PeopleSoft 8.3 eDevelopment PeopleBook

PeopleSoft 8.3 eDevelopment PeopleBook

SKU HRMSr83EDV-B 1001

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Printed in the United States.

Contents

Index

About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

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

Before You Begin

To benefit fully from the information covered in these books, 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 the PeopleSoft system, much of the information in these books 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. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, 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 for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product 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 for HRMS* and other PeopleBooks.

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 (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, 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://www4.peoplesoft.com/cc

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 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. 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.

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 product documentation, you will encounter fields that are used on many application pages or panels. 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.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	***Definition***
Country	Country for address. Other address fields will be adjusted to reflect Country choice. 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 using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
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 or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
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.
Locality	A tax location within an organization.
Name	Name of individual.

Field	***Definition***
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	The phone number for a person or organization.
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.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
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.

Field	***Definition***
Run Control ID	Identifies specific run control settings for a panel.
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.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
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.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using — Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field — Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

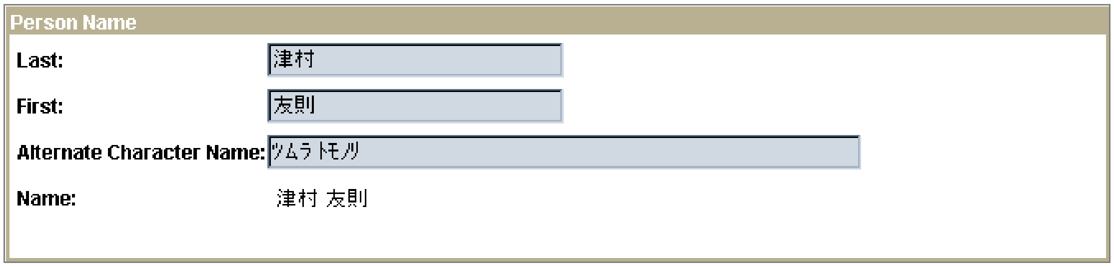
The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and **Name Prefix**	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). **Note.** You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. **Warning!** Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays “Last Name[space]First Name,” not “Last Name,First Name”; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS,” Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

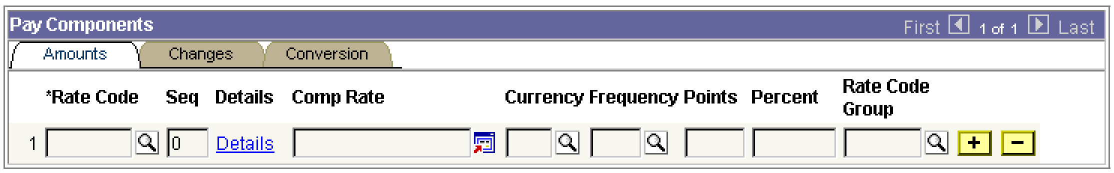
Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter 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.

House Type — Enter the house type, if applicable.

Postal Search — Click **Postal Search** to use international address formats.

Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code — Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.

Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.

Seq (sequence) — The sequence number of the rate code if it is used more than once.

Details — Click the **Details** button to open the Comp Rate Code Secondary Panel page.

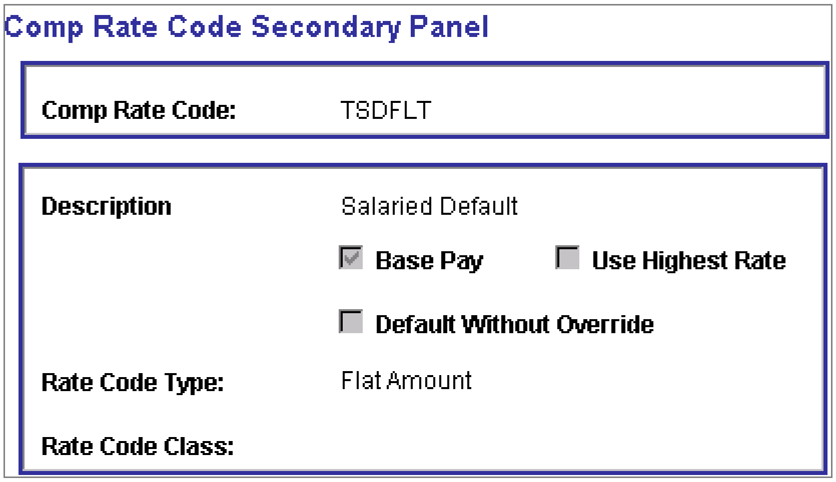
Comp Rate, (compensation rate) **Currency**, and **Frequency** — The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.

