PeopleSoft 8.00.01 eProfile Manager Desktop PeopleBook

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SKU MAXLr8SP1B 1200

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

About This PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft eProfile Manager Desktop. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAXLr8SP1B 1200.

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

Before You Begin

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

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

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

PeopleSoft Application Fundamentals

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

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

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

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

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

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

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

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

Working With Languages discusses PeopleSoft's language support features.

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

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

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

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

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

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

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

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

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

Related Documentation

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

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

Documentation on the Internet

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

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

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

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

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

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

Hardcopy Documentation

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

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

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

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

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

Email Email CPI at callcenter@conpub.com.

PeopleBooks Standard Page Element Definitions

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

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

Country	Country for address. Other address fields will be adjusted to reflect Country choice.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Description	Freeflow text up to 36 characters that describes what you are defining.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages and batch processes that use the information use the current row. For more information about effective dates, see Using PeopleSoft Applications, "Working With Pages".
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Fax (also **Fax Number**)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or **Language Code**	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Name	Name of individual.

National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.
Run Control ID	Identifies specific run control settings for a page.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province**)	State (Province) for address.
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.
User ID	Identifies the individual that generated the transaction.

Required Fields on Pages

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

Example of a required field label

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

Typographical Conventions and Visual Cues

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

Please take a moment to review the following typographical cues:

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

Cross-references

The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:

For more information, see Documentation on CD-ROM in *About These PeopleBooks:* Additional Resources.

- Topic list

Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents menu.

Name of Page

Opens a pop-up window that contains the named page. Click the button to display the page. Some screen shots may also appear inline (directly in the text).

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

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

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

Page Introductory Table

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

Usage	Describes how you would use the page or process.
Object Name	Gives the system name of the page or process as specified in the PeopleTools Application Designer. For example, the Object Name of

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

USF U.S. Federal Government Functionality

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

E&G Education and Government Functionality

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

Comments and Suggestions

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

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

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

mailto:DOC@PEOPLESOFT.COM

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

CHAPTER 1

eProfile Manager Desktop Overview

Overview of eProfile Manager Desktop

Department and line managers use eProfile Manager Desktop to update employee demographic information, as well as to manage an employee's status within the organization, all within an intuitive Web environment. These transactions include changing an employee's full-time or part-time status, updating address, telephone and other personal data, managing location and job changes, promotions, terminations, retirements, and other status-related events. PeopleSoft Workflow is used liberally throughout this application, to streamline processes. Links to related topics and transactions in other PeopleSoft products provide for natural access to associated data.

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

For more information, see Using Application Designer.

The PeopleSoft eProfile Manager Desktop collaborative application can be seamlessly integrated with PeopleSoft eProfile (for employees), enabling employees to review, add, update, and delete (where appropriate) their professional profile information. Transactions in PeopleSoft eProfile for employees include reviewing, adding, and updating personal information. Federal employees can also request leaves of absence or termination.

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

Components of eProfile Manager Desktop

PeopleSoft eProfile Manager Desktop is comprised of self-service Web applications that are designed to interface with the PeopleSoft Human Resources system. These applications enable managers to review, add, and update their employee’s professional profile information.

The following applications are included with eProfile Manager Desktop:

- **Employee Information.** This application enables your managers to view important information about an employee on one page, the Employee Information home page.

- **Approve Reporting Change.** This application enables your managers to approve a reporting change once it's been submitted.
- **Approve Transfer.** This application enables your managers to approve an employee's transfer.
- **Change Full/Part Time Status.** This application enables your managers to change an employee's status to full or part time.
- **Change Location.** This application enables your managers to assign their employees to another location.
- **Promote Employee.** This application enables your managers to request a promotion for employees.
- **Approve Promotion.** This application enables your managers to approve a promotion for employees.
- **Promotion Status.** This application enables your managers to check the status of a promotion to see if it has been approved.
- **Reporting Change.** This application enables your managers to request that their employees report to another manager.
- **Reporting Change Status.** This application enables your managers to view the status of a reporting change to see whether it's been submitted or approved.
- **Retire Employee.** This application enables your managers to initiate the employee retirement process.
- **Terminate Employee.** This application enables your managers to terminate an employee.
- **Transfer Employee.** This application enables your managers to request an employee transfer.
- **Transfer Status.** This application enables your managers to review the status of an employee's transfer request.

Understanding Roles

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

Understanding Security

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

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

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

Setting Up Approvals Workflow for Self-Service Transactions

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

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

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

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

CHAPTER 2

Using eProfile Manager Desktop

Using eProfile Manager Desktop Transactions to Review and Update Employee Information

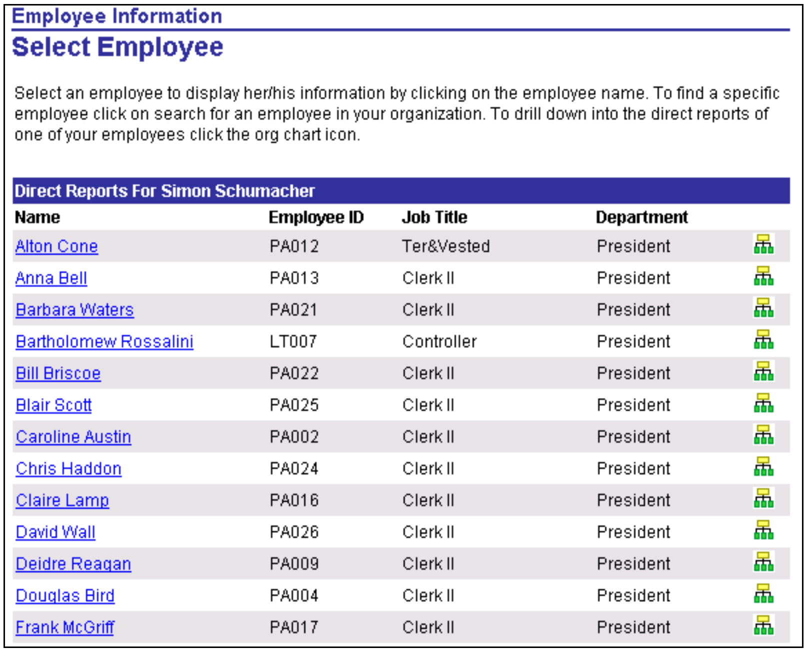
Viewing a Manager's Direct Reports

Managers can use the Employee Information page to see all of their direct reports. They can also see a list of the direct reports for any of those employees.

Many manager self-service transactions begin with a generic page that displays all of the manager's direct reports.

