set up your membership codes on the Membership Table before you can use this page.
Access Requirements	Enter an Employee ID.



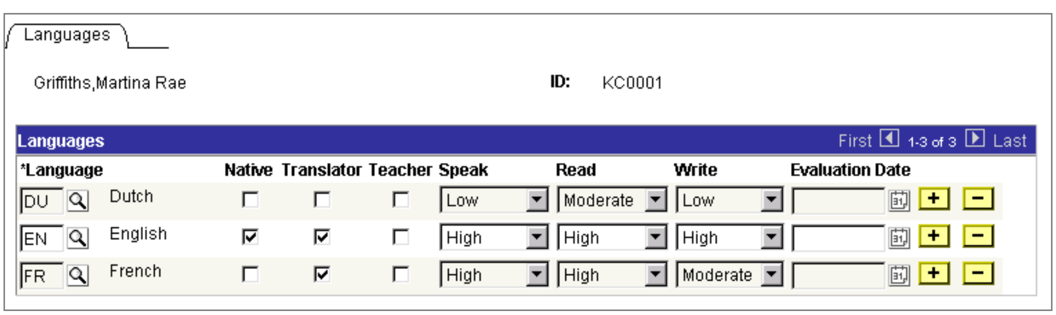
Memberships page

If the employee belongs to any professional organizations, enter the code of the **Organization** and the **Membership Date.** The system populates the **Description** when you move out of the **Organization** field.

Enter a **Mandate,** the **Mandate Position,** the **Mandate Begin Date,** and the **Mandate End Date.**

Languages Page

Usage	Use the Languages page to enter information on the languages in which workers are proficient, particularly those pertinent to their jobs or to your industry.
Object Name	LANGUAGES
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Languages, Languages** • **Develop Workforce, Administer Training (USF), Use, Languages, Languages** • **Develop Workforce, Manage Competencies (GBL), Use, Languages, Languages** • **Develop Workforce, Manage Competencies (USF), Use, Languages, Languages** • **Develop Workforce, Plan Careers, Use, Languages, Languages** • **Develop Workforce, Plan Successions (GBL), Use, Languages, Languages** • **Develop Workforce, Plan Successions (USF), Use, Languages, Languages** • **Administer Workforce, Track Global Assignments (GBL), Use, Languages, Languages** • **Administer Workforce, Track Global Assignments (USF), Use, Languages, Languages**
Prerequisites	Before you can use this page, you must set up language codes in the Language Table.
Access Requirements	Enter an Employee ID.



Languages page

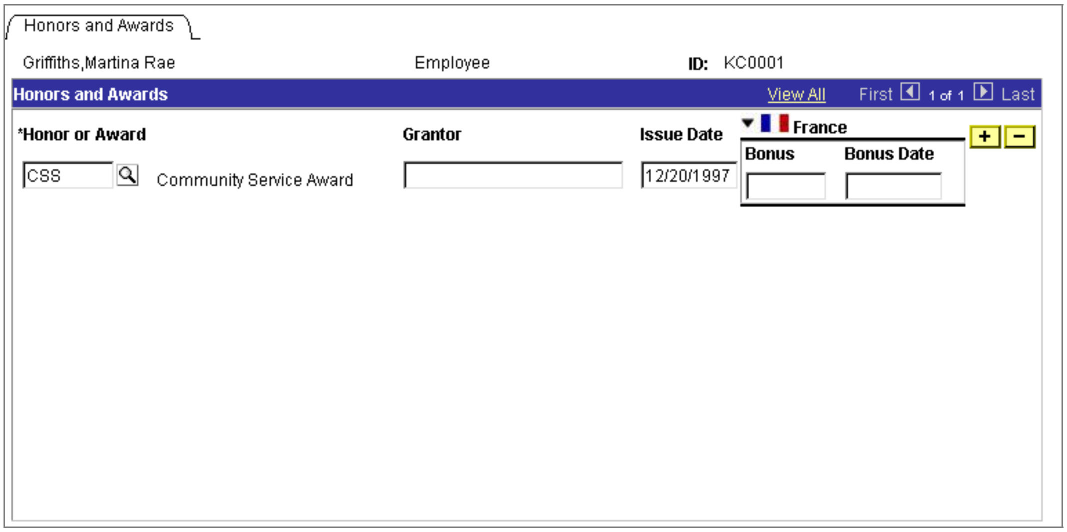
The system displays the employee name and **ID** you selected. These fields are for information only.

Language	Select the **Language** the employee speaks, reads, or writes from the available options. Codes for languages are included in the Accomplishment Table.
Native	Select the **Native** check box if the language is the person's first language.
Translator	Select the **Translator** check box if the person is able to translate in this language.
Teacher	Select the **Teacher** check box if the worker is able to teach using this language. The system uses this check box when scheduling multilingual courses to ensure that an instructor is able to teach a course in the selected language.
Speak	Select a proficiency that matches the worker's ability to **Speak** the language. The valid options are ***Low, Moderate,*** and ***High***.
Read	Select a proficiency for the worker's ability to **Read** the language.
Write	Select a proficiency for the worker's ability to **Write** the language.
Evaluation Date	Enter the date that you evaluated the worker.

Honors and Awards Page

Usage	Use the Honors and Awards page to record any special awards or honors your employees have received in recognition of their outstanding contributions.
Object Name	HONORS_AWARDS
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Honors and Awards, Honors and Awards** • **Develop Workforce, Manage Competencies (USF), Use, Honors and Awards, Honors and Awards** • **Develop Workforce, Plan Careers, Use, Honors and Awards, Honors and Awards** • **Develop Workforce, Plan Successions (GBL), Use, Honors and Awards, Honors and Awards** • **Develop Workforce, Plan Successions (USF), Use, Honors and Awards, Honors and Awards**
Prerequisites	Before you can use this page, you must set up codes for honors and awards in the Honor/Award Table.

Access Requirements	Enter an Employee ID.



Honors and Awards page

Honor or Award Select the **Honor or Award** from the list of valid values.

Grantor Enter the name of the person or organization granting the award.

Issue Date Enter the date that the **Honor or Award** was issued.

France

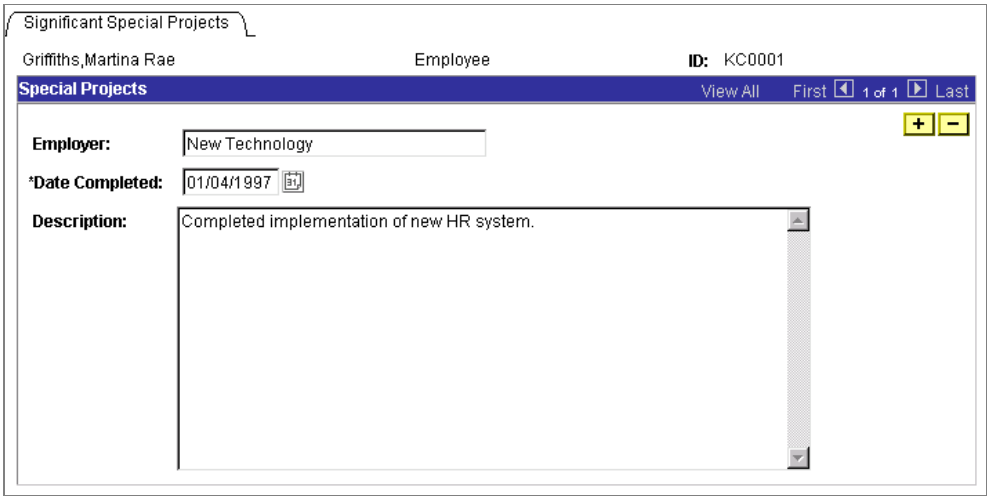
Bonus For French employees, if the employee received a bonus, enter the amount in this field.

Bonus Date For French employees, if the employee received a bonus, enter the date in this field.

Significant Special Projects Page

Usage	Use the Significant Special Projects page to track projects an employee has completed that benefit your organization or their own professional standing.
Object Name	SPECIAL_PROJECTS
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Significant Special Projects, Significant Special Projects** • **Develop Workforce, Manage Competencies (USF), Use, Significant Special Projects, Significant Special Projects**

	• **Develop Workforce, Plan Careers, Use, Significant Special Projects, Significant Special Projects**
Prerequisites	None.
Access Requirements	Enter an Employee ID.



Significant Special Projects page

Enter the name of the person's **Employer** at the time the project was completed, the **Date Completed,** and a **Description** of the project.

Enterprise Integration Points (EIP) Related to the Significant Special Projects Page

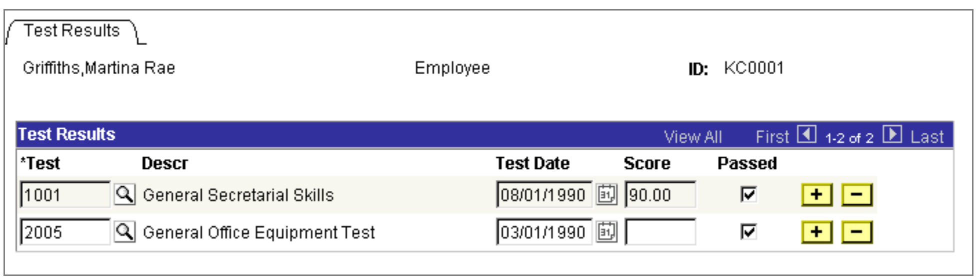
When you add, delete, or change information in the Significant Special Projects page, the system automatically publishes the Special Projects EIP message to any other PeopleSoft or third party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the Significant Special Projects table.

For more information regarding the subscribers and technical details of the Special Projects EIP, see Special Projects in the EIP Catalog. For more information about enterprise integration in PeopleSoft Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration.

Test Results Page

Usage	Use the Test Results page to track the results of tests you administer to

	employees applying for positions within your organization, such as typing, programming aptitude, or mathematical tests
Object Name	TEST_RESULTS_PANEL
Navigation	• **Develop Workforce, Administer Training (GBL), Use, Test Results, Test Results** • **Develop Workforce, Administer Training (USF), Use, Test Results, Test Results** • **Develop Workforce, Manage Competencies (GBL), Use, Test Results, Test Results** • **Develop Workforce, Manage Competencies (USF), Use, Test Results, Test Results** • **Develop Workforce, Plan Successions (GBL), Use, Test Results, Test Results** • **Develop Workforce, Plan Successions (USF), Use, Test Results, Test Results**
Prerequisites	You must set up your test codes on the Test Table before you can use this page.
Access Requirements	Enter an Employee ID.



Test Results page

Indicate the **Test** Code of the test that the worker took, and record the **Test Date.** Test Code values are in the Accomplishments Table. You may also indicate the **Score** and if the worker **Passed** the course.

CHAPTER 4

Performing Gap and Match Analyses on Your Workforce

In every organization, your workers have a rich variety of backgrounds, competencies, and accomplishments. You can use this information to maximize the resources to which your organization has access, and help workers realize their full career potential. With the Manage Competencies Business Process, you can compare your employees' competencies and accomplishments to your organization's project and team planning needs, and so ensure that you have the right people in the right places in your enterprise in order to keep up with ever-evolving business needs.

You can determine who is qualified to fill employee positions or join projects, who requires additional training to improve on competencies and accomplishments , and who, within your applicant pool, is qualified to join your workforce.

Overview of Gap and Match Analyses

With the Manage Competencies Business Process in PeopleSoft Human Resources, you can automatically evaluate candidates based on how closely their competencies match those required by a particular job or position. Visual cues built into the system give you easy-to-read analyses so that you can see who is most qualified to meet your staffing needs. You can:

- Perform dynamic Person to Role Matches to examine if workers are qualified to step into a role, and if not, arrange for additional training or competency development. These inquiries are explained in Matching Persons to Roles and Matching Roles to Your Workforce.
- Search for the top candidates in your organization qualified to fill a key position, job, or project roles. This inquiry is described in Searching for the Right Candidate.
- Match teams to projects, view a summary of team qualifications, and adjust your teams to ensure that they have the skill sets they need to complete projects successfully. Refer to Matching Teams for full details.
- Search your applicant pool for the best candidates to move into positions and projects within your organization. This inquiry is described in Searching for the Right Candidate.

Understanding the Match Analysis Process

When you run any of the Person to Role Matches or Competency Search inquiries, the system compares employees' competencies and accomplishments with those required by a role. If you run the Team Match - Competency Match Page inquiry, the system compares the competencies and accomplishments of all team members to see how well their combined skills meet the requirements of a given task.

For more information about setting up role competencies, see Assigning Competencies and Accomplishments to Roles, and for information about employee competencies, see Tracking Worker Competencies and Accomplishments.

The system awards points to employees for each of their competencies and accomplishments that match those required for the role. To weight the evaluation in favor of the most important competencies and accomplishments, the system awards points according to the importance values that you have assigned to each competency and accomplishment. The system assigns the following values to Importance levels:

Importance	***Points***
High	5
Above Average	4
Average	3
Below Average	2
Low	1
None	0

For example, the following table shows the competency requirements for an HR specialist position and the points awarded for each competency:

Competency	***Importance***	***Points Assigned***
Communication	High	5
Leadership	Average	3
Interpersonal Effectiveness	Above Average	4
Planning	Low	1
Decision Making	Above Average	4

Competency	*Importance*	*Points Assigned*
Adaptability to Change	Below Average	2
	Total Match	19

The Total Match value represents the maximum number of points available if the employee meets all the requirements. The system displays the results of the analysis on the inquiry pages in these fields:

Total Match indicates how many points the employee has been awarded out of the total points possible for the role.

Competency Match indicates how many of the total points stem from competencies.

Accomplishment Match indicates how many of the total points stem from accomplishments.

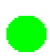
Accomplishment Match Analysis

Accomplishments are one-time achievements, such as obtaining a degree, and aren't rated in the same way as competencies. This makes the matching process straightforward: If the employee has the accomplishment in their profile, the system selects the EE Accomplishment check box on the inquiry pages and awards the employee points based on the Importance value that you assigned to the accomplishment.

Competency Proficiencies Match Analysis

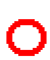
Unlike accomplishments, competencies have ratings associated with them that indicate the level of expertise in the competency. When you assign competencies to a role, you also define the rating required for each competency. Similarly, you give employees a rating for each competency that you assign to them. This makes the process of matching competencies more complex because, while the employee may have the necessary competency, the rating may not match the rating required for the role.

The system uses these indicator lights to indicate how well the employee's rating matches the rating required for the role:



A **green light** indicates that the employee possesses the required competency and has the required proficiency rating. If the employee's rating is more than one level higher than the rating required for the role, the system displays a "+" sign beside the green light.

A **yellow light** indicates that the employee has a rating one level lower than that required for the role.



A **red light** indicates that the employee's rating in this competency is multiple levels below that required for the role.

Employees are *only* awarded points for the competency if they have a green light for a competency. The yellow and red lights indicate a rating lower than the required level, so the employee does not match the requirements. If an employee is not rated on a competency, the system does not display a light at all.

Ratings vary according to the Rating Model you use. Some Rating Models use alphabetic ratings rather than numeric codes. To cater for all types of ratings, the system actually uses the Review Points value associated with the rating when performing a Match Analysis. In some cases the Review Points field is the same as the rating. For example, the PSCM Rating Model has ratings from 0 (none) to 5 (expert) which have associated Review Points of 0 to 5.

For more information about Rating Models see the Rating Model Table Setup Page.

Assuming you are using the PSCM Rating Model, the following table shows ratings required for an HR specialist position alongside a hypothetical employee profile. The Page Display column shows which indicator lights would be displayed for the employee:

Competency	***Rating Required***	***Employee Rating***	***Page Display***
Communication	5	5	Green
Leadership	4	3	Yellow
Interpersonal Effectiveness	3	5	Green +
Planning	3	1	Red
Decision Making	2	3	Green
Adaptability to Change	3	None	No light

Multiple Evaluations

So far, the examples have assumed that an employee has only one evaluation. However, if your organization uses 360 Degree Feedback where an employee is evaluated by many people, there are multiple evaluations. Each evaluation could include different competencies, competency ratings, and accomplishments.

In order to control which evaluation types the system uses in performing the Match Analysis, you define Match Evaluation Types. For example, if you decide only to include the Approved/Official evaluations in the matching inquiries, the system ignores all the other active evaluations that exist for the employee. Match Evaluation Types also control which groups of users can run the matching inquiries. Set up the Match Evaluation Types on the Match Evaluation Types Setup Page.