Apply FTE — If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.

Points — The salary points associated with this rate code, if any.

Percent — If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.

Rate Code Group — A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



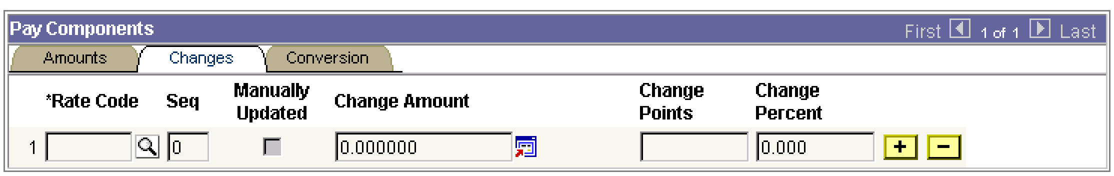
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

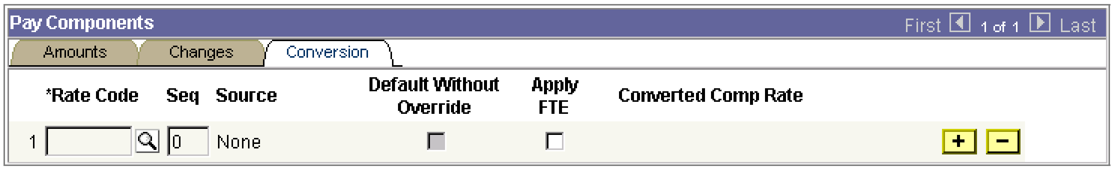
Changes Tab



Pay Components – Changes page

This page displays the change in an employee's salary.

Manually Updated	The system selects this if you have manually updated the pay components.
Change Amount	The overall change amount to this pay component rate.
Change Points	The overall change amount (in points) to this pay component, if applicable.
Change Percent	The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source	The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

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.
See Also	PeopleBooks provide cross-references under the heading “See Also.” Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. 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.

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

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	System Name	Navigation	Usage
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the 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 an 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.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country 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:

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 product communications for you.

C H A P T E R 1

About the PeopleSoft 8.3 eDevelopment PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft eDevelopment.

This preface explains how to use the documentation for PeopleSoft eDevelopment. General information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks. It provides information about the following topics:

- Using related documentation such as the PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook.
- Ordering documentation on the Internet, on CD-ROM, and in hardcopy.
- PeopleBooks standard page element definitions.
- Required fields on pages.
- Typographical conventions and visual clues in the documentation.
- Process introductory table explanation.
- U.S. Federal Government functionality designation within the documentation.
- Education and Government functionality designation within the documentation.
- Local country functionality designation within the documentation.
- Comments and suggestions about the documentation.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft HRMS Application Fundamentals section explains where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook.*

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

CHAPTER 2

Introducing PeopleSoft eDevelopment

This chapter defines the components of PeopleSoft eDevelopment and explains how to:

- Move around eDevelopment.
- Understand roles and security.
- Set up approvals workflow for self-service transactions.

Understanding eDevelopment Components

PeopleSoft eDevelopment's self-service transactions interface with the PeopleSoft Human Resources system. The following table illustrates the actions that employees, faculty, and managers can perform.

