



PeopleSoft 8.3 Human Resources PeopleBook: Manage Competencies

PeopleSoft 8.3 Human Resources PeopleBook: Manage Competencies

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

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

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

Before You Begin

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

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

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

PeopleSoft Application Fundamentals for HRMS PeopleBook

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

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've

removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

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

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: <http://www4.peoplesoft.com/cc>

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

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks*, SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks*, SKU PTB814R0.

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

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section

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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:

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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	☐	0.000000		0.000	+	-		

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	☐	☐		+	-	

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:	This is a required field
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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:

<code>monospace font</code>	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 <i>About These HRMS PeopleBooks</i> , PeopleSoft 8.3 HRMS PeopleBooks Preface

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

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

Process Introductory Table

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

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

USF U.S. Federal Government Functionality

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

E&G Education and Government Functionality

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

Local Country Functionality

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

Comments and Suggestions

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

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

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

DOC@PEOPLESOFT.COM

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

CHAPTER 1

About the PeopleSoft 8.3 Human Resources PeopleBook: Manage Competencies

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Manage Competencies.

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*.

See Also

PeopleSoft HRMS PeopleBooks Preface, “About the HRMS PeopleBooks”

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.

Field	Definition
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.
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

Setting Up Competencies and Accomplishments

This chapter provides an overview of accomplishments and competencies and discusses how to:

- Set up competencies.
- Set up educational qualifications and accomplishments.

Understanding Accomplishments and Competencies

Before you design your Manage Competencies system, you need to understand the differences between accomplishments and competencies.

Accomplishments are tangible, typically one-time achievements. An accomplishment might be a degree, license, language, test score, honor or award, or membership.

Competencies are directly related to an employee's current role and may encompass skills, abilities, knowledge, or behavior. Unlike accomplishments, competencies are measured using a scale that you define (one employee might have more sophisticated computer skills than another, for example).

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

Important! Requesting, granting, and tracking federal government agency monetary and non-monetary awards and bonuses as employee compensation are functions of the Administering Your Workforce module.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “((USF) Administering Personnel Action Requests”

Setting Up Competencies

This section describes how to:

- Set up competency types.
- Set up rating models.
- Define individual competencies.
- Define competency elements.
- (Optional) Create proficiency descriptions.
- Set up performance criteria.
- Locate and review competency information quickly.
- (Optional) Set up a competency tree.

Pages Used to Set Up Competencies

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Competency Type Table	CM_TYPE_TABLE	Develop Workforce, Manage Competencies (GBL), Setup, Competency Type Table, Competency Type Table	Create competency types, or broad categories of competencies relevant to particular positions or projects. While you don't have to define types in general, you must define them to build and maintain competency trees.
Rating Model Table	CM_REVW_RATING_TBL	Develop Workforce, Manage Competencies (GBL), Setup, Rating Model Table, Rating Model Table	Define a set of alphabetic or numeric codes for ranking an employee's degree of expertise or experience in a competency. You can define a single rating model for your entire organization or build multiple models for different projects or departments.

Page Name	Object Name	Navigation	Usage
Competency Table	COMPETENCY_TABLE	Develop Workforce, Administer Training (GBL), Setup, Competency Table, Competency Table	Record skills, abilities, knowledge or behaviors pertinent to jobs in your organization, such as experience with office equipment, knowledge of specialized manufacturing processes, expertise with computer programming languages, or a background in financial planning. The codes can be broad or detailed and can represent any type of competency.
Element Table	CM_ELEMENT_TABLE	Develop Workforce, Manage Competencies (GLB), Setup, Competency Element Table	Define all of the valid competency elements within clusters.
Proficiency Descriptions	CM_RATING_DESCRS	Develop Workforce, Manage Competencies (GBL), Setup, Proficiency Descriptions	Describe the proficiency levels for a competency.
Perf Criteria Tbl (performance criteria table)	PERF_CRITERIA_TBL	Develop Workforce, Manage Competencies (GBL), Setup, Performance Criteria Table	Establish and define performance criteria for job and competency rating. Performance criteria establish guidelines for evaluating competencies and competency elements.
Competency Summary	CM_COMPETENCY_SUMM	Develop Workforce, Manage Competencies (GBL), Setup, Competency Summary, Competency Summary	Review and modify the different competency categories or types that you've established.

Competency Table Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Setup, Competency Table, Competency Table

Administer Workforce, Plan Salaries (GBL), Setup, Competency Table, Competency Table

Develop Workforce, Recruit Workforce (GBL), Setup, Competency Table, Competency Table

Administer Workforce, Track Global Assignments (GBL), Setup, Competency Table, Competency Table

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

Make sure both the core and the relevant local country control tables are set up before you start working with the Manage Competency pages.

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

Setting Up Competency Ratings

Access the Rating Model Table page.

Rating Model Table

Rating Model: PSCM

Description View All First 1 of 1 Last

*Effective Date: 01/01/1980 Status: Active

*Description: Competency Management Scale Short: Comp Mgmt

*Rating	*Description	Short Description	Review Pts	Strgth/Develop
0	0-None	None	0	Developmn + -
1	1-Little	Little	1	Developmn + -
2	2-Fair	Fair	2	Developmn + -
3	3-Good	Good	3	Strength + -
4	4-Very Good	Very Good	4	Strength + -
5	5-Expert	Expert	5	Strength + -

Rating Model Table page

Rating

Enter an alphabetic or numeric code to represent the rating that you are defining. You can add as many rows as necessary.

Review Pts (points)	Enter a number, from 0 to 999, associated with this rating. When performing employee and team matches, the system uses review points to calculate how well employees meet the requirements of a role.
Strgth/Develop (strength/development)	The system uses this value when transferring competency profiles between the Manage Competencies and Plan Careers modules. Select one of the following options: <i>Development</i> (development): Use if the rating represents an area that needs more skill development, education, or training. <i>Strength</i>: Use if the rating represents an area of strength.

Ratings establish the level of a competency for a job, position, or project team. For example, an entry-level software programmer's position and a software development manager's position both require programming language expertise; however, the degree of expertise required for a manager is greater than for an entry-level job. Likewise, to match a candidate with an open position, you evaluate the employee's computer programming proficiency against all other candidates for the position.

The Manage Competencies business process comes with the PeopleSoft Competency Management Scale (PSCM) rating model, shown in the following table. You can both modify this rating model and create new ones: different competencies can be associated with different rating models.

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

See Also

“Performing Gap and Match Analyses on Your Workforce”

“Tracking Employee Competencies and Accomplishments,” Synchronizing the Plan Careers and Manage Competencies Business Processes

Defining Individual Competencies

Access the Competency Table page.

Competency Table

Competency: 0101

***Description:** Analytical thinking

Short Description: Analytical

***Category:** Ability ***Rating Model:** PSCM Competency Management Scale

Description:

- Anticipates obstacles.
- Breaks problems apart systematically
- Makes logical conclusions
- Sees consequences, implications.
- Sees causal relationships, inferences.

Competency Types First 1-2 of 2 Last

*Type	Description		
BUSPLN	Business Planning	+	-
INTEL	Intellectual	+	-

Competency Table page

Before you can set up competency codes, you must define competency categories using the Competency Type Table Setup page. You also must set up the rating models that define how you measure a competency using the Rating Model Table Setup page.

Category Select a competency category: *Ability, Knowledge, NVQ Unit, Other, Sal Plan (salary planning), or Skill.*

Type Select a competency type. These values come from the Competency Type Table.

Note. If you decide to maintain competency hierarchies using a competency tree, the competency will appear in the branch for each type that you indicate here.

Defining Competency Elements

An element is a required outcome or criterion for assessing a competency. Use the Element Table page to establish methods to satisfy an element—training courses, on-the-job training, licenses, and so forth.

Access the Element Table page.

Element Table

Element Code: 1

Element Table		View All	First	1 of 1	Last
Effective Date:	01/01/2000	Status:	Active		
*Description:					
*Satisfaction Method:	Training				
Title:					

Criteria		First	1-2 of 2	Last
*Criteria Code	Description			
1				
2				

Element Table page

Satisfaction Method

Identifies how this element can be satisfied or achieved. The system uses the satisfaction method specified here to match an element to be completed with an appropriate satisfaction response.

Title

Enter a longer description of the element using up to 50 characters.

Criteria Code

Enter the code associated with the element. This is optional information to assist in assessing an employee against the element. For example, you could create a competency element called Presentation and attach specific criteria to this element, including a Professional Standard of Dress. This would become part of the requirements of the Presentation competency element. When you specify a code, its description appears on the page. These codes are stored on the Criteria Table.

Creating Proficiency Descriptions

Access the Proficiency Descriptions page.

Proficiency Descriptions

Competency: 1001 Typing

Ratings

*Review Rating	Description	
0-None	No experience or familiarity with typing skills, or keyboard.	+ -
1-Little	Types 30-40 WPM with fewer than 10 errors.	+ -
2-Fair	Types 40-55 WPM with fewer than 10 errors.	+ -
		+ -

Proficiency Descriptions page (1 of 2)

3-Good	Types 55-75 WPM with fewer than 7 errors.	
4-Very Good	Types 75-95 WPM with fewer than 5 errors.	+ -
5-Expert	Types 95+ WPM with fewer than 3 errors.	+ -

Proficiency Descriptions page (2 of 2)

You must set up competency codes before you can define proficiency descriptions.

Review Rating

Select a review rating. The system prompts against the rating model that you assigned on the Competency Table Setup page. For example, you can define what it means to be an *Expert* in conflict management (a 5 rating), or *Very Good* in conflict management (a 4 rating). This helps ensure that everyone in the organization knows what each rating means.

Locating and Reviewing Competency Information

Access the Competency Summary page.

Competency Summary

Competency Category:

OR

Competency Type: Leadership

Competencies			View All	First	1-6 of 6	Last
Competency	Description	*Category				
0209	Team leadership	Knowledge	-			
0211	Motivate & lead people	Ability	-			
0403	Innovative	Ability	-			
0504	Decision Making Abilities	Ability	-			
0509	Judgement	Ability	-			
0510	Leadership	Ability	-			

Competency Summary page

To search for a particular competency, select a category or type.

Results are sorted by competency code. You can change the category or type from the results list; if you do, remember to save the page.

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

Setting Up Competency Trees

Competency trees are pictorial representations of the Competency Table. You can use a tree to organize your competencies into hierarchies based on competency types. This organizational method can be helpful if you maintain many competencies or if your competencies are easily organized into definable hierarchies.

You build a competency tree with PeopleTools Tree Manager the same way you build any other tree. You enter competency types, and Tree Manager defines their relative hierarchical organization.

You don't have to order competency codes into a particular sequence to use a competency tree. That means you don't need to set up your management-level competencies in the range of 100 to 199 or your technical competencies in the range of 200 to 299.

You can build as many competency trees as necessary.

Using Competency Trees

To use a competency tree, select PeopleTools, Tree Manager, and then open the tree.

You can organize competencies under competency types, such as ADMIN, EXPER, MGMT, and TECH. You can also maintain competency types within related types and define competency trees to be as shallow or deep as you need.

To view the competencies in a particular type, use the dynamic detail feature of the Tree Manager. Dynamic details are represented by the [] nodes in the tree. When you select the [] node under a competency type, the system displays a list of the competencies maintained under that type.