To understand how the system performs a Match Analysis when there are multiple evaluations, consider the following example of an employee who has three active evaluations:

Competency	***Manager Eval***	***Peer 1 Eval***	***Peer 2 Eval***	***Average Rating***
Communication	5	4	5	4.67
Leadership	4	3	3	3.33
Interpersonal Effectiveness	5	5	5	5
Planning				
Decision Making	3	2	3	2.67
Adaptability to Change	2	1	2	1.67

If you have selected that the system considers only Manager and Peer Evaluations for Match Analysis, the system calculates the average rating based on the three evaluations: Manager, Peer 1, and Peer 2.

The following table shows what happens if this employee is compared to the HR specialist position:

Competency	***Importance***	***Points Assigned***	***Rating Reqd***	***EE Rating***	***Employee Match***	***EE Points***
Communication	High	5	5	4.67	Yellow	0
Leadership	Average	3	4	3.33	Yellow	0
Interpersonal Effectiveness	Above Average	4	3	5	Green +	4
Planning	Low	1	3		No light	0
Decision Making	Above Average	4	2	2.67	Green	4
Adaptability to Change	Below Average	2	3	1.67	Red	0
		Total Match = 19				EE Points = 8

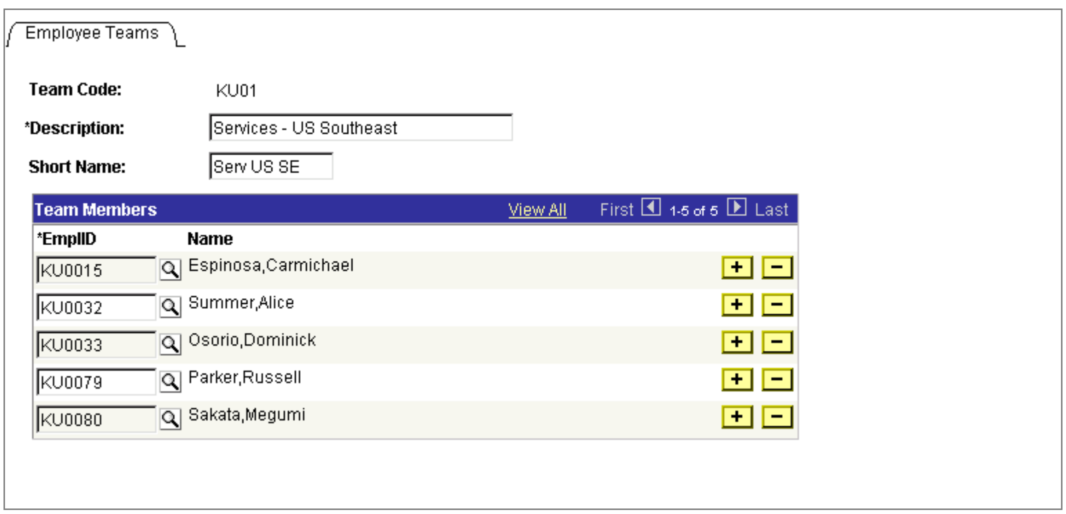
Remember, employees are *only* awarded points for the competency if they have a green light for a competency. The yellow and red lights indicate a rating lower than the required level, so the employee does not match the requirements.

Setting Up Employee Teams

You can group individual workers into teams and evaluate their competencies and accomplishments together or simultaneously for each individual. Use the Employee Teams page to define your teams.

Employee Teams Page

Usage	Use the Employee Teams page to build teams of workers.
Object Name	EE_TEAMS
Navigation	• **Develop Workforce, Manage Competencies (GBL), Use, Employee Teams, Employee Teams** • **Develop Workforce, Manage Competencies (USF), Use, Employee Teams, Employee Teams**
Prerequisites	None.
Access Requirements	Enter an employee team code.



Employee Teams page

Enter a **Team Name** and a **Short Name.** The system will display these names whenever you reference the **Team ID.**

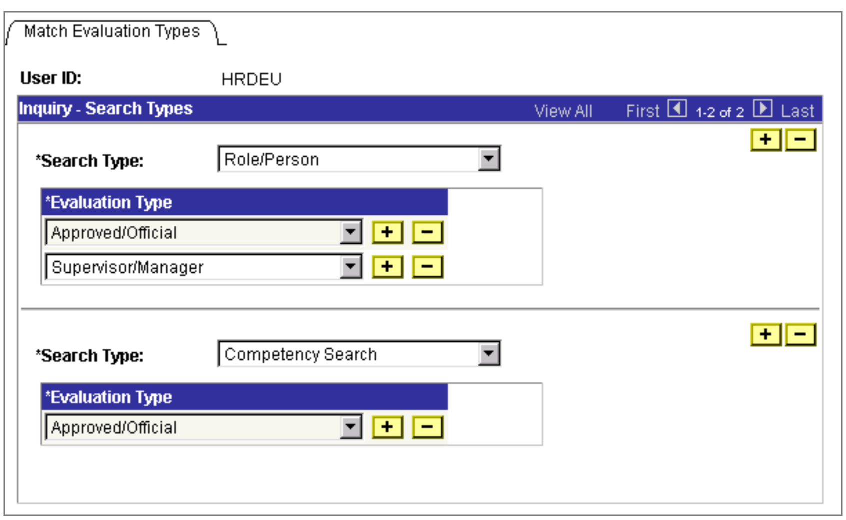
To add **Team Members,** select an employee from the list of valid employee IDs. To add another employee, insert a new data row.

Setting Up Match Evaluations

Before you run any gap and match inquiries, you must setup the Match Evaluation Types page to define the types of evaluation that are included in the analyses and who has access to the gap and match inquiries.

Match Evaluation Types Setup Page

Usage	Use the Match Evaluation Types setup page to define the types of inquiries a user can run, and the evaluation types a user can access. In the 360 Feedback Process, you can have competency evaluations that include various groups, such as managers, customers, peers, and subordinates. Although you may want capability for all these types of evaluations, you do not necessarily want all these evaluators to be able to run the gap analyses inquiries. You can define parameters to control which group has access to different types of evaluations.
Object Name	CM_MATCH_INSTR
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Match Evaluation Types, Match Evaluation Types** • **Develop Workforce, Manage Competencies (USF), Setup, Match Evaluation Types, Match Evaluation Types**
Prerequisites	None
Access Requirements	Enter a User ID.



Match Evaluation Types setup page

The system displays the **User ID** you selected. This field is for information only.

Search Type

Select a **Search Type** from the following options:

Competency Search. Use this option to give the selected **User ID** the ability to run the Competency Search inquiries.

Role/Person. Use this option to give the selected **User ID** the ability to run the Role to Person Match, Person to Role Match, and Team Match inquiries.

Evaluation Type

Select an **Evaluation Type** from the available options.

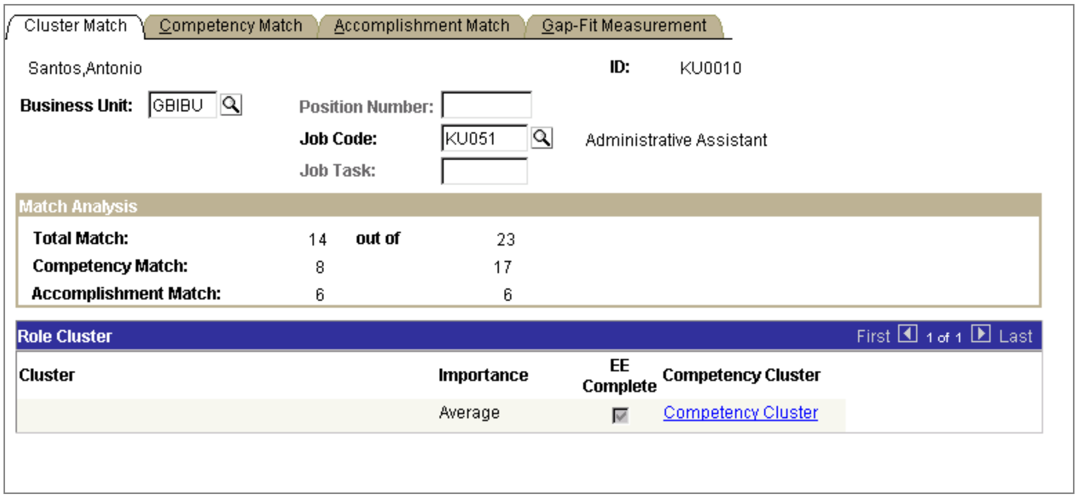
The evaluation types you enter here control which competency ratings the system considers when performing the analysis. For example, when performing a gap analysis for a person, as opposed to a project team, you may only want to include manager and peer evaluations and exclude customer evaluations.

Matching Persons to Roles

Use the Person to Role Match inquiry to determine how well a worker's competencies and accomplishments match those required by a specific Position, Job Code, or Job Task within your organization.

Person to Role Match - Cluster Match Page

Usage	Use the Person to Role Match - Cluster Match page to specify the role (Position, Job Code, or Job Task) with which you want to compare the employee. When you select the role, the system performs the analysis enabling you to see how well the employee matches the required clusters.
Object Name	CM_PERSON_CLUSTER1
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Cluster Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Person to Role Match, Cluster Match**
Prerequisites	You must set up the competency profile for the role and the employee before you can use this inquiry. You must also set up the Match Evaluation Types Setup Page to control which evaluations are considered in the inquiry.
Access Requirements	Enter an Employee ID.



Person to Role Match - Cluster Match page

Business Unit Select a **Business Unit** from the list of valid values.

Position Number If you want to compare the employee against a position, select the **Position** from the list of valid values.

When you move out of the field, the system compares the employee's competencies and accomplishments with the **Position** that you selected and displays the results of the analysis.

Job Code If you want to compare the employee against a Job Code, select the **Job Code** from the list of valid values.

When you move out of the field, the system compares the employee's competencies and accomplishments with the **Job Code** that you selected and displays the results of the analysis.

Job Task If you want to compare the selected employee against the requirements of a Job Task, select the **Job Task** from the list of valid values.

When you move out of the field, the system compares the employee's competencies and accomplishments against the **Job Task** that you selected and displays the results of the analysis.

Total Match **Total Match** indicates how many points the employee has out of the total points possible for the role. This total is a weighted sum based on the importance of the cluster to the role.

Competency Match — **Competency Match** indicates how many of the total points are from competencies.

Accomplishment Match — **Accomplishment Match** indicates how many of the total points are from accomplishments.

For more information about the Total Match, Competency Match and Accomplishment Match fields see Understanding the Match Analysis Process.

Role Cluster

The **Role Cluster** group box lists the clusters required for the role.

Cluster — The system defaults the clusters that you assigned to the role from the Role Cluster - Assign Cluster Page.

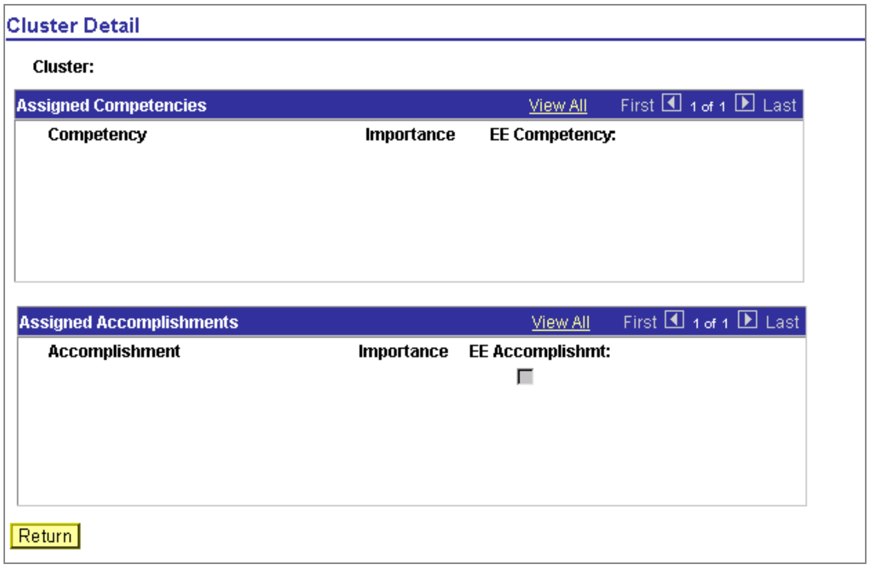
Importance — The system displays the relative **Importance** of each cluster to the selected role.

EE Complete (employee complete) — The system selects the **EE Complete** check box if the employee has all the required competencies and accomplishments assigned to the cluster.

Competency Cluster — Click **Competency Cluster** to view the Cluster Detail page where you can see the competencies and accomplishments assigned to the cluster.

Cluster Detail Page

Usage	Use the Cluster Detail page to view details of the competencies and accomplishments in the selected cluster.
Object Name	CM_PERSON_CLST_SEC
Navigation	To access the page: Click the **Competency Cluster** link on the Person to Role Match - Cluster Match page. Click the **Competency Cluster** link on the Role to Person Match - Cluster Match page.



Cluster Detail page

The system displays the **Cluster** that you selected. This field is for information only.

Assigned Competencies

Competency

The system displays the **Competencies** that you assigned to the cluster from the Cluster Table - Cluster Competencies Page.

Importance

The system displays the **Importance** level that is assigned to each competency.

EE Competency

The system displays a green, yellow, or red traffic light symbol that indicates if the employee has the required rating for the competency.

For more information about these symbols, see Competency Proficiencies Match Analysis.

Assigned Accomplishments

Accomplishment

The system displays the accomplishments that you assigned to the cluster from the Cluster Table - Cluster Accomplishments Page.

Importance

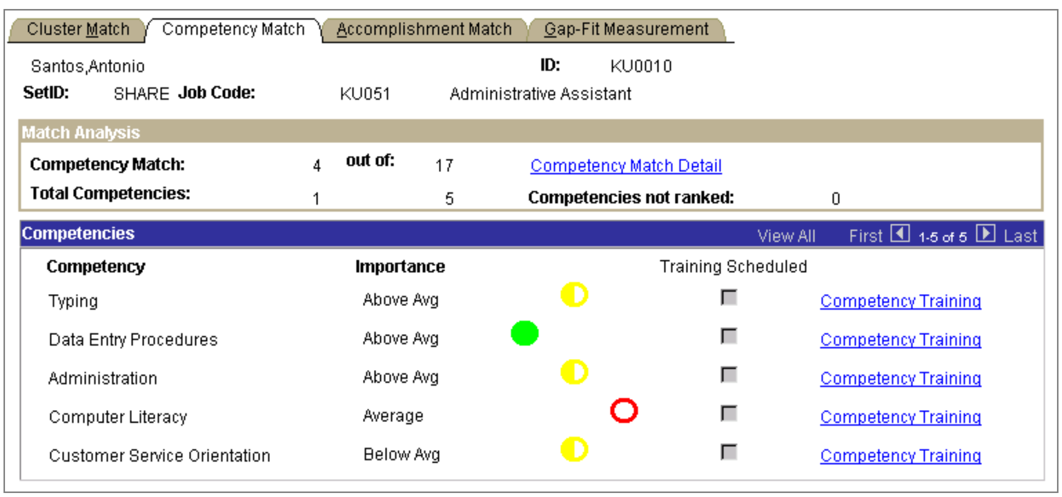
The system displays the **Importance** level assigned to the accomplishment.

EE Accomplishmt (employee accomplishment)

The system selects the **EE Accomplishmt** check box if the employee has the accomplishment.

Person to Role Match - Competency Match Page

Usage	Use the Person to Role Match - Competency Match page to see how well the employee matches the competencies required for a given role. The system displays all the competencies assigned to the role. This includes individual competencies that you assigned using the Role Competency - Assign Competencies Page and competencies that are part of clusters that you assigned to the role.
Object Name	CM_PERSON_ROLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Competency Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Person to Role Match, Competency Match**
Prerequisites	You must select the role from the Cluster Match page.
Access Requirements	Enter an Employee ID.



Person to Role Match - Competency Match page

The system displays the employee **ID** you selected and the details of the role including **Business Unit, Position, Job Code,** or **Job Task**. These fields are for information only.

Match Analysis

Competency Match	**Competency Match** indicates how many of the total points are from competencies.
Total Competencies	**Total Competencies** displays the number of employee competencies that match the competencies required for the role.

Competencies not ranked

The system displays the number of competencies required by the role that are not included in the employee’s evaluations.

Competency Match Detail

Click **Competency Match Detail** to view the Competency Match Detail page where you can view details of the employee’s average ratings in each competency.