Self-Service Transaction	***Users***	***Available Actions***
Competencies	Employees	Review or modify current competency self-evaluation. View evaluations from past review dates or create a new evaluation.
Professional Education	Employees and faculty	Review, add, update, or delete information about professional education.
Honors and Awards	Employees and faculty	Review, add, update, or delete records of honors or awards.
Licenses and Certificates	Employees and faculty	Review, add, update, or delete licenses and certifications records.
Languages	Employees	Review, add, update, or delete records of language proficiency.
Memberships	Faculty	Review, add, update, or delete membership records.
Professional Training	Employees and faculty	Review, add, update, or delete records about professional training.
Activities	Faculty	Review, add, update, or delete records of academic activities.
Administrative Posts	Faculty	Review, add, update, or delete administrative post records.

Self-Service Transaction	***Users***	***Available Actions***
Committees	Faculty	Review their committee membership information.
Presentations	Faculty	Review, add, update, or delete records of presentations.
Significant Special Project	Faculty	Review, add, update, or delete records of special projects.
Student Advising	Faculty	Review, add, update, or delete student advisee records.
Teaching Responsibilities	Faculty	Review, add, update, or delete teaching responsibilities records.
Review Training Summary	Employees and managers	*Employees:* View training history. Includes both internal courses administered by their organisation (using the Administer Training module) and other external training courses. *Managers:* Access training history for direct reports.
Request Training Enrollment	Employees and managers	*Employees:* submit a training request to the manager. *Managers:* Submit a training request for a direct report.
Approve Training Request	Managers	Approve or decline training requests from employees.
View Training Enrollment Approval Status	Managers	View the approval status of each submitted request.
Employee Performance Review/Evaluate Employee Performance	Managers	Select an employee from direct reports and view any performance reviews for the employee, update the most current one, or create a new performance review.

Navigating In PeopleSofteDevelopment

There are two ways to access self-service transactions:

- Homepages.
- Standard menu navigation path.

Homepages

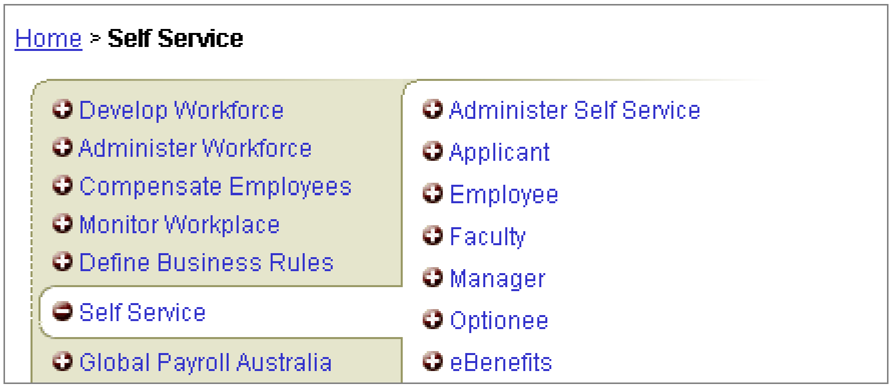
The homepage presents a simple interface design and direct navigation for the end user. The links that appear on a homepage depend on which collaborative applications have been purchased and whether the product has been selected on the Installation table.

The Human Resources homepage.

The Training and Personal Development homepage for PeopleSoft eDevelopment.

Standard Menu Navigation

The standard menu-driven navigation path is the standard access method. Homepages are easier to navigate for employees who are not PeopleSoft users.



Standard self-service navigation path.

Understanding Roles and Security

User profiles determine default access to transactions. Create user profiles on the Maintain Security page in the User Profile component. You assign a role to each user profile. Profiles are linked to access control lists. Each access control list identifies the pages that users can access. To modify access to specific web pages for each role, modify the access control list. User profiles also control the data that each employee can access.

