



PeopleSoft 8.3 Human
Resources PeopleBook: Plan
Careers and Successions

PeopleSoft 8.3 Human Resources PeopleBook: Plan Careers and Successions

SKU HRr83HCS-B 1001

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Copyright © 2002 PeopleSoft, Inc. All rights reserved.

Printed in the United States.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. ("PeopleSoft"), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, the PeopleSoft logo, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, *PeopleTalk*, and Vantive are registered trademarks, and "People power the internet." and Pure Internet Architecture are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

Contents

About the HRMS PeopleBooks

Before You Begin.....	vii
PeopleSoft Application Fundamentals for HRMS PeopleBook.....	vii
Related Documentation	viii
Documentation on the Internet.....	viii
Documentation on CD-ROM.....	viii
Hardcopy Documentation	viii
PeopleBooks Standard Page Element Definitions.....	ix
PeopleBook Standard Group Boxes	xii
Entering Name Information	xii
Entering Address Information.....	xiv
Entering or Viewing Pay Components.....	xv
Required Fields on Pages	xvii
Typographical Conventions and Visual Cues	xvii
Process Introductory Table.....	xviii
USF U.S. Federal Government Functionality.....	xix
E&G Education and Government Functionality.....	xix
Local Country Functionality.....	xix
Comments and Suggestions.....	xix

Chapter 1

About the PeopleSoft 8.3 Human Resources PeopleBook: Plan Careers and Successions

PeopleBooks Standard Page Element Definitions.....	1-1
Understanding the Documentation	1-2
Human Resources Reports	1-3

Chapter 2

Planning Careers

Understanding Career Planning.....	2-1
Common Element Used in This Chapter	2-3
(USF) Understanding Career Planning.....	2-3
(USF) Tracking a Career Plan Request, Approval, and Completion	2-4
Setting Up Career Planning	2-5
Page Used to Set Up Career Planning.....	2-5

Setting Up Global and Local Country Control Tables	2-5
Setting Up Job Codes and Default Training Programs	2-6
Setting Up Default Career Paths	2-6
Page Used to Set Up Default Career Paths	2-8
Defining Default Career Paths for Job Codes	2-8
Creating Career Plans	2-9
Pages Used to Create Career Plans	2-9
Entering Employee Job, Location, and Availability Preferences	2-11
Defining an Employee Career Path	2-12
(USF) Submitting and Printing the Career Plan	2-15
(USF) Adding Career Path Information	2-16
Ranking Employee Potential	2-17
Entering Career Goals	2-18
(USF) Adding Career Goal Information	2-20
Evaluating Employee Strengths and Developmental Areas	2-20
Synchronizing Competency Data	2-22
Entering and Updating Training Programs	2-23
(USF) Adding Information About a Career Developmental Goal	2-25
(USF) Approving a Career Plan	2-26
Conducting Employee Reviews	2-27
(USF) Tracking Employee Appraisals	2-27
Reviewing Career-Related Employee Data	2-28
Pages Used to Review Career-Related Employee Data	2-28
Viewing the Employee Job Path	2-29
Viewing Employee Reviews	2-30
Viewing Other Summary Information	2-32
Storing Employee Photos	2-32
Page Used for Storing Employee Photos	2-32

Chapter 3

Planning Successions

Understanding Succession Planning	3-1
Setting Up Prerequisites	3-2
Setting Up Global and Local Country Control Tables	3-2
Setting Up and Assigning Key Positions	3-3
Setting Up Career Plans for High-Potential Employees	3-3
Adding External Candidates	3-3
Setting Up Position Requirements	3-4
Tracking Employee Competencies and Accomplishments	3-4
Creating Succession Plans	3-5

Pages Used to Create Succession Plans	3-5
Entering Succession Plan Dates and Selecting Candidates.....	3-6
Indicating Candidate Readiness	3-6
Viewing Candidates for Specific Positions.....	3-8
Conducting Employee Reviews.....	3-8
Setting Up Key Employee Training and Development Plans	3-9
Searching for Additional Internal and External Candidates	3-9
Viewing Summary Information for Candidates	3-10
Storing Candidate Photos.....	3-10
Building a Graphical Succession Hierarchy for Key Positions	3-10
Accessing Career Plans and Related Employee Data.....	3-11

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 <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 Human Resources PeopleBook: Plan Careers and Successions

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Plan Careers and Successions.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists 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*.

PeopleBooks Standard Page Element Definitions

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

Field	Definition
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.

Field	Definition
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, “About the HRMS PeopleBooks,” PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions
- Manage Professional Compliance
- Meet Regulatory Requirements

- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports”

CHAPTER 2

Planning Careers

This chapter provides an overview of career planning and discusses how to:

- Set up career planning.
- Set up default career paths.
- Create career plans.
- Approve a career plan.
- Conduct employee reviews.
- Track employee appraisals.
- Review career-related employee data.
- Store employee photos.

Understanding Career Planning

To create career plans using the Plan Careers business process in PeopleSoft Human Resources, use the job information and competency data from the pages on the Administer Workforce, Administer Training, and Manage Competencies menus.

A PeopleSoft Human Resources career plan enables you to:

- Record general information about employee preferences regarding work locations and the ability and willingness to travel or relocate.
- Create a career path for the employee.

Base the career path on a default path for the job code or customize a path for the employee. Create up to nine career moves on a career plan; each career move can have multiple job codes.

- Assign an employee ranking, assess an employee's potential, and compare employees in a department or organization.
- Set up short- and long-term goals for an employee.
- Assign a mentor and record mentor details.

- Identify and evaluate an employee's strengths and developmental areas.

Use the competencies information in the Manage Competencies business process to include an assessment of an employee's key strengths and developmental areas. Developmental areas include competencies that the employee is lacking or needs to develop and improve.

- Devise a training plan for the employee.

Set up a training plan that will enable the employee to develop the skills and knowledge required to improve in the current job or move to the next job. If your organization has set up default training programs for your job codes, use the default plan or create a customized training plan.

- Create a development plan.

Set up an action plan to help employees acquire new skills and gain experience in developmental areas.

Create a new career plan whenever an employee changes jobs to ensure that the career plan is based on current job information. Use the old career plans for reference to see how elements like training, goals, and ratings change over time.

Recording Input From Multiple Sources

If you gather feedback on an employee from many people or groups and each evaluator has different recommendations, don't create a new career plan every time someone contributes information. Instead, identify the contributor by specifying an input evaluation type. After weighing the evaluations, assign a composite rating for inclusion in an approved career plan.

Integrating Career Planning and the Manage Competencies Business Processes

An essential part of career planning is identifying employee strengths and developmental areas. To do this, add or modify employee competency data in either the Plan Careers or the Manage Competencies business processes. To keep competencies synchronized between these business processes, transfer the competency data between them. If you set up employee competencies using the Manage Competencies process, use this as a basis for the strength and developmental areas in an employee's career plan. Conversely, enter the strengths and developmental areas from the Plan Careers process and then transfer the information to the employee's profile in the Manage Competencies process. Whichever way you decide to manage your employee competencies, make sure that employee profiles are consistent.

Integrating the Plan Careers and Plan Successions Business Processes

Planning careers also plays an important role in planning successions. Use the career plans for high-potential employees as the basis for their preparation to move into key positions.

Career plans are not a prerequisite for creating succession plans. However, if you set up career plans, you can automate the process of identifying candidates for any key position. From Plan Successions, click the Link button, and the system generates a list of people who have the selected key position in their career path. Using succession plans in conjunction with

career plans enables you to plan employee training and development in readiness for planned moves.

Note. You can also access the Manage Competencies pages used to track employee competencies and accomplishments such as education, certificates, licenses, memberships, and so forth from the Plan Careers menu path.

See Also

“Planning Successions”

PeopleSoft Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments”

Common Element Used in This Chapter

Status Select a status from the available options. If the employee is given more time to complete this goal, select a status of *Deferred*.

(USF) Understanding Career Planning

The Plan Careers business process for U.S. Federal Government users enables you to set up career plans and produce Individual Development Plans (IDPs) for employees' career development paths. You can track IDP progress, job move costs, training, employee appraisals, mentoring, and self-implemented career development activities. An employee or supervisor can request to work on a career plan at any time.

Once you create a career plan, the system:

1. Routes the plan along your agency's path of review and approval.
2. Tracks costs and activities associated with the plan.
3. Generates the IDP output form.

Use career plans to complement performance reviews and training programs or to prepare employees to become key managers. Career plans help you develop backup personnel for open positions.

Note. Using the Plan Careers business process is optional, and is intended to work with merit staffing practices as established by law, regulation, or internal policy.