Competencies

The system displays, in order of highest to lowest importance, each **Competency** that is assigned to the role.

Competency

The system defaults competencies that you assigned to the role from Role Competency or Role Cluster.

Importance

The system defaults Importance levels that you assigned to the competency on the Cluster Table - Cluster Competencies Page or the Role Competency - Rank Competencies Page

Training Scheduled

The system selects the **Training Scheduled** check box if the employee is already scheduled for training in this competency.

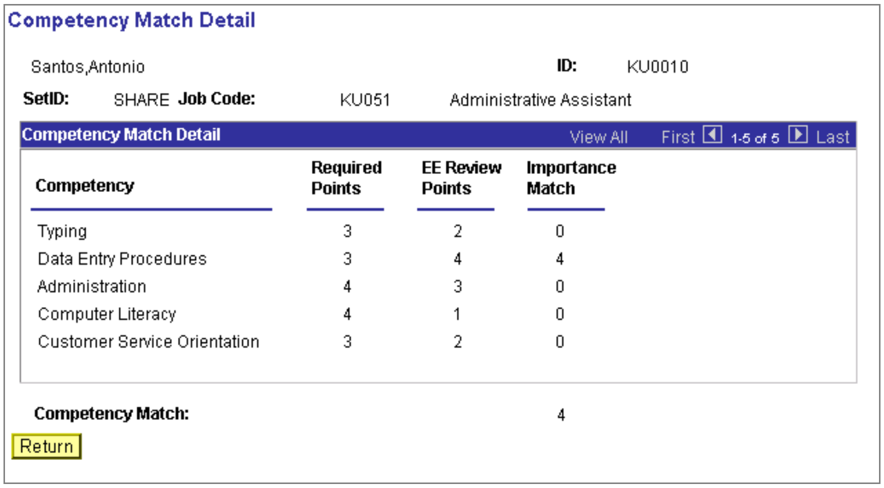
Competency Training

Click **Competency Training** to view the Competency Training Page where you can see if there are courses available that target the competency.

For more information about how the system matches competencies, see Competency Proficiencies Match Analysis.

Competency Match Detail Page

Usage	Use the Competency Match Detail page to view details of the employee’s ratings in each competency assigned to the role.
Object Name	CM_COMP_MATCH_SEC
Navigation	To access the page, click Competency Match Detail on the Competency Match page.


Competency Match Detail

Santos,Antonio ID: KU0010

SetID: SHARE Job Code: KU051 Administrative Assistant

Competency Match Detail View All First 1-5 of 5 Last

Competency	Required Points	EE Review Points	Importance Match
Typing	3	2	0
Data Entry Procedures	3	4	4
Administration	4	3	0
Computer Literacy	4	1	0
Customer Service Orientation	3	2	0

Competency Match: 4

Return

Competency Match Detail page

The system displays the employee **ID** you selected and the details of the role including **Position, Job Code,** or **Job Task**. These fields are for information only.

Competency Match Detail

Competency The system displays the competencies that are assigned to the roles.

Required Points **Required Points** relates to the rating required for the competency. Each rating in a Rating Model has associated with it a Review Points field. It is this value that appears in **Required Points.** In some cases the **Review Points** field is the same as the rating. For example, the PSCM Rating Model has ratings of 0 to 5, which have associated review points of 0 to 5.

For more information about Rating Models, see "Setting Up Competencies and Accomplishments".

EE Review Points (employee review points) **EE Review Points** is related to the employee's rating for the competency. For example, if you use the PSCM Rating Model, a rating of 5 has an associated Review Points value of 5. The Review Points value appears in this field.

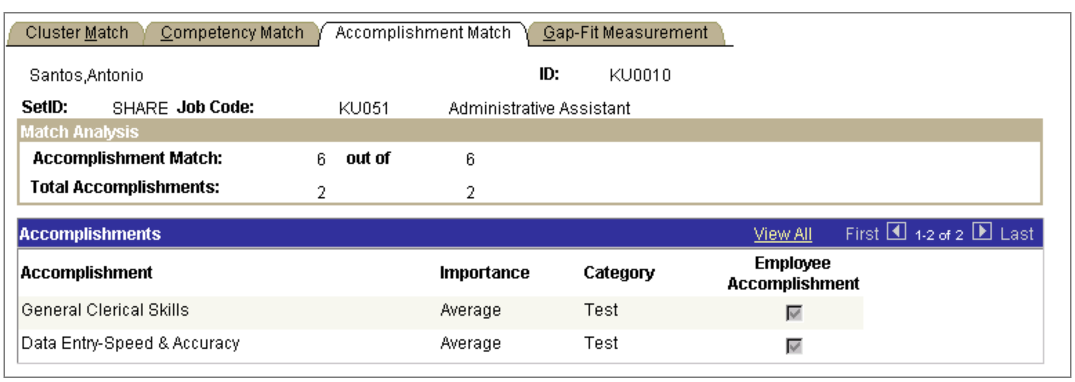
Importance Match

The **Importance Match** shows how many points the employee has been awarded for the competency. If the employee possesses the required competency and has the required rating, the employee is awarded points that are based on the Importance of this competency.

For more information about how the system awards points, see Understanding the Match Analysis Process.

Person to Role Match - Accomplishment Match Page

Usage	Use the Person to Role Match - Accomplishment Match page to see how well your employee's accomplishments fit those required for a given role. The system displays all the accomplishments assigned to the role. This includes individual accomplishments that you assigned using the Role Accomplishment - Assign Accomplishments Page and accomplishments that are part of clusters that you assigned to the role.
Object Name	CM_PERSON_ROLE2
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Accomplishment Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Person to Role Match, Accomplishment Match**
Prerequisites	You must specify the role on the Cluster Match page.
Access Requirements	Enter an Employee ID.



Person to Role Match - Accomplishment Match page

The system displays the employee **ID** you selected and details of the role including **Position, Job Code,** or **Job Task**. These fields are for information only.

Match Analysis

Accomplishment Match	Indicates how many of the total points are from accomplishments.
Total Accomplishments	**Total Accomplishments** displays the number of employee accomplishments that match the accomplishments required for the role.

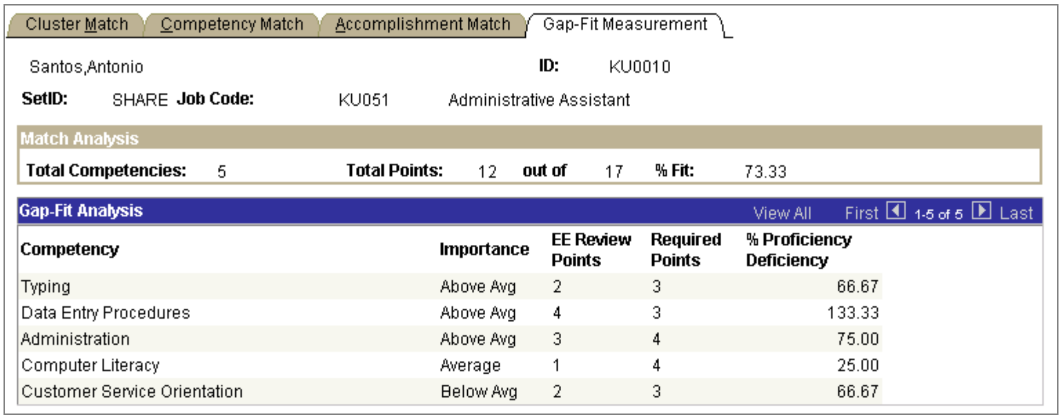
Accomplishments

The system displays each **Accomplishment** assigned to the role in order of highest to lowest importance**.**

Accomplishment	The system defaults accomplishments that you assigned to the role from Role Accomplishment or Role Cluster.
Importance	The system defaults **Importance** levels you assigned from Role Accomplishment or on the Cluster Table.
Category	The system displays the accomplishment type.
Employee Accomplishment	The system selects the **Employee Accomplishment** check box if the employee possesses the accomplishment.

Person to Role Match - Gap-Fit Measurement Page

Usage	Use the Gap-Fit Measurement page to view a detailed analysis of the employee's competency ratings as compared to the competency ratings required for the role. The system compares an employee's ratings in each required competency against the rating expected for the role and calculates the percentage difference (known as the % Proficiency Deficiency). The sum of these percentages gives you an overall indication of how well the employee fits the requirements of the role.
Object Name	CM_PERSON_ROLE3
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Gap-Fit Measurement** • **Develop Workforce, Manage Competencies (USF), Inquire, Person to Role Match, Gap-Fit Measurement**
Prerequisites	You must specify the role on the Cluster Match page.
Access Requirements	Enter an Employee ID.



Person to Role Match - Gap-Fit Measurement page

The system displays the employee **ID** you selected and details of the role including **Position, Job Code,** or **Job Task**. These fields are for information only.

Match Analysis

Total Competencies

Total Competencies shows the number of competencies that are assigned to the role.

Total Points

Total Points indicates how many points the employee has out of the total possible for the role. These values do not include points associated with accomplishments.

For more information about how the system awards points see Understanding the Match Analysis Process.

% Fit

% Fit is the employee's points expressed as a percentage of total possible for the role (shown in the **Total Points** field). The system only includes points associated with competencies in this calculation.

For example, if the employee has 5 points and the total possible for the role is 20 points, the **% Fit** is 25%.

Gap-Fit Analysis

Competency

The system defaults the competencies assigned to the role. This includes individual competencies that you assigned from Role Competency and competencies that are part of clusters that you assigned to the role (using Role Cluster).

Importance

The system displays the **Importance** levels you assigned to each competency.

EE Review Points (employee review points)	**EE Review Points** is related to the employee's rating for the competency. This field displays the review points associated with the employee's rating.
Required Points	**Required Points** relates to the rating required for the competency. Each rating in a Rating Model has associated with it a Review Points field. It is this value that appears in **Required Points.** In some cases, the Review Points field is the same as the Rating. For example, the PSCM Rating Model has ratings of 0 to 5, which have associated review points of 0 to 5. Therefore, if a role requires a rating of 5, the **Required Points** field is also set to 5.
	For more information about rating models, see "Setting Up Competencies and Accomplishments".
% Proficiency Deficiency	**% Proficiency Deficiency** is the percentage difference between the employee's rating and the rating required for the role. The system calculates **% Proficiency Deficiency** by dividing **EE Review Points** by **Required Points** and converting the result into a percentage. For example, if **EE Review Points** is ***3*** but the role has **Required Points** of ***4,*** the **% Proficiency Deficiency** is ***75%.*** If an employee's rating exactly matches the required rating, **% Proficiency Deficiency** is 100%. A percentage less than 100% indicates the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

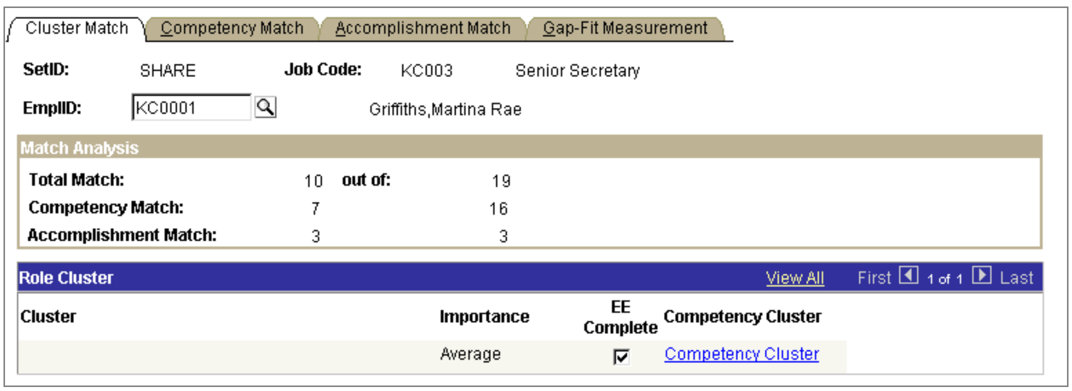
Matching Roles to Your Workforce

Using the Person to Role Match, you select a worker and compare their skills to a role. With the Role to Person Match you work from the other direction: You select a role and then compare its competency and accomplishment requirements to individuals. In other words, you have a role to fill and can see who are the most qualified current candidates for that position.

Role to Person Match - Cluster Match Page

Usage	Use the Role to Person Match - Cluster Match page to specify the employee to which you want to compare the role.

	When you select the employee, the system performs the analysis, which enables you to see how well the employee matches the required clusters.
Object Name	CM_ROLE_CLUSTER1
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Cluster Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Role to Person Match, Cluster Match**
Prerequisites	You must set up the competency profile for the role and the employee before you can use this inquiry. You must also set up the Match Evaluation Types Setup Page to control which evaluations are considered in the inquiry.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role to Person Match - Cluster Match page

The system displays the role you selected (**Position, Job Code,** or **Job Task**). These fields are for information only.

EmplID (employee ID) Select an employee from the list of valid values.

When you move out of the field, the system compares the employee's competencies and accomplishments against the role you selected and displays the results of the analysis.

Match Analysis

Total Match **Total Match** indicates how many points the employee has earned out of the total points possible for the role. These points are a weighted sum based on the importance of the cluster to the role.

Competency Match **Competency Match** indicates how many of the total points are from competencies.

Accomplishment Match	**Accomplishment Match** indicates how many of the total points are from accomplishments.

For more information about the Total Match, Competency Match, and Accomplishment Match fields, see Understanding the Match Analysis Process.

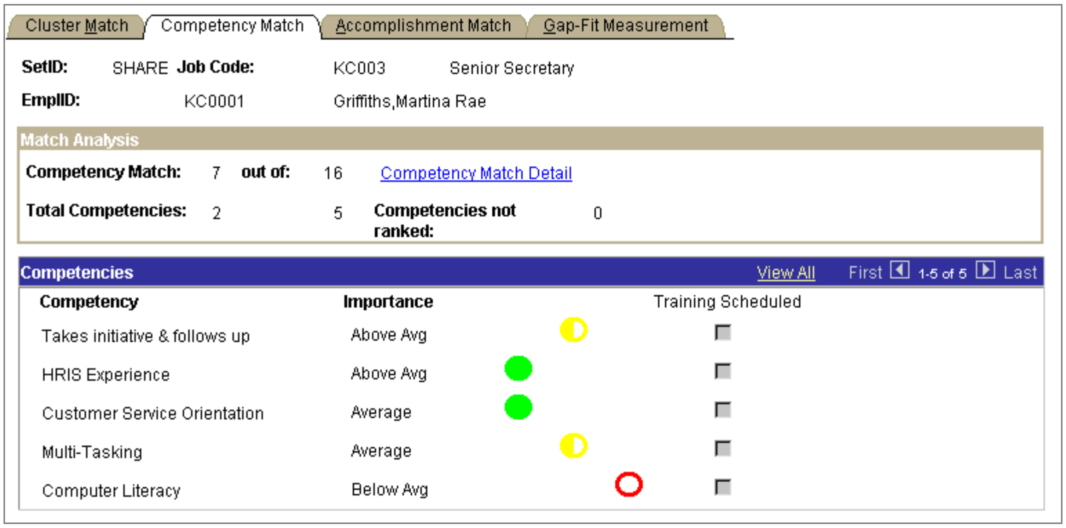
Role Clusters

The **Role Cluster** group box lists the clusters required for the role.

Cluster	The system defaults the clusters you assigned to the role on the Role Cluster - Assign Cluster Page.
Importance	The system displays the relative **Importance** of the cluster to the selected role.
EE Complete (employee complete)	The system selects the **EE Complete** check box if the employee has all the required competencies and accomplishments assigned to the cluster.
Competency Cluster	Click **Competency Cluster** to view the Cluster Detail Page where you can see the competencies and accomplishments assigned to the cluster.

Role to Person Match - Competency Match Page

Usage	Use the Role to Person Match - Competency Match page to see how well the employee matches the required competencies. The system displays all the competencies assigned to the role. This includes individual competencies that you assigned using the and competencies that are part of clusters that you assigned to the role.
Object Name	CM_ROLE_PERSON
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Competency Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Role to Person Match, Competency Match**
Prerequisites	You must select the employee from the Cluster Match page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role to Person Match - Competency Match page

The system displays details of the role and **EmplID** (employee ID) you selected. These fields are for information only.

Match Analysis

Competency Match	**Competency Match** indicates how many of the total points are from competencies.
Total Competencies	**Total Competencies** displays the number of employee competencies that match the competencies required for the role.
Competencies not ranked	The system displays the number of competencies required by the role that are not included in the employee's evaluations.
Competency Match Detail	Click **Competency Match Detail** to view the Competency Match Detail page where you can view details of the employee's average ratings in each competency.