See Also

PeopleTools PeopleBook: Security, "Understanding PeopleSoft Security"

Setting Up Approvals Workflow

Many self-service transactions take advantage of workflow functions, such as approvals workflow. Approvals workflow takes a request entered by an employee or manager and routes it to an approver to accept or deny. If the approver accepts the request, the system routes it to the next approver. If the request is denied, the request is not routed any further, and the system notes that the request was denied. If there are no approvers, the system notes that the request has final approval, and it is routed to someone to process the request further (such as a stock administrator). Employees and managers can view the approval status of some requests with self-service transactions.

See Also

PeopleTools PeopleBook: *Workflow*, "Using Workflow"

CHAPTER 3

Using PeopleSoft eDevelopment

This chapter provides an overview of PeopleSoft eDevelopment and covers how to review and update:

- Employee competencies.
- Professional education information.
- Honors and awards information for faculty members and employees.
- Licenses and certificates information for faculty members and employees.
- Language information.
- Membership information.
- Professional training information for faculty members and employees.
- Activity information.
- Administrative post information.
- Committee information.
- Presentation information.
- Special project information.
- Student advising information.
- Teaching responsibility information.

This chapter also covers how to:

- Review training summary information.
- Request training.
- Approve training requests.
- View training approval status.
- Evaluate employee performance.

Reviewing and Updating Employee Competencies

Employees use this transaction to review or modify their current competency self-evaluation. They can also view evaluations from past review dates or create a new evaluation.

To add competencies, employees push the Add button and select competencies from the competency tree. After they save their changes, notification of the update is sent to their manager.

Setting Up Competencies

The organization must define competencies and rating models for evaluating competencies. Once these are defined, each competency must be linked to a rating model.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies

Pages Used to Manage Competencies

Page Name	*Object Name*	*Navigation*	*Usage*
Your Competency Self-Evaluation	HR_CM_EVALUATN_CUR	Self Service, Employee, Tasks, Competencies	Employees review or modify their current competency self-evaluation.
Competency Details	HR_COMP_DETAIL	Click the Edit button on the Competency Self-Evaluation page.	Employees add or modify details about a specific competency
Add a Competency	HR_COMP_ASSIGN	Click the Add button on the Your Competency Self-Evaluation page.	Employees use this page to add a competency to their self-evaluation.
(New) Your Competency Self-Evaluation	HR_CM_EVALUATN_NEW	Click the Create New Evaluation link on the Your Competency Self-Evaluation page or on the initial search page.	Employees use this page to create a new competency self-evaluation.
Your Previous Competency Self-Evaluation	HR_CM_EVALUATN_PRV	Click a Review Date on the Your Competency Self-Evaluation page.	Employees view the details of previous competency self-evaluations.

Reviewing and Updating Professional Education Information

Faculty members and employees use the Professional Education self-service transaction to review, add, update, or delete information about their professional education. The Education Detail page enables faculty members and employees to record information about the post-secondary education that they have received that has resulted or will result in a degree, such as the degree acquired, the educational institution, and the degree major.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Pages Used to Review and Update Profession Education Information

Page Name	***Object Name***	***Navigation***	***Usage***
Your Professional Education	EG_SSEDUCATION_L	Self Service, Faculty, Tasks, Professional Education	Faculty members review, add, update, or delete information about the post-secondary education that they have received that has resulted or will result in a degree.
Education Detail	EG_SSEDUCATION_D	Edit or the Add Education button on the Your Professional Education page.	Faculty members create new professional education records, and to review and edit details of professional education records already assigned to them.

Reviewing and Updating Honors and Awards Information for Faculty Members and Employees

The Honors and Awards Detail page enables faculty members to record information about the honors or awards that they have received, including the type of honor or award, the grantor or presenter the issue date and any relevant end date.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies

Pages Used to Review and Update Honors and Awards Information

Page Name	*Object Name*	*Navigation*	*Usage*
Your Honors and Awards	EG_SSHON_AWDS_LIST	Self Service, Faculty, Tasks, Honors and Awards	Faculty members review, add, update, or delete information about the honors or awards that they have received.
Honors and Awards Detail	EG_SSHON_AWDS_LIST	Click Edit or the Add Honor or Award button on the Your Honors and Awards page.	Faculty members create new honor or award records, and to review and edit details of honor and award records already assigned to them.
Honors and Awards	HR_HONOR_AWARD	Self Service, Employee, Tasks, Honors and Awards	Employees review, add, update, or delete information about the honors or awards that they have received.
Honor/Award Detail	HR_HONOR_AWARD_DET	Click Edit or the Add button on the Honor and Awards page.	Employees create new honor or award records, and to review and edit details of honor and award records already assigned to them.

