



PeopleSoft 8.3 eProfile Manager Desktop PeopleBook

PeopleSoft 8.3 eProfile Manager Desktop PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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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 <i>Active</i> or <i>Inactive</i> .
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.

Person Name	
Last:	津村
First:	友則
Alternate Character Name:	ツムラトモリ
Name:	津村 友則

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

Comp Rate Code: TSDFLT

Description: Salaried Default

Base Pay **Use Highest Rate**

Default Without Override

Rate Code Type: Flat Amount

Rate Code Class:

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							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Manually Updated	Change Amount	Change Points	Change Percent				
1	0	<input type="checkbox"/>	0.000000		0.000	<input type="button" value="+"/>	<input type="button" value="-"/>		

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							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate				
1		None	<input type="checkbox"/>	<input type="checkbox"/>		<input style="background-color: yellow;" type="button" value="+"/>	<input style="background-color: yellow;" type="button" value="-"/>		

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 <i>Absorbing Premium</i> , <i>Seniority Pay</i> , <i>Job Code</i> , or <i>Manual</i> .
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.

*Description:	<input type="text" value="This is a required field"/>
----------------------	---

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).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: <i>field value</i> . We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
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.

<i>Page</i>	<i>System Name</i>	<i>Navigation</i>	<i>Usage</i>
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.

CHAPTER 1

About the PeopleSoft 8.3 eProfile Manager Desktop PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft eProfile Manager Desktop.

This preface explains how to use the documentation for PeopleSoft eProfile Manager Desktop. 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 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 Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, “About the HRMS PeopleBooks”

CHAPTER 2

Introducing PeopleSoft eProfile Manager Desktop

This chapter identifies the components of eProfile Manager Desktop and explains how to:

- Move around eProfile Manager Desktop.
- Understand roles and security.

Understanding eProfile Manager Desktop Components

PeopleSoft eProfile Manager Desktop self-service transactions 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 enables managers to view important information about an employee on one page, the Employee Information home page.
- Approve Reporting Change enables managers to approve a reporting change after it's been submitted.
- Approve Transfer enables managers to approve an employee's transfer.
- Change Full/Part Time Status enables managers to change an employee's status to full- or part-time.
- Change Location enables managers to assign their employees to another location.
- Promote Employee enables managers to request a promotion for employees.
- Approve Promotion enables managers to approve a promotion for employees.
- Promotion Status. This application enables managers to check the status of a promotion to see if it has been approved.
- Reporting Change enables managers to request that their employees report to another manager.
- Reporting Change Status enables managers to view the status of a reporting change to see whether it's been submitted or approved.

- Retire Employee enables managers to initiate the employee retirement process.
- Terminate Employee enables managers to terminate an employee.
- Transfer Employee enables managers to request an employee transfer.
- Transfer Status enables managers to review the status of an employee's transfer request.

Navigating in eProfile Manager Desktop

There are two ways to access self-service transactions:


- Manager's homepage.
- Standard menu navigation path.

Manager's Homepage

Homepages present a simple user interface design and more direction navigation for the end user.

The links that appear on a home page depend on which collaborative applications have been purchased and whether the application has been selected on the Installation table.

Manager's Home



eProfile

Reporting Changes
Manage changes in the reporting relationship.

- [Reporting Change](#)
- [Approve Reporting Change](#)
- [Reporting Change Status](#)
- [Change Location](#)

Status Changes
Review and update an employee's job status within the organization.

- [Change Full/Part Time Status](#)
- [Retire Employee](#)
- [Terminate Employee](#)

Employee Information
Review employee address, emergency contacts and other personal data.

- [Employee Information](#)

Transfers
Manage employee transfers.

- [Transfer Employee](#)
- [Approve Transfer](#)
- [Transfer Status](#)

Promotions
Manage promotions for your employees.

- [Promote Employee](#)
- [Approve Promotion](#)
- [Promotion Status](#)

The eProfile Manager Desktop portion of the Manager's homepage

Standard Menu Navigation

The standard menu navigation path is the traditional access method users of PeopleSoft applications are familiar with.



Standard self-service navigation path

Understanding Roles and Security

User profiles determine default access to transactions. You 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, you modify the access control list.

User profiles also control the data each employee can access.