Competencies

The system displays each **Competency** assigned to the role in order of highest to lowest importance.

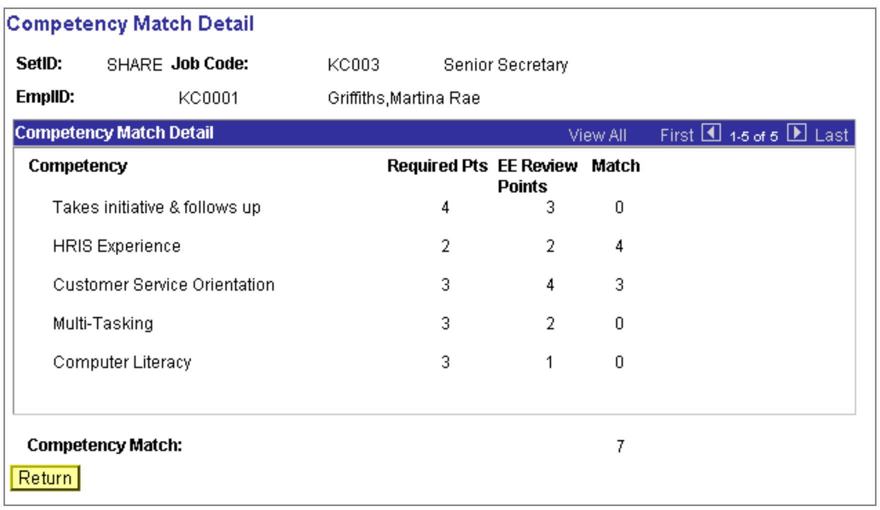
Competency	The system defaults competencies that you assigned to the role from Role Competency.
Importance	The system defaults **Importance** levels you assigned on the Cluster Table - Cluster Competencies Page or the Role Competency - Rank Competencies Page.

Training Scheduled The system selects the **Training Scheduled** check box if the employee is scheduled for training in this competency already.

For more information about how Match Analysis works, see Understanding the Match Analysis Process.

Competency Match Detail Page

Usage	Use the Competency Match Detail page to view details of the employee’s ratings in each competency assigned to the role.
Object Name	CM_ROLE_PERSON_SEC
Navigation	To access the page, click Competency Match Detail on the Competency Match page.



Competency Match Detail page

The system displays the **Position Number, Job Code,** or **Job Task,** and the **EmplID** (employee ID) that you selected, along with the role description and employee’s name. These fields are for information only.

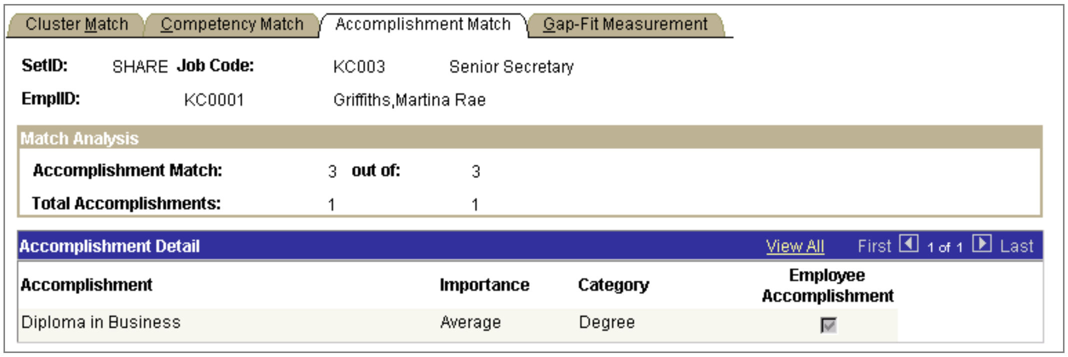
Competency Match Detail

Competency The system displays the competencies assigned to the roles.

Required Pts (required points)	**Required Pts** relates to the rating required for the competency. Each rating in a Rating Model has associated with it a Review Points field. It is this value that appears in **Required Pts.** In some cases the Review Points field is the same as the rating. For example, the PSCM Rating Model has ratings of 0 to 5, which have associated review points of 0 to 5.
	For more information about rating models, see "Setting Up Competencies and Accomplishments".
EE (employee) **Review Points**	**EE Review Points** is related to the employee's rating for the competency. For example, if you use the PSCM Rating Model, a rating of 5 has an associated **Review Points** value of 5. The **Review Points** value appears in this field.
Match	**Match** shows how many points the employee has been awarded for the competency. If the employee possesses the required competency and has the required rating, the employee is awarded points that are based on the Importance of this competency.
	For more information about how the system awards points see Understanding the Match Analysis Process.

Role to Person Match - Accomplishment Match Page

Usage	Use the Role to Person Match - Accomplishment Match page to see how well the employee's accomplishments fit those required for the role.
Object Name	CM_ROLE_PERSON2
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Accomplishment Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Role to Person Match, Accomplishment Match**
Prerequisites	You must select the employee from the Cluster Match page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Role to Person Match - Accomplishment Match page

At the top of this page, the system displays the **Position Number, Job Code,** or **Job Task,** and the **EmplID** (employee ID) that you selected, along with the role description and employee's name.

Match Analysis

Accomplishment Match	Indicates how many of the total points are from accomplishments.
Total Accomplishments	**Total Accomplishments** displays the number of the employee accomplishments that match the accomplishments required for the role.

Accomplishment Detail

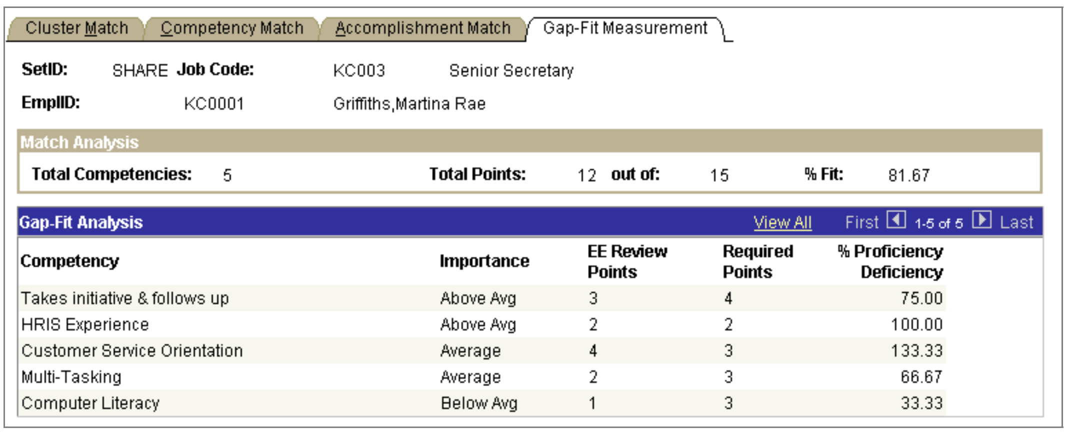
The system displays each **Accomplishment** assigned to the role in order of highest to lowest importance.

Accomplishment	The system defaults accomplishments that you assigned to the role from Role Accomplishment or Role Cluster.
Importance	The system defaults Importance levels that you assigned from Role Accomplishment or on the Cluster Table.
Category	The system displays the accomplishment type.
Employee Accomplishment	The system selects the **Employee Accomplishment** check box if the employee possesses the accomplishment.

Role to Person Match - Gap-Fit Measurement Page

Usage	Use the Gap-Fit Measurement page to view a detailed analysis of the employee's competency ratings as compared to the competency ratings required for the role.

	The system compares an employee's ratings in each required competency against the rating expected for the role and calculates the percentage difference (known as the % Proficiency Deficiency). The sum of these percentages gives you an overall indication of how well the employee fits the requirements of the role.
Object Name	CM_ROLE_PERSON3
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Gap-Fit Measurement** • **Develop Workforce, Manage Competencies (USF), Inquire, Role to Person Match, Gap-Fit Measurement**
Prerequisites	You must select the employee from the Cluster Match page.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.


Cluster Match | Competency Match | Accomplishment Match | Gap-Fit Measurement

SetID: SHARE Job Code: KC003 Senior Secretary

EmplID: KC0001 Griffiths,Martina Rae

Match Analysis

Total Competencies: 5 Total Points: 12 out of: 15 % Fit: 81.67

Gap-Fit Analysis View All First 1-5 of 5 Last

Competency	Importance	EE Review Points	Required Points	% Proficiency Deficiency
Takes initiative & follows up	Above Avg	3	4	75.00
HRIS Experience	Above Avg	2	2	100.00
Customer Service Orientation	Average	4	3	133.33
Multi-Tasking	Average	2	3	66.67
Computer Literacy	Below Avg	1	3	33.33

Role to Person Match – Gap-Fit Measurement page

The system displays details of the role you selected (**Position, Job Code,** or **Job Task**) and the employee ID **(EmplID).** These fields are for information only.

Match Analysis

Total Competencies — **Total Competencies** shows the number of competencies assigned to the role.

Total Points — **Total Points** indicates how many points the employee has out of the total possible for the role. These values do not include points associated with accomplishments.

For more information about how the system awards points see Understanding the Match Analysis Process.

% Fit

% Fit is the employee's points expressed as a percentage of total possible for the role (shown in the **Total Points** field). The system only includes points associated with competencies in this calculation.

For example, if the employee has 5 points and the total possible for the role is 20 points, the **% Fit** is 25%.

Gap-Fit Analysis

Competency

The system defaults the competencies assigned to the role. This includes individual competencies that you assigned using Role Competency and competencies that are part of clusters that you assigned to the role (using Role Cluster).

Importance

The system displays the **Importance** levels you assigned to each competency.

EE Review Points (employee review points)

EE Review Points is related to the employee's rating for the competency. This field displays the review points associated with the employee's rating.

Required Points

Required Points relates to the rating required for the competency. Each rating in a Rating Model has associated with it a Review Points field. It is this value that appears in **Required Points**. In some cases the Review Points field is the same as the rating. For example, the PSCM Rating Model has ratings of 0 to 5, which have associated review points of 0 to 5. So if a role requires a rating of 5, the **Required Points** field is also set to 5.

For more information about rating models, see "Setting Up Competencies and Accomplishments".

% Proficiency Deficiency

% Proficiency Deficiency is the percentage difference between the employee's rating and the rating required for the role. The system calculates **% Proficiency Deficiency** by dividing **EE Review Points** by **Required Points** and converting the result into a percentage. For example, if **EE Review Points** is ***3*** but the role has **Required Points** of ***4,*** the **% Proficiency Deficiency** is ***75%.***

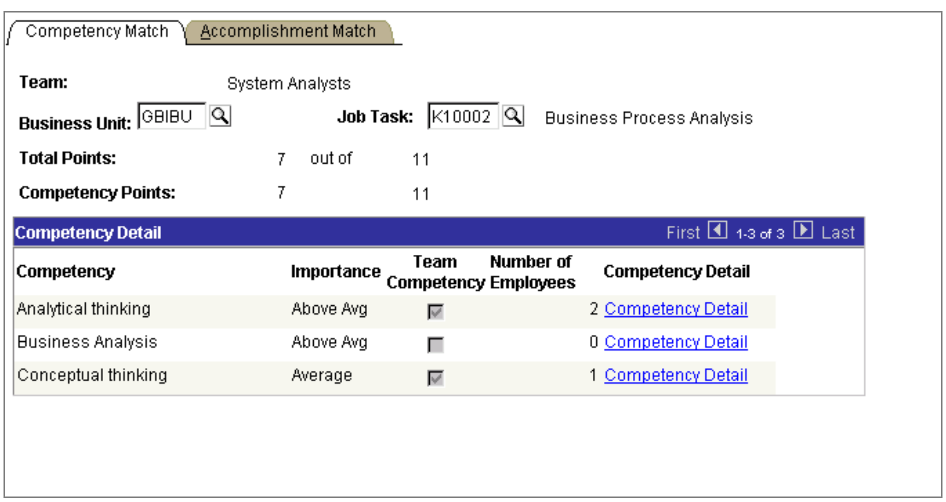
If an employee's rating exactly matches the required rating, **% Proficiency Deficiency** is 100%. A percentage less than 100% indicates the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

Matching Teams

The Team Match inquiry enables you to compare a team's competencies and accomplishments against those required for a Job Task.

Team Match - Competency Match Page

Usage	Use the Team Match – Competency Match page to compare the competencies assigned to a Job Task with the competency profiles of team members.
Object Name	CM_TEAM_ROLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Team Match, Competency Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Team Match, Competency Match**
Prerequisites	You must set up the competency profile for the Job Task and the team members before you can use this inquiry. Set up employee teams using the Employee Teams Page page. You must also set up the Match Evaluation Types Setup Page to control which evaluations are considered in the inquiry.
Access Requirements	Enter a team code.



Team Match - Competency Match page

The system displays the **Team** you selected. This field is for information only.

Business Unit	Select the **Business Unit** that is associated with the **Job Task** from the list of valid values.

Job Task — Select the **Job Task** to which you want to match the team from the list of tasks.

Total Points — **Total Points** indicates how many points the team has earned out of the total points possible for the task.

Competency Points — **Competency Points** indicates how many of the total points are from competencies.

For more information about the Total Points and Competency Points fields, see Understanding the Match Analysis Process.

Competency — The system defaults the competencies you assigned to the **Job Task** from Role Competency.

Importance — The system displays the **Importance** you assigned to each competency for the **Job Task.**

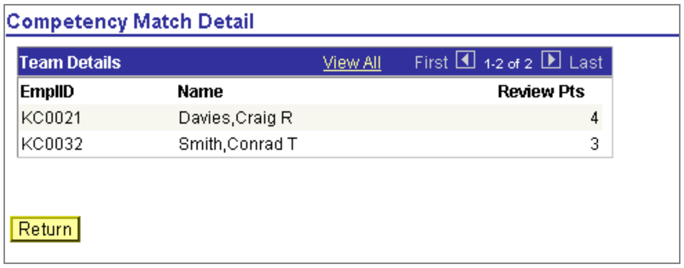
Team Competency — The system selects the **Team Competency** check box if any member of the team has the competency at the required proficiency.

Number of Employees — The **Number of Employees** lists how many team members have the competency at the required proficiency level.

Competency Detail — Click **Competency Detail** to view the Competency Match Detail Page where you can see who has the required competency.

Competency Match Detail Page

Usage	Use the Competency Match Detail page to view a list of the team members with the competency at the required proficiency.
Object Name	CM_TEAM_ROLE_SEC
Navigation	To access the page, click Competency Match Detail on the Competency Match page.


Competency Match Detail

Team Details	View All	First 1-2 of 2 Last
EmplID	**Name**	**Review Pts**
KC0021	Davies,Craig R	4
KC0032	Smith,Conrad T	3

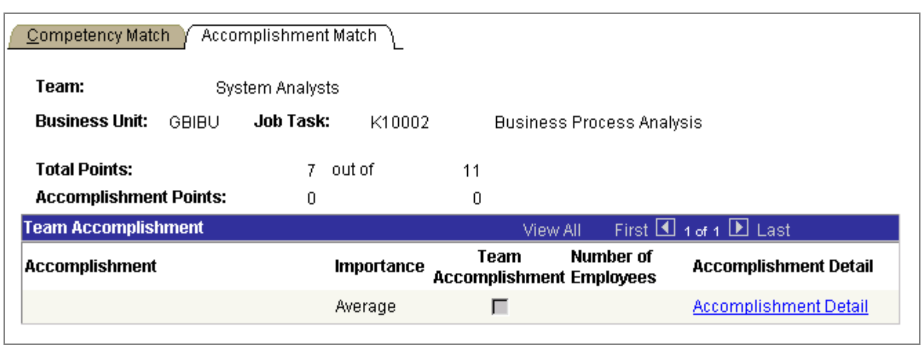
Return

Competency Match Detail page

The system lists the team members who have the selected competency at the required rating. The data is for information only and covers **EmplID** (employee ID), **Name,** and **Review Pts** (points).

Team Match - Accomplishment Match Page

Usage	Use the Team Match – Accomplishment Match page to compare the accomplishments required by a Job Task with the team members' accomplishments.
Object Name	CM_TEAM_ROLE2
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Team Match, Accomplishment Match** • **Develop Workforce, Manage Competencies (USF), Inquire, Team Match, Accomplishment Match**
Prerequisites	You must enter a Job Task on the Team Match - Competency Match page.
Access Requirements	Enter a team code.