(USF) Tracking a Career Plan Request, Approval, and Completion

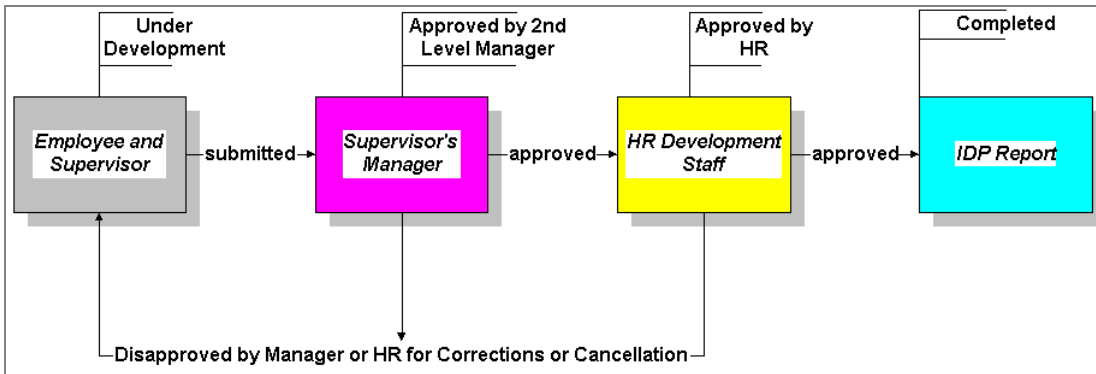
The career plan process includes a sequence of steps, which can be designed to meet requirements. For example, a path might include:

- Creating a career plan.
- Submitting it as a request.
- Giving reviews and approvals.
- Completing an authorized career plan.
- Producing an IDP.

PeopleSoft Workflow manages routing and tracking. You assign a status, and workflow tracks and routes the career plan through the approval cycle. Reviewers change the status to either continue the review process or disapprove the plan. The system then shows the career plan status on the Career Plan page.

Career Plan Process

Here is an overview of the career plan process. This is a general example.



The career plan approval process

The following definitions describe the process of submitting and reviewing career plans. Use these or create custom paths, reviews, and processing routes.

Status	Career Plan Status Code	Definition
Under Development	1	Employee and supervisor create a career plan, assign this status, and work on the plan until submitting it to the second-level supervisor or manager.
Submitted to Supervisor	2	Supervisor assigns this status to send the career plan to the second-level supervisor or manager.

Status	Career Plan Status Code	Definition
Approved by Manager	3	Manager or second-level supervisor assigns this status to send the plan to the human resources department.
Disapproved by Manager	4	Manager or second-level supervisor assigns this status to send career plan back to originators for cancellation.
Approved by HR	5	Human resources official approves request by assigning this status.
Disapproved by HR	6	Human resources official disapproves request by assigning this status.

Setting Up Career Planning

This section, covers how to:

1. Set up global and local country control tables.
2. Define geographic preferences.
3. Set up job codes and default training programs.

Complete these tasks before setting up employee career plans.

Page Used to Set Up Career Planning

Page Name	Object Name	Navigation	Usage
Geog Pref Tbl (geographic preference table)	GEOG_PREF_TBL	Develop Workforce, Plan Careers, Setup, Geographic Preference Table	Define relevant geographic areas for job relocation in career planning components.

Setting Up Global and Local Country Control Tables

All core setup tables, pages, and functionality described in this section are located on the Plan Careers menu.

The system uses data stored in employee records to create career plans. Before you create a career plan, you must:

- Hire an employee.
- Set up general tables in PeopleSoft Human Resources.
- Create plan careers and successions organizational and employee data in the Administer Workforce business process in PeopleSoft Human Resources.

The identifying information in the Career Path table is autopopulated from the Job Code table. Create all job codes that you use in default career paths first.

Most plan careers and plan successions tables are effective-dated, which enables you to track the data changes chronologically. Data history isn't deleted.

When you create codes, enter effective dates that *precede* the effective dates of any succession plans, otherwise the system will not display all the valid codes on the Plan Successions pages. Use a date such as January 1, 1980, to ensure that the effective date accounts for assignment history.

If you implement multiple business units and SetIDs, business unit and setID functionality set up for your user ID determines the information that you use and create.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce“

Updating Workforce Information

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Regulating PeopleSoft HRMS System Data”

Setting Up Job Codes and Default Training Programs

You can set up training programs in the Training Program table and associate them with job codes in the Job Code table. If you do, the standard training programs will help with career planning. You can use the default training programs to measure employee training experience with the norm for their job codes and set up training plans for the next career plan period. You can also customize to meet the needs of a particular employee.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs and Pay Groups”, Classifying Jobs

PeopleSoft Human Resources PeopleBook: Administer Training, “Defining Training Courses and Programs”

Setting Up Default Career Paths

Set up default career paths for key job codes or for all job codes. Default career paths enable you to:

- Create a hierarchy or network of jobs.
- See a logical career progressions and the relationship between jobs.
- Save time when developing employee career plans.

- Save time when planning employee successions.

For example, you might want to coordinate career paths only for job codes above a certain management level, to make sure that employees in them get the necessary work experience to prepare for higher-level management positions.

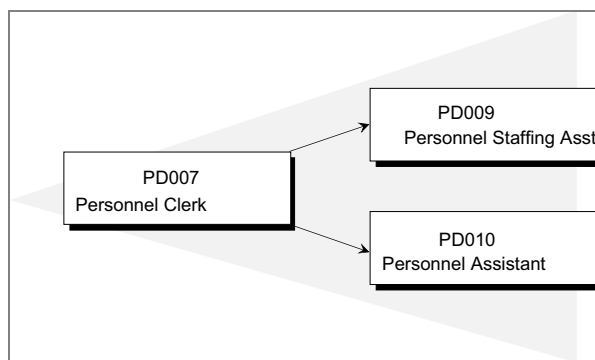
Overview of Career-Move Levels

Career-move levels usually show a hierarchical job progression in a career path and build on the job code in the previous career-move level.

Let’s look at an example of a default career path for a Job Code, PD007, Personnel Clerk. The first move from the current job is to Personnel Assistant, which leads to Personnel Staffing Specialist as a second level move from the current job. As a third level move, the job leads to Personnel Officer, and so on. You can define up to nine career moves on a career plan.

<i>Career-Move Level</i>		<i>Job Code</i>	<i>Position</i>
	Current	PD007	Personnel Clerk GS-0203
1	First move from current job	PD010	Personnel Assistant GS-0203-06
2	Second move from current job	PD101	Personnel Staffing Specialist GS-0212-09
3	Third move from current job	PD107	Personnel Officer GS-0201-13

Some job codes have more than one possible job move in a particular career-move level. For example, Job Code PD007, Personnel Clerk, could have two job options as the first move from the current job: Job Code PD010, Personnel Assistant; and an additional option (not shown in the table) could be Job Code PD009, Personnel Staffing Assistant.



Optional moves from current job

If you have more than one job option in a career-move level, use option numbers to sort the job codes in the proper order.

Page Used to Set Up Default Career Paths

Page Name	Object Name	Navigation	Usage
Career Path Table	CAREER_PATH_TBL	Develop Workforce, Plan Careers, Setup, Career Path Table, Career Path Table	Define the default career path for a job code.

Defining Default Career Paths for Job Codes

Access the Career Path Table page

Career Path Table

Business Unit: CAN01 **Job Code:** KC003 Senior Secretary
Description: Administration

Default Salary Details

SetID: SHARE **Sal Plan:** KC02 **Grade:** Non-Mgr
Translate Short Name:

Career Move View All First 1 of 2 Last

*Career Move: 1st Move Second Move from Current Job + -

Job Options for Career Move View All First 1 of 1 Last

Opt #	Business Unit	Job Code	Job Title	Translate Short Name	Translate Short Name	SetID	Plan	Grade
1	GBIBU	KC019	Sr Admin	Non-Mgr		SHARE	KC02	

Career Path Table page

Default Salary Details

In the **Default Salary Details** group box, the system displays the setID, salary plan, grade, and manager level associated with the selected job code. These fields are for information only.

Career Move

Career Move Select a career move level. *First Move from Current Job* defines the first move from the selected job code, and *Ninth Move from Current Job* is the last move. You can include multiple job codes for any career move to reflect moves at the same management level and moves up the management hierarchy.

Opt # (option number) Enter a number if there is more than one job code option for the selected career-move level. Use the option number to sort the job codes.

Job Code Select the job code for the career move level.

When you exit the **Job Code** field, the system completes the job details [**Job Title**, **Mgr Level** (manager level), and **Function** fields] and salary details (**SetID**, **Plan**, and **Grade** fields). The system makes these fields unavailable.

Creating Career Plans

Use the Career Plan component to enter information about an employee's current position, abilities, strengths, and career desires for the future. You can use this information to help plan employee careers and maintain an available pool of candidates for key positions.