See Also

PeopleTools PeopleBook: Security, “Understanding PeopleSoft Security”

CHAPTER 3

Defining Workflow for Self-Service Transactions

This chapter provides an overview of self-service transaction workflow and explains how to:

- Set up workflow for self-service transactions.
- Review self-service transaction status.

Understanding Workflow for Self-Service Transactions

Many self-service transactions update employee information. These transactions might start approval processing routing and become a worklist item for an administrator. Other transactions directly update the HR database.

Setting Up Workflow for Self-Service Transactions

Two workflow methods are used with self-service transactions.

- The standard workflow.
- Workflow for self-service transactions.

Standard Workflow Processing

Most transactions start a workflow approval process that is routed using email to a manager or administrator and becomes an administrator worklist item. Other transactions do not have an approval process but create a worklist or email that becomes a worklist item for the administrator informing them an action is required.

Workflow for Self-Service Transactions

Workflow for self-service transactions builds upon the standard workflow processing and is designed to provide rules that automatically update the HR database. There are ten transactions that adhere to these rules:

<i>Transaction Name</i>	<i>Application</i>
Address	eProfile

Transaction Name	Application
Marital Status Change	eProfile
Name Change	eProfile
Change Full/Part Time Status	eProfile Manager Desktop
Change Location	eProfile Manager Desktop
Promote Employee	eProfile Manager Desktop
Reporting Change	eProfile Manager Desktop
Retire Employee	eProfile Manager Desktop
Terminate Employee	eProfile Manager Desktop
Transfer Employee	eProfile Manager Desktop

Understanding the Workflow Process

1. The employee or manager enters data using a self-service transaction and clicks Submit.
2. If an approval process *is* required, the system notifies, using email and worklist, the people included in the approval process for the transaction.
3. If an approval process is *not* required, the system displays a confirmation page to the employee or manager.
4. If an approval process is followed and completed, or automatic updates to the HR database are allowed, then the database is updated.
5. If an automatic update to the HR database is *not* allowed, the administrator is notified through email and worklist that an action is required.

Note. If you have purchased eBenefits and have set up the life event rules, those rules override the rules you set for the marital status transaction on the Workflow Configuration page.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow”

PeopleSoft eBenefits PeopleBook, “Managing Life Events”

Pages Used to Set Up Workflow

Page Name	Object Name	Navigation	Usage
Configuration Options	WF_CO_CONFIG	Define Business Rules, Define General Options, Setup, Workflow Configurations	Determine whether transactions should follow an approval process or automatically update the database. Identify who handles errors and manual updates to the database.
Admin Notification Setup	WF_HR_TRANS_NOTIFICATION	Click Notification Setup on the Self Service Workflow Config - Configuration Options page.	Define when you want the role identified on the Configuration Options page to receive email or worklist notifications.
Component Interface	WF_CO_CONFIG	Define Business Rules, Define General Options, Setup, Workflow Transactions	Determine which predefined component interface definitions are used if a transaction is configured to automatically update the database.

Determining Self-Service Workflow

Access the Configuration Options page.

Description	Approval Process?	Allow DB Update	*Administrator Role	Notification Setup
Address Change	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Personnel Administrator	Notification Setup
Change Full/PPT Status	<input type="checkbox"/>	<input type="checkbox"/>	Personnel Administrator	Notification Setup
Change Location	<input type="checkbox"/>	<input type="checkbox"/>	Personnel Administrator	Notification Setup
Marital Status	<input type="checkbox"/>	<input type="checkbox"/>	Personnel Administrator	Notification Setup
Name Change	<input type="checkbox"/>	<input type="checkbox"/>	Personnel Administrator	Notification Setup
Promotion	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Personnel Administrator	Notification Setup
Reporting Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Personnel Administrator	Notification Setup
Retire Employee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Personnel Administrator	Notification Setup
Terminate Employee	<input type="checkbox"/>	<input type="checkbox"/>	Personnel Administrator	Notification Setup
Transfer	<input type="checkbox"/>	<input type="checkbox"/>	Personnel Administrator	Notification Setup

Configuration Options page

Approval Process

This check box is available only for the Promotion, Reporting Change, and Transfer transactions. Select to have this transaction follow the normal approval process.

Allow DB Update

If Position Management on the Installation Table is set to None or Partial, this check box is available for all transactions.

If Position Management on the Installation Table is Full, this check box is available for all transactions except Change Full/Part Time Status, Change Location, and Reporting Change.