Employee Information Page

Usage	The Employee Information page enables you to see all the direct reports for a manager.
Object Name	OPRROWS
Navigation	**Self Service, Manager, View, Employee Information**



Employee Information

Select Employee

Select an employee to display her/his information by clicking on the employee name. To find a specific employee click on search for an employee in your organization. To drill down into the direct reports of one of your employees click the org chart icon.

Direct Reports For Simon Schumacher

Name	Employee ID	Job Title	Department
Alton Cone	PA012	Ter&Vested	President
Anna Bell	PA013	Clerk II	President
Barbara Waters	PA021	Clerk II	President
Bartholomew Rossalini	LT007	Controller	President
Bill Briscoe	PA022	Clerk II	President
Blair Scott	PA025	Clerk II	President
Caroline Austin	PA002	Clerk II	President
Chris Haddon	PA024	Clerk II	President
Claire Lamp	PA016	Clerk II	President
David Wall	PA026	Clerk II	President
Deidre Reagan	PA009	Clerk II	President
Douglas Bird	PA004	Clerk II	President
Frank McGriff	PA017	Clerk II	President

Employee Information page

Direct Reports for (Manager)

All direct reports for the manager are listed. An employee can be considered a direct report in a number of ways: by Manager ID, by Department Manager ID, by using the Dept Security tree, and so on. The method that is used to determine the reporting structure can vary by transaction and is set up through the Self-Service Setup table page (in Define Business Rules, Administer HR System, Setup, Manager Self Service Options). The information listed includes: ***Name, Employee ID, Job Title,*** and ***Department.***

Viewing Employee Information

Managers can view important information about an employee from one page, the Employee Information Home page. In addition to job information, many links are provided to enable managers to view more information about an employee.

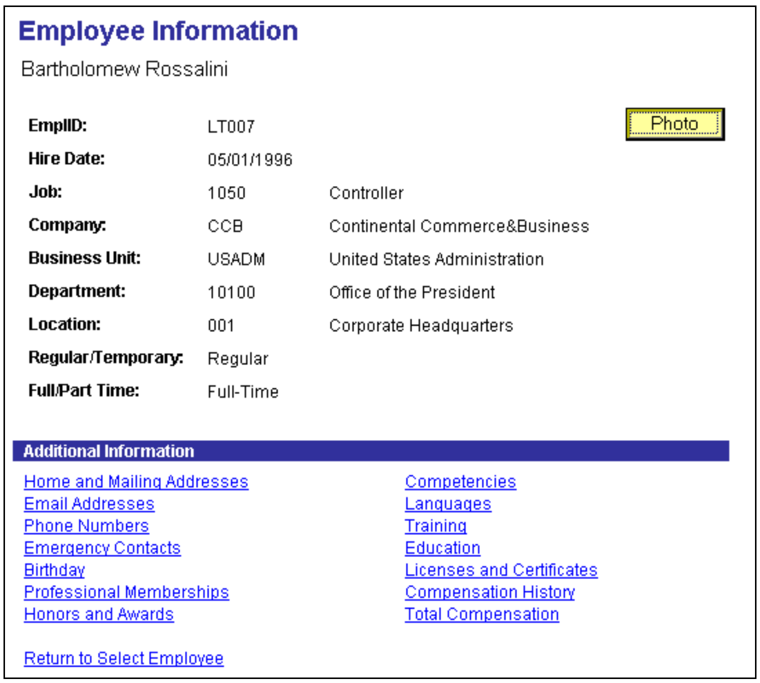
Managers can view important information about their direct and indirect reports. Employee Information first page displays all the employees who report directly to the logged manager, their name, employee ID, job title and department. Each of the searched rows has one link on the employee's name that goes to the Employee Information home page, and a button that goes one level lower and shows all the employees who report to that particular employee. There is also a Search for Employee link that enables the user to search for a particular employee, using the standard search page.

The Employee Information home page displays the information that is inquired about most often, such as employee name, ID, hire date, job, company, department, location, and business unit.

This transaction is display-only.

Employee Information Home Page

Usage	Managers use the Employee Information page to see information about their employees.
Object Name	HR_EE_INF_HOME
Navigation	**Self Service, Manager, View, Employee Information**
Access Requirements	Select one employee.



Employee Information home page

The name of the selected employee is displayed at the top of the page.

EmplID (employee ID)	The employee's ID number is displayed.
Photo	Click this button to see a photo of the employee.
Hire Date	The employee's hire date is displayed.
Job	The employee's job is displayed.
Company	The employee's company is displayed.
Business Unit	The employee's business unit is displayed.
Department	The employee's department is displayed.

Location	The employee's location is displayed.
Regular/Temporary	The employee's status is displayed.
Full/Part Time	The employee's work status is displayed.
Additional Information	Links to other pages are displayed.

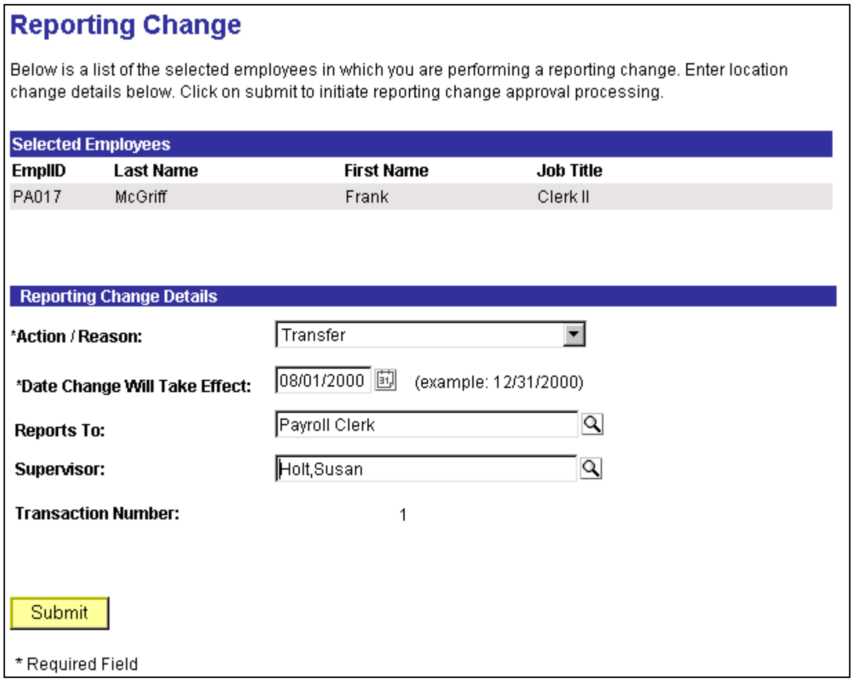
Using eProfile Manager Desktop Transactions to Change an Employee's Reporting Assignment

Requesting a Reporting Change

Managers can use the Reporting Change transaction to submit a request to change the reporting manager assignment of one of their direct reports.