This section covers how to:

- Enter employee job, location, and availability preferences.
- Submit and print a career plan.
- Define an employee career path.
- Display a position description.
- Display a job description.
- Add career path information.
- Rank employee potential.
- Enter career goals.
- Assign career mentors.
- Add career goal information.
- Evaluate employee strengths and developmental areas.
- Synchronize competency data.
- Enter and update training programs.
- Improve employee developmental areas.
- Add information about a career developmental goal.

Pages Used to Create Career Plans

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Career Plan	CAREER_PLAN1	Develop Workforce, Plan Careers, Use, Career Plan, Career Plan	Enter employee preferences for jobs and geographic locations; indicate availability to move into new positions.

Page Name	Object Name	Navigation	Usage
Career Plan - Career Path	CAREER_PLAN2	Develop Workforce, Plan Careers, Use, Career Plan, Career Path	Define an employee's career path; modify a default career path; create a customized job progression.
Current Career Position Descr (current career position description)	CAREER_POSN_SEC	Click the Current Position Data button on the Career Plan - Career Path page.	View a description of the position selected on the Career Plan - Career Path page.
Current Career Job Descr (current career job description)	CAREER_JOB_CD_SEC	Click Jobcode Long Description (next to the Job Code field) on the Career Plan - Career Path page.	View a description of the job code selected on the Career Plan - Career Path page.
(USF) Federal Potential Future Positions (USF) Federal Data / Print IDP Actions	GVT_CAR_PLN2_SEC	Click the Federal Data link on the Career Plan - Career Path page. Click Federal Data/Print IDP on the Career Plan - Career Path page.	Add further information about the career path specified on the Career Plan - Career Path page. Submit the career plan for approval; print the completed plan.
Career Plan - Career Ranking and Potential	CAREER_PLAN3	Develop Workforce, Plan Careers, Use, Career Plan, Career Ranking and Potential	Show how employees compare to their peers; indicate their potential.
Career Plan - Career Goals	CAREER_PLAN4	Develop Workforce, Plan Careers, Use, Career Plan, Career Goals	Enter short- and long-term goals for employees.
Career Plan - Career Mentoring	CAREER_PLAN5	Develop Workforce, Plan Careers, Use, Career Plan, Career Mentoring	Use the Career Mentoring page to assign career mentors.
Federal Coaching/Mentor Information	GVT_CAR_PLN5_SEC	Click the Federal Data button on the Career Plan - Career Mentoring page.	Add further information about the career goal specified on the employee's Career Plan - Career Mentoring page.
Career Plan - Career Strength/Develop Areas (career plan - strength/developmental areas)	CAREER_PLAN6	Develop Workforce, Plan Careers, Use, Career Plan, Career Strength/Develop Areas	Record and evaluate an employee's career strengths and developmental areas.

Page Name	Object Name	Navigation	Usage
Plan Careers/Manage Competencies Link	CAREER_STRDVLPEC	Click the link on these pages: Career Plan - Career Strength/Develop Areas Competency Assignment	Synchronize competency data between the Plan Careers and Manage Competencies business processes.
Career Plan - Career Training Plan	CAREER_PLAN7	Develop Workforce, Plan Careers, Use, Career Plan, Career Training Plan	Enter or update a training program for the selected employee; use the default training program for the employee job code or create a custom program.
Career Plan - Career Development Plan	CAREER_PLAN8	Develop Workforce, Plan Careers, Use, Career Plan, Career Development Plan	Help employees improve in developmental areas before their next performance review or career planning session.
(USF) Federal Career Plan Information	GVT_CAR_PLN8_SEC	Click the Federal button on the Career Plan – Career Development Plan page.	Add further information about the career developmental goal specified on the Career Plan - Career Development Plan page.

Entering Employee Job, Location, and Availability Preferences

Access the Career Plan page.

The screenshot displays the 'Career Plan' page for employee Griffiths, Martina Rae (EmpID: KC0001). The page is divided into several sections:

- Header:** Career Plan | Career Path | Career Ranking and Potential | Career Goals | Career Mentoring
- Employee Info:** Griffiths, Martina Rae | Employee | EmpID: KC0001
- Career Plan Summary:**
 - Effective Date: 9/09/2001
 - Career Plan Review Date: [Empty]
 - Date Available: [Empty]
 - Projected Retirement Date: 31/03/2021
- Employee Willing To:**
 - Relocate
 - Take International Assignment
 - Travel
- Desired Work Sites:**
 - First Choice:** Business: GBIBU, Unit: [Empty], Location: [Empty]
 - Second Choice:** Business: GBIBU, Unit: [Empty], Location: [Empty]
- Obstacles to Mobility:** [Empty scrollable area]
- Geographic Preferences:** [Empty scrollable area]
- International Preferences:** [Empty scrollable area]

Career Plan page

Projected Retirement Date This field autopopulates with the date on which the employee turns 65. If that is not the employee's actual retirement date, enter the correct date.

Federal Data/Print IDP This link appears for U.S. Federal users only.

Click to display the Federal Data/Print IDP Actions page, where you submit the career plan for approval and print the completed plan.

If there are reasons that the employee can't travel, define them in the **Obstacles to Mobility** scroll area.

Defining an Employee Career Path

Access the Career Plan - Career Path page.

Griffiths, Martina Rae ID: KC0001 Empl Rcd#: 0

Career Path View All First 1 of 1 Last

Effective Date: 08/01/2000 Career Plan Review Date: **Career Path** + -

Business Unit: CAN01 GBI BU for Canada
 Job Code: KC003 Sr Secrty Department: KC001 HR
 Position: 19000017 Sr Secrty Short Desc: Cdn HQ Sal Plan: 004 Grade: KC0

Evaluation Type View All First 1 of 1 Last

*Evaluation Type: + -

Potential Future Positions View All First 1 of 1 Last

*Career Move Option # Target Date + -

Position	<input type="text"/>	Position Long Description	*Readiness	<input type="text"/>
Business Unit	<input type="text"/>			
Department	<input type="text"/>		Sal Plan:	Grade:
Job Code	<input type="text"/>	Jobcode Long Description		

Career Plan - Career Path page

Career Path

Click to create a career path based on the default career path for the employee's job code. If a career path is defined for that job code, when you click the button, the system completes most of the information in the **Potential Future Positions** scroll area. If the employee's path differs from the default path, modify the fields as required.

Once you save the plan, the **Career Path** button is unavailable. However, each time you create a new career plan for an employee, the system makes the button available, and you can use the default path for the new plan. See *Setting Up Default Career Paths* for information about creating default career paths.

Note. The system uses the effective date (career plan date) to determine the employee's job code. If the employee has changed jobs since the career plan date, the default career path is based on the previous job code. To ensure that the career plan is based on an employee's current job, create a new career plan whenever an employee changes job, and set the effective date to match the effective date on the Job Data page.

Evaluation Type

Within each career plan, there can be multiple evaluation types. Several people, such as the employee's supervisor or mentor, might have ideas about the next job to which an employee should move. Because their input affects the same time frame, create new evaluation type records, not a new career plan.

Evaluation Type	Select an evaluation type to indicate who is evaluating the information on the employee. This is populated with <i>Approved/Official</i> if you clicked the Career Plan button. To use the evaluation in Plan Successions, you must select <i>Approved/Official</i> .
<i>Potential Future Positions</i>	
Career Move	Select the career move to define. <i>1st Move</i> is the first step in the career path. It defines the job that the employee will move to from the current job and when the employee will be ready for that job. You can define up to nine moves. <i>9th Move</i> is the final step in the employee's career path. It defines the ninth job move from the current job.
Opt # (option number)	If you decide to include more than one job code in a career-move level, insert an option number to sort the job codes in the preferred order.
Position	If you're driving part or all of PeopleSoft Human Resources by position, select a position number from the available options. When you move out of this field, the system completes the Business Unit, Department and Job Code fields. It also displays the job title, salary plan, grade, manager level, and function associated with this position. If you're using partial position management and change your mind about using a position in this career move, delete the position number.
Position Long Description	Click to access the Current Career Position Descr page where you can see a description of the selected position. This link is active only after you select a position.
Readiness	Select your estimate of the employee's readiness for such a move from the drop-down list: <i>1–2 yrs:</i> (1–2 years) The employee will be ready for the move within the next two years. <i>3–5 yrs:</i> (3–5 years) The employee will be ready for the move in three to five years. <i>Emergency:</i> If the employee is overdue for a job move and needs to move as soon as possible. <i>Ready Now:</i> If the employee is ready for the move now. <i>Retirement:</i> If the employee will not move to another position after this; for example, those who are nearing retirement age.