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

To see details about any competency type, double-click the type node. The Competency Type Table appears.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security,” Creating and Modifying Security Trees

PeopleTools PeopleBook: Tree Manager

Setting Up Educational Qualifications and Accomplishments

This section describes how to track employee accomplishments, including:

- Licenses and certifications obtained.
- Schools attended.
- (JPN) Additional education-related information.
- Degrees received.

Note. Though all accomplishment types are stored in one table, ACCOMP_TBL, the system displays only the appropriate values when you prompt for a certain code. For example, if you were to prompt for a Degree code on a PeopleSoft Human Resources page, only degree code—and not licenses, honor/award, or membership codes, appear in the prompt table.

Pages Used to Set Up Educational Qualifications and Accomplishments

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
License/Certification Table	LICENSE_CERTIF_TBL	Develop Workforce, Administer Training (GBL), Setup, License/Certification Table, License/Certification Table	Define any required licenses or certificates for jobs in your organization.
Degree Table	DEGREE_TABLE_GBL	Develop Workforce, Administer Training (GBL), Setup, Degree Table, Degree Table	Define degree types and the years of study associated with them. Use the values that you enter in this table to track information about employee qualifications in the Education pages.
Honor/Award Table	HONOR_AWARD_TABLE	Develop Workforce, Manage Competencies (GBL), Setup, Honor/Award Table, Honor/Award Table	Track professional distinctions, corporate awards, competitions, and so forth.
Language Table	LANGUAGE_TABLE	Develop Workforce, Manage Competencies (GBL), Setup, Language Table, Language Table	Define codes to track employee language abilities.
School Type Table	SCHOOL_TYPE_TBL	Develop Workforce, Administer Training (GBL), Setup, School Type Table, School Type Tbl	Set up codes for the types of schools employees might have attended: high schools, universities, or professional schools, for example.
School Table	SCHOOL_TABLE	Develop Workforce, Administer Training (GBL), Setup, School Table, School Table	Create codes for specific schools. The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.

Page Name	Object Name	Navigation	Usage
JPN Faculty Table	FACULTY_TABLE_JPN	Develop Workforce, Manage Competencies (GBL), Setup Lcl, Faculty Table JPN	Define faculties, and associate sub-faculties, and majors with them.
Major Table	MAJOR_TABLE	Develop Workforce, Administer Training (GBL), Setup, Major Table, Major Table	Include areas of study most commonly associated with school degrees or certificates.
Membership Table	MEMBERSHIP_TABLE	Develop Workforce, Administer Training (GBL), Setup, Membership Table, Membership Table	Define codes for professional organizations, special clubs, or other associations.
Test Table	TEST_TABLE	Develop Workforce, Administer Training (GBL), Setup, Test Table, Test Table	Create codes for standard tests, such as typing, programming aptitude, or mathematical tests, that you administer to job applicants or employees.

License/Certification Table Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Setup, License/Certification Table, License/Certification Table

Develop Workforce, Recruit Workforce (GBL), Setup, License/Certification Table, License/Certification Table

School Type Table Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Setup, School Type Table, School Type Tbl

Administer Workforce, Track Global Assignments (GBL), Setup, School Type Table, School Type Tbl

School Table Alternate Navigations

Develop Workforce, Budget Training (GBL), Setup, School Table, School Table

Develop Workforce, Manage Competencies (GBL), Setup, School Table, School Table

Develop Workforce, Recruit Workforce (GBL), Setup, School Table, School Table

Administer Workforce, Track Global Assignments (GBL), Setup, School Table, School Table

Major Table Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Setup, Major Table, Major Table

Develop Workforce, Recruit Workforce (GBL), Setup, Major Table, Major Table

Administer Workforce, Track Global Assignments (GBL), Setup, Major Table, Major Table

Membership Table Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Setup, Membership Table, Membership Table

Develop Workforce, Recruit Workforce (GBL), Setup, Membership Table, Membership Table

Test Table Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Setup, Test Table, Test Table

Develop Workforce, Recruit Workforce (GBL), Setup, Test Table, Test Table

Note. You can access the Degree Table page from several menus, including Administer Training (GBL), Manage Competencies (GBL), and Administer Workforce. The Degree Table page is discussed below.

Tracking Licenses and Certification

Access the License/Certification Table page.

The screenshot shows the 'License/Certification Table' page. At the top, there is a tab labeled 'License/Certification Table'. Below the tab, the 'License/Certificate' field is set to 'PMA'. A horizontal line separates this from the details section. The details section includes:

- *Description:** A text box containing 'Personnel Management Associatn'.
- Short Title:** A text box containing 'Per Mgmt'.
- Renewal:** A section with a header 'Renewal' and a checkbox labeled 'Required' which is currently unchecked.
- Renewal Period:** A section with a text box and a dropdown menu. The text box is empty, and the dropdown menu shows '(Invalid Valu'.

License/Certification Table page

Renewal Period

Indicate whether the license or certification must be renewed, and if so, the number of days, weeks, months, or years in the renewal period. If there is no renewal requirement, the Renewal Period fields are unavailable.

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

Tracking Degrees

Access the Degree Table page.

Degree Table

Degree:BA

*Description:Bachelor of Arts

Short Description:BA

Years Of Education:4

Education Level:Bachelors

Country:USAUnited States

Germany

Field Of Study:

Type Of Study:

Duration (Months):

French Public Sector

Level:

Degree Table page

StatsCan Teaching Survey Degree Level (Statistics Canada Teaching Survey Degree Level)

For degree type accomplishments, select the corresponding **StatsCan Teaching Survey Degree Level** from the list of available options. The data in this field is used on Canada Academic Teaching Surveys.

This field is intended for Canadian higher education degree-granting institutions only.

Years of Education

Enter the number of years required to obtain the degree.

Education Level

Specify the education level achieved when the degree is earned.

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PEOPLESOFT PROPRIETARY AND CONFIDENTIAL

Country Indicate the country where the degree is earned.

(GER) Germany

Field of Study Select *Commercial*, *Industrial*, or *Technical*.

Tracking Schools

Access the School Table page.

School Table

School Code: KBS001

Description: Limburgs Universitair Centrum ☒ **Public** ☐ **Private**

Short Description: Limburgs U

Country: BEL Belgium

Province: LI Limburg

Australia

Higher Education

Institute Type:

School Table page

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

(JPN) Recording Additional Education-Related Information

Access the JPN Faculty Table page.

JPN Faculty Table

Faculty Code: JPN

Faculty Information

*Faculty Description:

*Faculty Short Description:

Major Category:

Sub-Faculty Information First 1 of 1 Last

*Sub-Faculty Code	*Sub-Faculty Description	*Sub-Faculty Short Description
1		+ -

JPN Faculty Table page

Major Category

Select *Humanities* or *Sciences*.

The value that you select here is the default major category wherever you select this faculty, for example, on the Professional Ed and Trg (Professional Education and Training) page, but you can override the default.

Sub-Faculty Code

Enter a code for the sub-faculty. You can enter multiple sub-faculties. Only sub-faculties that you enter for this faculty can be selected wherever you select the faculty.

CHAPTER 3

Assigning Competencies and Accomplishments to Roles

This chapter provides an overview of clusters and discusses how to:

- Set up competency clusters and job families.
- Assign clusters, competencies, and accomplishments to roles.

Understanding Clusters

You assemble competency and accomplishment profiles for roles to establish proficiency levels for employees and job candidates. Competency and accomplishment profiles help you perform gap and match analyses for planning employee career and training needs and for filling positions and team assignments.

A *cluster* is a group of competencies and accomplishments. By defining a cluster and assigning it to a position or project, you automatically assign all of the individual competencies and accomplishments to that project or position.

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

It is common to use clusters in the following scenarios:

- Positions sharing common competencies.

Individual competencies can be assigned to roles; however, there might be some jobs, positions, or projects in your organization that share a grouping of competencies. In this case, even though individual roles would have competencies that might not be shared with other groups, they still might have some competencies in common. It is much easier to assign a cluster with these shared competencies to the role or the group, rather than assigning the competencies individually.

- Team-based environments.

In a team environment, members are cross-trained in required functions and periodically improve their skills. The team breaks down tasks into mini-projects that require certain skills and competencies. During a defined period, team members perform the tasks of each cluster. For example, team members responsible for creating car doors might rotate

from a two-month period on the welding mini-team and then move to the window insertion team.

- Skill-based pay environments.

In skill-based pay environments, such as medical outpatient clinics, employees must be proficient in a subset of the total task clusters but might add clusters to increase job responsibilities. For example, operating room nurses need specific competencies to perform their basic job. However, some nurses might add a customer service cluster. The nurses move from a specialist-only status to a more general status yet retain the competencies required for the specialty. In skill-based pay environments, overall tasks are broken down into clusters; employees usually have to be certified in a subset of required clusters.

Common Elements Used in This Chapter

Role	An umbrella term for a position, a job family, a job code, or a job task.
Position	A position is uniquely identified by a position number.
Job code	A job code is identified by its setID and code.
Job task	A job task is identified by its setID and code.
Competency cluster code	Displays the code assigned to the cluster.

Note. During some gap analysis and matching, you often compare an employee to a job code within a business unit. On most of these analysis and matching pages, job codes and job tasks are identified by corresponding business units. However, this is not applicable to positions and job families.

Setting Up Clusters and Job Families

This section describes how to:

- Assign competencies to a cluster.
- Assign accomplishments to a cluster.
- Group jobs into families.

Pages Used to Set Up Clusters and Job Families

Page Name	Object Name	Navigation	Usage
Cluster Competencies	CM_CLST_COMP_TABLE	Develop Workforce, Manage Competencies (GBL), Setup, Cluster Table, Cluster Competencies	Define the competencies included in a cluster.
Cluster Accomplishments	CM_CLST_ACOMP_TABLE	Develop Workforce, Manage Competencies (GBL), Setup, Cluster Table, Cluster Accomplishments	Define the accomplishments included in a cluster.
Job Family	JOB_FAMILY_TABLE	Develop Workforce, Manage Competencies (GBL), Setup, Job Family Table, Job Family	Group jobs to make it easier to assign a competency or competency cluster to similar jobs. You can assign a competency or cluster to all the jobs in a family at once.

Assigning Competencies to a Cluster

Access the Cluster Competencies page.

Cluster Competencies | Cluster Accomplishments

Competency Cluster: KMGRS

*Description: Managers

Short Description: Managers

Description: Generic Managerial Competency Model.

Competencies				First	1-3 of 3	Last
*Competency	Description	*Importance	*Proficiency			
0201	Accountability for decisions	4-Above Average	4-Very Good	+	-	
0206	Developing others	4-Above Average	3-Good	+	-	
0209	Team leadership	3-Average	3-Good	+	-	

Cluster Competencies page

Competencies

Importance

Indicate how important this competency is in relation to the other competencies within the cluster. The default value is *Average*.

Proficiency

Select a rating to measure of the level of expertise required for a competency. Define rating models on the Rating Model Table Setup page and assign rating models to competencies using the Competency Table Setup page.

Assigning Accomplishments to a Cluster

Access the Cluster Accomplishments page.

Cluster Accomplishments page

Importance

Indicate how important this accomplishment is in relation to the other accomplishments within the cluster. The default value is *Average*.

Grouping Jobs Into Families

Access the Job Family page.

Job Family page

Status

Select *Active* or *Inactive*. Only active job families appear when you prompt the system.

Important! The job family effective date must be effective as of the relevant job code effective dates.