Reporting Change Page

Usage	Managers use the Reporting Change page to request a reporting change for one of their direct reports.
Object Name	HR_MGR_REPORT_CHNG
Navigation	**Self Service, Manager, Tasks, Reporting Change**


Reporting Change

Below is a list of the selected employees in which you are performing a reporting change. Enter location change details below. Click on submit to initiate reporting change approval processing.

Selected Employees

EmplID	Last Name	First Name	Job Title
PA017	McGriff	Frank	Clerk II

Reporting Change Details

*Action / Reason: Transfer

*Date Change Will Take Effect: 08/01/2000 (example: 12/31/2000)

Reports To: Payroll Clerk

Supervisor: Holt,Susan

Transaction Number: 1

Submit

* Required Field

Reporting Change page

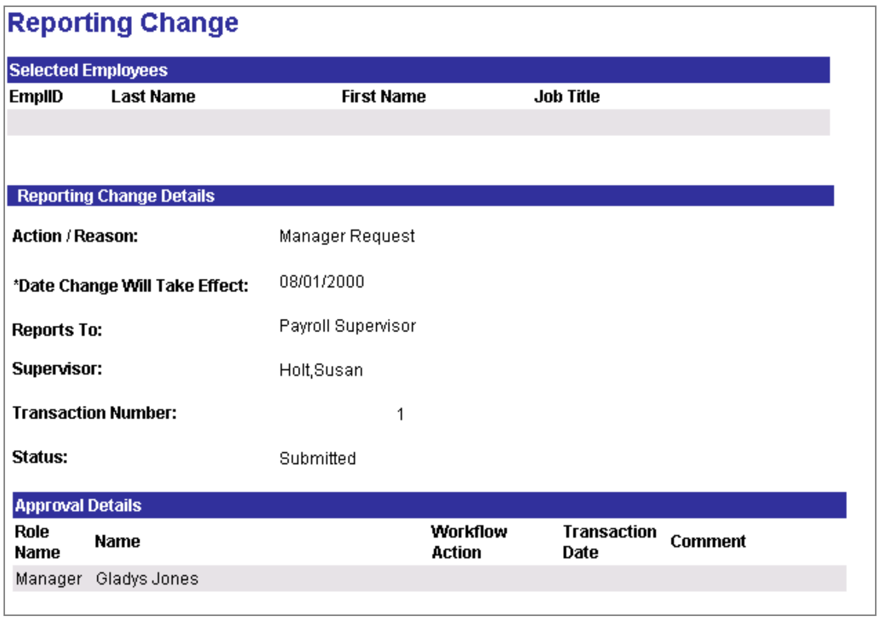
Selected Employees	Information for the employees the manager has selected is displayed. Information includes employee ID, last name, first name, and job title.
Reporting Change Details	Managers enter data for the reporting change.
Action/Reason	Managers specify a reason or action for this reporting change. Values are: ***Manager Request, Promotion,*** and ***Transfer.***
Date Change Will Take Effect	Managers enter the date that the reporting change takes effect.
Reports To	Managers enter the role the employee will report to.
Supervisor	Managers enter the name of the supervisor the employee will report to.
Transaction Number	The system gives the transaction a number.
Submit	Click the **Submit** button to complete the transaction.

Checking the Status of a Reporting Change

Managers can use the Reporting Change Status transaction to view the status of reporting change requests that they have submitted.

Reporting Change Status Page

Usage	Managers use the Reporting Change page to view the status of reporting change requests that they have submitted.
Object Name	HR_MGR_REP_VW_L
Navigation	**Self Service, Manager, Tasks, Reporting Change Status**
Access Requirements	Managers must have submitted a Reporting Change.



Reporting Change Status page

Selected Employees
All employees that this Reporting Change pertains to are listed. The Information listed includes EmplID, first and last names, and job title.

Reporting Change Details
Information concerning this reporting change is listed, including action/reason, the date the change takes effect, what job the employees now report to, the new supervisor, transaction number of the reporting change, and the status of the reporting change.

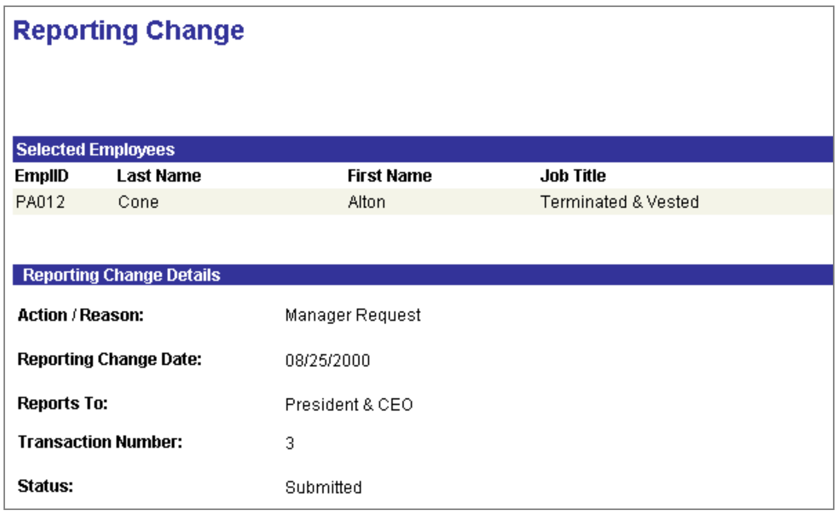
Approval Details
Information concerning the approval of this reporting change is listed, including role name and name of originator, workflow action, transaction date, and comment.

Approving a Reporting Change

Managers can use the Approve Reporting Change transaction to approve submitted reporting change requests.

Approve Reporting Change Page

Usage	Managers use the Approve Reporting Change page to check on the status of promotions.
Navigation	**Self Service, Manager, Tasks, Approve Reporting Change**
Access Requirements	A manager must have submitted a Reporting Change.