Reviewing and Updating Licenses and Certificates Information for Faculty Members and Employees

Faculty members and employees use the Licenses and Certificates self-service transaction to review, add, update, or delete licenses and certifications records. The Licenses and Certificates page enables faculty members and employees to record information about licenses and certifications that are pertinent to their job, including the license or certificate code, issue date, license number, and the licensing or certifying organization.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

PeopleSoft Human Resources PeopleBook: Manage Competencies

Setting Up Licenses and Certificates

Add any relevant professional organizations not already in the system to the translate table.

See Also

PeopleTools PeopleBook: Application Designer, "Using the Translate Table"

Pages Used to Manage Your Licenses and Certificates Information

Page Name	*Object Name*	*Navigation*	*Usage*
Licenses and Certificates	EG_SSLIC_CERTIFS_L	Self Service, Faculty, Tasks, Licenses and Certificates	Faculty members review, add, update, or delete information about licenses and certifications that are pertinent to their job, including the license or certificate code, issue date, license number, and the licensing or certifying organization.
License or Certificate Detail	EG_SSLIC_CERTIFS_D	Click Edit or the Add a License/Certificate button on the Licenses and Certificates page.	Faculty members create new licenses and certificates records, and to review and edit details of licenses and certificates records already assigned to them.
Licenses and Certificates	HR_LIC_CERT	Self Service, Employee, Tasks, Licenses and Certificates	Employees review, add, update, or delete information about licenses and certifications that are pertinent to their job, including the license or certificate code, issue date, license number, and the licensing or certifying organization.
Licenses/Certificates Detail	HR_LIC_CERT_DETAIL	Click Edit or the Add button on the Licenses and Certificates page.	Employees create new licenses and certificates records, and to review and edit details of licenses and certificates records already assigned to them.

Reviewing and Updating Languages Information

Employees use the Languages self-service transaction to review, add, update, or delete records of their proficiency in a language. The Languages page enables employees to record information about their proficiency in a selected language, including their speaking, reading, and writing proficiency and their ability to translate or teach in this language.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies

Pages Used to Manage Languages

Page Name	***Object Name***	***Navigation***	***Usage***
Languages	HR_LANGUAGE	Self Service, Employee, Tasks, Languages	Employees review, add, update, or delete information about their proficiency in a selected language, including their speaking, reading, and writing proficiency and their ability to translate or teach in this language.
Language Detail	HR_LANGUAGE_DETAIL	Click the Edit or the Add button on the Languages page.	Employees create new language records, and to review and edit details of language records already assigned to them.

Reviewing and Updating Membership Information

Faculty members use the Professional Memberships self-service transaction to review, add, update, or delete membership records. The Membership Detail page enables faculty members to record information about their professional memberships, including the organization's name, mandate, and their membership date.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Pages Used to Manage Professional Memberships

Page Name	*Object Name*	*Navigation*	*Usage*
Professional Memberships	EG_SSMEMBERSHIPS_L	Self Service, Faculty, Tasks, Professional Memberships	Faculty members review, add, update, or delete membership information about their professional memberships, including the organization's name and their membership date.
Membership Detail	EG_SSMEMBERSHIPS_D	Click the Edit or Add button on the Your Professional Memberships page.	Faculty members create new professional membership records, and to review and edit details of professional membership records already assigned to them.

Reviewing and Updating Professional Training Information for Faculty Members and Employees

Faculty members and employees use the Professional Training self-service transaction to review, add, update, or delete records about their professional training.