Assigning Clusters, Competencies, and Accomplishments to Roles

This section describes how to:

- Assign clusters to roles.
- View cluster details.
- Rank clusters.
- Assign individual competencies to roles.
- Rank competencies.
- Rate competencies.
- Assign individual accomplishments to roles.
- Rank accomplishments.

Pages Used to Assign Clusters, Competencies, and Accomplishments to Roles

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Assign Clusters	CM_ROLE_CLST_ASGN	Develop Workforce, Manage Competencies (GBL), Use, Role Cluster, Assign Clusters Develop Workforce, Plan Successions (GBL), Use, Position Cluster, Assign Clusters	Assign clusters to a selected role.
Cluster Detail	CM_CLUSTER_SEC	Click Cluster on the Assign Clusters page.	View the competencies and accomplishments assigned to the cluster and the relative importance of each one. For competencies, you can also view the proficiency level required.

Page Name	Object Name	Navigation	Usage
Rank Clusters	CM_ROLE_CLST_IMP	Develop Workforce, Manage Competencies (GBL), Use, Role Cluster, Rank Clusters Develop Workforce, Plan Successions (GBL), Use, Position Cluster, Rank Clusters	Allocate an importance level to each cluster assigned to a selected role.
Assign Competencies	CM_ROLE_COMP_ASGN	Develop Workforce, Manage Competencies (GBL), Use, Role Competency, Assign Competencies Develop Workforce, Plan Successions (GBL), Use, Position Competency, Assign Competencies	Assign individual competencies to a selected role.
Rank Competencies	CM_ROLE_COMP_IMP	Develop Workforce, Manage Competencies (GBL), Use, Role Competency, Rank Competencies Develop Workforce, Plan Successions (GBL), Use, Position Competency, Rank Competencies	Allocate an importance level to each competency assigned to a selected role.
Rate Competencies	CM_ROLE_COMP_PROF	Develop Workforce, Manage Competencies (GBL), Use, Role Competency, Rate Competencies Develop Workforce, Plan Successions (GBL), Use, Position Competency, Rate Competencies	Define the proficiency level required for each competency assigned to a selected role.

Page Name	Object Name	Navigation	Usage
Assign Accomplishments	CM_ROLE_ACMP_ASGN	Develop Workforce, Manage Competencies (GBL), Use, Role Accomplishment, Assign Accomplishments Develop Workforce, Plan Successions (GBL), Use, Position Accomplishment, Assign Accomplishments	Assign individual accomplishments to a selected role, such as language skills, professional memberships, or licenses.
Rank Accomplishments	CM_ROLE_ACMP_IMP	Develop Workforce, Manage Competencies (GBL), Use, Role Accomplishment, Rank Accomplishments Develop Workforce, Plan Successions (GBL), Use, Position Accomplishment, Rank Accomplishments	Allocate an importance level to each accomplishment assigned to a selected role.

Assigning Clusters to Roles

Access the Assign Clusters page.

The screenshot displays the 'Assign Clusters' page. At the top, there are tabs for 'Assign Clusters' and 'Rank Clusters'. Below the tabs, the page header shows 'SetID: SHARE', 'Job Task: K10001', and 'Project Management'. There are also buttons for '+', '-', and a 'BT' button. The 'Effective Date' is set to '01/01/1980'. Below this, there is a 'Default From' section with 'Job Family' and 'Job Code' fields. The main area is divided into two sections: 'Assigned Clusters' and 'Source Clusters'. The 'Assigned Clusters' section has a table with columns 'Description' and 'Detail', showing four clusters: 'Administration & Management', 'Consultancy', 'Decision Making Skills', and 'Ethics & Tolerance Skills', each with a checked checkbox and a 'Cluster' link. The 'Source Clusters' section has a table with columns 'Cluster', 'Description', and 'Detail', showing seven clusters: 'KCOMMN', 'KINFLN', 'KINTEL', 'KINTPR', 'KMANGR', 'KMGRS', and 'KPLANS', each with an unchecked checkbox and a 'Cluster' link. Navigation buttons like 'View All', 'First', and 'Last' are present for both lists.

Assign Clusters page

Default From**Job Family**

Click to display a list of the default clusters assigned to this role's job family. This link is available only if you selected a position or a job code.

Job Code

Click to display the default clusters assigned to the job code. This link is available only if you selected a position.

Assigned Clusters

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

Cluster

Click **Cluster** to display the Cluster Detail page where you can view a list of the competencies and accomplishments assigned to the cluster.

Source Clusters

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

Add and Delete Buttons

Select clusters in **Source Clusters** and then click **Add** to assign clusters to the role. The selected clusters move to **Assigned Clusters**.



Select clusters in **Assigned Clusters** and then click **Delete** to remove clusters from the role. The selected clusters move back to **Source Clusters**.

Assigning Rank to Clusters

Access the Rank Clusters page.

Assign Clusters Rank Clusters

Rank Clusters View All First 1 of 1 Last

SetID: SHARE Job Task: K10001 Project Management

Effective Date: 01/01/1980

Order By Importance Cluster

Assigned Clusters View All First 1-4 of 4 Last

Cluster	Importance
KAD/MG Administration & Management	★ ★ ★ ★ ★ Average
KCONS Consultancy	★ ★ ★ ★ ★ Average
KDECSN Decision Making Skills	★ ★ ★ ★ ★ Average
KETHIC Ethics & Tolerance Skills	★ ★ ★ ★ ★ Average

Rank Clusters page

Assigned Clusters**Cluster**

The system lists the clusters you assigned to the role on the Role Cluster - Assign Cluster page.

Importance

Click a star to assign an importance level to a cluster. One star indicates **Low** importance; five stars indicate **High** importance. Importance increases as you move from left to right.

Assigning Competencies to Roles

Access the Assign Competencies page.

Assign Competencies Rank Competencies Rate Competencies

Competency Profiles View All First 1 of 1 Last

SetID: SHARE Job Task: K10001 Project Management

Effective Date: 01/01/1980

Default From Job Family Job Code

Assigned Competencies View All First 1-6 of 7 Last

Category	Competency	Hiring Requirements	Tenure Requirements	Promotion Requirements
☐ Ability	Identify resources to assist	N	N	N
☐ Ability	Accountability for decisions	N	N	N
☐ Ability	Developing others	N	N	N
☐ Other	Stress tolerance	N	N	N
☐ Knowledge	Team leadership	N	N	N

Category: Ability Type: Competency

Source Competencies View All First 1-7 of 63 Last

Competency	Description
☐ 0100	Abstract thinking
☐ 0101	Analytical thinking
☐ 0102	Conceptual thinking
☐ 0103	Mental flexibility
☐ 0110	Ability to manage own time
☐ 0150	Creative thinking
☐ 0151	Directiveness/Assertiveness

Assign Competencies page

Job Family

Click to display the default competencies assigned to this role's job family. This link is available only if you selected a position or a job code.

Job Code

Click to display the default competencies assigned to the job code. This link is available only if you selected a position.

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

Assigned Competencies

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

Source Competencies

The **Source Competencies** group box lists the results of the competency search.

Add and Delete Buttons

Select competencies in **Source Competencies** and then click **Add** to assign competencies to the role. The selected competencies move to **Assigned Competencies**.



Select competencies in **Assigned Competencies** and then click **Delete** to remove competencies from the role. The selected competencies move back to **Source Competencies**.

Ranking Competencies

Access the Rank Competencies page.

Assign Competencies Rank Competencies **Rate Competencies**

Rank Competency View All First 1 of 1 Last

SetID: SHARE Job Code: KU077 Consultant - Senior

Effective Date: 01/01/1980 Order By Importance Competency

Assigned Competencies View All First 1-2 of 2 Last

Competency	Importance
0702 Conflict resolution	★★★★★ Above Avg
0707 Can identify problems & causes	★★★★ Average

Rank Competencies page

Assigned Competencies**Importance**

Click a star to assign an importance level to a competency. One star indicates **Low** importance; five stars indicate **High** importance. Importance increases as you move from left to right.

Rating Competencies

Access the Rate Competencies page.

Assign Competencies Rank Competencies **Rate Competencies**

Rate Competencies View All First 1 of 1 Last

SetID: SHARE Job Code: KU077 Consultant - Senior

Effective Date: 01/01/1980

Assigned Competencies View All First 1-2 of 2 Last

Competency	Importance	Rating
0702 Conflict resolution	4-Above Average	3-Good
0707 Can identify problems & causes	3-Average	3-Good

Rate Competencies page

Assigned Competencies

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

Competency	The system populates the competency code and name from the Competency Table.
Importance	The system populates the importance from Role Competency - Rank Competencies page
Proficiency	Select a rating. When you navigate out of the field, the system displays the description of that proficiency. The ratings vary according to the rating model used to measure the competency.

Assigning Accomplishments to Roles

Access the Assign Accomplishments page.

Assign Accomplishments page

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

Default From

Job Family	Click to display the default accomplishments assigned to this role's job family. This link is available only if you selected a position or a job code.
Job Code	Click to display the default accomplishments assigned to the job code. This link is available only if you selected a position.

Assigned Accomplishments

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

Accomplishment Select a specific accomplishment, or enter part of the accomplishment code.

Source Accomplishments

The **Source Accomplishments** group box lists the results of the accomplishment search.

Add and Delete Buttons



Select accomplishments in **Source Accomplishments** and then click **Add** to assign accomplishments to the role. The selected accomplishments move to **Assigned Accomplishments**.



Select accomplishments in **Assigned Accomplishments** and then click **Delete** to remove accomplishments from the role. The selected accomplishments move back to **Source Accomplishments**.

Ranking Accomplishments

Access the Rank Accomplishments page.

Rank Accomplishments page

Assigned Accomplishments

In the **Assigned Accomplishments** group box, the system lists the accomplishments you assigned to the role on the Role Accomplishment - Assign Accomplishments page. Use the

Cluster Accomplishments page to view the ranking of accomplishments that are assigned to the role as a part of a cluster.

Importance

Click a star to assign an importance level to an accomplishment. One star indicates **Low** importance; five stars indicate **High** importance. Importance increases as you move from left to right.

CHAPTER 4

Tracking Employee Competencies and Accomplishments

This chapter provides an overview of competency and accomplishment tracking and discusses how to:

- Enter employee competencies.
- Enter employee accomplishments.

Understanding Competency and Accomplishment Tracking

In PeopleSoft Human Resources, you can maintain information on the competencies and accomplishments of employees and applicants. You can use this information to:

- Help employees make decisions about their professional development.
- Identify employees with particular experiences or knowledge that might qualify them for other projects and positions.
- Determine if job applicants have the necessary credentials for a position.

When an applicant is hired, competency and accomplishment information entered in the Recruit Workforce pages automatically becomes part of the person's employee record.

Once you enter employee data, you can search PeopleSoft Human Resources for people with certain skills or credentials. For example, if your company is planning to expand to the Pacific Rim, you can determine which employees or applicants speak Japanese.

See Also

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

Entering Employee Competencies

This section describes how to:

- Assign competency evaluation IDs for performance reviews.
- Assign competencies to employees.

- Synchronize competency data between the Plan Careers and Manage Competencies business processes.
- Define proficiency levels for assigned competencies.
- Track how competency data is verified.