Reporting Change

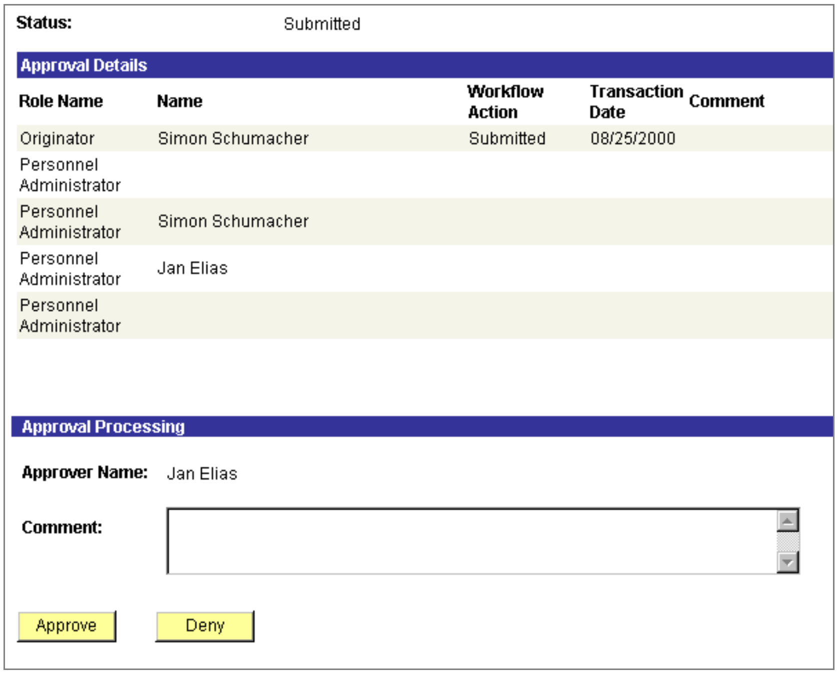
Selected Employees

EmplID	Last Name	First Name	Job Title
PA012	Cone	Alton	Terminated & Vested

Reporting Change Details

Action / Reason:	Manager Request
Reporting Change Date:	08/25/2000
Reports To:	President & CEO
Transaction Number:	3
Status:	Submitted

Approve Reporting Change page (1 of 2)



Approve Reporting Change page (2 of 2)

Reporting Change Details

Information concerning this reporting change is listed, including action/reason, the date the change takes effect, what job the employees now report to, the new supervisor, transaction number of the reporting change, and the status of the reporting change.

Approval Details

Information concerning the approval of this reporting change is listed, including role name and name of originator, manager and personnel administer, workflow action, transaction date, and comment.

Comment

Managers enter any comments here. The manager's name appears above the **Comment** field.

Approve and **Deny**

Managers use the **Approve** or **Deny** button to complete the Reporting Change Approval process.

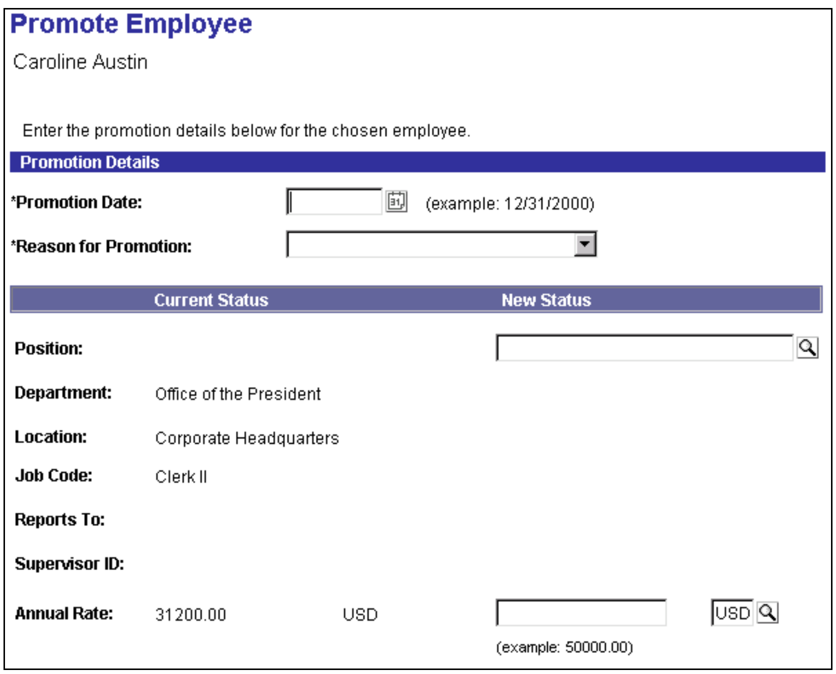
Using eProfile Manager Desktop Transactions to Promote an Employee

Requesting an Employee's Promotion

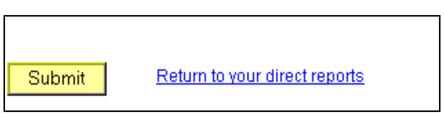
Managers can use the Promote Employee transaction to request a promotion for one of their direct report employees.

Promote Employee Page

Usage	Managers use the Promote Employee page to initiate the promotion process.
Object Name	HR_PROMOTE_EE
Navigation	**Self Service, Manager, Tasks, Promote Employee**
Access Requirements	Select one employee, and decide whether the promotion is by department and/or job code or by position.



Promote Employee page (1 of 2)



Promote Employee page (2 of 2)

The name of the selected employee is displayed at the top of the page.

Promotion Details

Promotion Date	The manager enters the Promotion Date.
Reason for Promotion	Managers must select a reason for the promotion. Values are: ***Normal Career Progression*** and ***Outstanding Performance.***

Current Status, New Status

Position	The employee's position is displayed on the left. Managers select a new position on the right.
Department	The employee's department is displayed on the left. Managers select a new department on the right.
Location	The employee's location is displayed on the left. Managers select a new location on the right.
Job Code	The employee's job code is displayed on the left. Managers select a new job code on the right.
Reports To	The person the employee reports to is displayed on the left. Managers select a new person to report to on the right.
Supervisor ID	The employee's supervisor ID is displayed on the left. Managers select a new supervisor ID on the right.
Annual Rate	The employee's annual rate is displayed on the left. Managers select a new annual rate on the right, including currency.
Submit	Click the **Submit** button to complete the transaction.

Approving an Employee's Promotion

Managers can use the Approve Promotion transaction to approve an employee promotion request.

Promote Employee Page

Usage	Managers use the Promote Employee page to approve requested promotions.
Navigation	**Self Service, Manager, Tasks, Promote Employee**
Access Requirements	Select one employee, and decide whether the promotion is by department and/or job code or by position.

Promote Employee

Adland Chu

Promotion Details

Promotion Date:	08/31/2000
Reason for Promotion:	Normal Career Progression
Effective Sequence:	1
Status:	Submitted

	Current Status	New Status
Position:		Manager-Finance
Department:		Human Resources
Location:		Corporation Headquarters
Job Code:		Manager-Finance
Reports To:	Manager-Employee Relations	Director-Finance

Promote Employee page (1 of 2)

Approval Details

Role Name	Name	Action Taken	Transaction Date	Comment
Originator	Antonio Santos	Submitted	08/08/2000	
Manager	Jean Parsons			
Personnel Administrator	Douglas Lewis			

Approval Processing

Approver Name: Jean Parsons

Comment:

Approve Deny

Promote Employee page (2 of 2)

The name of the selected employee is displayed at the top of the page.