Competency Match | Accomplishment Match

Team: System Analysts

Business Unit: GBIBU **Job Task:** K10002 Business Process Analysis

Total Points: 7 out of 11

Accomplishment Points: 0 0

Team Accomplishment View All First 1 of 1 Last

Accomplishment	Importance	Team Accomplishment	Number of Employees	Accomplishment Detail
	Average	☐		Accomplishment Detail

Team Match - Accomplishment Match inquiry page

The system displays the **Team**, **Business Unit**, and **Job Task** you selected. These fields are for information only.

Total Points	**Total Points** indicates how many points the team has out of the total points possible for the task.

Accomplishment Points

Accomplishment Points indicates how many of the total points are from accomplishments.

For more information about the Total Points and Accomplishment Points fields see Understanding the Match Analysis Process.

Team Accomplishment

Accomplishment

The system defaults the accomplishments you assigned to the role from Role Accomplishment.

Importance

The system displays the **Importance** you assigned to each accomplishment for the Job Task.

Team Accomplishment

The system selects the **Team Accomplishment** check box if any member of the team has the required accomplishment.

Number of Employees

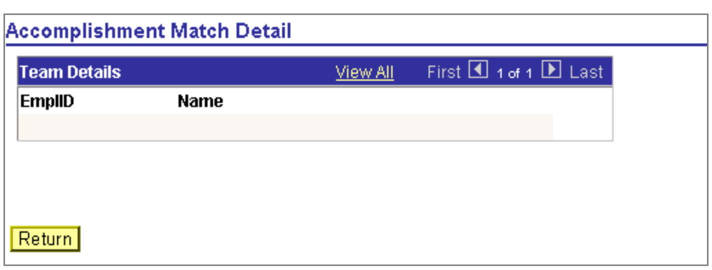
The **Number of Employees** lists how many team members have the accomplishment.

Accomplishment Detail

Click **Accomplishment Detail** to view the Accomplishment Match Detail Page where you can see who has the required accomplishment.

Accomplishment Match Detail Page

Usage	Use the Accomplishment Match Detail page to view a list of the team members with the required accomplishment.
Object Name	CM_TEAM_ROLE2_SEC
Navigation	To access the page, click Accomplishment Match Detail on the Accomplishment Match page.



Accomplishment Match Detail page

The system lists the team members who have the selected accomplishment. The data is for information only and covers **EmplID** (employee ID) and employee **Name.**

Searching for the Right Candidate

Once you've entered all the accomplishments and competencies data for both workers and roles in your enterprise, you can perform searches in PeopleSoft Human Resources to find the people most qualified to assume roles within your organization, be they positions, jobs, or job tasks.

Competency Search - Employees. Use this inquiry to search through all current employees who might be qualified to fill a role. The search does not include applicants or contractors.

Competency Search - Applicants. Use this inquiry to search for qualified applicants who might be qualified to fill a role.

Competency Search - Contractors. As companies turn more and more to contract labor to meet their staffing needs, it is increasingly important to be able to match contractors with roles in your organization. Use the inquiry Competency Search - Contractors to search through all your contractors for those possessing the competencies required for a role.

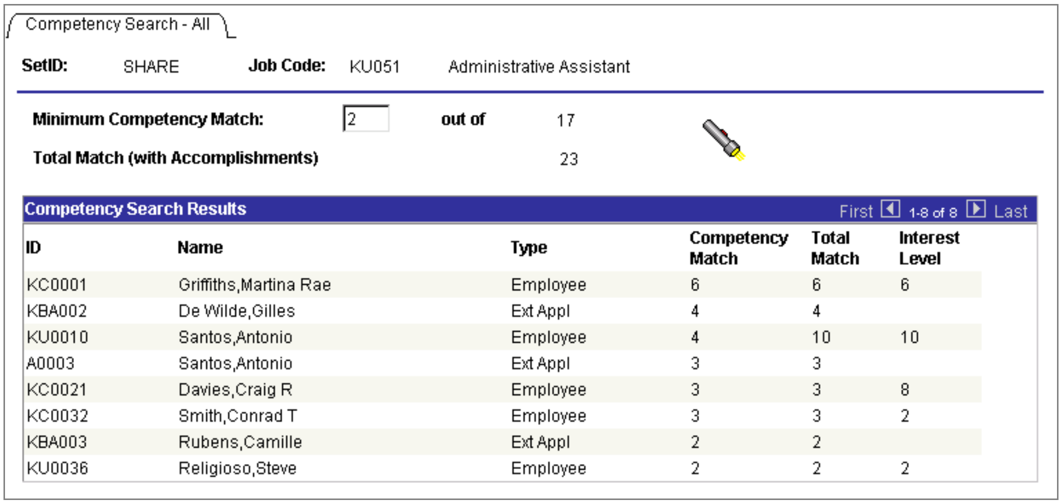
Competency Search - All. Use this inquiry to search through all current employees, contractors, and applicants for qualified candidates.

If you want to review employee competencies and see their current position or job in your organization, you can run the Competency Inventory report. The report lists workers in a department, profiles their competencies, their proficiency in each competency, and their current job or position.

Competency Search All Page

Usage	Use the Competency Search inquiry page to perform a search for employees, contractors, or applicants who have the competencies and accomplishments required for a selected role.
Object Name	CM_SEARCH_ALL
Navigation	• **Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-All, Competency Search - All** • **Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-Applicants, Competency Search - Applicants** • **Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-Contractors, Competency Search - Contractor** • **Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-Employees, Competency Search - Employee**
Prerequisites	You must set up the competency profile for the role before you can use this inquiry. You must also set up the Match Evaluation Types Setup Page to control which employee evaluations are considered in the

	inquiry.
Access Requirements	Enter a Position, a Job Family, a Job Code, or a Job Task.



Competency Search - All

SetID: SHARE Job Code: KU051 Administrative Assistant

Minimum Competency Match: 2 out of 17

Total Match (with Accomplishments) 23

Competency Search Results First 1-8 of 8 Last

ID	Name	Type	Competency Match	Total Match	Interest Level
KC0001	Griffiths,Martina Rae	Employee	6	6	6
KBA002	De Wilde,Gilles	Ext Appl	4	4	
KU0010	Santos,Antonio	Employee	4	10	10
A0003	Santos,Antonio	Ext Appl	3	3	
KC0021	Davies,Craig R	Employee	3	3	8
KC0032	Smith,Conrad T	Employee	3	3	2
KBA003	Rubens,Camille	Ext Appl	2	2	
KU0036	Religioso,Steve	Employee	2	2	2

Competency Search - All page

At the top of this page, the system displays the **SetID, Position Number, Job Code,** or **Job Task** that you selected and the description of the role.

Minimum Competency Match

Enter a **Minimum Competency Match** requirement. Use this match number to indicate the minimum number of points a candidate must have to qualify for this position. To initiate the search, click the **Search Type** button.

Total Match (with Accomplishments)

Total Match shows the maximum number of points possible for the role. This value includes points for required accomplishments.

Click the **Search Type** button to perform the search. The system displays the results of the search in the **Competency Search Results** group box.

Competency Search Results

ID

Depending on the inquiry you selected, the system displays the **ID** of all employees, contractors, or applicants who meet your minimum requirements and ranks those qualified by **Competency Match** and **Total Match** points. If you chose the Competency Search - All inquiry, the system includes employees, contractors, and applicants in the search.

Name

The system displays the employee, contractor, or applicant **Name** in this field.

Competency Match	**Competency Match** indicates how many of the employee's total points are from competencies.
Total Match	The **Total Match** shows the employee's total points for competencies and accomplishments.
Interest Level	**Interest Level** indicates how keen the employee is to develop the given competency. The value in this column is based on a summary of the employee's Interest Levels assigned on the Competencies - Competency Rating Page. ***Very desirable = 4*** ***Desirable = 3*** ***No preference = 2*** ***Undesirable = 1*** ***Very undesirable = 0***

For more information about the matching analysis, see Understanding the Match Analysis Process.

Adapting Images for Gap and Match Analyses

The Manage Competencies Business Process enables you not only to record, but also to analyze how your worker competencies match up against your project and position needs.

The system uses visual cues to indicate how a worker's level of proficiency for a competency compares to a project or position's required proficiency level for a competency by using a red stop light, a yellow light, and a green light. You can change the images used on the inquiry pages using the Application Designer.

For more information about using the Application Designer see Using Application Designer.

CHAPTER 5

Managing Competency Training

With the Manage Competencies business process, you can do far more than track and match worker skills to the positions and projects in your enterprise. Manage competencies also enables you to plan training and develop your workers' skills and knowledge in order to prepare them for career advancement.

If employees need to acquire a new competency or accomplishment, or improve their proficiency rating, you can schedule them into appropriate courses or training programs. You can attach competencies to training courses offered either within your company or by an outside school or provider. You can match employees to the training courses they need and schedule the courses. When they complete the courses, the system automatically updates their competencies profile.

Setting Up Competency Training Courses and Programs

This section explains how you can set up competency training in your PeopleSoft Human Resources system.

Setting Up Training Courses describes how you can define courses aimed at developing or improving selected competencies. To track other forms of training, such as computer based training, use the Non Course Table Competencies Setup Page.

Setting Up Training Programs describes how to develop training programs for specific Job Codes.

Setting Up Training Courses

To set up training courses and track employee skills and accomplishments, create courses in the Course Table. This is where you define course information, identify course prerequisites, target competencies, and specify standard equipment and materials required to administer courses.

Courses are the foundation of in-house course session administration; before you can set up sessions, you must set up the courses themselves. You'll also find course codes useful for tracking external courses that students frequently attend, such as trade association seminars or classes offered at a local college.

You can also access the Course Table through the Administer Training menu.

To access the Course Table, select **Develop Workforce, Manage Competencies, Use, Training.**

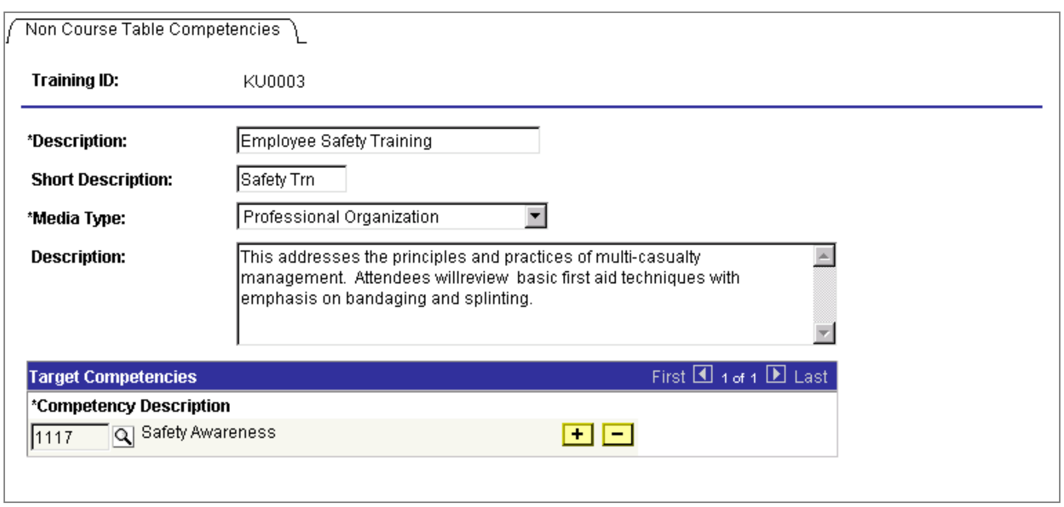
For more information about the Course Table pages, see Setting Up Training Courses.

To view a list of standard courses already defined in the system, you can generate the Course Table report (PER703). This report's lists all available courses and a description including the location and duration of the course.

For more information about the Course Table report, see Running Administer Training Reports.

Non Course Table Competencies Setup Page

Usage	Use the Non Course Table Competencies setup page to track training that does not involve take a course or attending a class, such as multimedia CD-ROM presentations or self-paced training guides.
Object Name	CM_NON_CRSE_TABLE
Navigation	• **Develop Workforce, Manage Competencies (GBL), Setup, Non-Course Training Table, Non Course Table Competencies** • **Develop Workforce, Manage Competencies (USF), Setup, Non-Course Training Table, Non Course Table Competencies**
Prerequisites	None.
Access Requirements	Enter a training ID.



Non Course Table Competencies setup page

Enter a **Description** and a **Short Description** for the non-course related training method. The descriptions that you enter here will display whenever you refer to this **Training ID** when you schedule training for workers in the Manage Competencies business process.

Select a **Media Type** from the list of valid values. These values are stored on the Translate Table and can be easily edited to include additional media types.

Give the Non Course related training a long **Description** to record any additional information about this training method, including prerequisites, related training, and so forth. This information is for your own documentation purposes and does not trigger any system processes.

To specify training objectives, you can select **Target Competencies,** which you create in the Competency Table.

To specify additional competencies, insert additional rows of data.

Setting Up Training Programs

Use the Training Program Table to group courses into logical progressions. You can then associate standard training programs with Job Codes on the Job Code Table. You can also associate them with projects within the Manage Competencies business process. The training programs that you set up here are particularly helpful in planning careers and improving worker competencies. When you set up training and development programs for employees, you can choose to use the default training program for their Job Codes.

You can also access the Training Program Table through the Administer Training and Plan Careers menus.

To access the Training Program Table, select **Develop Workforce, Manage Competencies, Setup, Training Program Table.**

For more information about the Training Program page, see Training Program Table Page.

Tracking Worker Training

To fulfill training requirements, some workers perform courses of study outside your organization or take courses not taught by an in-house instructor. For example, your organization might offer computer-based training (CBT) courses that workers complete on their own. Workers might take courses at local colleges or seminars that are offered by trade associations.

Use the Training History page to track the training employees have taken or plan to take. This includes both in-house course sessions and external courses for employees.

You can also access this page through the Administer Training menu. It's called Course Student Enrollment when you access it from Administer Training.

To access the Training History page, select **Develop Workforce, Manage Competencies, Use, Training.**

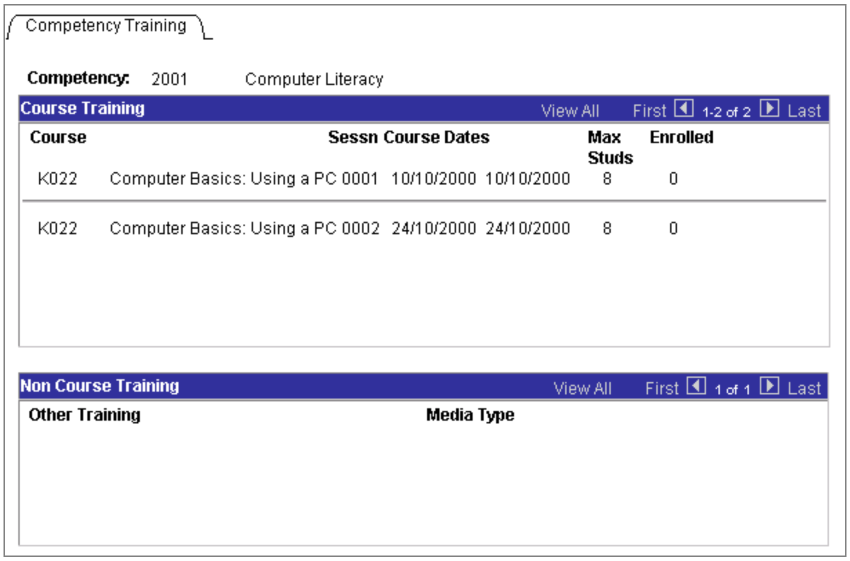
For more information about the Training History page, see Student Training - Course Student Enrollment Page.

Viewing Competency Training Courses

If a worker has a low rating for a particular competency and would like to improve the rating, you can view the various training courses that are set up to improve proficiency using the Competency Training page.

Competency Training Page

Usage	Use the Competency Training page to view the training courses that address a selected competency.
Object Name	COMP_TRAINING
Navigation	**Develop Workforce, Manage Competencies (GBL), Inquire, Course Competencies, Competency Training** **Develop Workforce, Manage Competencies (USF), Use, Course Competencies, Competency Training** Click Competency Training on the Person to Role Match - Competency Match page
Prerequisites	None
Access Requirements	Enter a competency.