Pages Used to Enter Employee Competencies

Page Name	Object Name	Navigation	Usage
Competency Evaluation	CM_COMPETENCY_EVL1	Develop Workforce, Manage Competencies (GBL), Use, Competencies, Competency Evaluation	Establish Evaluation IDs to use in performance reviews.
Competency Assignment	CM_PERS_COMP_ASGN	Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Assignment	Enter employee competencies. If you have set up competency profiles for your job codes or positions, you can use these profiles to populate employee competencies. Before you assign competencies, you must set up competency codes on the Competency Table.
Plan Careers / Manage Competencies Link	COMP_STRDVLP_SEC	Click Link to Career Planning on the Competency Assignment page.	Synchronize competency data between the Plan Careers and the Manage Competencies business processes. (With PeopleSoft Human Resources you can add employee competency data in both these processes. To keep data consistent, you can transfer competency information between them.)

Page Name	Object Name	Navigation	Usage
Competency Rating	CM_PERS_COMP_PROF	Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Rating	Record employees' level of expertise for each competency assigned to them, and record their interest in developing each competency. Before assigning ratings to employees, you must define ratings on the Rating Model Table and assign rating models to competencies on the Competency Table.
Competency Verification	COMPETENCIES	Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Verification	Track how you verified competencies assigned to employees. Also record when employees acquired the competencies assigned to them, how recently they used each competency, and their total experience in each competency

Competency Evaluation Alternate Navigations

Develop Workforce, Administer Training (GBL), Use, Competencies, Competency Evaluation

Develop Workforce, Plan Careers, Use, Competencies, Competency Evaluation

Develop Workforce, Plan Successions (GBL), Use, Competencies, Competency Evaluation

Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Evaluation

Competency Assignment Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Competencies, Competency Assignment

Develop Workforce, Plan Careers, Use, Competencies, Competency Assignment

Develop Workforce, Plan Successions (GBL), Use, Competencies, Competency Assignment

Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Assignment

Competency Rating Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Competencies, Competency Rating

Develop Workforce, Plan Careers, Use, Competencies, Competency Rating

Develop Workforce, Plan Successions (GBL), Use, Competencies, Competency Rating

Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Rating

Competency Verification Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Competencies, Competency Verification

Develop Workforce, Plan Careers, Use, Competencies, Competency Verification

Develop Workforce, Plan Successions (GBL), Use, Competencies, Competency Verification

Administer Workforce, Track Global Assignments (GBL), Use, Competencies, Competency Verification

Assigning Competency Evaluation IDs

Access the Competency Evaluation page.

Competency Evaluation | Competency Assignment | Competency Rating | Competency Verification

Daniels, Jeff | Employee | EmplID: B-ELG115

Competency Evaluation | View All | First | 1 of 1 | Last

*Evaluation ID: 01 | [Licenses and Certifications](#) + -

*Evaluation Type: Executive Committee

Review Date: 08/21/2001 | ☒ Review Active

Reviewer ID: B-ELG101 | Bonds, Betty

Reviewer Name:

☒ Reviewer is Approved

Competency Evaluation page

Use this page to track 360-degree feedback if your organization uses this evaluation method. In 360-degree feedback, several people evaluate an employee on his or her specified competencies.

Competency Evaluation

Evaluation ID

You can enter an evaluation ID manually or have the system assign one for you. The system assigns evaluation IDs in sequence.

You should either consistently assign IDs manually, according to a planned system, or you should consistently have the system assign them.

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

Licenses and Certifications

Click to display the Licenses and Certifications link page.

Evaluation Type

Select an evaluation type.

If you want a manager to review competency evaluations, select **Approved** to indicate approved or official competencies that are assigned to an employee.

Note. If you are not using 360-degree feedback or will not have multiple evaluations for an employee, use the **Approved** evaluation type. Remember that there can be only one **Approved** evaluation type.

Review Date

Enter the date the review took place.

Review Active

Select if this is a current evaluation. The system considers only active evaluations when performing inquiries, such as a role match or competency search.

Reviewer ID, Reviewer Name

If the reviewer is an employee, select the employee ID. If the reviewer is not an employee, leave this field blank and complete the **Reviewer Name** field instead.

This field is not available if you have selected an evaluation type of **Approved** or **Self**.

Reviewer is Approved

Select if the reviewer is approved. If you have selected an evaluation type of **Approved**, this check box is not available for entry.

See Also

“Performing Gap and Match Analyses on Your Workforce”

Assigning Competencies to Employees

Access the Competency Assignment page.

Competency Evaluation Competency Assignment Competency Rating Competency Verification

Griffiths, Martina Rae Employee ID: KC0001 [Link to Career Planning](#)

Competency Assignment View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

Populate from Job

Assigned Competencies View All First 1-6 of 6 Last

Description	Category
Takes initiative & follows up	Ability
Customer Service Orientation	Other
Typing	Skill
Computer Literacy	Knowledge
HRIS Experience	Knowledge
Multi-Tasking	Skill

Search by: Category Type

Source Competencies View All First 1 of 1 Last

Description
☐

⏪

Competency Assignment page

Link to Career Planning

Click to display the Plan Careers / Manage Competencies Link page and view competencies included in the employee's career plan. You can also transfer competencies between the business processes.

Populate from Job

Click to populate employee competencies based on the employee's current job code. If you use position management, the system also displays any competencies assigned to the employee's position.

Assigned Competencies

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

Competency Search

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

Source Competencies

The **Source Competencies** group box lists competency search results.

Adding Competencies



Select competencies in **Source Competencies**, and then click **Add** to assign competencies to the employee. The selected competencies move to **Assigned Competencies**.

Note. If you add a competency in error, remove it with the Competencies - Competency Rating page.

Synchronizing the Plan Careers and Manage Competencies Business Processes

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		
Eval Type	Competency	Strgth/Develop
☐ Approved	Multi-Tasking	Developmnt
☐ Approved	HRIS Experience	Developmnt
☐ Approved	Computer Literacy	Developmnt
☐ Approved	Typing	Strength
☐ Approved	Customer Service Orientation	Strength
☐ Approved	Takes initiative & follows up	Strength

Career Planning		
Eval Type	Competency	Rating
☐ Approved	Abstract thinking	Very Good
☐ Approved	Teamwork and cooperation	Good

Select All
Select All

OK Cancel

Plan Career / Manage Competencies Link page

Each group box lists the competencies that you have assigned to the employee, either from the Competencies - Competency Assignment page or the Plan Careers / Manage Competencies Link page.

Strgth/Develop
(strength/development area)

The system indicates if the competency represents an area of strength or development for the employee based on the rating assigned to the employee from the Competencies - Competency Rating page. Each rating is designated a strength or development area on the Rating Model Table.

Select All

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

For each group box, select the competencies that you want to transfer, and then click **OK** to start the transfer.

Defining Proficiency Levels for Assigned Competencies

Access the Competency Rating page.

Competency Evaluation		Competency Assignment		Competency Rating		Competency Verification	
Griffiths, Martina Rae		Employee		EmplID: KC0001			
Competency Evaluation View All First 1 of 1 Last							
Evaluation ID/Type: 01 Approved							
Assigned Competencies View All First 1-6 of 6 Last							
Competency	*Effective Date	*Proficiency	Interest Level	Detail			
Takes initiative & follows up	06/01/2000	3-Good	2-No Preference	Detail + -			
Customer Service Orientation	06/01/2000	4-Very Good	2-No Preference	Detail + -			
Typing	06/01/2000	5-Expert	2-No Preference	Detail + -			
Computer Literacy	06/01/2000	1-Little	2-No Preference	Detail + -			
HRIS Experience	06/01/2000	2-Fair	2-No Preference	Detail + -			
Multi-Tasking	06/15/2000	2-Fair	2-No Preference	Detail + -			

Competency Rating page

Assigned Competencies

The **Assigned Competencies** group box lists the employee's assigned competencies.

Effective Date

Enter an effective date for your modification to the employee's competency assignment. To track the history of an employee's proficiency or interest level for an assigned competency, insert a new row for that competency with a new effective date.

Interest Level

Indicate the employee's interest in developing the selected competency.

Detail

Click to view details of a specific competency. This displays the details of the competency as set up Competencies Element table.

Verifying Competency Tracking Methods

Access the Competency Verification page.

Competency Evaluation Competency Assignment **Competency Rating** Competency Verification

Griffiths, Martina Rae Employee ID: KC0001

Competency Verification View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

Assigned Competencies View All First 1 of 6 Last

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

Competency Verification page

Assigned Competencies

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

Entering Employee Accomplishments

This section describes how to track employee accomplishments, including:

- Educational background.
- Professional education and training.
- Licenses and certifications.
- Professional memberships.
- Language abilities.
- Honors and awards.
- Significant special projects.
- Tests.

Pages Used to Track Employee Accomplishments

Page Name	Object Name	Navigation	Usage
School Education	SCHOOL_EDUCATION	Develop Workforce, Administer Training (GBL), Use, Education, School Education	Document an employee's educational background. You must set up school types on the School Type Table to use this page.
Professional Ed. and Training (professional education and training)	EDUCAT_TRAIN_GBL	Develop Workforce, Administer Training (GBL), Use, Education, Professional Ed. and Training	Record professional qualifications and other training. You must set up degree codes, major codes, school codes, and faculty codes to use this page.
Licenses and Certificates	LICENSES_CERTIFS	Develop Workforce, Administer Training (GBL), Use, Licenses and Certifications, Licenses and Certifications	Record pertinent licenses or certificates. For example, if an employee in Finance and Accounting has a CPA license, you can enter the information here. You must set up license/certification codes on the License/Certification Table to use this page.
Memberships	MEMBERSHIPS	Develop Workforce, Administer Training (GBL), Use, Memberships, Memberships	Record employee membership in professional organizations. You must set up membership codes on the Membership Table to use this page.

Page Name	Object Name	Navigation	Usage
Languages	LANGUAGES	Develop Workforce, Administer Training (GBL), Use, Languages, Languages	Enter the languages employees are proficient in, particularly those pertinent to their jobs or to your industry. To use this page, you must set up language codes on the Language Table.
Honors and Awards	HONORS_AWARDS	Develop Workforce, Manage Competencies (GBL), Use, Honors and Awards, Honors and Awards	Record awards or honors your employees have received. To use this page, you must set up codes for honors and awards on the Honor/Award Table.
Significant Special Projects	SPECIAL_PROJECTS	Develop Workforce, Manage Competencies (GBL), Use, Significant Special Projects, Significant Special Projects	Track projects that benefit your organization or an employee's own professional standing.
Test Results	TEST_RESULTS_PANEL	Develop Workforce, Administer Training (GBL), Use, Test Results, Test Results	Track test results, such as typing, programming aptitude, or mathematical tests. You must set up test codes on the Test Table to use this page.

School Education Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Education, School Education

Develop Workforce, Plan Careers, Use, Education, School Education

Develop Workforce, Plan Successions (GBL), Use, Education, School Education

Administer Workforce, Track Global Assignments (GBL), Use, Education, School Education

Professional Education and Training Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Education, Professional Education and Training

Develop Workforce, Plan Careers, Use, Education, Professional Education and Training

Develop Workforce, Plan Successions (GBL), Use, Education, Professional Education and Training

Administer Workforce, Track Global Assignments (GBL), Use, Education, Professional Education and Training

Licenses and Certificates Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Licenses and Certificates, Licenses and Certifications

Develop Workforce, Plan Careers, Use, Licenses and Certificates, Licenses and Certifications

Develop Workforce, Plan Successions (GBL), Use, Licenses and Certificates, Licenses and Certifications

Memberships Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Memberships, Memberships

Develop Workforce, Plan Careers, Use, Memberships, Memberships

Develop Workforce, Plan Successions (GBL), Use, Memberships, Memberships

Languages Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Languages, Languages

Develop Workforce, Plan Careers, Use, Languages, Languages

Develop Workforce, Plan Successions (GBL), Use, Languages, Languages

Administer Workforce, Track Global Assignments (GBL), Use, Languages, Languages

Honors and Awards Alternate Navigations

Develop Workforce, Plan Careers, Use, Honors and Awards, Honors and Awards

Develop Workforce, Plan Successions (GBL), Use, Honors and Awards, Honors and Awards

Significant Special Projects Alternate Navigations

Develop Workforce, Plan Careers, Use, Significant Special Projects, Significant Special Projects

Test Results Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Use, Test Results, Test Results

Develop Workforce, Plan Successions (GBL), Use, Test Results, Test Results

Tracking Educational Background

Access the School Education page.