Promotion Details

Promotion Date The manager enters the promotion date.

Reason for Promotion Managers must select a reason for the promotion. Values are: ***Normal Career Progression*** and ***Outstanding Performance.***

Current Status, New Status

The employee's Current Status is displayed on the left side of the page. The requested New Status after the promotion is displayed on the right side of the page.

Position	The employee's position is displayed on the left. Managers select a new position on the right.
Department	The employee's department is displayed on the left. Managers select a new department on the right.
Location	The employee's location is displayed on the left. Managers select a new location on the right.
Job Code	The employee's job code is displayed on the left. Managers select a new job code on the right.
Reports To	The person the employee reports to is displayed on the left. Managers select a new person to report to on the right.

Approval Details

This group box displays approval detail information associated with this promotion request.

Role Name	The role of the person who takes specific actions in this promotion is displayed.
Name	The name of the person filling the role from the previous field is displayed.
Action Taken	The action that the role's taken on this promotion is displayed.
Transaction Date	The date the action was taken is displayed.
Comment	Any comments are displayed.

Approval Processing

This group box enables the approving manager to approve or deny the promotion request and, optionally, to enter comments that support the manager's decision.

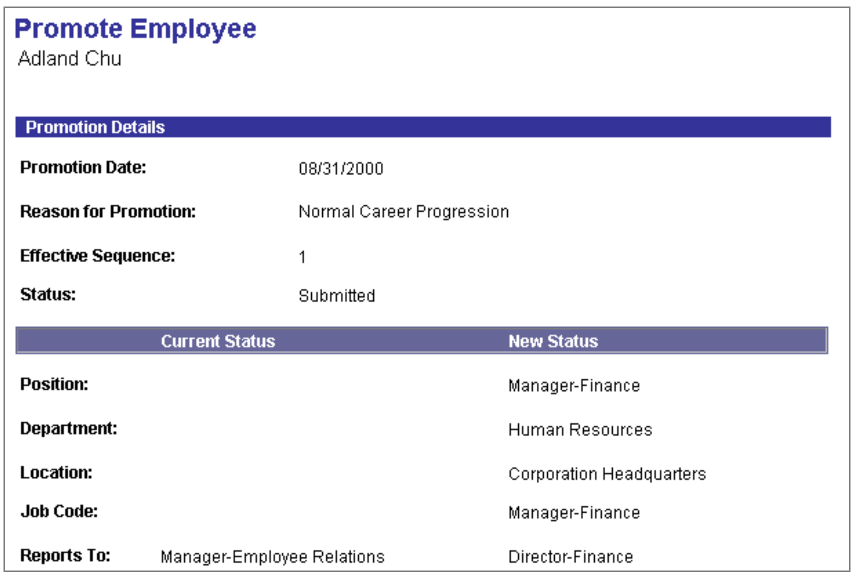
Approver Name	The system displays the name of the approving manager.
Comments	The approving manager can enter comments about the choice to approve or deny a promotion here.
Approve and **Deny**	Managers use the **Approve** or **Deny** button to complete the Reporting Change Approval process.

Checking the Status of a Promotion

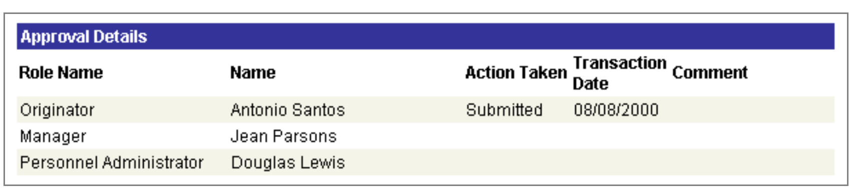
Managers can use the Promotion Status transaction to check the status of their promotion requests and see if they have been approved.

Promotion Status Page

Usage	Managers use the Promotion Status page to check on the status of promotions.
Navigation	**Self Service, Manager, Tasks, Promotion Status**
Access Requirements	The manager must have submitted at least one employee for promotion.



Promotion Status page (1 of 2)



Promotion Status page (2 of 2)

The system displays the names of employees for whom the manager has requested promotions at the top of the page.

Promotion Date	The system displays the promotion date.
Reason for Promotion	The system displays the reason for the promotion.

Status	The system displays the status of the promotion. Values are: ***Submitted*** and ***Approved.***

Current Status, New Status

Position	The employee's current position is displayed on the left. The new position is displayed on the right.
Department	The employee's current department is displayed on the left. The new department is displayed on the right.
Location	The employee's current location is displayed on the left. The new location is displayed on the right.
Job Code	The employee's current job code is displayed on the left. The new job code is displayed on the right.
Reports To	The person the employee currently reports to is displayed on the left. The new person to report to is displayed on the right.
Supervisor ID	The employee's current supervisor ID is displayed on the left. The new supervisor ID is displayed on the right.
Approval Details	The status details for this promotion request are displayed at the bottom of the page.
Role Name	The role of the person who takes specific actions in this promotion is displayed.
Name	The name of the person filling the role in the previous field is displayed.
Action Taken	The action that the role has taken on this promotion is displayed.
Transaction Date	The date the action was taken is displayed.
Comment	Any comments are displayed.

Using eProfile Manager Desktop Transactions to Transfer an Employee

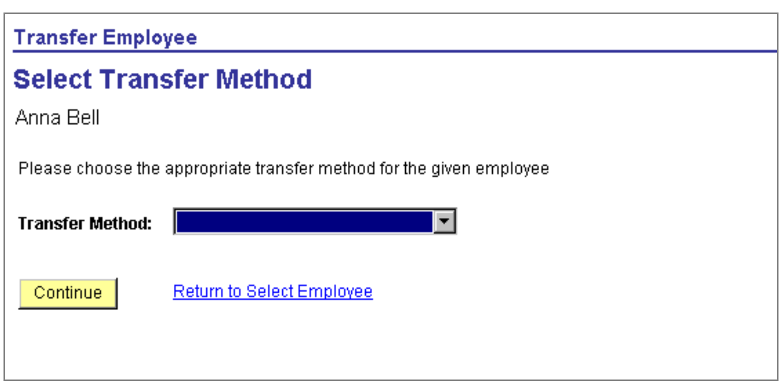
Requesting an Employee Transfer

Managers can request an employee transfer, with the Transfer Employee transaction. This initiates an employee's transfer to a new position. Managers select the employee and enter the transfer method, which determines which fields they will update on the Transfer Details page. Managers provide the reason and the effective date for the transfer request, as well as specific details about the new position. If your organization uses full position management, your manager can make only a position transfer. If your organization does do not use position management, your manager can make only a department/job code transfer.