The Training Detail page enables faculty members to record information about professional training courses that they have taken, including the course name, school name, and course dates.

The Professional Training page enables the employee to record information about professional training courses that they have taken, including the course name, school name, and course dates. This page only includes records for professional training courses taken outside of the workplace. The employee's entire training summary, including external and internal training courses, is recorded on the Training Summary page.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

PeopleSoft Human Resources PeopleBook: Manage Competencies

Pages Used to Manage Your Professional Training

Page Name	***Object Name***	***Navigation***	***Usage***
Professional Training	EG_SSTRAINING_L	Self Service, Faculty, Tasks, Professional Training	Faculty members review, add, update, or delete information about professional training courses that they have taken, including the course name, school name, and course dates.
Training Detail	EG_SSTRAINING_D	Click the Edit or Add button on the Your Professional Training page.	Faculty members create new professional training records, and to review and edit details of professional training records already assigned to them.
Professional Training	HR_PROF_TRAINING	Self Service, Employee, Tasks, Professional Training	Employees review, add, update, or delete information about professional training courses that they have taken, including the course name, school name, and course dates.
Professional Training Detail	HR_PROF_TRN_DETAIL	Click the Edit or Add button on the Professional Training page.	Employees create new professional training records, and to review and edit details of professional training records already assigned to them.

Reviewing and Updating Activity Information

Faculty members use the Activities self-service transaction to review, add, update, or delete records of their academic activities. The Activity Detail page enables faculty members to record information about their academic activities, such as activity type, sponsor, and beginning and end dates.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Pages Used to Manage Your Activities

Page Name	*Object Name*	*Navigation*	*Usage*
Your Activities	EG_SSACTIVITY_LIST	Self Service, Faculty, Tasks, Activities	Faculty members review, add, update, or delete information about their academic activities, such as activity type, sponsor, and beginning and end dates.
Activity Detail	EG_SSACTIVITY_DET	Click the Edit or Add button on the Your Activities page.	Faculty members create new activity records, and to review and edit details of activity records already assigned to them.

Reviewing and Updating Administrative Post Information

Faculty members use the Administrative Posts self-service transaction to review, add, update, or delete Administrative Post records. The Administrative Post Detail page enables faculty members to enter details about their administrative posts, such as post type, begin and end dates, and organization.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Setting Up Administrative Posts

Before you can track administrative posts, you'll need to define administrative posts on the Administrative Post Table. Examples of an administrative post are Department Head and Chairperson.

Pages Used to Set Up Administrative Posts

Page Name	*Object Name*	*Navigation*	*Usage*
Your Administrative Posts	EG_SSADMIN_POSTS_L	Self Service, Faculty, Tasks, Administrative Posts	Faculty members review, add, update, or delete information about their administrative posts, such as post type, begin and end dates, and organization.

Page Name	Object Name	Navigation	Usage
Add Administrative Post	EG_SSADMIN_POSTS_D	Click the Edit or Add button on the Your Administrative Posts page.	Faculty members create new administrative post records, and to review and edit details of administrative post records already assigned to them.

Reviewing and Updating Committee Information

Faculty members use the Committee self-service transaction to review their committee membership information. The Committee Detail page displays the committee name, the dates of your membership, and your role on the committee.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Setting Up Committees

In order for faculty members to view their committee memberships you need to set up the following three tables:

Use the Committee Type Table page to maintain different committee types and committee roles within each type. The committee types that you set up in this page are used in the Committee page.

Use the Committee page to establish a committee and attach a committee type to it. For example, you can establish the research Committee Type and attach it to the research and development committee.

- Use the Committee Members page to assign faculty members to a committee type within the committee.

Pages Used to Manage Your Committees

Page Name	Object Name	Navigation	Usage
Your Committees	EG_SSCOMMIT_MBR_L	Self Service, Faculty, Tasks, Committees	Faculty members review their committee membership information.