School Education Professional Ed. and Training

Jones, Susan Employee ID: K0G001

School Education View All First 1 of 1 Last

Country: GBR + -

School Type: UNI University Level: Degree Achieved:

Date Acquired: 29/06/1990

Average Grade: Completed

School Code: KGS006 School Name: University of Leeds

County: SYORKS South Yorkshire

Area of Study View All First 1 of 1 Last

*Area of Study	Grade
Psychology	+ -

School Education page

(USF) Note. If you are a United States federal user, use the Professional Ed and Training page to track education.

School Code, Name, and State

Enter the code or name for the school attended. When you move out of this field, the system automatically completes the school name (if you entered a code) and state (or province, county, and so on, depending on the country).

Area of Study

Enter a major and grade.

Tracking Professional Education and Training

Access the Professional Ed. and Training page.

School Education		Professional Ed. and Training	
bill3,celia		Employee	
		EmplID: B-BILL3	
Professional Education First 1 of 1 Last			
Country:	USA	United States + -	
*Degree:			
Date Acquired		Average Grade:	☐ Graduated
Major Code:		Major:	
School Code:		School:	
Educator:			
State:		☐ Minority Institution	
▼ Germany			
Practical Grade:		Theoretical Grade:	☐ Intern. Professional Education
▼ US Federal			
Credit Hours:		Hours Type:	

Professional Ed. and Training page (1 of 3)

▼ Australia	
Higher Education	
Educational Level:	
Australian Public Service	
Minor Code:	Minor:
Education Level:	Not Given
▶ Japan	
Faculty Code:	Faculty:
Sub-Faculty Code:	Sub-Faculty:
Major Category:	

Professional Ed. and Training page (2 of 3)

▼ French Public Sector		
Subject:		
Training First 1 of 1 Last		
Course Title	School Name	Course Date
		+ -

Professional Ed. and Training page (3 of 3)

Degree, Date Acquired, Average Grade, Graduated	Select the degree the employee has earned, followed by the date the degree was obtained and the average grade. If the employee has graduated, select the check box.
Major Code, School Code	Select codes for the employee's major and school. The system automatically populates additional information based on the codes you select. If no code exists, enter the information manually. If you select another country code after you've already selected a state code, the system clears the value in the State field.

(GER) Germany

If this record is for an **Intern. Professional Education**, select the check box. Enter the practical grade and the theoretical grade.

(AUS) Australia – Higher Education

These group boxes appear only if the Education & Government check box on the Installation Table – Country Specific page has been selected.

Education Level	Select the highest education level achieved by the employee.
------------------------	--

(AUS) Australia – Australian Public Service

Minor Code and Minor	Select the minor code from the values provided. If the minor does not have a code associated with it, enter the minor in the Minor field.
Education Level	Select the highest education level achieved by the employee.

(JPN) Japan

Faculty Code	Select a faculty code. To enter a faculty that doesn't have a code, leave the Faculty Code field blank and enter a description in the Faculty field.
Sub-Faculty Code	Select a sub-faculty code. To enter a sub-faculty that doesn't have a code, leave the Sub-Faculty Code field blank and enter a description in the Sub-Faculty field.

(FPS) French Public Sector

Course Title, School Name If the employee has completed additional professional training courses, enter the course titles and school names.

Add additional rows as necessary.

Tracking Licenses and Certificates

Access the Licenses and Certifications page.

Licenses and Certifications

Griffiths, Martina Rae Employee ID: KC0001

Licenses and Certifications View All First 1 of 1 Last

*License/Certif Code: PMA Personnel Management Associatn

Issue Date: 10/03/1992

License #:

Issued By:

Expiration Date:

☐ License Verified

☐ Renewal in Progress

Issued In

Country: CAN Province: ON Ontario

Licenses and Certifications page

Country, State Displays the country code indicated in this user's preferences; you can select the state where the license was issued.

Note. If you select a different country code after a state code is entered, the system clears the **State** field.

Tracking Professional Memberships

Access the Memberships page.

Memberships

Griffiths, Martina Rae Employee ID: KC0001

Memberships View All First 1-2 of 2 Last

*Organization	Description	Membership Date	Mandate	Mandate Position	Mandate Begin Date	Mandate End Date
BPW	Business & Professional Women	01/10/15				
PSA	Professional Secretaries Assoc	01/01/15				

Memberships page

Mandate Enter the mandate.

Mandate Position Enter the mandate position.

Tracking Language Abilities

Access the Languages page.

Languages

Griffiths, Martina Rae ID: KC0001

Languages First 1-3 of 3 Last

*Language	Native	Translator	Teacher	Speak	Read	Write	Evaluation Date
DU Dutch	☐	☐	☐	Low	Moderate	Low	
EN English	☒	☒	☐	High	High	High	
FR French	☐	☒	☐	High	High	Moderate	

Languages page

Native Select if the language is the person's first language.

Translator Select if the person can translate this language.

Teacher Select if the employee is able to teach a class in this language. The system uses this check box when scheduling multilingual courses.

Tracking Significant Special Projects

Access the Significant Special Projects page.

Significant Special Projects

Griffiths, Martina Rae Employee ID: KC0001

Special Projects View All First 1 of 1 Last

Employer: New Technology

***Date Completed:** 01/04/1997

Description: Completed implementation of new HR system.

Significant Special Projects page

Enter the name of the person's employer (department or group) at the time the project was completed, the date completed, and a description of the project.

Tracking Test Results

Access the Test Results page.

Test Results

bill3, celia Employee EmplID: B-BILL3

Test Results View All First 1 of 1 Last

*Test	Descr	Test Date	Score	Passed
1004	Office Management Skills			☐

Test Results page

Test Enter the test code. The system automatically populates the description.

CHAPTER 5

Performing Gap and Match Analyses on Your Workforce

This chapter provides an overview of gap and match analyses and discusses how to:

- Set up match evaluation types.
- Match employees to roles.
- Match roles to employees.
- Match teams to projects.
- Search your database for job candidates.

Understanding Gap and Match Analyses

You run different inquiries to match:

- Employees to roles.
- Roles to employees.
- Teams to projects.
- Candidates to open roles.

However, all inquiries are performed the same way. The system:

- Awards points to employees, applicants, or teams based on their assigned competencies, competency proficiency ratings, and accomplishments.
- Weights the evaluation in favor of the importance values you've assigned to each competency and accomplishment.

The system assigns the following values to importance levels:

<i>Importance</i>	<i>Points</i>
High	5
Above Average	4

Importance	Points
Average	3
Below Average	2
Low	1
None	0

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

Competency	Importance	Points Assigned
Communication	High	5
Leadership	Average	3
Interpersonal Effectiveness	Above Average	4
Planning	Low	1
Decision Making	Above Average	4
Adaptability to Change	Below Average	2
	Total Match	19

Total Match represents the maximum number of points available if the employee meets all the requirements. Points are assigned differently for accomplishments and competencies, as explained in the following sections.

Assigning Employee Points for Accomplishments

Accomplishment points are calculated this way: if the accomplishment is in an employee's profile, the system awards points to the employee based on the importance value that you assigned to the accomplishment.

Assigning Employee Points for Competencies

Unlike accomplishments, competencies have proficiency ratings associated with them, which indicate a level of expertise. When you assign competencies to a role, you also define the rating required for each competency. Similarly, you give employees a rating for each competency that you assign to them.

The system assigns points to an employee only if he or she has the required proficiency level for the competency. However, the system also indicates when employees have a required competency, but not at the required proficiency level.



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



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



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

Because proficiency ratings vary according to the rating model, the system uses the review points value associated with the rating to perform the match analysis. In some cases, the Review Points field is the same as the rating. For example, the PSCM rating model has ratings from 0 (none) to 5 (expert) which have associated review points of 0 to 5.

Note. You can change stoplight images by using PeopleSoft Application Designer.

The following table shows ratings required for an HR specialist position alongside a hypothetical employee profile, with competencies assigned to the PSCM rating model. The Page Display column shows which indicator lights would appear.

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

See Also

"Assigning Competencies and Accomplishments to Roles"

"Tracking Employee Competencies and Accomplishments"

"Setting Up Competencies and Accomplishments"

Multiple Evaluations

If many people evaluate your employees, each evaluation could include different competencies, competency ratings, and accomplishments.

To control which evaluations are used in match and gap analyses, you define match evaluation types. For example, you might include only Approved/Official evaluations.

To understand how the system performs a match analysis with multiple evaluations, consider the following example:

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

If you have decided to use manager and peer evaluations for match analysis, the system calculates the average rating based on the three evaluations: Manager, Peer 1, and Peer 2.

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

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

Setting Up Match Evaluation Types

Match evaluation types must be set up for each user you want to run the match analyses. Evaluation types determine which evaluations are included in each analysis.

Page Used to Set Up Match Evaluation Types

Page Name	Object Name	Navigation	Usage
Match Evaluation Types	CM_MATCH_INSTR	Develop Workforce, Manage Competencies (GBL), Setup, Match Evaluation Types, Match Evaluation Types	Define the types of inquiries a user can run and the evaluation types a user can access. Evaluation types and user access must be set up to run the match analyses.

Defining Match Evaluation Types

Access the Match Evaluation Types page

Match Evaluation Types

User ID: HRDEU

Inquiry - Search Types View All First 1-2 of 2 Last

*Search Type: Role/Person

*Evaluation Type

Approved/Official + -

Supervisor/Manager + -

*Search Type: Competency Search

*Evaluation Type

Approved/Official + -

Match Evaluation Types page

Search Type

Select one or both search types.

Competency Search. Enables the selected user ID to search the database for candidates that fit a specified role.

Role/Person. Enables the selected user ID to match roles to employees, employees to roles, and teams to projects.

Evaluation Type

Select evaluation types.

These control which competency ratings the system considers when performing the analysis. For example, when performing a gap analysis for a person, as opposed to a project team, you might include manager and peer evaluations and exclude customer evaluations.

Matching Employees to Roles

This section discusses how to:

- Specify a role to match with an employee, and analyze competency cluster matches.
- View cluster details.
- Analyze competency matches.
- View competency match details.
- Analyze accomplishment matches.
- Perform a gap analysis on the employee and role.

Pages Used to Match Employees to Roles

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Cluster Match	CM_PERSON_CLUSTER1	Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Cluster Match	Specify the role (position, job code, or job task) with which you want to compare the employee.
Cluster Details	CM_PERSON_CLST_SEC	Click the Competency Cluster link on the Person to Role Match - Cluster Match page. Click the Competency Cluster link on the Role to Person Match - Cluster Match page.	View details of the employee's ratings for competencies and accomplishments in the selected cluster.