The system uses this information in Plan Successions to show blockages: succession candidates who are blocked from advancement

Federal Data

This link only appears if you are a U.S. Federal user.

Click to display the Federal Potential Positions page, where you enter further information about the potential career move.

Department

If you know it, select a department for the job. This field is optional. You create departments in the Department table. The setID determines the departments that you see.

Job Code

Select the job code for the career move from the available options. When you select a job code and move out of the field, the system displays the associated job title, salary plan, grade, manager level, and function. You use the Job Code table to create job codes.

Jobcode Long Description

Click to access the Current Career Job Descr (current career job description) page, where you can see a description of the selected job. This link is active only after you select a job code.

See Also

“Planning Successions”

(USF) Submitting and Printing the Career Plan

Access the Federal Data/Print IDP Actions page.

Federal Data/Print IDP Actions page

Reason Career Plan Initiated

Select a reason for the career plan. Valid values are *BU Agree* (bargaining unit agreement), *Car Ladder* (career ladder), *Car Prgm* (career program), *Dec Prgm* (developmental program), *Employee* (employee requested), *Period Rvw* (periodic review), and *Supv* (supervisor requested).



Currently Participating

Select if the employee is participating in a developmental program and select the program from the list of available options.

(USF) Adding Career Path Information

Access the Federal Potential Future Positions page.

Federal Potential Future Positions

Potential Future Positions			
Date Need Identified:	<input type="text"/>		
Reason:	<input type="text"/>		<input type="checkbox"/> Self-Development
Status:	<input type="text"/>		<input type="checkbox"/> Required
Estimated Cost:	<input type="text"/>	Actual Cost:	<input type="text"/>

Federal Potential Future Positions page

- Date Need Identified** Enter the date that the career move was agreed to.
- Self-Development** Select if this is part of the employee's self-development activities.
- Required** Select if the move is required.

Ranking Employee Potential

Access the Career Plan - Career Ranking and Potential page.

Career Plan		Career Path		Career Ranking and Potential		Career Goals		Career Mentoring	
Griffiths, Martina Rae				ID: KC0001		Empl Rcd#: 0			
Career Ranking and Potential						View All First 1 of 2 Last			
Effective Date: 08/01/2000		Career Plan Review Date:				+ -			
Business Unit: CAN01		GBI BU for Canada							
Job Code: KC003		Senior Secretary							
Department: KC001		Human Resources							
Force Ranking						View All First 1 of 1 Last			
*Review Date	Rank	Out of	Rank Type	Description					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		+ -			
Career Potential						View All First 1 of 1 Last			
*Review Date	*Rating	Reviewer Comments							
<input type="text"/>	<input type="text"/>	<input type="text"/>				+ -			

Career Plan - Career Ranking and Potential page

To get a better cross-section of employee skills and promotability, enter rankings of different types.

Out of Enter the total number of people against whom the employee has been ranked.

To illustrate how force ranking and career potential might work together, consider John Smith, an engineer. John ranks second out of 200 engineers who have the same job code. On the basis of force ranking alone, an executive committee might think he’s a candidate to move to a critical Kuwaiti project. However, John is about to retire, loves his current position in Bahrain, and does not want to move anywhere. You can indicate this by giving him a rating of currently well-placed, *placed*, in his career potential evaluation.

Entering Career Goals

Access the Career Plan - Career Goals page.

Griffiths, Martina Rae ID: KC0001 Empl Rcd#: 0

Career Goals View All First 1 of 1 Last

Effective Date: 08/21/2000 Career Plan Review Date: + -

Business Unit: CAN01 GBI BU for Canada

Job Code: KC003 Senior Secretary

Department: KC001 Human Resources

Short-Term Career Goals View All First 1 of 1 Last

*Estimated Completion Date	Actual Completion Date	Goal (Next 1 - 3 Years)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Import Long-Term Goals

Long-Term Career Goals View All First 1 of 1 Last

*Estimated Completion Date	Actual Completion Date	Goals (3 - 5 Years)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Career Plan - Career Goals page

Actual Completion Date

Enter the actual completion date when the employee achieves the goal.

When you change the status of a short-term goal in the employee's review (on the Employee Review - Goals page), the system automatically updates this field with the date on which the goal was met. Keep in mind that if the information in the employee's review changes a second time (for example, a met goal is changed back to unmet), the system will not update the date in this page again.

Goal (Next 1 - 3 Years)

If you're tracking employee reviews in PeopleSoft Human Resources, you can use the short-term goals that you enter here as the basis for short-term goals and objectives in employee reviews.

Import Short-Term Goals

This button is for U.S. Federal users only.

Click this button to import goals from the employee's most recent appraisal.

Goals (3 - 5 Years)

If you're tracking employee reviews in PeopleSoft Human Resources, you can use the long-term goals that you enter here as the basis for short-term goals and objectives in employee reviews.

Import Long-Term Goals

This button is for U.S. Federal users only.


Click this button to import goals from the employee's most recent appraisal.

(USF) Adding Career Goal Information



Access the Federal Coaching/Mentor Information page.

Federal Coaching/Mentor Information

Federal Coaching/Mentoring Information

Date Need Identified: 

Self-Development **Activity Required**

Reason:  **Status:** 

Estimated Cost: **Actual Cost:**

Federal Coaching/Mentor Information page

Date Need Identified	Enter the date that the goal was agreed to.
Self-Development	Select if this is part of the employee's self-development. This indicates that the employee is paying the costs for this activity.
Activity Required	Select if the activity is mandatory.

Evaluating Employee Strengths and Developmental Areas

Access the Career Plan - Career Strength/Develop Areas page.

Griffiths, Martina Rae ID: KC0001 Empl Rcd#: 0

Career Strength/Development Areas View All First 1 of 2 Last

Effective Date: 08/01/2000 Career Plan Review Date: [Link to Competencies](#) + -

Business Unit: CAN01 GBI BU for Canada

Job Code: KC003 Senior Secretary

Department: KC001 Human Resources

Strengths View All First 1 of 1 Last

*Evaluation Type: [] *Strength: [] + -

Rating Model: [] Rating: []

Comment: []

Developmental Areas View All First 1 of 1 Last

*Evaluation Type: [] *Dev Area: [] + -

Rating Model: [] Rating: []

Comment: []

Career Plan - Career Strength/Develop Areas page

Link to Competencies

Click to transfer the employee's competency data between the Plan Careers and Manage Competencies business processes.

If you already have employee competencies, use this link to display that information and copy it into the employee's career plan. You can also use the link to transfer the competency information from the Career Strength/Develop Areas page to Manage Competencies.

Strengths

Strength

Select the strength to evaluate from the list of competencies.

Rating Model

When you move out of the **Strength** field, the system displays the rating model used to measure that competency. You set up rating models on the Rating Model Table Setup page in Manage Competencies.

Rating

Select the rating that best matches the employee's level of proficiency for the selected competency.

Developmental Areas

Dev Area (developmental area)

Select a competency that is a developmental area for the employee.

Rating Model

When you move out of the **Dev Area** field, the system displays the rating model used to measure that competency. You set up rating models on the Rating Model Setup page in Manage Competencies.

Rating

Select the rating that best matches the employee’s level of proficiency for the selected competency.

Synchronizing Competency Data

Access the Plan Careers/Manage Competencies Link page.

Plan Careers / Manage Competencies Link

Griffiths, Martina Rae ID: KC0001 **Empl Rcd#:** 0

The selected competencies will be transferred to Plan Careers. The selected competencies will be transferred to Manage Competencies.

Manage Competencies			Career Planning		
Eval Type	Competency	Rating	Eval Type	Competency	Type
<input type="checkbox"/>	Approved	Takes initiative & follows up	Strength		
<input type="checkbox"/>	Approved	Customer Service Orientation	Strength		
<input type="checkbox"/>	Approved	Typing	Strength		
<input type="checkbox"/>	Approved	Multi-Tasking	Developmnt		
<input type="checkbox"/>	Approved	Computer Literacy	Developmnt		
<input type="checkbox"/>	Approved	HRIS Experience	Developmnt		

Select All
Select All

OK
Cancel

Plan Careers/Manage Competencies Link page

Manage Competencies

In this scroll area, the system displays the competencies assigned to the employee in Manage Competencies. For each competency, the system displays the evaluation type, competency, and the employee’s rating (*Strength* or *Developmnt*). Select the check boxes beside the competency to transfer to the employee’s career plan.

Career Planning

In this scroll area, the system displays the competencies listed on the employee’s career plan. For each competency, the system displays the evaluation type, competency, and the employee’s rating. Select the check boxes beside the competency to transfer to the employee’s competency profile in Manage Competencies.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies

Entering and Updating Training Programs

Access the Career Plan - Career Training Plan page.