Competency Training page

The system displays courses that are designated for the **Competency** that you selected. The page displays the **Course** name, **Sessn** (session) number, **Course Dates,** the **Max Studs** (maximum number of students) that can be enrolled in this course session, and the number of students currently **Enrolled** on the session.

The system displays the **Enroll into Course Session** button only when you access this page from the Person to Role Match inquiry. Click the **Enroll into Course Session** button, to add the selected employee to the waiting list for the course session. If the worker is already enrolled or waitlisted in the session, a message is displayed indicating that this is the case. If the employee is already enrolled or waitlisted in another session of the same course, then the system displays a message and bypasses the waitlist request.

Non Course Training

The system also displays **Other Training** that may be available for this competency, and the **Media Type** associated with the **Other Training** method.

For more information about tracking and scheduling course training in PeopleSoft Human Resources, see Tracking Student Training.

CHAPTER 6

Managing Local Functionality for the UK

In this section, we cover the administration of National Vocational Qualifications (NVQs) for your employees in the United Kingdom.

Overview of NVQs

National Vocational Qualifications, or NVQs, reflect the skills, knowledge, and understanding that your employees possess in relation to a specific area of work. It builds an industry standard and is tailored to meet government requirements.

The primary goal of the NVQ system is to create a coherent structure for NVQs and to enable the transfer and progression, both within areas of competence and between them. This enables you to view NVQs as you would other accomplishments in your organization.

NVQs are based on national occupational standards. The Qualifications and Curriculum Authority (QCA) works with organizations, including national training organizations, in order to coordinate the development and specification of these standards. The qualifications are unit-based, and the number and size of units varies between areas of competence. A unit is achieved when an enrolled employee is assessed as having competent skills and knowledge. The areas of competence defined within the NVQ system result from a functional analysis of business roles and provide a structure for competence-based qualifications. As this structure is developed, you'll identify further routes for the progression or transfer of competencies for your employees.

NVQs give your employees a standardized, yet flexible, training for life-long education. In the emerging organizational paradigm, individual expertise is yielding to cooperative teams that are comprised of skilled workers with broad-based knowledge. The NVQ system is generally viewed according to areas of work and levels of competence.

The following areas of work are currently covered by the NVQ system:

NVQ Areas	***NVQ Areas***	***NVQ Areas***
Tending animals, plants, and land	Transporting	Providing business services
Extracting and providing natural resources	Providing health, social, and protective services	Developing and extending knowledge and skill
Constructing	Providing goods and services	Communicating
Engineering	Manufacturing	

The following definitions of NVQ levels provide a general guideline:

Level	***Definition***
Level 1	Competence that involves the application of knowledge and skills in the performance of a range of varied work activities, most of which may be routine or predictable.
Level 2	Competence that involves the application of knowledge and skills in a significant range of varied work activities and performed in a variety of contexts. Some of the activities are complex or non-routine, and there is some individual responsibility and autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement.
Level 3	Competence that involves the application of knowledge and skills in a broad range of varied work activities performed in a variety of contexts, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often required.
Level 4	Competence that involves the application of knowledge and skills in a broad range of complex, technical or professional work activities, performed in a wide range of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present.
Level 5	Competence that involves the application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Substantial personal autonomy and significant responsibility for the work of others and for the allocation of substantial resources is important, as personal accountability for analysis and diagnosis, design, planning, execution, and evaluation.

A number of organizations are involved in the process of developing, delivering, awarding, and preserving the quality of NVQs:

Lead bodies identify, define, and update employment-based standards of competence for agreed groups of occupations. NVQs are based on these standards and criteria, which are established by the Qualifications and Curriculum Authority (QCA).

Awarding bodies have a dual role. With lead bodies, they are jointly responsible for the development of NVQs and they are also responsible for the implementation of individual NVQs. They approve centers that want to offer assessment services towards NVQs.

Awarding bodies monitor the assessment process and award NVQs and unit certificates. They undertake external verification to ensure that your employees are being assessed fairly and consistently across all centers.

Qualifications and Curriculum Authority (QCA) ensures that NVQs meet particular criteria and that they are comparable across different sectors. QCA accredits (formally recognizes) proposals for NVQ awards developed by lead and awarding bodies and quality assures and audits the activity of the awarding bodies.

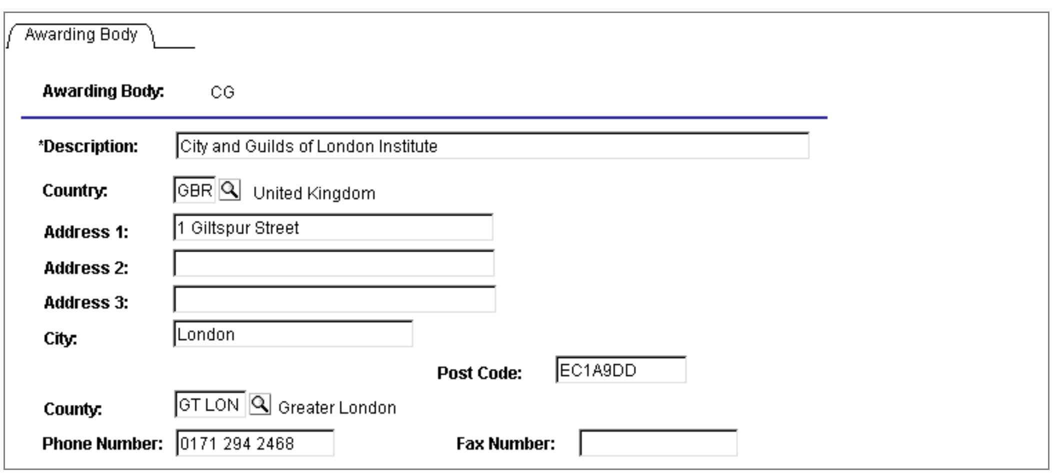
Additionally, there is the National Database of Vocational Qualifications, which contains comprehensive information on NVQs, including the units that make up each qualification, the key skills units, and units specifically developed for assessors and verifiers.

Setting Up NVQ Information

Setting up NVQ information involves entering information in the Award Body and Unit Tables. This enables you to enter information about the components that are necessary to define NVQs and which have relevance to your organization. This information is available from the National Council for Vocational Qualifications (NCVQ).

Award Body Table Setup Page

Usage	Use the Award Body Table setup page to enter information about the NVQ awarding bodies.
Object Name	NVQ_AWARD_TBL
Navigation	**Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - Award Body Table, NVQ Award Body Table**
Prerequisites	None.
Access Requirements	Enter a code for the awarding code. You can obtain a list of relevant bodies from the NCVQ.



Award Body Table setup page

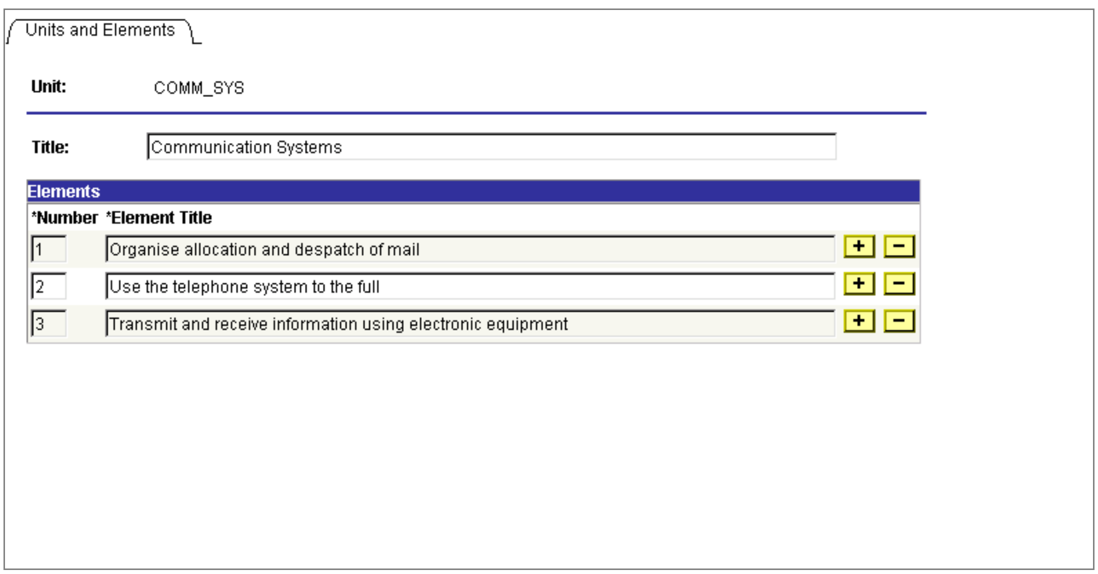
Enter a **Description** of the awarding body.

Select a **Country** from the list of valid values and press **TAB** to move through the field. The system automatically displays the appropriate address fields for the country selected by using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields displayed.

Enter the awarding body's **Phone Number** and **Fax Number**.

Units and Elements Setup Page

Usage	Use the NVQ Units and Elements setup page to enter information about the NVQ units.
Object Name	NVQ_UNITELEMENTS
Navigation	**Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - Unit/Element Table, NVQ Units/Elements**
Prerequisites	None.
Access Requirements	Enter the unique code used to denote the specific unit. You can obtain a list of relevant units from the NCVQ.



Units and Elements setup page

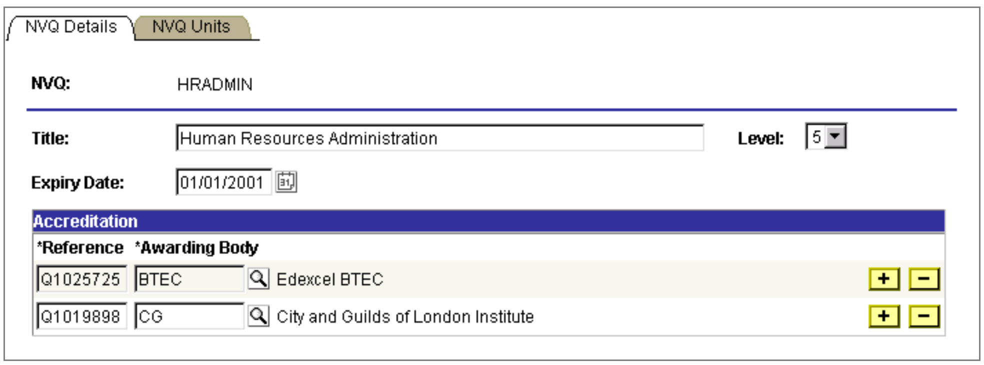
Enter the **Title** of the competency unit.

Each unit is further sub-divided into **Elements.** These elements have a distinct and independent value in the relevant area of employment. Enter the **Elements** that make up the unit, as provided by the NCVQ.

Each unit is also listed in the Competency Table. This enables you to monitor these NVQ units as you would any other competency within your organization. It also enables you to optimize an employee's skill definition.

NVQ Table - NVQ Details Setup Page

Usage	Use the NVQ Details setup page to create NVQ codes and specify the awarding bodies for each NVQ.
Object Name	NVQ_DETAILS
Navigation	**Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - NVQ Table, NVQ Details**
Prerequisites	You must set up codes for the NVQ awarding bodies before you can use this page. Set up awarding body codes on the Award Body Table Setup Page.
Access Requirements	Enter an accomplishment code allocated to the NVQ by the NVCQ.



NVQ Table - NVQ Details setup page

Enter the NVQ **Title** as specified by the NCVQ.

Select the **Level** of the NVQ from the available options. NVQs range from level ***1*** basic work activities, up to level ***5*** for senior management.

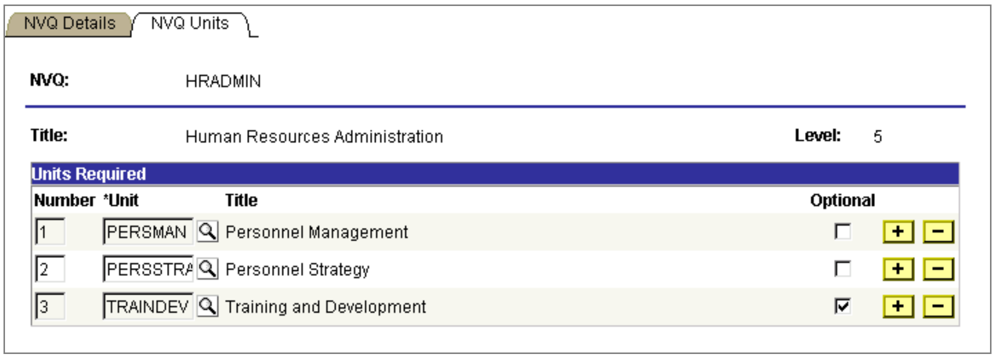
Enter the **Expiry Date** of the NVQ. This is the date for which the current NVQ details will be reviewed, and perhaps altered, by the Awarding Bodies.

Select an **Awarding Body** associated with the NVQ from the list of valid options. Insert a row for each **Awarding Body** for the NVQ. Enter the corresponding **Reference** numbers for each awarding body, as provided by NVCQ Authority.

NVQ Table - NVQ Units Setup Page

Usage	Use the NVQ Units page to specify the units that make up the specified NVQ.
Object Name	NVQ_NVQUNITS
Navigation	**Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - NVQ Table, NVQ Units**

Prerequisites	You must set up your NVQ Unit codes on the Units and Elements Setup Page before you can use this page.
Access Requirements	Enter an accomplishment code allocated to the NVQ by the NVCQ.



NVQ Table - NVQ Units setup page

The system displays the **NVQ** code you selected and the **Title** of the NVQ defined on the NVQ Table - NVQ Details Setup Page.

Enter the **Units Required** to complete the selected NVQ. Select appropriate units from those you created in the Units Table. Enter their associated **Nbr** (number).

Select the **Optional** check box if the unit isn't mandatory.

NVQs are also stored in the Accomplishment Table, which is used as a key field on this page; therefore, you can track NVQs as you would any other accomplishment within your organization.

Enrolling Employees in NVQs and Tracking Progress

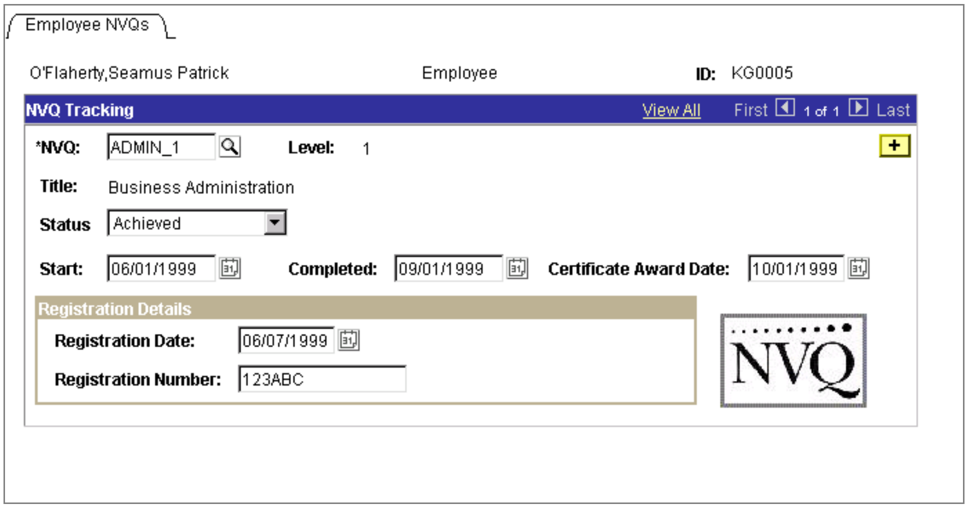
Use the UK NVQ - Enroll NVQ - Employee NVQs Page to enter data for employees who've registered for an NVQ. As well as registering employees for NVQs, you can also enter historical and completion data.

Once enrolled in an NVQ, you monitor how your employees are progressing though their NVQs using the Track NVQ – Track NVQ - Review NVQ Page and Track NVQ - Plan NVQ Units Page.

UK NVQ - Enroll NVQ - Employee NVQs Page

Usage	Use the Employee NVQs page to record details of employees who have registered for an NVQ course.
Object Name	NVQ_EMPLNVQS
Navigation	**Develop Workforce, Manage Competencies (GBL), Use Lcl, UK NVQ - Enroll NVQ, Employee NVQs**

Prerequisites	You must set up the NVQ Table - NVQ Details Setup Page before you can use this page.
Access Requirements	Enter an employee ID.