When managers submit the request, the transfer is routed to the appropriate manager for approval. If the approving manager grants approval, the system notifies the current and new managers of the employee to be transferred and creates a worklist entry for the human resources department, notifying them to begin the transfer process.

Transfer Employee - Select Transfer Method Page

Usage	If you are using partial position management, use the Select Transfer Method page to select the method of transfer.
Object Name	HR_TRANSFR_MENU_EE
Navigation	**Self Service, Manager, Tasks, Transfer Employee**
Access Requirements	User must have an Employee ID. The system displays information that is specific to the user.



Transfer Employee - Transfer Method page

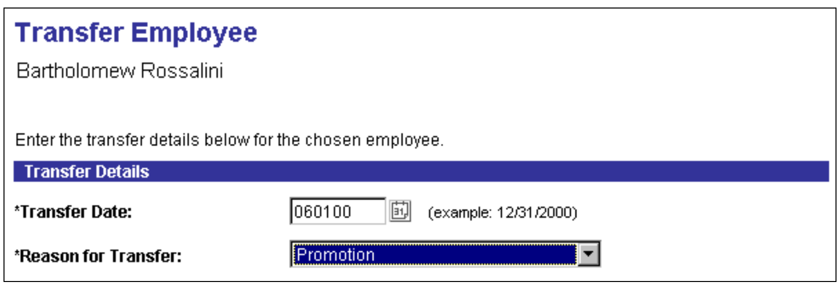
Transfer Method Select a transfer method. Values are: ***By Department and/or Job Title*** and ***By Position.***.

This determines the detailed information that you must enter on the

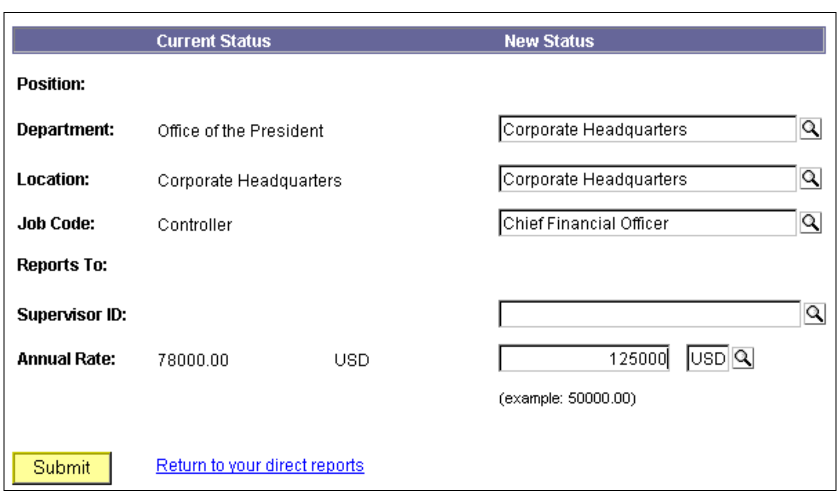
Continue Click **Continue** to submit the request and display the Transfer Details - Transfer Details page.

Transfer Employee - Transfer Details Page

Usage	Managers use the Transfer Details page to enter detail information about the transfer.
Object Name	HR_TRANSFER_EE
Navigation	Click Continue on the Transfer Employee - Transfer Method page.



Transfer Employee - Transfer Details page (1 of 2)



Transfer Employee - Transfer Details page (2 of 2)

Transfer Date Select the date on which the transfer goes into effect.

Reason for Transfer	Select the reason for the transfer. Values are: ***Employee Request, Manager Request, Promotion,*** and ***Transfer to Affiliate.***
Current Status	This column displays the current position information for the employee.
New Status	This column enables you to enter the new position's detailed information. Which fields are available for entry depends on the transfer method selected on the Transfer Method page.
Position	This field is displayed if you are not using position management. The title of the employee's job.
Department	The department to which the employee's job belongs.
Location	The location of the employee's position.
Job Code	The job code of the employee
Reports To	Who the employee reports to.
Supervisor ID	The ID of the supervisor.
Annual Rate	The annual salary for the position.
Submit	Click **Submit** to return to the Select Employee page.

Transfer Employee - Submit Confirmation Page

Usage	The Submit Confirmation page
Object Name	HR_TRANSFER_CONFRM
Navigation	Click Submit on the Transfer Employee - Transfer Details page.

Transfer Employee - Submit Confirmation page

Approval Details	This section displays information about the transfer request.
Role Name	This is the list of roles involved or associated with the employee transfer.
Name	This is the name of the person who performs the associated role.
Action Taken	This is the task the associated person took regarding the transfer.
Transaction	This is the date on which the action was made.
Comment	This is any comment associated with the action.
OK	This closes the page.

Approving an Employee Transfer

The Approve Employee Transfer is the second phase of the Transfer Employee process. After managers submit a request for an employee transfer, it goes through the approval process. Approving managers use the Approve Employee Transfer page to enter their approval action for a transfer request.

Once the approving manager submits a response, the system notifies the current and new managers of the approved transfer and creates a worklist entry for the human resources department, notifying them to begin the transfer process.

Employee Transfer - Approve Transfer Page

Usage	Use this page to approve an employee transfer. After you select the employee from the list of employees with transfer requests, review the detailed information about the transfer.

Navigation	**Self Service, Manager, Tasks, Approve Transfer**
Access Requirements	Enter the employee ID.

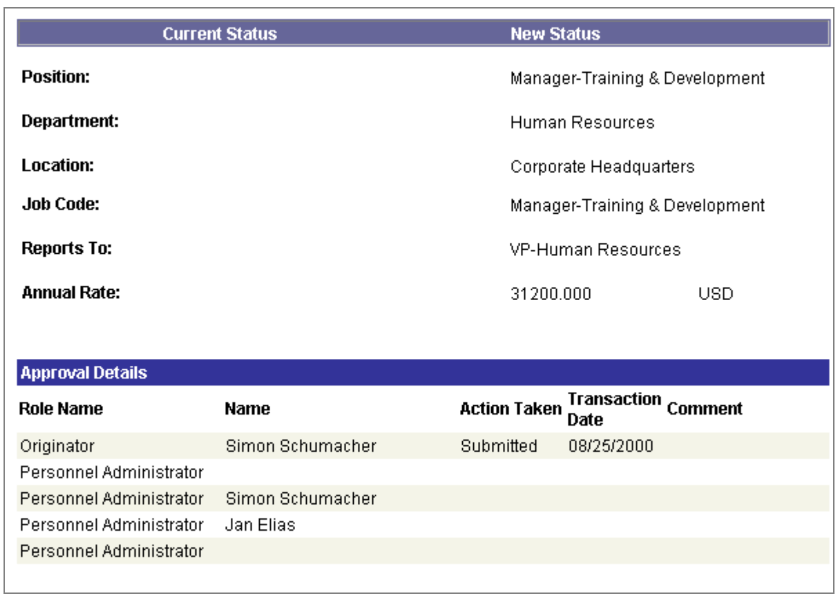
Employee Transfer - Approve Transfer

Anna Bell

Transfer Details

Transfer Date:	08/25/2000
Reason for Transfer:	Manager Request
Effective Sequence:	1
Status:	Submitted