Career Plan - Career Training Plan page

Training Plan

Click this button to create a training plan based on the default training plan for the employee's job code. If a training plan has been set up for the job code, when you click the button, the system completes most of the fields in the **Training Plan** scroll area with information that is related to that plan. If the employee's training plan differs from the default plan, modify the fields as required.

After you save the plan, this button is unavailable. However, each time you create a new career plan for an employee, this button is available, and you can choose to use the default for the new plan.

Note. The system uses the effective date (career plan date) to determine the employee's job code. If the employee has changed jobs since the career plan date, the default training plan is based on the previous job code. To ensure that the training plan is based on an employee's current job, create a new career plan whenever an employee changes job and set the effective date to match the effective date on the Job Data page.

Training Program**Training Program**

If the employee's training plan is based on a predefined training program, the system displays the training program name.

Training Plan**Sequence**

To set the course order, enter a sequence number. If this field is left cleared, courses appear in ascending chronological order by estimated completion date. To rearrange the courses on the list, enter sequence numbers for the courses in the order that they should appear. Save this information, close, and reopen the page. The courses will appear in the new order.

Completion Date

If the training course has been scheduled in Administer Training, the system will display the end date of the course in this field when the status changes to **Completed**.

If you are tracking a training course that is not handled in Administer Training, enter the actual completion date when the employee completes the course or training.

Course

Select a course code from the list of available options. When you exit this field, the system enters the course title, the internal and external value, the school code, and the school name for the course. The system makes the fields unavailable; you can't change this information.

If you've entered a course code and decide that you don't want to use it after all, delete your selection. When you exit this field, the system makes the other fields available.

Course Title

If you selected a course code, the system supplies the course title and makes this field unavailable. If the course is not in your course table, enter the course title.

Required

Select this check box if the course is mandatory.

Internal/External

If you selected a course code, the system completes this field and makes it unavailable. If you left the **Course** field cleared, select one of these options:

Internal: If the course is held in-house.

External: If an external vendor administers the course.

Dt Need Identified (date need identified)

The system autopopulates this field with the career plan date, which you can change if necessary.

School

If the course is **External**, select a school code, which you define in the School table. If the school isn't in your School table, leave this field cleared and complete the school **Name** field. When you select a course that is **Internal**, the system makes the **School** field unavailable.

Name If you selected a school code, the system enters the school name and makes this field unavailable. If the school isn't in your School table, enter the school name.

USF fields

The following elements are for U.S. Federal users only.

Self-Development If this is part of the employee's self-development activities, select this check box. This indicates that the employee is paying the costs for this activity.

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs" and "Tracking Student Training"

(USF) Adding Information About a Career Developmental Goal

Access the Federal Career Plan Information page.

Federal Career Plan Information page

Self-Development If this is part of the employee's self-development activities, select this check box. This indicates that the employee is paying the costs for this activity.

Date Need Identified Enter the date that the goal was agreed to.

(USF) Approving a Career Plan

Depending on how your agency sets up the approval process, PeopleSoft Workflow routes requested career plans to the appropriate person for approval. The reviewer can approve or change the request and send it to other reviewers and, ultimately, to a human resources person. To view the request, the reviewers open their worklist and the career plan appears. The reviewer then brings it up as a correction to approve or reject it. All of the pages that you route through workflow for approval contain a Status field to indicate approval or disapproval. These pages include Career Plan 1, Career Path, Career Mentoring, and Career Training Plan.

The process is the same for each page:

1. Open the page by accessing your worklist.
2. View the plans that are ready for your approval.
3. Review them, then change the status to indicate your review decision.

To open your worklist:

1. Select View, Navigator Display, Worklist.
2. Open the career plan ready for approval.

To approve a career plan request:

1. Access the page by accessing your worklist.
2. At the bottom of the page, click either Approve or Disapprove.

To approve a career path request:

1. Open your worklist.
The system prompts you for an employee ID.
2. Open the page and change the status to *Approved* or *Disapproved*.

To approve a career mentoring request:

1. Open your worklist.
The system prompts you for an employee ID.
2. Open the page and change the status to *Approved* or *Disapproved*.

To approve a career training plan request:

1. Open your worklist.

The system prompts you for an employee ID.

2. Open the page and change the activity status to such as *Approved* or *Disapproved*.

See Also

Creating Career Plans

Conducting Employee Reviews

In addition to reviewing career plans, you can conduct salary or performance reviews for your employees. You can set up groups of employees and define the review criteria and method of calculating review results for the group. From the Plan Careers menu, you can access these components:

- Employee Review.

Use the Employee Review component to enter detailed information on employees' salary and performance reviews. To access the Employee Review pages, select Develop Workforce, Plan Careers, Use, Employee Review.

- Employee Review by Group.

Use the Employee Review by Group component to view a list of employees in the review groups. To access the Employee Review by Group page, select Develop Workforce, Plan Careers, Use, Employee Review by Group.

You can also access the Employee Review and Employee Review by Group components on the Plan Salaries menu.

See Also

PeopleSoft Human Resources PeopleBook: Planning Salaries, "Reviewing Employee Performance"

(USF) Tracking Employee Appraisals

Use the Employee Appraisal component to enter information on employee appraisals and to track online, detailed appraisal information. Enter comments from multiple reviewers, choose from multiple rating scales, rate employees according to performance plans, and give them a final rating. Use the component to organize review data. Enter rating data, evaluations, and comments on the first page; review elements and standards on the second page, goals and objectives on the third page. These pages are optional. You can also find the Employee Appraisal pages on the Manage Performance (USF) and the Plan Salaries (USF) menus.

See Also

PeopleSoft Human Resources PeopleBook: Manage Performance, “Setting Up Performance Management Tables”

Reviewing Career-Related Employee Data

When you prepare employees for career advancements, look at the candidates’ personal and job histories and review their career plans. All the information is on the Plan Careers menu. You can access prior work experience, employee reviews, education, career assignments, and several summary pages. The information on the summary pages is display-only.

Note. In the Plan Careers component, you can access career-related employee data only for employees who have career plans.

This section covers how to view:

- Employee information.
- The employee job path.
- Employee reviews.
- Other summary information.

Pages Used to Review Career-Related Employee Data

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee Data Summ (employee data summary)	EMPLOYEE_SUMMA RY1	Compensate Employees, Administer Automated Benefits, Inquire, Employee Data Summary, Employee Data Summary.	View current job, employment data and current employee personal information.
Career Assignment Summary	CAREER_SUMMARY	Develop Workforce, Plan Careers, Inquire, Career Assignment Summary, Career Assignment Summary.	See the job path that the employee has followed in the organization.

Page Name	Object Name	Navigation	Usage
Employee Reviews	ALL_EE_REVIEWS	Develop Workforce, Plan Careers, Inquire, Employee Reviews.	View a list of employees whose reviews are due before a given date. Search for employees within a selected business unit, company, department, or location. Search the records of employees by manager.
Immediate Family Summary	IMMEDIATE_FAMILY	Develop Workforce, Plan Careers, Inquire, Immediate Family Summary.	View employee's dependent and beneficiary information.

Employee Data Summary Alternate Navigations

Compensate Employees, Administer Base Benefits, Inquire, Employee Data Summary, Employee Data Summary

Define Business Rules, Define General Data (NLD), Inquire, Employee Data Summary, Employee Data Summary

Develop Workforce, Plan Careers, Inquire, Employee Summary, Employee Data Summary

Career Assignment Summary Alternate Navigations

Develop Workforce, Plan Successions (GBL), Inquire, Career Summary, Career Assignment Summary

Develop Workforce, Plan Successions (USF), Inquire, Career Summary,

Viewing the Employee Job Path

Access the Career Assignments Summary page.

Career Assignment Summary

Davies,Craig R **ID:** KC0021 **Empl Rcd#:** 0

Company: GBI GBI **Hire Date:** 03/16/1980

Annual Rate: 55,000.00 CAD **Country:** CAN

Current Location: Calgary Province: AB Alberta

Career Summary View All First 1-2 of 2 Last

Eff Date	Business Department Unit	Description	Manager Level	Grade
06/01/1996	GBIBU	KC001	Human Resources	Non-Mgr 004
		KC014	Systems Analyst	+ -
03/16/1980	CAN01	KC003	Information Services	Non-Mgr 004
		KC014	Systems Analyst	

Career Assignment Summary page

This page shows a history of previous jobs that an employee has held in the company. It does not list every personnel action, it shows only job movements. Each job code, salary grade, or department change appears.

Viewing Employee Reviews

Access the Employee Reviews page.