Administrator Role

Identify the role responsible for reviewing the results of the self-service process if approval is required or errors occur. Also, if Notify on Success on the Admin Notification Setup page is selected, this role receives notifications when processing is successful.

Setting Administrator Notification

Access the Admin Notification Setup page.

Admin Notification Setup

Change Full/PT Status

Component	Notify on Success	Notify on Warnings	Business Process Name	Activity Name	Event Name		
HR_MGR_FULL_PART	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HR_SS_WORK_EVENTS	HR_SS_CI_ADMIN_ORIG	Full_Part Change CI Notify	<input type="checkbox"/>	<input type="checkbox"/>
WF_MGR_FULL_PART	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HR_SS_WORK_EVENTS	HR_SS_CI_ADMIN_ADMIN	Full_Part Change CI Notify	<input type="checkbox"/>	<input type="checkbox"/>

Admin Notification Setup page

Component

The name of the transaction.

Notify on Success

Available only if Allow DB Update is selected on the Configuration Options page. Select to have the selected role on the Configuration Options page receive an email when automatic updates are successful.

Notify on Warnings

Select to have the selected role on the Configuration Options page receive an email when warning messages are generated during a successful HR database update.

Business Process Name, Activity Name, and Event Name

This is predefined system data that can be changed if you want to use a different component interface.

Reviewing Component Interface Definitions

Access the Component Interface page.

Note. You do not need to modify this page unless you use custom-built component interfaces or exception tables.

Self Service Workflow Config					
Configuration Options		Component Interface			
Description	*Component Interface Name	*BC Item Logical Name	*Table Name	*Exception Table	
Address Change	CI_PERSONAL_DATA	COLL_ADDRESSES	ADDRESSES	WF_PER_ERR_WRN	
Change Full/PT Status	CI_JOB_DATA	COLL_JOB	JOB	WF_JOB_ERR_WRN	
Change Location	CI_JOB_DATA	COLL_JOB	JOB	WF_JOB_ERR_WRN	
Marital Status	CI_PERSONAL_DATA	COLL_PERS_DATA_EFFDT	PERS_DATA_EFFDT	WF_PER_ERR_WRN	
Name Change	CI_PERSONAL_DATA	COLL_NAMES	NAMES	WF_PER_ERR_WRN	
Promotion	CI_JOB_DATA	COLL_JOB	JOB	WF_JOB_ERR_WRN	
Reporting Change	CI_JOB_DATA	COLL_JOB	JOB	WF_JOB_ERR_WRN	
Retire Employee	CI_JOB_DATA	COLL_JOB	JOB	WF_JOB_ERR_WRN	
Terminate Employee	CI_JOB_DATA	COLL_JOB	JOB	WF_JOB_ERR_WRN	
Transfer	CI_JOB_DATA	COLL_JOB	JOB	WF_JOB_ERR_WRN	

Component Interface page

Component Interface Name, BC Item Logical Name, Table Name, and Exception Table

This is predefined system data that can be changed if you want to use a different component interface.

Reviewing Self-Service Transaction Status

This section describes how to:

- Review self-service transactions.
- Review transaction errors.

Pages Used to Review Transaction Status

Page Name	Object Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Define Business Rules, Administer Self Service, Inquiry, Workflow Inquiry	Review self-service transaction status and link to other pages to correct personal or job data and update the status of a transaction.

Page Name	Object Name	Navigation	Usage
Transactions Errors/Warnings	WF_JOB_ERR_WRN _ALL	Click View Errors/Warnings for this Transaction link.	Review transaction errors.

Reviewing Self-Service Transactions

Access the Workflow Inquiry page.

The information that displays in the search results area depends on the type of transaction that you select in the Transaction Name field.

Required Search Fields

Transaction Type or Employee ID Number is required. Choose a transaction with the following status:

EmpID:

Transaction Name:

Error with Processing
 In Approval Process
 Administrator Action Required
 Warnings Encountered
 Successful Updates
 Denied/Cancelled

Optional Search Fields

Date:

Employee Name Change

Transaction Data		Prefix and Suffix	Additional Names	Other	First Name	Last Name	Go to Personal Data	Update Status
Status	EmpID	Effective Date	Eff Seq		BettyTEST7	LochertyTEST7	Go to Personal Data	Update Status
1 Success	KJ0007	07/06/2001	1					

Workflow Inquiry page

Required Search Fields

Search for transactions by employee ID or transaction name. You can select one or more status.