UK NVQ - Enroll NVQ - Employee NVQs page

Select the **NVQ** code from the list of valid options. When you move out of this field, the system defaults the NVQ **Level** and **Title** from the NVQ Table - NVQ Details Setup Page.

Select the current **Status** of the NVQ from the available options. The valid options are: ***Enrolled, Achieved, Cancelled,*** or ***Prior Achievement*** depending on the employee's progress.

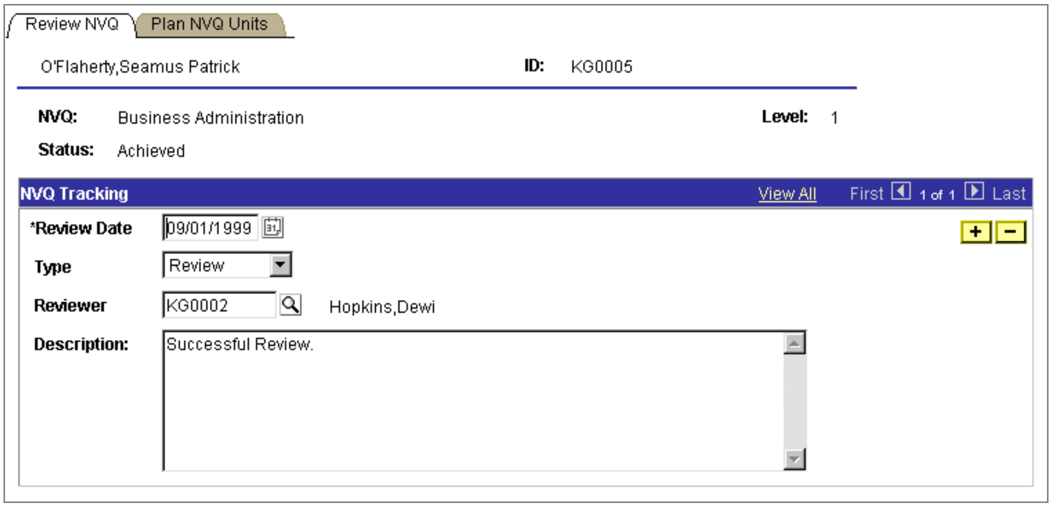
Enter the **Start, Completed,** and **Certificate Award Date** for the NVQ.

Registration Details

Enter the **Registration Date** and **Registration Number.**

Track NVQ - Review NVQ Page

Usage	Use the Review NVQ page to review employees' progress through their NVQs.
Object Name	NVQ_REVIEW
Navigation	**Develop Workforce, Manage Competencies (GBL), Use Lcl, UK NVQ - Track NVQ, NVQ Review**
Prerequisites	You need to enroll employees using the UK NVQ - Enroll NVQ - Employee NVQs Page before using this page.
Access Requirements	Enter an employee ID.



Track NVQ - Review NVQ page

The system displays the employee **ID** you selected, the **NVQ** that the employee is taking, the **Level** of the NVQ, and the employee's **Status**.

NVQ Tracking

Enter the next **Review Date** and select the review **Type** from the available options.

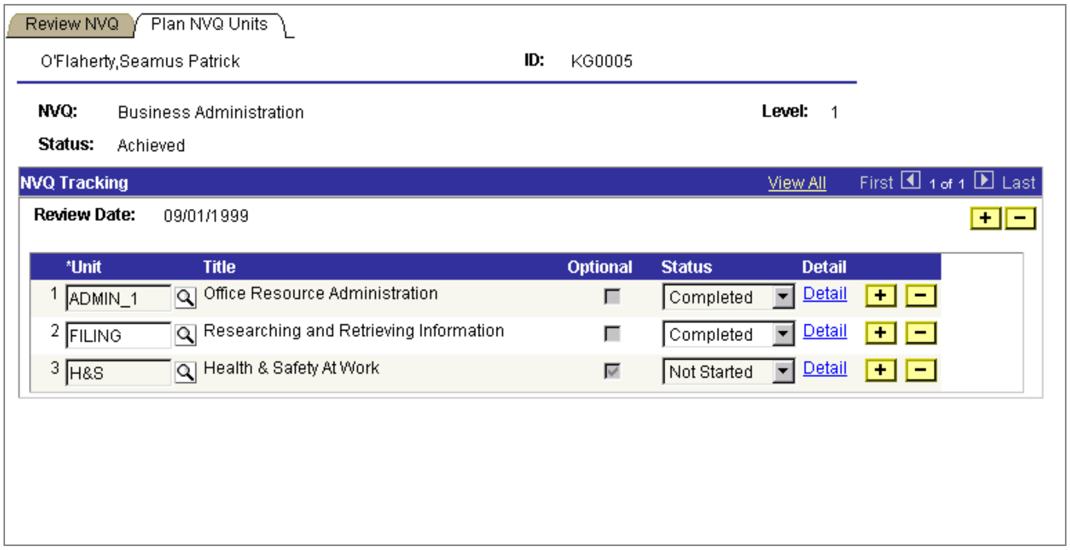
Select the **Reviewer** from the list of employees.

Enter any comments in **Description** as necessary.

You can enter more than one set of review data by inserting additional rows. You need to ensure that your review dates are entered in descending chronological order. You cannot update historical review data. Remember to save after each review entry.

Track NVQ - Plan NVQ Units Page

Usage	Use the Plan NVQ Units page to set up an overall plan of the NVQ units that the employee will take. From here you can view the elements that make up the units.
Object Name	NVQ_UNIT_PLAN
Navigation	**Develop Workforce, Manage Competencies (GBL), Use Lcl, UK NVQ - Track NVQ, NVQ Unit Plan**
Prerequisites	You must set up your NVQ Table and your NVQ Units and Elements before you can use this page.
Access Requirements	Enter an employee ID and accomplishment code.



Track NVQ - Plan NVQ Units page

The system displays the employee **ID** you selected, the **NVQ** that the employee is taking, the **Level** of the NVQ, and the employee's **Status**.

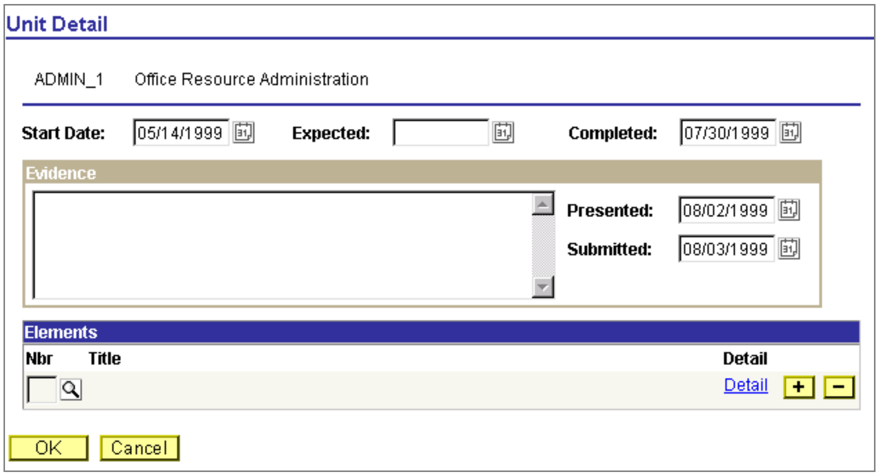
Select the **Unit** from the Unit/Element Table. When you move out of the field the system displays the Unit description and selects the **Optional** check box if the unit isn't mandatory.

Select a **Status** that shows how far the employee has progressed with the unit. The valid options are: ***Completed***, ***In Progress***, ***Not Started***, ***Planned***, and ***Submitted***.

Click the **Detail** to view the Unit Detail Page where you enter further information about the employee's progress.

Unit Detail Page

Usage	Use the Unit Detail page to record the date when the employee is expected to start the unit, the actual start and completion dates.
Object Name	NVQ_UNIT_PLAN_SEC
Navigation	To access the page, click **Detail** on the **Plan NVQ Units** page.



Unit Detail page

Enter the **Start Date, Expected,** and **Completed** dates for the unit. The system checks that the dates entered don't lead to any conflicts.

Evidence

Use the **Evidence** group box to enter the dates that you **Presented** and **Submitted** evidence of completion of the unit. Enter additional comments in the scrolling region as necessary.

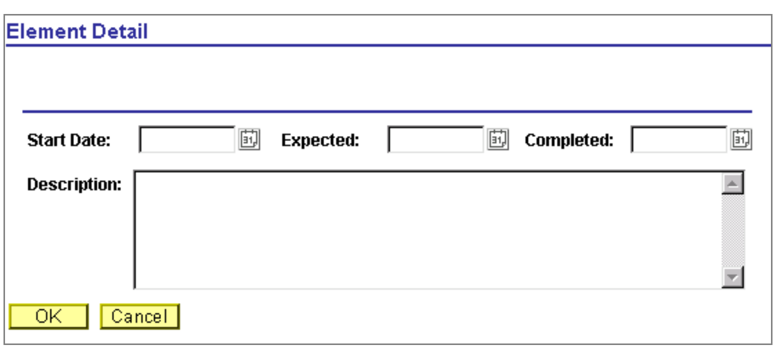
Elements

The system lists the **Nbr** (number) and **Title** of the elements that make up the selected unit.

Click **Detail** to access the Element Detail Page where you can enter further details of the elements.

Element Detail Page

Usage	Use the Element Detail page to enter the date when the employee is expected to start the element and the actual start and completion dates.
Object Name	NVQ_EMPLELEM_SEC
Navigation	To access the page, click **Detail** on the Unit Detail Page.



Element Detail page

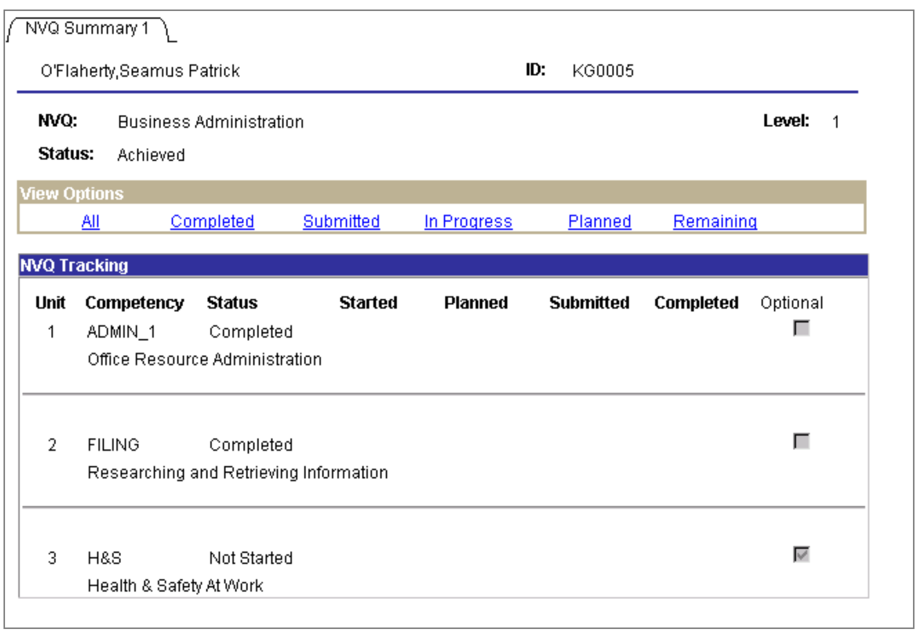
Enter the **Start Date, Expected,** and **Completed** dates for the element.

Reviewing NVQ Information

We provide two summary pages for you to review NVQs. Reviewing this information can help you to spot trends and gaps in the planning or implementation of your NVQ schedule. You can view NVQ summaries UK NVQs – by Employee - NVQ Summary 1 Page or UK NVQs – by Qualification - NVQ Summary 2 Page.

UK NVQs – by Employee - NVQ Summary 1 Page

Usage	Use the UK NVQs – by Employee - NVQ Summary 1 inquiry page to view all NVQs associated with an employee.
Object Name	NVQ_SUMMARY1
Navigation	**Develop Workforce, Manage Competencies (GBL), Inq Lcl, UK NVQs - by Employee**
Prerequisites	None.
Access Requirements	Enter an employee ID.



UK NVQs – by Employee - NVQ Summary 1 page

The system displays the employee **ID** you selected, the **NVQ** that the employee is taking, the **Level** of the NVQ, and the employee's **Status**.

View Options

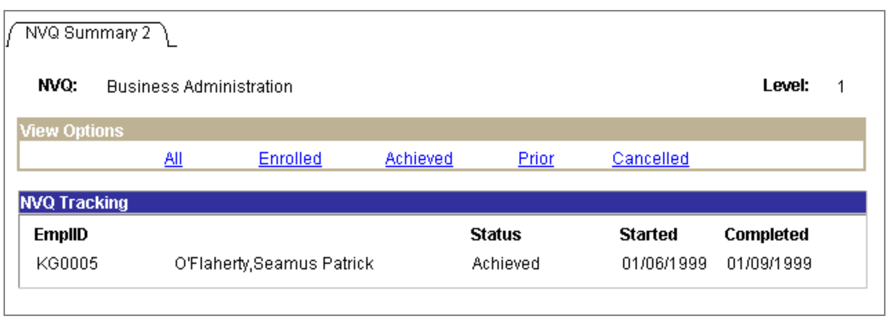
By default, the system lists all the NVQ units sorted by **Status** and date. Click the options in View Options to view only units of a given status. Your options are **All, Completed, Submitted, In Progress, Planned,** and **Remaining.**

NVQ Tracking

The system lists the units in the NVQ, the **Competency** code, and the **Status** of the unit. If the unit is optional, the system selects the **Optional** check box.

UK NVQs – by Qualification - NVQ Summary 2 Page

Usage	Use the UK NVQs – by Qualification - NVQ Summary 2 page to view the employees associated with an NVQ.
Object Name	NVQ_SUMMARY2
Navigation	**Develop Workforce, Manage Competencies (GBL), Inq Lcl, UK NVQs - by Qualification**
Prerequisites	None.
Access Requirements	Enter an accomplishment code for an NVQ.



UK NVQs – by Qualification - NVQ Summary 2 page

The system displays the **NVQ** you selected and the **Level** of the NVQ.

View Options

By default, the system lists all the employees sorted by **Status** and date. Click the options in View Options to view only employees with a given status. Your options are **All, Enrolled, Achieved, Prior,** and **Cancelled**.

NVQ Tracking

The system lists the **EmplID** (employee ID), the employee’s name, the **Status**, and the date that the employee **Started** and **Completed** the NVQ.

Printing NVQ Information

Once you have set up employee NVQ plans, you can generate a report summarizing an employee's plan.

To generate an employee plan:

1. Run the Initialize Plan process.

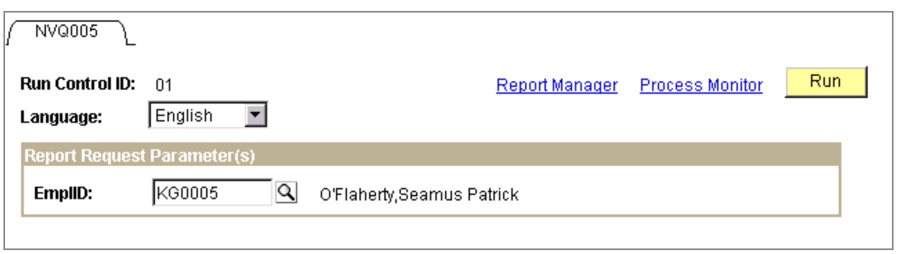
You run the process on the UK NVQ – Initialize Plan - NVQ005 Page.

2. Run the Employee Plan report.

This report is described in Generating the UK NVQ - Employee Plan Report.

UK NVQ – Initialize Plan - NVQ005 Page

Usage	Use the UK NVQ – Initialize Plan - NVQ005 page to run the Initialize Plan process for a selected employee. This SQR process must be run as a prerequisite for the UK NVQ – Employee Plan report.
Object Name	RUNCTL_NVQ005
Navigation	**Develop Workforce, Manage Competencies (GBL), Proc Lcl, UK NVQ - Initialize Plan, Run Control**
Prerequisites	None
Access Requirements	Enter a Run Control ID.



UK NVQ – Initialize Plan - NVQ005 page

The system displays the **Run Control ID** you selected. This field is for information only.

Language	The system populates the **Language** from the Run Control ID that you selected. Override the default **Language** if necessary.
EmplID (employee ID)	Select the employee whose plan you want to process.