Employee Reviews

* **Reviews type:**

* **Manager ID:**

Reviews Before Date:

Review Details View All First 1 of 1 Last

[Review Details](#)

Next Review Date: **EmplID:**

Business Unit: **Job Code:**

Department:

Manager ID:

Employee Reviews page

Depending on the review type that you select, the system displays certain fields on the Employee Reviews page and hides others. The following table shows which fields are displayed.

<i>Reviews Type</i>	<i>Fields Displayed</i>
Reviews by Business Unit	Business Unit Reviews Before Date
Reviews by Company	Company Reviews Before Date
Reviews by Department	Business Unit Department, Reviews Before Date
Reviews by Location	Business Unit Location, Reviews Before Date
Reviews by Manager	Manager ID Reviews Before Date

Reviews Before Date

Enter a review date in this field. When you click the **Employee Review Refresh** button, the system searches for employees whose reviews are due before this date.



Click the **Employee Review Refresh** button to run the inquiry. The system displays a list of employees who match the criteria that you entered.

Review Details

When you click the **Employee Review Refresh** button, the system populates the **Review Details** scroll area with employees who meet your criteria. The data is for information only and includes: the next review date, employee ID, business unit, job code, department, and manager ID.

Review Details

Click **Review Details** to access the Employee Review component, where you can view and update the employee's review details.

Viewing Other Summary Information

You can review other employee summary information, such as compensation history, training history, and information about the employee's immediate family. If this information exists in PeopleSoft Human Resources, you can view it in summary form on the following pages:

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Viewing Summary Workforce Information," Job Summary Page and "Hiring Your Workforce," Hiring an Employee.

PeopleSoft Human Resources PeopleBook: Administer Training, "Tracking Student Training"

Storing Employee Photos

Page Used for Storing Employee Photos

Page Name	Object name	Navigation	Usage
Employee Photo	EMPLOYEE_PHOTO	<ul style="list-style-type: none"> • Develop Workforce, Plan Careers, Use, Candidate Photo. • Develop Workforce, Plan Successions, Use, Candidate Photo. 	Store images of candidates for identification purposes.

See Also

Storing Candidate Photos

CHAPTER 3

Planning Successions

This chapter provides an overview of succession planning and discusses how to:

- Set up prerequisites.
- Create succession plans.
- Conduct employee reviews.
- Set up key employee training and development plans.
- Search for additional internal and external candidates.
- Build a graphical succession hierarchy for key positions.
- Access career plans and related employee data.

Note. Use of the Plan Successions business process is optional. This process is intended to work in conjunction with merit staffing practices as established by law, regulation, or internal policy and procedures.

Understanding Succession Planning

Succession Planning Process

Create succession plans based on position data. Using the Manage Positions business process, identify key positions and the employees currently in these positions (known as *incumbents*). With the position data, create a succession plan for each key position as follows:

1. Set up a list of possible succession candidates.

The system provides candidate data on employees for whom the job code or position has been identified as a potential career move. Add employees or nonemployees (including external candidates) to consider.

2. Finalize the successor list.

If you need additional information about particular employees, access several pages that provide succession-related information.

3. Review succession plans, and implement training and development plans.

You may discover employees who are blocked from moving to a new position by incumbents. Implement training and development programs to provide blocked employees with alternative career paths.

Searching for Candidates

If you're creating a succession plan for a position that requires an unusual combination of skills, specify the criteria for the position (using the Manage Competencies menu) and perform searches for employees, nonemployees, and applicants.

See Also

Building a Graphical Succession Hierarchy for Key Positions

Searching for Additional Internal and External Candidates

Setting Up Prerequisites

Perform the following tasks before creating succession plans for key positions:

1. Set up global and local country control tables.
2. Set up and assign key positions.
3. Set up career plans for high-potential employees.
4. Add external candidates.
5. Set up position requirements.
6. Track employee competencies and accomplishments.

Setting Up Global and Local Country Control Tables

The core and local country setup tables, pages, and functionality described in this section are accessed from the Plan Successions menu (Plan Successions (GBL) navigation). The core and local country functionality is accessed from the appropriate local country menus.

This discussion uses the system pages accessed from the Global menus as examples. If there is a page accessed from one of the local country menus whose functionality is not covered in the Global menu page discussions, it is covered separately and in its entirety.

Most of the plan careers and plan successions tables are effective-dated. When creating codes in these tables, enter effective dates that precede the effective dates of the succession plans, if you don't, the system will not display all the valid codes when you select from prompt lists on the Plan Successions pages. Use a date such as January 1, 1980, to ensure that the effective date accounts for assignment history.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS”

Setting Up and Assigning Key Positions

Create the position hierarchy before setting up succession plans. Once the position hierarchy exists, identify the incumbent in each key position. View incumbent information from succession plans. Use the Key Position Data pages to enter details of key positions. To access the Key Position Data pages, select Develop Workforce, Plan Successions, Use, Key Position Data. You can also access these pages from the Manage Positions menu.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, “Setting Up Positions,”
Creating Positions

Setting Up Career Plans for High-Potential Employees

The system uses career path data to help identify potential succession candidates. Use other portions of career plans to create training and development plans for key employees, ensuring that they are adequately prepared for key positions.

See Also

Planning Careers

Adding External Candidates

When creating candidate lists for key positions, consider candidates outside your organization. Before you can include external candidates in a succession plan, add them to the PeopleSoft Human Resources system as nonemployees. Nonemployees are added and maintained on the pages accessed from the Administer Workforce menu. Employee job data must exist in the Administer Workforce tables before you work with the Plan Careers and Successions pages. If you've implemented multiple business units and SetIDs, the information that you use and create will be determined by how business unit and setID functionality is set up for your user ID.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Setting Up Position Requirements

Before choosing the most suitable candidates for any key positions, specify the competencies and accomplishments required for the position. The following definitions apply:

Competency	A skill, ability, or knowledge, such as problem solving or the ability to work under pressure.
Accomplishment	An achievement, such as an educational qualification or license that is useful or essential for a position.
Cluster	A set of competencies and accomplishments.

From the Plan Successions menu, access the following pages to assign competencies and accomplishments:

- Position Cluster

Use the Position Cluster pages to assign clusters to a position. Use clusters for positions that share common requirements. For instance, all the mid-level management positions in the accounting and finance department require a group of the same competencies, such as leadership, motivation, planning, and communication. To access the Position Cluster pages, select Develop Workforce, Plan Successions, Use, Position Cluster.

- Position Competency

Use the Position Competency pages to assign individual competencies to a position and define the proficiency levels required for each competency. To access the Position Competency pages, select Develop Workforce, Plan Successions, Use, Position Competency.

- Position Accomplishment

Use the Position Accomplishment pages to assign individual accomplishments to a position. To access the Position Accomplishment pages, select Develop Workforce, Plan Successions, Use, Position Accomplishment.

Note. These pages are also accessible from the Manage Competencies menu.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, “Assigning Competencies and Accomplishments to Roles”

Tracking Employee Competencies and Accomplishments

Once you have set up the competencies and accomplishments for positions, compare candidates with the position requirements. You can access the Manage Competencies pages used to track employee competencies and accomplishments such as education, certificates, licenses, memberships, and so forth from the Plan Successions menu path as well.

Note. These pages are also accessible from the Plan Careers menu.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments”

Creating Succession Plans

There are three tasks involved in creating succession plans:

1. Entering succession plan dates and selecting candidates.
2. Indicating candidate readiness.
3. Viewing candidates for specific positions.

Create succession plans for individuals with PeopleSoft Tree Manager. You can also create or update succession plans on the pages accessed from the Plan Successions menu (Develop Workforce, Plan Succession, Use, Succession Plan, Succession Plan). The system prompts you for a key position number.

Pages Used to Create Succession Plans

Page Name	Object Name	Navigation	Usage
Succession Plan	SUCCESSION_PLAN 1	Develop Workforce, Plan Successions (GBL), Use, Succession Plan, Succession Plan	Enter plan dates and select succession candidates.
Succession Plan - Candidates	SUCCESSION_PLAN 2	Develop Workforce, Plan Successions (GBL), Use, Succession Plan, Candidates	Use career path information to plan successions and indicate candidate readiness to move into a new position.
Succession Plan - Slate	SUCCESSION_SLAT E	Develop Workforce, Plan Successions (GBL), Use, Succession Plan, Slate	View the candidates that are slated to replace successors in their current positions.

Succession Plan Alternate Navigations

Develop Workforce, Plan Successions (USF), Use, Succession Plan, Succession Plan

Candidates Alternate Navigations

Develop Workforce, Plan Successions (USF), Use, Succession Plan, Candidates

Slate Alternate Navigations

Develop Workforce, Plan Successions (USF), Use, Succession Plan, Slate

Entering Succession Plan Dates and Selecting Candidates

Access the Succession Plan page.