Go to Personal Data

If the search result involves personal data, click to access the employee’s personal data pages.

Go to Job Data

If the search result involves job data, click to access the employee’s job data pages.

Update Status

Click to access the appropriate self-service transaction page and manually update the status.

CHAPTER 4

Using PeopleSoft eProfile Manager Desktop

This chapter provides a list of the pages used in the self-service transactions.

Understanding Workflow for eProfile Manager Desktop

The following transactions are designed to use workflow for self-service.

- Change Full/Part Time Status
- Change Location
- Promote Employee
- Reporting Change
- Retire Employee
- Terminate Employee
- Transfer Employee

However, you must first set up workflow before you can use this feature.

See Also

“Setting Up Workflow for Self-Service Transactions”

Pages Used in eProfile Manager Desktop

Page Name	Object Name	Navigation	Usage
Employee Information - Select Employee	OPROWS	Self Service, Manager, View, Employee Information	Managers view 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	HR_EE_INF_HOME	Self Service, Manager, View, Employee Information	Managers view job information for their direct reports.
Reporting Change	HR_MGR_REPORT_ CHNG	Self Service, Manager, Tasks, Reporting Change	Managers submit a request to change the reporting manager assignment for one of their direct reports.
Reporting Change Status	HR_MGR_REP_VW_ L	Self Service, Manager, Tasks, Reporting Change Status	Managers view the status of reporting change requests that they have submitted.
Approve Reporting Change	HR_MGR_REPORT_ CHNG	Self Service, Manager, Tasks, Approve Reporting Change	Managers approve submitted reporting change requests.
Promote Employee	HR_PROMOTE_EE	Self Service, Manager, Tasks, Promote Employee	Managers request a promotion for one of their direct report employees. This page is also used to approve or deny an employee promotion request.
Promotion Status	HR_PROMOTE_EE	Self Service, Manager, Tasks, Promotion Status	Managers check the status of their promotion requests and see if they have been approved.
Transfer Employee - Select Transfer Method	HR_TRANSFR_MEN U_EE	Self Service, Manager, Tasks, Transfer Employee	If partial position management is used, managers select the method of transfer.

Page Name	Object Name	Navigation	Usage
Transfer Employee - Transfer Details	HR_TRANSFER_EE	Click Continue on the Transfer Employee - Transfer Method page.	Managers enter detail information about the transfer.
Transfer Employee - Submit Confirmation	HR_TRANSFER_CO NFRM	Click Submit on the Transfer Employee - Transfer Details page.	Managers submit the transfer request.
Request Employee Salary Change	HR_SS_SALCHNG_MGR	Click Change Employee Salary link from the Transfer Employee - Submit Confirmation or the Promote Employee pages.	Managers request a merit increase for an employee.
Change Salary Component	HR_SS_SALCHNG2_MGR	Click Edit from the Request Employee Salary Change page.	Managers use this page to enter the requested change in compensation for a salary component in the employee's compensation page.
Submit Confirmation	HR_SALCHNG_CON FIRM	Click the Submit button on the Request Employee Salary Change page.	Managers use the Submit Confirmation page to verify that the salary change request has been submitted.
Employee Transfer - Approve Transfer	HR_TRANSFER_EE	Self Service, Manager, Tasks, Approve Transfer	Managers approve an employee transfer.
Employee Transfer - View Transfer Approval Status	HR_TRANSFER_EE	Self Service, Manager, Tasks, View Transfer	The Employee Transfer - View Transfer Approval Status enables you to review the date on an employee's transfer request.
Change Location	HR_MGR_LOCATIO N	Self Service, Manager, Tasks, Change Location	Managers submit a request to change the work location of their direct report employees.
Full/Part Time Status Change	HR_MGR_FULL_PA RT	Self Service, Manager, Tasks, Change Full/Part Time Status	Managers submit a request to change an employee's status to full-or part-time.

Page Name	Object Name	Navigation	Usage
Enter Retirement Information	HR_RETIRE_EE	Self Service, Manager, Tasks, Retire Employee	Managers initiate the employee retirement process.
Retire Employee - Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Enter Retirement page	Managers validate that their retirement requests are successfully submitted. This page is also used to create a workflow entry and notify the human resources department that retirement requests must be processed.
Terminate Employee	HR_EE_TERMINATE	Self Service, Manager, Tasks, Terminate Employee	Managers terminate a direct report's employment.

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