Employee Transfer - Approve Transfer page (1 of 3)

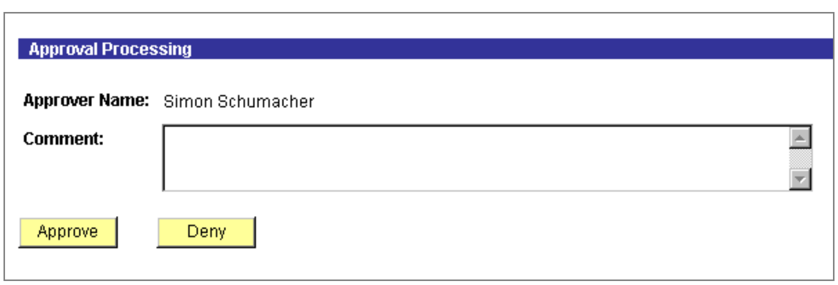


	Current Status	New Status	
Position:		Manager-Training & Development	
Department:		Human Resources	
Location:		Corporate Headquarters	
Job Code:		Manager-Training & Development	
Reports To:		VP-Human Resources	
Annual Rate:		31200.000	USD

Approval Details

Role Name	Name	Action Taken	Transaction Date	Comment
Originator	Simon Schumacher	Submitted	08/25/2000	
Personnel Administrator				
Personnel Administrator	Simon Schumacher			
Personnel Administrator	Jan Elias			
Personnel Administrator				

Employee Transfer - Approve Transfer page (2 of 3)



Approval Processing

Approver Name: Simon Schumacher

Comment:

Approve Deny

Employee Transfer - Approve Transfer page (3 of 3)

Transfer Details This section displays the detailed information about the employee transfer.

Current Status/New Status This section displays the detailed information about the current position and the proposed new position.

Approval Details This section displays the detailed information about the approval status regarding the employee transfer.

Comment This section enables you to approve or reject an employee transfer and provide any comment regarding your response.

Approve Click **Approve** to accept the transfer and save your information.

Deny Click **Deny** to reject the transfer and save your information.

View Transfer Approval Status Page

Usage	The Employee Transfer - View Transfer Approval Status enables you to review the date on an employee's transfer request.
Navigation	**Self Service, Manager, Tasks, View Transfer**
Access Requirements	Enter the employee ID.

Employee Transfer - View Transfer Approval Status
Adland Chu

Transfer Details

Transfer Date:	07/26/2000
Reason for Transfer:	Employee Request
Status:	Submitted

	Current Status	New Status
Position:	Sr Payroll Clerk	Manager-Compensation/Benefits
Department:	Finance	
Location:		
Job Code:		
Reports To:	Manager-Employee Relations	
Supervisor ID:		

Approval Details

Role Name	Name	Action Taken	Transaction Date	Comment
Manager	Jean Parsons			

Employee Transfer - View Transfer Approval Status page

Transfer Details This section displays information about the request for transfer. It includes the date the transfer was submitted, the reason for the transfer, and the current status of the transfer.

Current Status/New Status This section displays information about the employee's current position and the proposed new position.

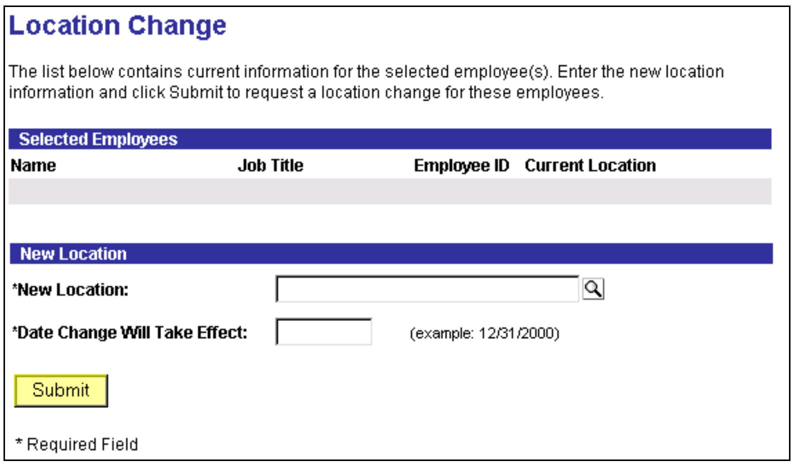
Approval Details This section displays information about the status of the transfer. Who did what and on what date regarding approval of the transfer.

Using eProfile Manager Desktop Transactions to Change an Employee's Work Location

Managers can submit a request to change the work location of one of their direct report employees with the Change Location transaction.

Change Location Page

Usage	Managers use the Change Location page to submit a request to change the work location of their direct report employees.
Object Name	HR_MGR_LOCATION
Navigation	**Self Service, Manager, Tasks, Change Location**
Access Requirements	Select one or more employees.



Location Change page

Selected Employees Information about the selected employees is displayed, including **Name, Job Title, Employee ID, and Current Location.**

New Location Managers select a **New Location** for employees.

Date Change Will Take Effect Managers enter the date the change is to take effect.

Submit Click the **Submit** button to complete the transaction and route the request to the HR administrator.

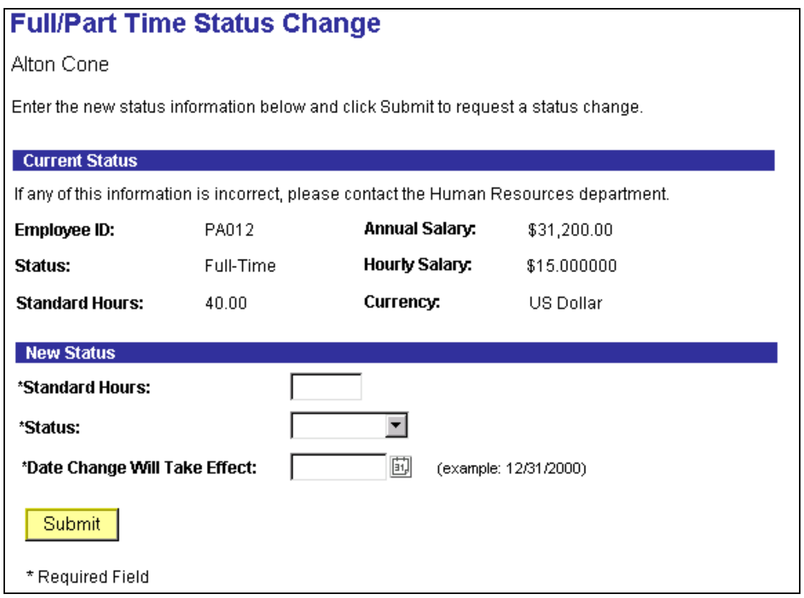
Using eProfile Manager Desktop Transactions to Change an Employee's Status

Changing an Employee's Status

Managers can submit a request to change an employee's status to full or part time with the Full/Part Time Status Change page.