The screenshot shows a web interface for entering succession plan data. At the top, there are three tabs: 'Succession Plan', 'Candidates', and 'Slate'. Below the tabs, there are several fields for identifying the position and company:

- Position Number:** 19000210, Director-Human Resources
- Business Unit:** GBIBU, Global Business Institute BU
- Department:** KU001, Human Resources
- Job Code:** KU210, Director-Human Resources
- Company:** GBI
- Sal Plan/Grade/Step:** KU01 009

Below these fields is a section titled 'Succession Data' with a blue header. It includes navigation buttons: 'View All', 'First', '1 of 1', and 'Last'. There are also '+' and '-' buttons. The fields in this section are:

- *Effective Date:** 01/01/2001
- Next Succession Plan Date:** 01/01/2002
- *Plan Status:** Proposed
- Projected Vacancy Date:** 12/24/2010

Below the 'Succession Data' section is a section titled 'Plan Incumbent' with a tan header. It contains the following information:

- EmpIID:** KU0005, Aliverdi,Reza
- Date Available:**
- Retire Dt:** 12/24/2010
- Potential:** Promote

Succession Plan page

Projected Vacancy Date If the incumbent has a career plan in PeopleSoft Human Resources, the projected vacancy date is the retirement date indicated in their career plan. Otherwise, enter a date in this field.

Return to the Key Position Data component at any time by opening the Node menu and selecting Key Position Data, Position Location, Description, Payroll and Information. The next time you double-click a number, the system will bring up the Key Position Data pages.

Indicating Candidate Readiness

Access the Succession Plan - Candidates page.

Succession Plan		Candidates		Slate	
Position Number:	19000210	Director-Human Resources	Company:	GBI	
Business Unit:	GBIBU	Global Business Institute BU	Sal Plan/Grade/Step:	KU01 009	
Department:	KU001	Human Resources			
Job Code:	KU210	Director-Human Resources			
Succession Data View All First 1 of 1 Last					
Effective Date:	01/01/2000	Next Succession Plan Date:	01/01/2002	Initialize	+ -
Plan Status:	Proposed	Projected Vacancy Date:			
Succession Candidates View All First 1 of 3 Last					
Rank:	1	*EmpID	KC0026	Johnson, Carol L	+ -
Target Date:		*Readiness	1 - 2 Yrs		
Position:	19000600	Business Unit	CAN01		
Department:	KC006	Job Code	KC016 Mgr Trng		
Salary Admin Plan:	KC02	Potential			

Succession Plan - Candidates page

Succession Data

Initialize

To automatically identify succession candidates, click the **Initialize** button. The system checks employees' career plans and lists all employees with the job code or position in their career paths.

If you haven't created any career plans or you want to add additional candidates, enter new data rows and select the candidate's employee ID.

Succession Candidates

The **Succession Candidates** scroll area lists potential successors for the selected position.

Rank

Enter a ranking number for each candidate. Assign the number 1 to indicate that a candidate is the first choice in the list. Proceed in descending order. When you save the succession plan, the candidates appear in order of rank.

Note. You rank the candidates and save the information before viewing candidates on the Succession Slate page, where you view the hierarchy of successors to a position.

Target Date

Enter the date when you expect the candidate to move into the selected position.

Readiness

The system autopopulates the candidate's readiness status from their career plans, which you can override.

If you change the readiness status, update it in the employee career plan also.

The system displays the candidates' current position, salary details, and potential from the Career Ranking and Potential page. These fields are information-only.

Viewing Candidates for Specific Positions

Access the Succession Plan - Slate page.

Succession Plan		Candidates		Slate	
Position Number:	19000210	Director-Human Resources			
Business Unit:	GBIBU	Global Business Institute BU			
Department:	KU001	Human Resources			
Job Code:	KU210	Director-Human Resources			
Succession Data		View All		First 1 of 1 Last	
Effective Date:	01/01/2000	Project Vacancy Date:	+ -		
Plan Incumbent:	Aliverdi,Reza	Projected Retirement Date:			
Readiness:		Potential:			
1st Ranked Candidates Slate		View All		First 1 of 3 Last	
EmplID	Name	Readiness	Title	Position	Block
KC0026	Johnson,Carol L	1 - 2 Yrs	Mgr Trng	19000600	Y
KC0015	Campbell,Barry Robert	Ready Now	Train Spec	19000601	N

Succession Plan - Slate page

In the **1st Ranked Candidates Slate** scroll area, you see the selected candidates from the Candidates page, in the ranking order. The second and third levels show the people who are ranked first to succeed the candidates in their current positions. In the example, Carol L Johnson (employee ID KC0026) is the first candidate for the position 19000210 (Director Human Resources). The first candidate to replace Carol Johnson in her current position 19000600 (Manager Training) is Barry Robert Campbell (employee ID KC0015).

The adjustments to the readiness status for incumbents and successors is probably the last step toward finalizing succession plans.

This page is particularly useful after you've created succession plans for several key positions, because you can see successors for positions three layers down. This helps to ensure that no gaps exist in replacements and to identify and prevent any organizational bottlenecks. See which candidates are blocked in their current position so that you can prepare them for other positions or change their rotations, thereby preventing the loss of high-potential employees.

Conducting Employee Reviews

Use the Employee Review pages to enter detailed information on employees' salary reviews, performance reviews, or both. To access the Employee Review pages, select Develop Workforce, Plan Successions, Use, Employee Review. You can also access the Employee Review pages from the Planning Salaries menu.

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, “Reviewing Employee Performance

Setting Up Key Employee Training and Development Plans

Use training and development plans to prepare key employees for future positions. Use the developmental areas identified in employee career plans to build comprehensive plans. Training and development plans reduce the loss of high-potential, blocked employees. Access the training and development plan pages from the Plan Careers menu, Career Plan component. You can also access them from a succession tree in PeopleSoft Tree Manager. You can use the default training plan for an employee’s job code as the basis from which to create a specific training plan. The system enters the standard training courses for the job code, which you can leave as they are or modify.

The system populates the Career Training Plan page with the standard training plan that you’ve associated with this job code. You create training programs in the Training Program Table and tie them to job codes in the Job Code Table.

See Also

“Setting Up Career Planning”

Searching for Additional Internal and External Candidates

There are two tasks involved in searching for additional candidates:

1. Viewing summary information for candidates.
2. Storing candidate photos.

The Succession Plan pages enable you to create a plan with employees or nonemployees who are qualified to fill a key position.

You can search for employees, nonemployees, and external applicants.

However, the search will be meaningful only if you’ve entered competencies and accomplishments for your workforce and applicants.

For employees and nonemployees, assign competencies and accomplishments on the pages accessed from the Manage Competencies, Plan Careers, or Plan Successions menus. For applicants, enter competency information on the pages accessed from the Recruit Workforce menu. If your workforce competency data is accurate, initiate a search by selecting one of the following from the Inquire menu:

Competency Search - All	Searches both the workforce and applicant tables for people who match the requirements.
--------------------------------	---

Competency Search - Employee	Searches the employee records.
Competency Search - Applicants	Searches the applicant records.
Competency Search - Contractors	Searches the nonemployee records.

If you find suitable candidates from a Competency Search inquiry, add them to a succession plan in the normal way. Add applicants as nonemployees before including them on a succession plan.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments” and “Performing Gap and Match Analyses on Your Workforce”

PeopleSoft Human Resources PeopleBook: Recruit Workforce, “Managing Applicants”

Creating Succession Plans

Viewing Summary Information for Candidates

To get a quick look at a candidate’s training, career, and compensation history, use the Training Summary, Career Summary, and Compensation Summary pages. These pages are view-only; if you want to update training, career, or compensation information for a candidate, you must use the appropriate pages accessed from the Administer Training, Plan Careers, and Administer Workforce menus.

Storing Candidate Photos

Use the Candidate Photo page to store images of candidates for identification purposes. You can also access this page from the Administer Workforce and the Plan Careers menus. To access the Candidate Photo page, select Develop Workforce, Plan Successions, Use, Candidate Photo.

Building a Graphical Succession Hierarchy for Key Positions

Important! Review the PeopleSoft Tree Manager documentation for a full, detailed discussion about using Tree Manager before attempting to modify or create succession trees. This section covers using Tree Manager to define and maintain succession trees in PeopleSoft Human Resources and focuses only on Tree Manager as it relates to the Planning Successions business processes.

You can view and update information about positions, incumbents, and candidate lists in a graphical format, which helps to see how a succession in one position affects successions in the key positions below it.

Represent positions as a hierarchy by identifying the reporting relationships among key positions and building a succession tree. You can create multiple succession trees, saving them with different effective dates or names to retain history on the succession plans, organizational structure, or alternative scenarios.