Page Name	Object Name	Navigation	Usage
Competency Match	CM_PERSON_ROLE	Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Competency Match	See how well the employee matches the individual competencies and competency clusters required for a given role.
Competency Match Details	CM_COMP_MATCH_SEC	Click Competency Match Detail on the Competency Match page.	View details of the employee's ratings in each competency assigned to the role.
Accomplishment Match	CM_PERSON_ROLE2	Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Accomplishment Match	See how well the employee matches individual and cluster accomplishments against a given role.
Gap-Fit Measurement	CM_PERSON_ROLE3	Develop Workforce, Manage Competencies (GBL), Inquire, Person to Role Match, Gap-Fit Measurement	Compare an employee's ratings in each required competency against the rating expected for the role and see the percentage difference. The sum of these percentages gives you an overall indication of how well the employee fits the requirements of the role.

Specifying a Role and Analyzing Cluster Matches

Access the Person to Role Match - Cluster Match Inquiry page.

Cluster Match	Competency Match	Accomplishment Match	Gap-Fit Measurement
Santos, Antonio		ID: KU0010	
Business Unit: GBIBU		Position Number:	
		Job Code: KU051 Administrative Assistant	
		Job Task:	
Match Analysis			
Total Match:	14	out of	23
Competency Match:	8		17
Accomplishment Match:	6		6
Role Cluster First 1 of 1 Last			
Cluster	Importance	EE Complete	Competency Cluster
	Average	☒	Competency Cluster

Person to Role Match - Cluster Match page

When you select the role, the system analyzes how well the employee matches the required competency clusters.

You must set up the competency profile for the role and the employee to use this inquiry. You must also set up the Match Evaluation Types Setup page for the user ID of the person running the search, to control which evaluations are considered.

Position Number, Job Code, Job Task Select a position, job code, or job task.

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

Total Match Indicates the employee's points out of the total points possible for the role. This total is weighted for the importance of each cluster to the role.

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

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

Role Cluster

EE Complete (employee complete) Automatically selected if the employee has all the required competencies and accomplishments assigned to the cluster.

Competency Cluster Click to see the competencies and accomplishments assigned to the cluster.

Viewing Cluster Details

Access the Cluster Details page.

Cluster Detail

Cluster:

Assigned Competencies			View All	First	1 of 1	Last
Competency	Importance	EE Competency:				

Assigned Accomplishments			View All	First	1 of 1	Last
Accomplishment	Importance	EE Accomplishmt:				

[Return](#)

Cluster Detail page

Assigned Competencies

EE Competency Displays a green, yellow, or red traffic light symbol that indicates if the employee has the required rating for the competency.

Assigned Accomplishments

EE Accomplishmt Automatically selected if the employee has the
(employee accomplishment) accomplishment.

Analyzing Competency Matches

Access the Person to Role Match - Competency Match page.

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
Santos, Antonio				ID: KU0010			
SetID: SHARE		Job Code: KU051		Administrative Assistant			
Match Analysis							
Competency Match:		4	out of:	17	Competency Match Detail		
Total Competencies:		1		5	Competencies not ranked:		0
Competencies View All First 1-5 of 5 Last							
Competency	Importance			Training Scheduled			
Typing	Above Avg			☐	Competency Training		
Data Entry Procedures	Above Avg			☐	Competency Training		
Administration	Above Avg			☐	Competency Training		
Computer Literacy	Average			☐	Competency Training		
Customer Service Orientation	Below Avg			☐	Competency Training		

Person to Role Match - Competency Match page

Match Analysis

Competency Match	Indicates how many of the employee's total points are from competencies.
Total Competencies	Lists the number of employee competencies that match the competencies required for the role.
Competencies not ranked	Lists the number of competencies required by the role that are not included in the employee's evaluations.
Competency Match Detail	Click to view the employee's average ratings in each competency.

Competencies

Competency	Lists competencies assigned to the role, from highest to lowest importance.
Importance	Importance levels are assigned on the Cluster Table - Cluster Competencies page or the Role Competency - Rank Competencies page.
Training Scheduled	Automatically selected if the employee is already scheduled for training in this competency.
Competency Training	Click to see if any available training courses target the competency.

Viewing Competency Match Details

Access the Competency Match Details page.

Competency Match Detail

Santos, Antonio

ID: KU0010

SetID: SHARE Job Code: KU051 Administrative Assistant

Competency Match Detail

View All First 1-5 of 5 Last

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

Competency Match:

4

[Return](#)

Competency Match Detail page

Required Points

Each rating in a rating model has points associated with it. In some cases, the **Review Points** field is the same as the rating. For example, the PSCM rating model has ratings of 0 to 5, which have associated review points of 0 to 5.

EE Review Points (employee review points)

Lists the employee's points rating for the competency. For example, if you use the PSCM rating model, a rating of 5 has an associated review points value of 5.

Importance Match

If the employee possesses the required competency and has the required rating, the employee is awarded points based on the importance of this competency.

Analyzing Accomplishment Matches

Access the Person to Role Match - Accomplishment Match page.

Cluster Match	Competency Match	Accomplishment Match	Gap-Fit Measurement
Santos, Antonio		ID: KU0010	
SetID: SHARE Job Code: KU051		Administrative Assistant	
Match Analysis			
Accomplishment Match:		6 out of	6
Total Accomplishments:		2	2
Accomplishments View All First 1-2 of 2 Last			
Accomplishment	Importance	Category	Employee Accomplishment
General Clerical Skills	Average	Test	☒
Data Entry-Speed & Accuracy	Average	Test	☒

Person to Role Match - Accomplishment Match page

Match Analysis

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

Accomplishments

Accomplishment	Lists each accomplishment assigned to the role, from highest to lowest importance.
Importance	Importance levels are assigned on the Role Accomplishment page or on the Cluster Table.
Category	Lists the accomplishment category.
Employee Accomplishment	Selected if the employee possesses the accomplishment.

Performing a Gap Analysis on the Employee and Role

Access the Person to Role Match - Gap-Fit Measurement page.

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
Santos, Antonio				ID:		KU0010	
SetID: SHARE		Job Code: KU051		Administrative Assistant			
Match Analysis							
Total Competencies:		5		Total Points:		12 out of 17 % Fit: 73.33	
Gap-Fit Analysis							
View All First 1-5 of 5 Last							
Competency		Importance	EE Review Points	Required Points	% Proficiency Deficiency		
Typing		Above Avg	2	3	66.67		
Data Entry Procedures		Above Avg	4	3	133.33		
Administration		Above Avg	3	4	75.00		
Computer Literacy		Average	1	4	25.00		
Customer Service Orientation		Below Avg	2	3	66.67		

Person to Role Match - Gap-Fit Measurement page

Match Analysis

Total Competencies	Shows the number of competencies that are assigned to the role.
Total Points	Indicates how many points the employee has out of the total possible for the role. These values do not include points associated with accomplishments.
% Fit	Expresses the employee's points as a percentage of the total possible. The system only includes points associated with competencies in this calculation.

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

Gap-Fit Analysis

EE Review Points (employee review points)	Lists the employee's points rating for the competency. For example, if you use the PSCM rating model, a rating of 5 has an associated review points value of 5.
Required Points	Each rating in a rating model has points associated with it. In some cases, the Review Points field is the same as the rating. For example, the PSCM rating model has ratings of 0 to 5, which have associated review points of 0 to 5.
% Proficiency Deficiency	Shows the percentage difference between the employee's rating and the rating required for the role. The system divides the EE review points by required points and converts the result into a percentage. For example, if EE Review Points is 3 but the role has Required Points of 4, the % Proficiency Deficiency is 75%. If an employee's rating exactly matches the required rating, % Proficiency Deficiency is 100%. A percentage less than 100% indicates the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

Matching Roles to Employees

This section discusses how to:

- Specify an employee to match to a role, and analyze cluster matches.
- Analyze competency matches.
- View competency match details.
- Analyze accomplishment matches.
- Perform a gap analysis on the role and employee.

Pages Used in Matching Roles to Employees

Page Name	Object Name	Navigation	Usage
Cluster Match	CM_ROLE_CLUSTER1	Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Cluster Match	Specify an employee to compare the selected role to; see how well the employee matches required clusters.

Page Name	Object Name	Navigation	Usage
Competency Match	CM_ROLE_PERSON	Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Competency Match	See how the employee matches both individual competencies and competency clusters.
Competency Match Detail	CM_ROLE_PERSON_SEC	Click Competency Match Detail on the Role to Person Match - Competency Match page.	View details of the employee's ratings in each competency assigned to the role.
Accomplishment Match	CM_ROLE_PERSON2	Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Accomplishment Match	See how well an employee's accomplishments fit those required for the role.
Gap-Fit Measurement	CM_ROLE_PERSON3	Develop Workforce, Manage Competencies (GBL), Inquire, Role to Person Match, Gap-Fit Measurement	Compares an employee's ratings in each required competency against the rating expected for the role, and calculates the percentage difference. The sum of these percentages gives you an overall indication of how well the employee fits the requirements of the role.

Specifying an Employee and Analyzing Cluster Matches

Access the Role to Person Match - Cluster Match page.

Cluster Match
Competency Match
Accomplishment Match
Gap-Fit Measurement

SetID: SHARE Job Code: KC003 Senior Secretary
EmplID: Griffiths, Martina Rae

Match Analysis

Total Match:	10	out of:	19
Competency Match:	7		16
Accomplishment Match:	3		3

Role Cluster
[View All](#)
First 1 of 1 Last

Cluster	Importance	EE Complete	Competency Cluster
	Average	☒	Competency Cluster

Role to Person Match - Cluster Match page

You must set up the competency profile for the role and the employee to use this inquiry. You must also set up the Match Evaluation Types Setup page for the user ID of the person running the search, to control which evaluations are considered.

EmplID (employee ID) Select an employee.

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

The rest of the fields on this page are identical to the Person to Role Match - Cluster Match page.

See Also

Specifying a Role and Analyzing Cluster Matches

Analyzing Competency Matches

Access the Role to Person Match - Competency Match page.

Cluster Match	Competency Match	Accomplishment Match	Gap-Fit Measurement
SetID: SHARE	Job Code: KC003	Senior Secretary	
EmplID: KC0001	Griffiths, Martina Rae		
Match Analysis			
Competency Match: 7	out of: 16	Competency Match Detail	
Total Competencies: 2	5	Competencies not ranked: 0	
Competencies View All First 1-5 of 5 Last			
Competency	Importance		Training Scheduled
Takes initiative & follows up	Above Avg		☐
HRIS Experience	Above Avg		☐
Customer Service Orientation	Average		☐
Multi-Tasking	Average		☐
Computer Literacy	Below Avg		☐

Role to Person Match - Competency Match page

This page displays details of the role and EmplID that you selected.

The rest of the fields on this page are identical to the Person to Role Match - Competency Match page.

See Also

Analyzing Competency Matches

Viewing Competency Match Details

Access the Competency Match Detail page.

Competency Match Detail

SetID: SHARE **Job Code:** KC003 Senior Secretary
EmplID: KC0001 Griffiths,Martina Rae

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

Competency	Required Pts	EE Review Points	Match
Takes initiative & follows up	4	3	0
HRIS Experience	2	2	4
Customer Service Orientation	3	4	3
Multi-Tasking	3	2	0
Computer Literacy	3	1	0

Competency Match: 7

Return

Competency Match Detail page

This page displays the role and EmplID that you selected, along with the role description and employee's name.