Click **Run** to run this request. Process Scheduler runs the NVQ005 process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

CHAPTER 7

Running Manage Competencies Reports

PeopleSoft Human Resources supplies a group of standard reports to help you track and manage your employee qualifications and skills.

In this section, we've listed the reports by name, and provided you with a description of each.

For more information about generating reports, see Introduction to PeopleSoft Reporting. **For a complete listing** of all PeopleSoft Human Resources reports by Report Name, see List of Reports in PeopleSoft Human Resources.

List of Manage Competencies Reports

Report Name	***Report ID***	***Location***	***Global or Local***
Accomplishment Listing	PER538	Develop Workforce, Manage Competencies, Report	GBL
Competency Inventory	PER011	Develop Workforce, Manage Competencies, Report	GBL
Competency Listing	PER537	Develop Workforce, Manage Competencies, Report	GBL
License/Certification Table	PER704	Develop Workforce, Manage Competencies, Report	GBL
UK NVQ - Employee Plan	NVQ006	Develop Workforce, Manage Competencies, Report Lcl	UK
UK NVQ - Employee Status	NVQ001	Develop Workforce, Manage Competencies, Report Lcl	UK
UK NVQ - NVQ Listing	NVQ003	Develop Workforce, Manage Competencies, Report Lcl	UK
UK NVQ – Unit/Element Listing	NVQ004	Develop Workforce, Manage Competencies, Report Lcl	UK
UK NVQ - Unit Listing	NVQ002	Develop Workforce, Manage Competencies, Report Lcl	UK

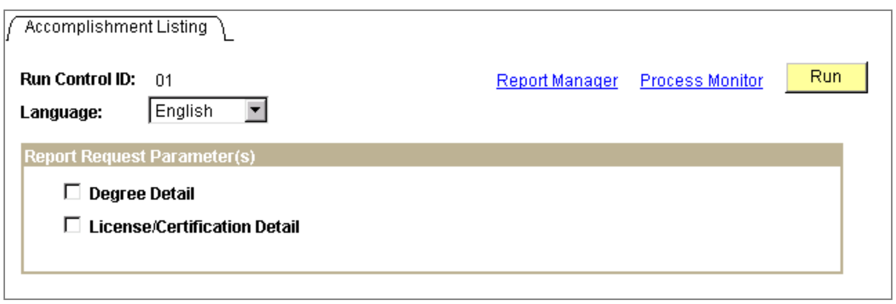
Generating the Accomplishment Listing Report

The Accomplishment Listing report lists the accomplishments that you have defined. You may find it useful to run this report once you have set up your accomplishment codes.

For more information about creating accomplishment codes, see Setting Up Educational Qualifications and Accomplishments.

Accomplishment Listing Page

Usage	Use this run control page to generate the Accomplishment Listing report.
Object Name	RUNCTL_PER538
Navigation	**Develop Workforce, Manage Competencies (GBL), Report, Accomplishment Listing, Accomplishment Listing**
Prerequisites	None
Access Requirements	Enter a Run Control ID.



Accomplishment Listing page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID,** and **Language.**

Degree Detail Select the **Degree Detail** check box if you want to include full details of the degree.

License/Certification Detail Select the **License/Certification Detail** check box if you want to include full details of the license or certification.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Accomplishment Listing Report

Description	The Accomplishment Listing report lists all accomplishments by category. The report does not include National Vocational Qualifications (NVQs) that are specific to the UK. For more information about NVQs, see "Managing Local Functionality for the UK"
Report ID	PER538
Type of Report	SQR
Parameters	Degree Detail, License/Certificate Detail
Source	RUNCTL_PER538
Source Records	PS_ACCOMP_TBL, PS_COUNTRY_TBL
Sorted By	Category

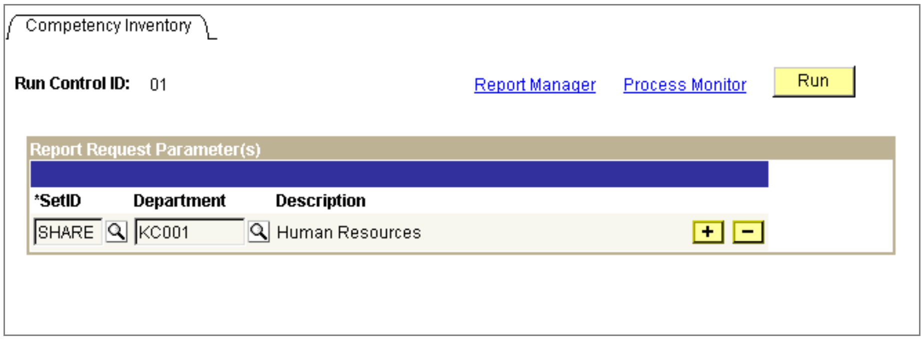
Generating the Competency Inventory Report

The Competency Inventory report provides an inventory of the employees in a given department and their competencies.

Competency Inventory Page

Usage	Use this run control page to generate the Competency Inventory report.
Object Name	RUNCTL_PER011
Navigation	**Develop Workforce, Manage Competencies (GBL), Report, Competency Inventory, Competency Inventory** **Develop Workforce, Manage Competencies (USF), Report, Competency Inventory, Competency Inventory**

Prerequisites	None
Access Requirements	Enter a Run Control ID.



Competency Inventory page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID,** and **SetID.**

Department Select the **Department** from list of valid values.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Competency Inventory Report

Description	This report lists employees in the specified departments and their competencies. Before you run this report, first run the Refresh Employees Table process to ensure that the Competency Inventory report includes any new employees in your system and their associated competencies. We recommend that you use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report. For more information about the Refresh Employees Table process, see Administering Your Workforce, “Generating Administer Workforce Reports”.
Report ID	PER011
Type of Report	SQR

Parameters	DeptID
Source	RUNCTL_PER011
Source Records	PS_EMPLOYEES, PS_COMPETENCIES, PS_COMPETENCY_TBL
Sorted By	Competency Code

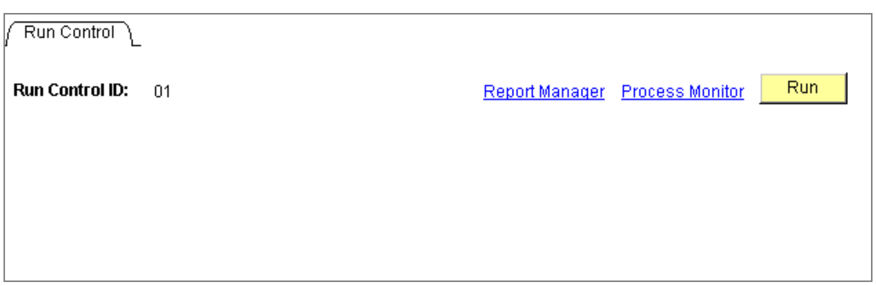
Generating the Competency Listing Report

The Competency Listing report lists the competencies associated with each competency types. Competency types are defined in the Competency Type Table and competencies are defined in the Competency Table.

For more information about setting up competencies, see Setting Up Competency Codes and Ratings.

Competency Listing Page

Usage	Use this run control page to run the Competency Listing report.
Navigation	**Develop Workforce, Manage Competencies, Report, Competency Listing**
Access Requirements	Enter a Run Control ID.



Competency Listing page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Competency Listing Report

Description	This report lists competency types and the competencies associated with the type. The report also shows the competency description and category.
Report ID	PER537
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	COMPETENCY_TBL, Competency_Typs, CM_Type_Tbl
Sorted By	CM_Type

Generating the License/Certification Table Report

The License/Certification Table report lists the codes you have defined in the License/Certification Table.

For more information about setting up license/certificate codes, see License/Certification Table Setup Page.

License/Certification Table Page

Usage	Use this run control page to run the License/Certification Table report.
Navigation	• **Develop Workforce, Manage Competencies (GBL), Report, License/ Certification Table** • **Develop Workforce, Manage Competencies (USF), Report, License/ Certification Table**
Access Requirements	Enter a Run Control ID.

License/Certification Table page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

License/Certification Table Report

Description	The License/Certification Table stores licenses and certifications that are required for employment in your organization and records those already held by employees. This report lists the codes that you assign these licenses and certifications.
Report ID	PER704
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	LIC_CERTIF_TBL, ACCOMP_TBL
Sorted By	License/Certification Code

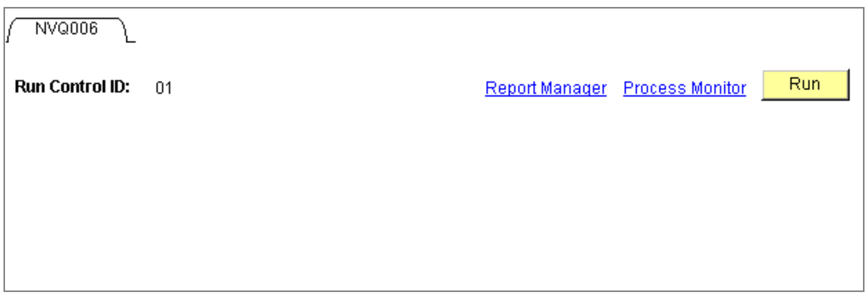
Generating the UK NVQ - Employee Plan Report

The NVQ – Employee Plan report is for UK users only. It summarizes the NVQ Unit plan for an employee that you defined on the Track NVQ - Plan NVQ Units Page. You must run the NVQ - Initialize Plan process before you can generate this report.

For more information about managing NVQ information, see Managing Local Functionality for the UK.

UK NVQ - Employee Plan Page

Usage	Use this run control page to run the UK NVQ – Employee Plan report.
Navigation	**Develop Workforce, Manage Competencies, Report Lcl, UK NVQ – Employee Plan**
Access Requirements	Enter a Run Control ID.



UK NVQ – Employee Plan – NVQ006 page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

UK NVQ - Employee Plan Report

Description	This report is associated with the NVQ module within Manage Competencies. The module is UK specific. This report displays the NVQ Unit Plan for an employee. It shows how NVQs are undertaken and the progress of the units for an employee. The information is presented by review; the comments and the status of each of the units appear by review date. You must run the SQR process NVQ005 - Initialize Plan before you can generate this report. For more information about the NVQ005 process, see “Managing Local

	Functionality for the UK”.
Report ID	NVQ006
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	NVQ_TEMP, ACCOMP_TBL, PERSONAL_DATA
Sorted By	NVQ Code, Review Dates

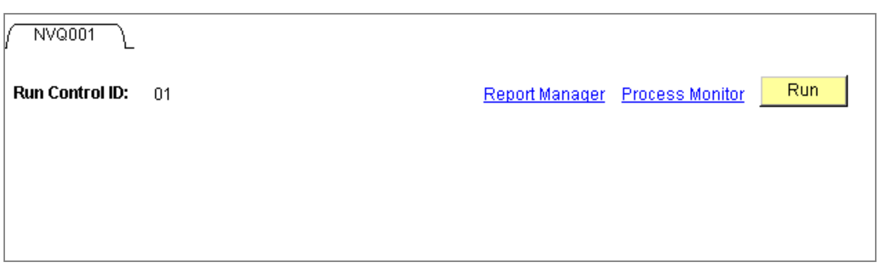
Generating the UK NVQ - Employee Status Report

The NVQ – Employee Status report is for UK users only. It lists employees enrolled in an NVQ program and their NVQ status.

For more information about managing NVQ information, see Managing Local Functionality for the UK.

UK NVQ - Employee Status Page

Usage	Use this run control page to run the UK NVQ – Employee Status report.
Navigation	**Develop Workforce, Manage Competencies, Report Lcl, UK NVQ – Employee Status**
Access Requirements	Enter a Run Control ID.



UK NVQ – Employee Status – NVQ001 page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

UK NVQ - Employee Status Report

Description	This report is associated with the National Vocational Qualification (NVQ) module within Manage Competencies. The module is UK specific. This report displays the list of employees and the NVQs with which they are associated. This list will also show the status of each NVQ.
Report ID	NVQ001
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	NVQ_PROG, ACCOMPLISHMENTS, ACCOMP_TBL
Sorted By	Employee ID

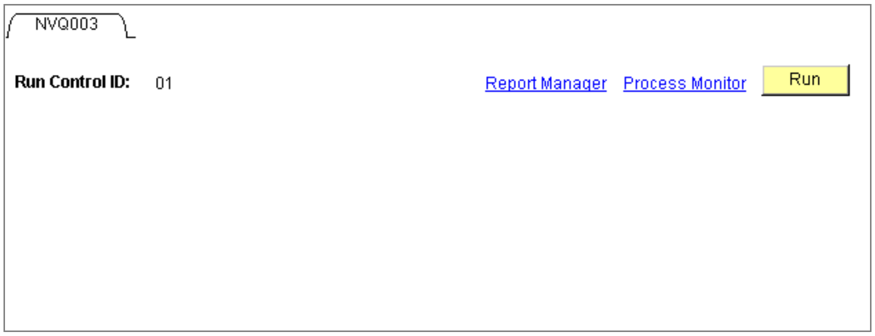
Generating the UK NVQ - NVQ Listing Report

The NVQ – NVQ Listing report is for UK users only. It lists the units you have defined on the NVQ Table.

For more information about managing NVQ information, see Managing Local Functionality for the UK.

UK NVQ - NVQ Listing Page

Usage	Use this run control page to run the UK NVQ – NVQ Listing report.
Navigation	**Develop Workforce, Manage Competencies, Report Lcl, UK NVQ – NVQ Listing**
Access Requirements	Enter a Run Control ID.



UK NVQ – NVQ Listing – NVQ003 page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

UK NVQ - NVQ Listing Report

Description	This report is associated with the National Vocational Qualification (NVQ) module within Manage Competencies. The module is UK specific. This report displays the list of all NVQs existing in the database.
Report ID	NVQ003
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	ACCOMP_TBL
Sorted By	NVQ Code

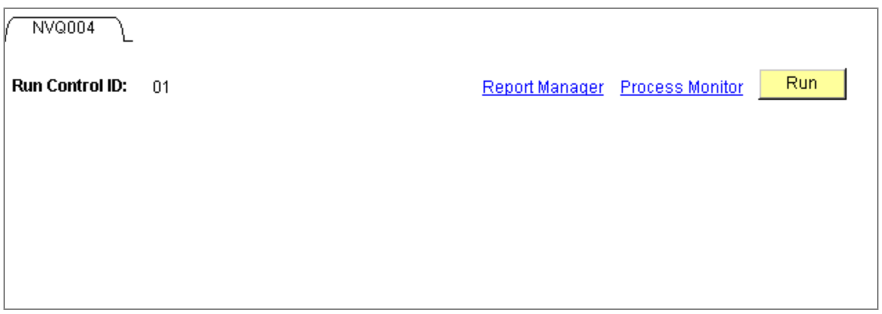
Generating the UK NVQ - Unit/Element Listing Report

The NVQ – Unit/Element Listing report is for UK users only. It lists the elements you have associated with a given NVQ unit.

For more information about managing NVQ information, see Managing Local Functionality for the UK.

UK NVQ - Unit/Element Listing Page

Usage	Use this run control page to run the UK NVQ – Unit/Element Listing report.
Navigation	**Develop Workforce, Manage Competencies, Report Lcl, UK NVQ – Unit/Element Listing**
Access Requirements	Enter a Run Control ID.



UK NVQ – Unit/Element Listing – NVQ004 page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

UK NVQ - Unit/Element Listing Report

Description	This report is associated with the NVQ module within Manage Competencies. The module is UK specific. This report displays the list of NVQ Units and its elements.
Report ID	NVQ004
Type of Report	Crystal

Parameters	None
Source	PRCSRUNCNTL
Source Records	COMPETENCY_TBL, NVQ_ELEMENT_TBL
Sorted By	Unit Code

Generating the UK NVQ - Unit Listing Report

The NVQ – Unit Listing report is for UK users only. It lists the units you have defined on the NVQ Table - NVQ Units Setup Page.

For more information about managing NVQ information, see Managing Local Functionality for the UK.

UK NVQ - Unit Listing Page

Usage	Use this run control page to run the UK NVQ – Unit Listing report.
Navigation	**Develop Workforce, Manage Competencies, Report Lcl, UK NVQ – Unit Listing**
Access Requirements	Enter a Run Control ID.

UK NVQ – Unit Listing – NVQ002 page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

UK NVQ - Unit Listing Report

Description	This report is associated with the NVQ module within Manage Competencies. The module is UK specific. This report displays the list of all NVQ Units stored in the database.
Report ID	NVQ002
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	COMPETENCY_TBL
Sorted By	Unit Code

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