Page Name	***Object Name***	***Navigation***	***Usage***
Committee Detail	EG_SSCOMMIT_MBR_D	Click the Edit or Add button on the Your Committees page.	Faculty members review details of administrative post records already assigned to them.

Reviewing and Updating Presentation Information

Faculty will use the Presentations self-service transaction to review, add, update, or delete records of their presentations. The Presentation Detail page enables faculty members to record information about the presentations they have given, including the presentation type, date, title, and the audience or function at which they gave the presentation.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Pages Used to Manage Your Presentations

Page Name	***Object Name***	***Navigation***	***Usage***
Your Presentations	EG_SSPRESENTATN_L	Self Service, Faculty, Tasks, Presentations	Faculty members review, add, update, or delete information about the presentations they have given, including the presentation type, date, title, and the audience or function at which they gave the presentation.
Presentation Detail	EG_SSPRESENTATN_D	Click the Edit or Add button on the Your Presentations page.	Faculty members create new presentation records, and to review and edit details of presentation records already assigned to them.

Reviewing and Updating Special Project Information

Faculty members use the Special Projects self-service transaction to review, add, update, or delete records of your special projects. The Special Project Detail Page enables faculty members to record details about special projects that benefit their professional standing, including a description of the project and the department and organization with which they carried out the special project. A special project would include things that don't fall into the publication or presentation area, for example designing a computer database for use in another department.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Pages Used to Enter Your Significant Special Projects

Page Name	***Object Name***	***Navigation***	***Usage***
Your Significant Special Projects	EG_SSSPECIAL_PRJ_L	Self Service, Faculty, Tasks, Significant Special Projects	Faculty members review, add, update, or delete information about special projects that benefit their professional standing.
Special Project Detail	EG_SSSPECIAL_PRJ_D	Click the Edit or Add button on the Your Significant Special Projects page.	Faculty members create new special project records, and to review and edit details of special project records already assigned to them.

Reviewing and Updating Student Advising Information

Faculty members use the Student Advising self-service transaction to review, add, update, or delete student advisee records. The Student Advising Detail Page enables faculty members to record information about their student advisees, including the level at which they are advising the students, the dates they will be advising the students, and the student's projects.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Pages Used to Review and Update Student Advising Information

Page Name	*Object Name*	*Navigation*	*Usage*
Your Student Advising	EG_SSADVISING_LIST	Self Service, Faculty, Tasks, Student Advising	Faculty members review, add, update, or delete information about their student advisees, including the level at which they are advising the students, the dates they will be advising the students, and the student's projects.
Student Advising Detail	EG_SSADVISING_DET	Click the Edit or Add button on the Your Student Advising page.	Faculty members create new student advising records, and to review and edit details of student advising records already assigned to them.

Reviewing and Updating Teaching Responsibility Information

Faculty members use the Teaching Responsibilities self-service transaction to review, add, update, or delete Teaching Responsibilities records. The Teaching Responsibility Detail page enables faculty members to record information about their teaching responsibilities, including course type and description, units, term, percent taught (if they are sharing teaching with another faculty member) and the type of enrollment (such as undergrad).

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events

Pages Used to Enter Your Teaching Responsibilities

Page Name	*Object Name*	*Navigation*	*Usage*
Your Teaching Responsibilities	EG_SSTEACH_RESP_L	Self Service, Faculty, Tasks, Teaching Responsibilities	Faculty members review, add, update, or delete information about their teaching responsibilities.

Page Name	Object Name	Navigation	Usage
Teaching Responsibility Detail	EG_SSTEACH_RESP_D	Click the Edit or Add button on the Your Teaching Responsibilities page.	Faculty members create new teaching responsibility records, and to review and edit details of teaching responsibility records already assigned to them.

Reviewing Training Summary Information

Employees use the Training Summary self-service transaction to view their training history, which includes both internal courses administered by their organization (using the Administer Training module) and other external training courses they have completed. Managers use the Training Summary transaction to access training history for their direct reports.