Full/Part Time Status Change Page

Usage	The Full/Part Time Status Change page enables managers to change an employee's status.
Object Name	HR_MGR_FULL_PART
Navigation	**Self Service, Manager, Tasks, Change Full/Part Time Status**
Access Requirements	Select an employee.



Full/Part Time Status Change page

The name of the selected employee is displayed at the top of the page.

Current Status Information about the selected employee is displayed, including **Employee ID, Annual Salary, Status, Hourly Salary, Standard Hours,** and **Currency.**

New Status Change the employee’s status by filling in the next three fields. Enter in the new value for **Standard Hours**. Select a new **Status** for the employee. Enter the date the new status takes effect.

Submit Click the **Submit** button to complete the transaction.

Using eProfile Manager Desktop Transactions to Retire an Employee

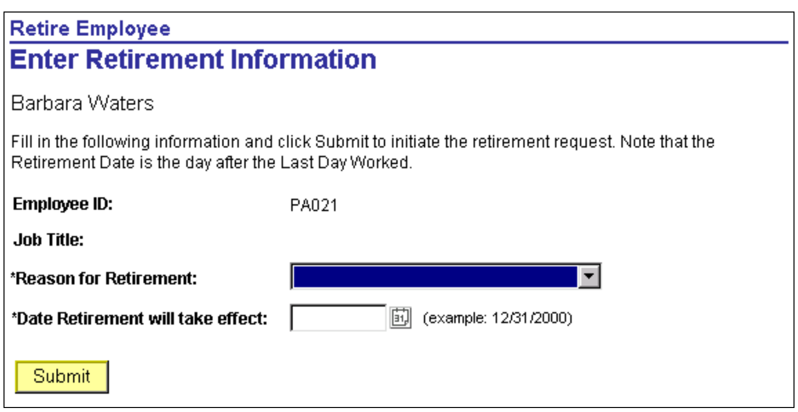
Retiring an Employee

Managers use this page to initiate the employee retirement process. After they select the employee from the list of direct reports, the system displays the Enter Retirement page. There, managers can enter the reason for the retirement request and the effective date of the retirement.

Once the request is submitted, a confirmation message is displayed. When the manager clicks OK, the system creates a worklist entry for the human resources department, notifying them to begin the retirement process.

Enter Retirement Information Page

Usage	Managers use the Enter Retirement Information page to explain and submit a retirement request.
Object Name	HR_RETIRE_EE
Navigation	Select an employee from the Select Employee page.



Retire Employee - Enter Retirement Information page

Employee ID The system displays the employee ID number the manager entered to access the page.

Job Title The system displays the job title for the selected employee.

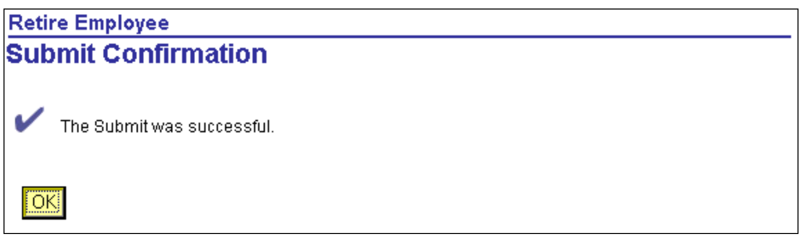
Reason for Retirement Select the reason for retirement.

Date Retirement will take effect Enter the date of retirement.

Submit Click the **Submit** button to submit the request and display the Submit Confirmation page.

Retire Employee - Submit Confirmation Page

Usage	Managers use the Submit Confirmation page to validate that their retirement requests are successfully submitted. They can also use this page to create a workflow entry and notify the human resources department that retirement requests need to be processed.
Object Name	EO_SUBMIT_CONFIRM
Navigation	Click the Submit button on the Enter Retirement page.



Retire Employee - Submit Confirmation page

OK Click **OK** to return to the Select Employee page.

Using eProfile Manager Desktop Transactions to Terminate an Employee

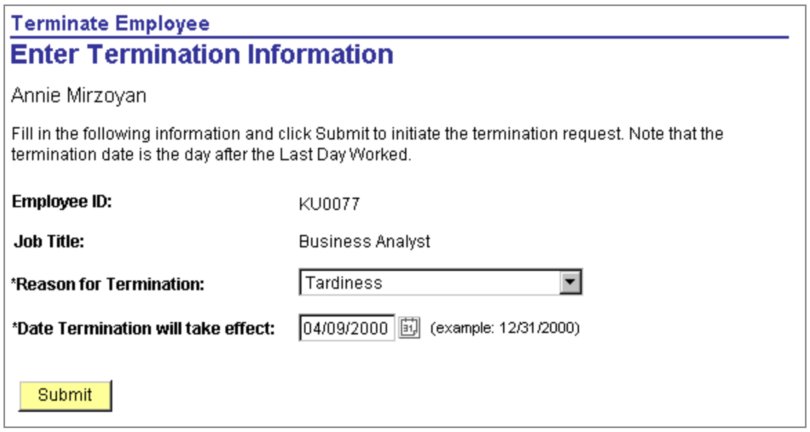
Managers can use the Terminate Employee page to explain and submit their requests to terminate employees that report to them.

Once the request is submitted, a confirmation message is displayed. When the manager clicks OK, the system creates a worklist entry for the human resources department, notifying them to begin the termination process.

Terminate Employee Page

Usage	Managers use the Terminate Employee page to end a direct report’s

	employment.
Object Name	HR_EE_TERMINATE
Navigation	**Self Service, Manager, Tasks, Terminate Employee**
Access Requirements	Select an employee.



Terminate Employee page

The selected employee's name is displayed at the top of the page.

Employee ID The employee's ID is displayed.

Job Title The employee's job title is displayed.

Reason for Termination Managers specify a reason for the termination.

Date Termination will take effect Managers enter the date the termination is effective. This is the first day that the employee is no longer employed by the company (the day after the last day worked).

Submit Click the **Submit** button to complete the transaction and route the request to the HR manager.

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