The rest of the fields on this page are identical to the Person to Role Match - Competency Match Details page.

Analyzing Accomplishments

Access the Role to Person Match - Accomplishment Match page.

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
SetID:	SHARE	Job Task:	K10001	Project Management			
EmplID:							
Match Analysis							
Accomplishment Match:	0	out of:	3				
Total Accomplishments:	0	1					
Accomplishment Detail							
View All First 1 of 1 Last							
Accomplishment	Importance	Category	Employee Accomplishment	Post-Graduate Degree	Short Description		
Customer Service Skills	Average	Test	☐				

Role to Person Match - Accomplishment Match page

At the top of this page, the system displays the role and EmplID that you selected, along with the role description and employee's name.

Match Analysis

Accomplishment Match Indicates how many of the employee's total match points are from accomplishments.

Total Accomplishments Lists the number of the employee accomplishments that match the accomplishments required for the role.

Accomplishment

Accomplishment Lists each accomplishment assigned to the role, from highest to lowest importance.

Importance Importance levels are assigned on the Role Accomplishment page or on the Cluster Table.

Category Lists the accomplishment category.

Employee Accomplishment Automatically selected if the employee possesses the accomplishment.

Performing a Gap Analysis on the Role and Employee

Access the Role to Person Match - Gap-Fit Measurement page.

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
SetID:	SHARE	Job Code:	KC003	Senior Secretary			
EmplID:	KC0001	Griffiths, Martina Rae					
Match Analysis							
Total Competencies:	5	Total Points:	12	out of:	15	% Fit:	81.67
Gap-Fit Analysis							
				View All	First	1-5 of 5	Last
Competency	Importance	EE Review Points	Required Points	% Proficiency Deficiency			
Takes initiative & follows up	Above Avg	3	4	75.00			
HRIS Experience	Above Avg	2	2	100.00			
Customer Service Orientation	Average	4	3	133.33			
Multi-Tasking	Average	2	3	66.67			
Computer Literacy	Below Avg	1	3	33.33			

Role to Person Match - Gap-Fit Measurement page

This page displays details of the role and the EmplID you selected. The rest of the fields on this page are identical to the Person to Role Match - Gap-Fit Measurement page.

See Also

Performing a Gap Analysis on the Employee and Role

Matching Teams to Projects

This section describes how to:

- Set up employee teams.
- Analyze team competency matches.
- View team competency details.
- Analyze team accomplishment matches.
- View team accomplishment details.

Pages Used to Match Teams to Projects

Page Name	Object Name	Navigation	Usage
Employee Teams	EE_TEAMS	Develop Workforce, Manage Competencies (GBL), Use, Employee Teams, Employee Teams	Set up employee teams.

Page Name	Object Name	Navigation	Usage
Competency Match	CM_TEAM_ROLE	Develop Workforce, Manage Competencies (GBL), Inquire, Team Match, Competency Match	Compare the competencies assigned to a job task with the competency profiles of team members.
Competency Match Details	CM_TEAM_ROLE_SEC	Click Competency Match Detail on the Competency Match page.	View the team members with the competency at the required proficiency.
Accomplishment Match	CM_TEAM_ROLE2	Develop Workforce, Manage Competencies (GBL), Inquire, Team Match, Accomplishment Match	Compare the accomplishments required by a job task with team members' accomplishments.
Accomplishment Match Detail	CM_TEAM_ROLE2_SEC	Click Accomplishment Match Detail on the Accomplishment Match page.	View a list of the team members with the required accomplishment.

Setting Up Employee Teams

Access the Employee Teams page.

Employee Teams

Team Code: KU01
***Description:** Services - US Southeast
Short Name: Serv US SE

Team Members [View All](#) First 1-5 of 5 Last

*EmpID	Name		
KU0015	Espinosa, Carmichael	+	-
KU0032	Summer, Alice	+	-
KU0033	Osorio, Dominick	+	-
KU0079	Parker, Russell	+	-
KU0080	Sakata, Megumi	+	-

Employee Teams page

Team Members

Add members by selecting from the list of employee IDs.
Insert new rows to add more employees.

Analyzing Team Competency Matches

Access the Team Match - Competency Match page.

Competency Match
Accomplishment Match

Team: System Analysts

Business Unit: GBIBU
Job Task: K10002 Business Process Analysis

Total Points: 7 out of 11

Competency Points: 7 11

Competency Detail				
First 1-3 of 3 Last				
Competency	Importance	Team Competency	Number of Employees	Competency Detail
Analytical thinking	Above Avg	☒	2	Competency Detail
Business Analysis	Above Avg	☐	0	Competency Detail
Conceptual thinking	Average	☒	1	Competency Detail

Team Match - Competency Match page

You must set up the competency profile for the job task and the team members, as well as the employee team. You must also set up the Match Evaluation Types Setup page for the user ID of the person running the search, to control which evaluations are considered.

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

Competency Points Indicates how many of the total points are from competencies.

Team Competency Automatically selected if any member of the team has the competency at the required proficiency.

Number of Employees Lists how many team members have the competency at the required proficiency level.

Competency Detail Click to see which team member has the required competency.

Analyzing Team Accomplishment Matches

Access the Team Match - Accomplishment Match page.

Competency Match		Accomplishment Match	
Team:	System Analysts		
Business Unit:	GBIBU	Job Task:	K10002 Business Process Analysis
Total Points:	7	out of	11
Accomplishment Points:	0		0
Team Accomplishment		View All First 1 of 1 Last	
Accomplishment	Importance	Team Accomplishment	Number of Employees
	Average	☐	Accomplishment Detail

Team Match - Accomplishment Match inquiry page

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

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

Team Accomplishment

Team Accomplishment Automatically selected if any team member has the required accomplishment.

Number of Employees Lists how many team members have the accomplishment.

Accomplishment Detail Click to see which team member has the required accomplishment.

Searching for Job Candidates

This section describes how to search for current employees, current contractors, and job applicants who are qualified to fill a role.

Note. To review employee competencies and see their current roles, run the Competency Inventory report. The report lists workers in a department and profiles their competencies, their proficiency in each competency, and their current roles.

Page Used to Search for Job Candidates

Page Name	Object Name	Navigation	Usage
Competency Search	CM_SEARCH_ALL	Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-All, Competency Search - All	Search for employees, contractors, and applicants who have the competencies and accomplishments required for a selected role.

Competency Search Alternate Navigations

Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-Applicants, Competency Search - Applicants

Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-Contractors, Competency Search - Contractor

Develop Workforce, Manage Competencies (GBL), Inquire, Competency Search-Employees, Competency Search - Employee

Conducting the Search

Access the Competency Search page.

Competency Search - All

SetID: SHARE **Job Code:** KU051 Administrative Assistant

Minimum Competency Match: out of 17

Total Match (with Accomplishments) 23



Competency Search Results					
First 1-8 of 8 Last					
ID	Name	Type	Competency Match	Total Match	Interest Level
KC0001	Griffiths, Martina Rae	Employee	6	6	6
KBA002	De Wilde, Gilles	Ext Appl	4	4	
KU0010	Santos, Antonio	Employee	4	10	10
A0003	Santos, Antonio	Ext Appl	3	3	
KC0021	Davies, Craig R	Employee	3	3	8
KC0032	Smith, Conrad T	Employee	3	3	2
KBA003	Rubens, Camille	Ext Appl	2	2	
KU0036	Religioso, Steve	Employee	2	2	2

Competency Search - All page

You must set up the competency profile for the role to use this inquiry. You must also set up the Match Evaluation Types Setup page for the user ID of the person running the search, to control which employee evaluations are considered.

Minimum Competency Indicate the minimum number of points a candidate must

Match

have to qualify for this position.

Total Match (with Accomplishments)

Shows the maximum number of points possible for the role. This value includes points for required accomplishments.



Click the **Search Type** button to perform the search. Results appear in the **Competency Search Results** group box.

Competency Search Results**ID**

Depending on the inquiry you selected, the system displays the IDs of all employees, contractors, and applicants who meet your minimum requirements and ranks those qualified by Competency Match and Total Match points.

Competency Match

Indicates how many of the employee's total points are from competencies.

Total Match

Shows the employee's total points for competencies and accomplishments.

Interest Level

Indicates the employee's interest in developing the given competency. The value is based on a summary of the employee's interest levels assigned on the Competencies - Competency Rating Page.

CHAPTER 6

Using Competencies to Manage Training

This section provides an overview of using competencies to manage training and discusses how to:

- Assign competencies to training courses.
- Assign competencies to other training options, such as computer-based training.
- Develop training programs for specified job codes.
- Set up personalized training programs for employees.
- Search for courses that address a specified competency.

Understanding Competencies and Training

By assigning competencies to training, you can better match employees to appropriate training options. You can also automatically schedule the courses. And when a course is completed, the system automatically updates the employee's competency profile. You can assign competencies to courses and to other forms of training, such as computer-based programs.

The functionality to manage competencies and training is split between the Manage Competencies and Administer Training business processes. The following table lists Administer Training pages that are also available through the Manage Competencies menu.

Page	Navigation	Usage
Course Table	Develop Workforce, Manage Competencies, Setup, Course Table	Assign competencies when you create courses. Define course information. Identify course prerequisites. Target competencies. Specify standard equipment and materials required to administer courses. After you set up the courses and assign competencies, you can set up training programs and search for courses based on competency.
Training Program Table	Develop Workforce, Manage Competencies, Setup, Training Program Table	Group courses into logical progressions. Associate the training programs with job codes on the Job Code Table page or with projects within the Manage Competencies business process.
Training History	Develop Workforce, Manage Competencies, Use, Training	Track the training employees have taken or plan to take. This includes both in-house course sessions and external courses for employees.

Note. To view a list and descriptions of standard courses already defined in the system, generate the Course Table report (PER703).

See Also

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

PeopleSoft Human Resources PeopleBook: Administer Training, “Tracking Student Training”

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

Managing Competencies with Training

You can track other types of training and search for courses that address specific competencies within the Manage Competencies business process.

Page Used to Assign Competencies to Other Training Options

Page Name	Object Name	Navigation	Usage
Non Course Table Competencies	CM_NON_CRSE_TABLE	Develop Workforce, Manage Competencies (GBL), Setup, Non-Course Training Table, Non Course Table Competencies	Track training that does not involve take a course or attending a class, such as CD-ROM presentations or self-paced training guides.
Competency Training	COMP_TRAINING	Develop Workforce, Manage Competencies (GBL), Inquire, Course Competencies, Competency Training Click Competency Training on the Person to Role Match – Competency Match page	Search for training courses that address a selected competency.

Tracking Other Training

Access the Non Course Table Competencies page.

Non Course Table Competencies

Training ID: KU0003

*Description: Employee Safety Training

Short Description: Safety Trn

*Media Type: Professional Organization

Description: This addresses the principles and practices of multi-casualty management. Attendees will review basic first aid techniques with emphasis on bandaging and splinting.

Target Competencies First 1 of 1 Last

*Competency Description	
1117 Safety Awareness	+

Non Course Table Competencies page

Media Type

Select a media type (such as CD-ROM). These values are stored on the Translate Table page; you can edit them or add more values.

Competency

Add competencies that are developed through this training method. (The competency definitions are accessible through the Competency Table page.)

Searching for Courses

Access the Competency Training page.