Pages Used to Review Training Summary Information

Page Name	Object Name	Navigation	Usage
Training Summary	HR_TRN_SUMMARY	• Self Service, Employee, View, Training Summary • Self Service, Manager, View, Training Summary	Employees view their training history and managers use this page to view the training history of their employees.
Course Detail	HR_TRN_CRSDESC	Click the Edit or Add button on the	View a detailed description of a course listed on the Training Summary page.

Requesting Training

Employees use the Request Training Enrollment self service transaction to submit a training request to their manager. Managers use the transaction to submit a training request for one of their direct reports. Training requests require two levels of approval, the employee's manager and a role designated during the implementation (the default role PeopleSoft delivers is the Training Administrator).

If an employee uses the transaction, workflow is used to route the request to the employee's manager and then the training administrator. However, if a manager submits the request, the system automatically routes the request to the training administrator.

Managers use Approve Training to approve or decline training requests from their employees. Employees submit training requests using Request Training Enrollment and their manager must decide whether to approve or decline each request. If the request is approved, the system automatically routes the request to the person responsible for giving final approval and enrolling the employee in the requested course (the default role PeopleSoft delivers is the Training Administrator).

Pages Used to Manage Training Requests

Page Name	*Object Name*	*Navigation*	*Usage*
Request Training Enrollment	HR_TRN_COURSE_SESS	Self Service, Employee, Task, Request Training Enrollment	Employees view a list of course sessions set up for the course and select the course session that they want to attend. Managers select a session for an employee that they have previously selected.
Session Detail	HR_TRN_SESS_DETAIL	Click the session number on the Request Training Enrollment page.	Employees view details of the course session they selected and submit the training request to their manager for approval.

Approving Training Requests

Managers use Approve Training to approve or decline training requests from their employees. Employees submit training requests using Request Training Enrollment and their manager must decide whether to approve or decline each request. If the request is approved, the system automatically routes the request to the person responsible for giving final approval and enrolling the employee in the requested course (the default role PeopleSoft delivers is the Training Administrator).

Pages Used to Approve Training Requests

Page Name	*Object Name*	*Navigation*	*Usage*
Approve Training	HR_ENROLL_APPR	Self Service, Manager, Task, Approve Training	Managers approve or decline training that their employees have requested.
Session Detail	HR_ENROLL_APPR_DTL	Click any Session number on the Approve Training page.	Managers view details about a training session, and to approve or decline training that their employees have requested.

Viewing Training Approval Status

Employees use Training Enrollment Status to view the status of training requests they have made. When employees submit a request for training using Request Training Enrollment, the request is sent to their manager for approval. Employees can then use Training Enrollment Status to find out the approval status of each request they have submitted.

Training requests require two levels of approval, the employee’s manager and a role designated during the implementation (the default role PeopleSoft delivers is the Training Administrator).

Pages Used to View Training Approval Status

Page Name	***Object Name***	***Navigation***	***Usage***
Training Enrollment Status	HR_TRN_ENROLL_VW	Self Service, Employee, View, Training Enrollment Status	Employees view the course sessions that they have requested to be enrolled in and check up on the session approval status for each course.
Session Detail	HR_ENROLL_VW_DTL	Click the session number on the Training Enrollment Status page.	Employees view details of the course session they have requested to be enrolled in.

Evaluating Employee Performance

Managers use this transaction to select an employee from their direct reports and view any performance reviews for the employee, update the most current one, or create a new performance review. When managers create a new review, they can prepopulate the competency list for the employee by selecting a rating scale. They can also capture the employee's career goals either at the time of the evaluation or from their most recent career plan. Adding or deleting individual competencies or goals will modify the competency list.

Page Used to Manage Employee Performance Reviews

Page Name	***Object Name***	***Navigation***	***Usage***
Employee Performance Review	HR_PERF_REV1_MGR	Self Service, Manager, Tasks, Employee Performance Review	Managers view performance reviews for their employees.

Index