Use the Detail feature of PeopleSoft Tree Manager to view and update career plans for succession candidates and to view and update several other pages containing pertinent employee data, such as compensation history, skills, languages, and prior work experience.

Notes on Security Access

You can determine the type of access that users have to trees. Many levels of access exist: to the tree itself, to key position and succession plans, and to career plans. For example, you might allow many operators to update key position, succession plan, and career plan data from within succession trees yet permit only a few operators to make changes to the succession trees themselves. You might want other operators to view key position, succession plan, and career plan data as display-only. You can delegate the maintenance of different levels in trees by specifying the level of access or update authority that a user or a set of users has.

Use object security to specify which users can access trees and to control whether the trees that users access are display-only. Operator security determines whether users can access pages from nodes and details and controls whether they are display-only pages. Use employee data security to specify whether users can access the data in pages tied to specific nodes and details.

Adding Details to a Succession Tree

In succession trees, you can view career plans and related employee data for candidates. However, before you can use details in a succession tree, you must have created succession plans and formed candidate lists.

See Also

PeopleTools PeopleBook: Security

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS”

Building a Graphical Succession Hierarchy for Key Positions

Accessing Career Plans and Related Employee Data

Once you’ve created succession plans with candidate lists, you can view career plans and related employee data for succession candidates. This information is useful for making decisions about particular candidates, reranking candidates in succession plans, or removing some candidates from the candidate list.

Using Details in Succession Trees

To access candidate career plans and related employee data, add details to the succession tree. When you double-click the detail, the system displays a list of candidates in the succession plan for that key position. Select the candidate for whom to view career plans or related employee data.

Note. Before you can view career plans and other employee data, create succession plans for key positions and include succession candidates in them. These pages are available in PeopleSoft Tree Manager only for succession candidates.

To add a detail to succession tree:

1. In PeopleSoft Tree Manager, open the succession tree and highlight the key position for which you want to add a detail.
2. Select Edit, Insert, Detail.

A dialog box appears.
3. Select the Dynamic Value Range check box, and click Save.

The detail is placed on the tree in what appears to be a lower level in the plan. For example, a detail for Position 1 in the CEO level appears under the EVP level.

To hide the details in a succession tree:

1. Select View.
2. Clear the Node Descriptions check box.

When you highlight a detail and press ENTER, or right-click and select Edit Data from the pop-up menu, the system displays a list of candidates in the succession plan for the key position. The candidates are sorted first by succession plan date, then by ranking, and then by readiness. If a candidate is in more than one succession plan, they appear in this list only for the most current succession plan. Select the candidate for which you want to view additional information. The first page in the group, Career Plan, will appear. If you prefer to access other pages from within PeopleSoft Tree Manager, you can change the link between PeopleSoft Tree Manager and the pages.

Note. You can specify which page you'll see when you select to see details on a tree object, by selecting a page on the Details menu.

See Also

PeopleTools PeopleBook: Tree Manager

Index

A

- accomplishment
 - defined 3-4
 - succession plans, creating 3-5
- accomplishments
 - employee, tracking 3-4

C

- candidates
 - external, adding 3-3
 - external, additional 3-9
 - internal, additional 3-9
 - photos, storing 3-10
 - readiness, indicating 3-6
 - searching for 3-2
 - selecting 3-6
 - specific positions, viewing 3-8
 - Succession Plan - Candidates page 3-6
 - summary information, viewing 3-10
 - Career Assignments Summary page 2-29
- career goals
 - Career Plan - Career Goals page 2-18
 - entering 2-18
- career move levels
 - overview 2-7
- career paths
 - Career Assignments Summary page 2-29
 - Career Plan - Career Path page 2-12
 - default, setting up 2-6, 2-8
 - defining 2-12
 - viewing 2-29
- Career Plan - Career Goals page 2-18
- Career Plan - Career Path page 2-12
- Career Plan - Career Ranking and Potential page 2-17
- Career Plan - Career Strength/Develop Areas page 2-20
- Career Plan - Career Training Plan page 2-23
- Career Plan page 2-11
- career plans
 - accessing 3-11
 - Career Assignments Summary page 2-29
 - Career Plan - Career Goals page 2-18
 - Career Plan - Career Path page 2-12
 - Career Plan - Career Ranking and Potential page 2-17

- Career Plan - Career Strength/Develop Areas page 2-20
- Career Plan page 2-11
- career related employee data, reviewing 2-28
- competency data, synchronizing 2-22
- creating 2-9
- developmental areas, evaluating 2-20
- employee potential, ranking 2-17
- Employee Reviews page 2-30
- employee reviews, conducting 2-27
- employee reviews, viewing 2-30
- employee strengths, evaluating 2-20
- high potential employees, setting up 3-3
- Plan Careers/Manage Competencies Link page 2-22
- preferences, entering 2-11
- succession trees, using details 3-12
- training programs, entering 2-23

CD-ROM

- ordering ii
- competencies
 - employee, tracking 3-4
- competency
 - defined 3-4

E

- Employee Reviews page 2-30
- external candidates
 - adding 3-3

F

- Federal Career Plan Information page 2-25
- Federal Coaching/Mentor Information page 2-20
- Federal Data/Print IDP Actions page 2-15
- Federal Potential Future Positions page 2-16

J

- job codes
 - default career paths, setting up 2-8
 - setting up 2-6

K

- key positions
 - assigning 3-3
 - setting up 3-3

P

PeopleBooks

- CD-ROM, ordering ii
- printed, ordering ii

photos

- employee, storing 2-32

Plan Careers/Manage Competencies Link page 2-22

planning careers

- career paths, setting up 2-6, 2-8
- career plans, setting up 2-9
- career related employee data, reviewing 2-28
- competency data, synchronizing 2-22
- developmental areas, evaluating 2-20
- Employee Reviews page 2-30
- employee reviews, conducting 2-27
- employee reviews, viewing 2-30
- employee strengths, evaluating 2-20
- global control tables, setting up 2-5
- job codes, setting up 2-6
- local country control tables, setting up 2-5
- manage competencies, integration 2-2
- move levels, overview 2-7
- multiple sources, recording input 2-2
- Plan Careers/Manage Competencies Link page 2-22

- plan successions, integration 2-2
- setting up 2-5

- training programs, entering 2-23
- training programs, setting up 2-6
- understanding, overview 2-1
- understanding, steps 2-3

planning successions

- accomplishments, tracking 3-4
- candidates, indicating readiness 3-6
- candidates, searching for external 3-9
- candidates, searching for internal 3-9
- candidates, selecting 3-6
- candidates, stroing photos 3-10
- candidates, viewing for positions 3-8
- candidates, viewing summary information 3-10
- competencies, tracking 3-4
- dates, entering 3-6
- development plans, setting up 3-9
- external candidates, adding 3-3
- global control tables, setting up 3-2
- key positions, assigning 3-3
- key positions, setting up 3-3
- local country control tables, setting up 3-2
- overview 3-1
- position requirements, setting up 3-4
- prerequisites, setting up 3-2
- process, steps 3-1
- reviews, conducting 3-8
- succession hierarchy, building 3-10
- succession plans, creating 3-5

- succession trees, using details 3-12
- training plans, setting up 3-9

prerequisites

- setting up 3-2

R

ranking

- employee potential 2-17

reviews

- Employee Reviews page 2-30
- employee, conducting 2-27
- employee, viewing 2-30
- employees, conducting 3-8

S

Succession Plan - Candidates page 3-6

Succession Plan - Slate page 3-8

Succession Plan page 3-6

succession plans

- candidates, indicating readiness 3-6
- candidates, searching for external 3-9
- candidates, searching for internal 3-9
- candidates, stroing photos 3-10
- candidates, viewing for positions 3-8
- candidates, viewing summary information 3-10
- development plans, setting up 3-9
- entering dates 3-6
- reviews, conducting 3-8
- selecting candidates 3-6
- succession hierarchy, building 3-10
- Succession Plan - Candidates page 3-6
- Succession Plan - Slate page 3-8
- Succession Plan page 3-6
- succession trees, using details 3-12
- training plans, setting up 3-9

T

training programs

- Career Plan - Career Training Plan page 2-23
- entering 2-23
- setting up 2-6

U

United States

- career developmental goals, adding 2-25
- career goals, adding 2-20
- career path, adding 2-16
- career plan approval, tracking 2-4
- career plan completion, tracking 2-4
- career plan process, overview 2-4

career plan request, tracking 2-4
career plan, approving 2-26
career plan, printing 2-15
career plan, submitting 2-15
career planning, understanding 2-3
employee appraisals, tracking 2-27

Federal Career Plan Information page 2-25
Federal Coaching/Mentor Information page
2-20
Federal Data/Print IDP Actions page 2-15
Federal Potential Future Positions page 2-16