Competency Training

Competency: 2001 Computer Literacy

Course Training						View All	First	1-2 of 2	Last
Course	Sessn	Course Dates	Max Studs	Enrolled					
K022	Computer Basics: Using a PC 0001	10/10/2000 10/10/2000	8	0					
K022	Computer Basics: Using a PC 0002	24/10/2000 24/10/2000	8	0					

Non Course Training		View All	First	1 of 1	Last
Other Training	Media Type				

Competency Training page

The system displays courses that are designated for the competency that you selected.



Displays the **Enroll into Course Session** button only when you access this page from the Person to Role Match page. Click to add the selected employee to the waiting list for the course session.

If the worker is already enrolled or waitlisted in the session, a message is displayed.

If the employee is already enrolled or waitlisted in another session of the same course, then the system displays a message and bypasses the waitlist request.

CHAPTER 7

(GBR) Managing National Vocational Qualifications

This section provides an overview of National Vocational Qualifications (NVQs) and discusses how to:

- Set up NVQ information.
- Enroll employees in NVQs and track progress.
- Review NVQ summaries.
- Print NVQ plans for employees.

Understanding NVQs

NVQs reflect the skills, knowledge, and understanding that employees possess, much like competencies. As with other accomplishments, NVQs enable transfer and progression, both within areas of competence and between them.

The national Qualifications and Curriculum Authority (QCA) coordinates the development and specification of NVQ standards. NVQ competence areas derive from a functional analysis of business roles and provide structure for competence-based qualifications. The qualifications are unit-based; the number and size of units varies between areas of competence. A unit is achieved when an enrolled employee is assessed as having competent skills and knowledge.

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

- Tending animals, plants, and land.
- Extracting and providing natural resources.
- Constructing.
- Engineering.
- Transporting.
- Providing health, social, and protective services.
- Providing goods and services.

- Manufacturing.
- Providing business services.
- Developing and extending knowledge and skill.
- Communicating.

NVQ competence levels include the following:

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

Several organizations develop, deliver, award, and preserve the quality of NVQs:

- *Lead bodies* identify, define, and update employment-based standards of competence for groups of occupations.
- *Awarding bodies* also develop NVQ standards. Additionally, they monitor the assessment process and award NVQs and unit certificates. They verify that employees are assessed fairly and consistently across all assessment centers.

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

Setting Up NVQ Information

This section describes how to:

- Define NVQ awarding bodies.
- Define NVQ units.
- Create NVQ codes and assign awarding bodies.
- Specify units for NVQs.

Pages Used to Set Up NVQ Information

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Awarding Body	NVQ_AWARD_TBL	Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - Award Body Table, NVQ Award Body Table	Define NVQ awarding bodies.
Units and Elements	NVQ_UNITELEMENTS	Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - Unit/Element Table, NVQ Units/Elements	Define NVQ units.
NVQ Details	NVQ_DETAILS	Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - NVQ Table, NVQ Details	Create NVQ codes and specify awarding bodies for each NVQ. You must set up codes for the NVQ awarding bodies to use this page.
NVQ Units	NVQ_NVQUNITS	Develop Workforce, Manage Competencies (GBL), Setup Lcl, UK NVQ - NVQ Table, NVQ Units	Specify the units that make up the specified NVQ. You must set up NVQ unit codes to use this page.

Defining NVQ Units

Access the Units and Elements page.

Units and Elements

Unit: COMM_SYS

Title: Communication Systems

*Number	*Element Title		
1	Organise allocation and despatch of mail	+	-
2	Use the telephone system to the full	+	-
3	Transmit and receive information using electronic equipment	+	-

Units and Elements page

Title Enter a title for the competency unit.

Element Each unit is divided into elements, which have an independent value within the relevant NVQ area.

Enter the elements that make up the unit (this information is provided by the NVQ).

Each unit is also listed in the Competency table, so that you can monitor units just like any other competency.

Creating NVQ Codes and Assigning Awarding Bodies

Access the NVQ Details page.

NVQ Details NVQ Units

NVQ: HRADMIN

Title: Human Resources Administration **Level:** 5

Expiry Date: 01/01/2001

Accreditation

*Reference	*Awarding Body		
Q1025725	BTEC	Edexcel BTEC	+ -
Q1019898	CG	City and Guilds of London Institute	+ -

NVQ Details page

Title	Enter the title as specified by the NVCQ.
Expiry Date	Enter the date on which current NVQ details will be reviewed by the awarding bodies.
Awarding Body and Reference	Select one or more awarding bodies. Enter the corresponding reference numbers for each one as provided by the NVCQ.

Specifying Units for NVQs

Access the NVQ Units page.

NVQ Details NVQ Units

NVQ: HRADMIN

Title: Human Resources Administration **Level:** 5

Units Required

Number	*Unit	Title	Optional	
1	PERSMAN	Personnel Management	☐	+ -
2	PERSSTR#	Personnel Strategy	☐	+ -
3	TRAINEV	Training and Development	☒	+ -

NVQ Units page

Units Required	Select units to complete the selected NVQ. Enter their associated numbers.
-----------------------	--

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

Enrolling Employees in NVQs and Tracking Progress

This section describes how to:

- Enter data for employees registered for an NVQ.
- Monitor employee progress through NVQs.
- Create NVQ training plans for employees.
- View unit details.
- View element details.

Pages Used to Enroll Employees and Tracking Progress

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee NVQs	NVQ_EMPLNVQS	Develop Workforce, Manage Competencies (GBL), Use Lcl, UK NVQ - Enroll NVQ, Employee NVQs	Record details of employees who have registered for an NVQ course. You must set up the NVQ Table - NVQ Details Setup page to use this page.
Review NVQ	NVQ_REVIEW	Develop Workforce, Manage Competencies (GBL), Use Lcl, UK NVQ - Track NVQ, NVQ Review	Review employee progress through NVQs.
Plan NVQ Units	NVQ_UNIT_PLAN	Develop Workforce, Manage Competencies (GBL), Use Lcl, UK NVQ - Track NVQ, NVQ Unit Plan	Set up an overall plan of the NVQ units that the employee will take and view the elements that make up the units. You must set up the NVQ Table and NVQ Units and Elements to use this page.
Unit Detail	NVQ_UNIT_PLAN_SEC	Click Detail on the Plan NVQ Units page.	Record the date when the employee is expected to start the unit, and actual start and completion dates.

Page Name	Object Name	Navigation	Usage
Element Detail	NVQ_EMPLELEM_SEC	Click Detail on the Unit Detail page.	Enter the date when the employee is expected to start the element, and actual start and completion dates.

Entering Employee NVQ Data

Access the Employee NVQ page.

Employee NVQs

O'Flaherty, Seamus Patrick Employee ID: KG0005

NVQ Tracking [View All](#) First 1 of 1 Last

*NVQ: ADMIN_1 Level: 1

Title: Business Administration

Status: Achieved

Start: 06/01/1999 Completed: 09/01/1999 Certificate Award Date: 10/01/1999

Registration Details

Registration Date: 06/07/1999

Registration Number: 123ABC

NVQ

Employee NVQs page

Status

Select the status that reflects the employee's progress with this NVQ. Valid values are *Enrolled*, *Achieved*, *Cancelled*, or *Prior Achievement*.

Registration Details

Enter the registration date and number.

Tracking Employee Progress

Access the Review NVQ page.

Review NVQ Plan NVQ Units

O'Flaherty, Seamus Patrick ID: KG0005

NVQ: Business Administration **Level:** 1

Status: Achieved

NVQ Tracking View All First 1 of 1 Last

***Review Date** 09/01/1999 **Type** Review **Reviewer** KG0002 Hopkins, Dewi

Description: Successful Review.

Review NVQ page

Review Date Enter the next review date.

Type Select a review type.

Reviewer Select a reviewer.

Description Enter comments here.

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

Creating an NVQ Training Plan

Access the Plan NVQ Units page.

Review NVQ Plan NVQ Units

O'Flaherty,Seamus Patrick ID: KG0005

NVQ: Business Administration **Level:** 1

Status: Achieved

NVQ Tracking View All First 1 of 1 Last

Review Date: 09/01/1999 + -

Unit	Title	Optional	Status	Detail
1 ADMIN_1	Office Resource Administration	☐	Completed	Detail + -
2 FILING	Researching and Retrieving Information	☐	Completed	Detail + -
3 H&S	Health & Safety At Work	☒	Not Started	Detail + -

Plan NVQ Units page

Unit

Select a unit that the employee wants to take, is taking, or has taken.

When you navigate out of the field, the **Optional** box is automatically selected if the unit isn't mandatory.

Detail

Click to view the elements associated with the unit and to enter actual or anticipated start and completed dates for the unit.

Reviewing NVQ Summaries

This section describes how to view the two available types of NVQ summaries:

- All NVQs associated with an employee.
- All employees associated with an NVQ.

Pages Used to Review NVQ Information

Page Name	Object Name	Navigation	Usage
NVQ Summary 1	NVQ_SUMMARY1	Develop Workforce, Manage Competencies (GBL), Inq Lcl, UK NVQs - by Employee	View all NVQs associated with an employee.

Page Name	Object Name	Navigation	Usage
NVQ Summary 2	NVQ_SUMMARY2	Develop Workforce, Manage Competencies (GBL), Inq Lcl, UK NVQs - by Qualification	View the employees associated with an NVQ.

Reviewing the NVQs Associated With an Employee

Access the NVQ Summary 1 page.

NVQ Summary 1

O'Flaherty,Seamus Patrick
ID: KG0005

NVQ: Business Administration
Level: 1

Status: Achieved

View Options

[All](#)
[Completed](#)
[Submitted](#)
[In Progress](#)
[Planned](#)
[Remaining](#)

NVQ Tracking

Unit	Competency	Status	Started	Planned	Submitted	Completed	Optional
1	ADMIN_1	Completed					☐
	Office Resource Administration						
2	FILING	Completed					☐
	Researching and Retrieving Information						
3	H&S	Not Started					☒
	Health & Safety At Work						

NVQ Summary 1 page

The system lists all the NVQ units sorted by status and date. Click a view option to view only units of a given status.

Reviewing All Employees Associated With an NVQ

Access the NVQ Summary 2 page.

NVQ Summary 2

NVQ: Business Administration **Level:** 1

View Options

[All](#) [Enrolled](#) [Achieved](#) [Prior](#) [Cancelled](#)

NVQ Tracking

EmplID		Status	Started	Completed
KG0005	O'Flaherty,Seamus Patrick	Achieved	01/06/1999	01/09/1999

NVQ Summary 2 page

The system lists all the employees associated with this NVQ, sorted by status and date. Click a view option to see only those employees with a given status.

Printing NVQ Plans for Employees

To print an employee's NVQ plan:

1. Run the Initialize Plan process.
2. Run the Employee Plan report.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports"

Page Used to Print NVQ Plans for Employees

Page Name	Object Name	Navigation	Usage
NVQ005	RUNCTL_NVQ005	Develop Workforce, Manage Competencies (GBL), Proc Lcl, UK NVQ - Initialize Plan, Run Control	Run the Initialize Plan process for a selected employee. This SQR process must be run to generate the UK NVQ – Employee Plan report.

Running the Initialize Plan Process

Access the NVQ005 page.

NVQ005

Run Control ID: 01

Language: English

Report Request Parameter(s)

EmplID: KG0005

O'Flaherty, Seamus Patrick

[Report Manager](#) [Process Monitor](#) [Run](#)

NVQ005 page

Language

Automatically populated based on the run control ID that you selected.

Override the default language if necessary.

See Also

PeopleTools PeopleBook: Process Scheduler

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