

PeopleSoft®

PeopleSoft 8.8
eRecruit Manager Desktop
PeopleBook

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eRecruit Manager Desktop PeopleBook
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, 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.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</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.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID 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.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, 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.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access 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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft eRecruit Manager Desktop Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft eRecruit Manager Desktop PeopleBook* provides you with implementation and processing information for your PeopleSoft eRecruit Manager Desktop system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, 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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft eRecruit Manager Desktop

This chapter provides an overview of PeopleSoft eRecruit Manager Desktop business processes and discusses PeopleSoft eRecruit Manager Desktop implementation tasks.

PeopleSoft eRecruit Manager Desktop Business Processes

PeopleSoft eRecruit Manager Desktop supports the following business processes:

- Job requisition administration
- Job posting administration
- Applicant search
- Applicant processing
- Interview organization
- Applicant checking
- Job offer management

We cover these business processes in the business process chapters in this PeopleBook.

Implementing PeopleSoft eRecruit Manager Desktop

The eRecruit Manager Desktop table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- eRecruit Manager Desktop application tables.
- Additional eRecruit Manager Desktop application tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences.

Note. The order in which you set up tables required to implement PeopleSoft eRecruit Manager Desktop may vary; each individual application isn't necessarily set up in sequence. For example, you may set up core Human Resources tables, then tables for eRecruit Manager Desktop, then several tables specific to the country or industry you operate in, followed by additional eRecruit Manager Desktop core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft eRecruit Manager Desktop requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the eRecruit Manager Desktop setup.

Step	Reference
1. □ Set up PeopleSoft HRMS fundamental tables. □	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , “Getting Started With PeopleSoft HRMS”

Setting Up Core PeopleSoft eRecruit Manager Desktop Tables

The steps discussed in this section suggests an order in which you define the information in your core eRecruit Manager Desktop tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Job requisition administration
- Applicant search
- Applicant processing
- Interview organization
- Job offer management

Step	Reference
1. Set up the Recruit Workforce business process.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce</i> , “Getting Started With PeopleSoft Human Resources: Recruit Workforce”
2. Set up Search for Applicant transaction.	Chapter 3, “Setting Up eRecruit Manager Desktop.” Setting Up the eRecruit Manager Installation Options, page 11

Setting Up Additional PeopleSoft eRecruit Manager Desktop Tables

These steps define information in additional eRecruit Manager Desktop tables. The information that you define in your core tables lays the foundation for this additional setup.

Setting up these additional tables prepares your system to support these business process:

- Job posting administration
- Applicant checking

Step	Reference
1. If you're integrating with RecruitUSA, set up the merchant profile pages, define the merchant URL, and define your merchant accounts.	<u>Chapter 3, "Setting Up eRecruit Manager Desktop," page 11</u>
2. If you're integrating with HireRight, set up the merchant profile pages, define the merchant URL, and define your merchant accounts.	<u>Chapter 3, "Setting Up eRecruit Manager Desktop," page 11</u>

CHAPTER 2

Understanding eRecruit Manager Desktop

This chapter discusses:

- The components of eRecruit Manager Desktop.
- PeopleSoft eRecruit Manager Desktop integrations.
- Moving around eRecruit Manager Desktop.
- Roles and security.

Understanding eRecruit Manager Desktop Components

PeopleSoft eRecruit Manager Desktop comprises self-service transactions for these recruitment activities:

- Administering job requisitions.

Hiring managers and recruiters can create job requisitions, view job postings, and view job requisition status. In partnership with RecruitUSA, PeopleSoft enables your managers and recruiters to post jobs to multiple online job boards through one easy to use interface.

- Processing applicants.

At the selection stage, the Search for Applicants self-service transaction enables managers and recruiters to look for applicants that meet their job requirements and link them to their requisitions. Using Requisition Detail, the manager or recruiter can review the applicants linked to a requisition at each stage in the recruitment process. Other transactions are used to review applicant references and view questionnaire results.

- Organizing interviews.

PeopleSoft eRecruit Manager Desktop includes transactions for managers and recruiters to select applicants for interview, schedule interviews, view interviewers' evaluations, and make final recommendations.

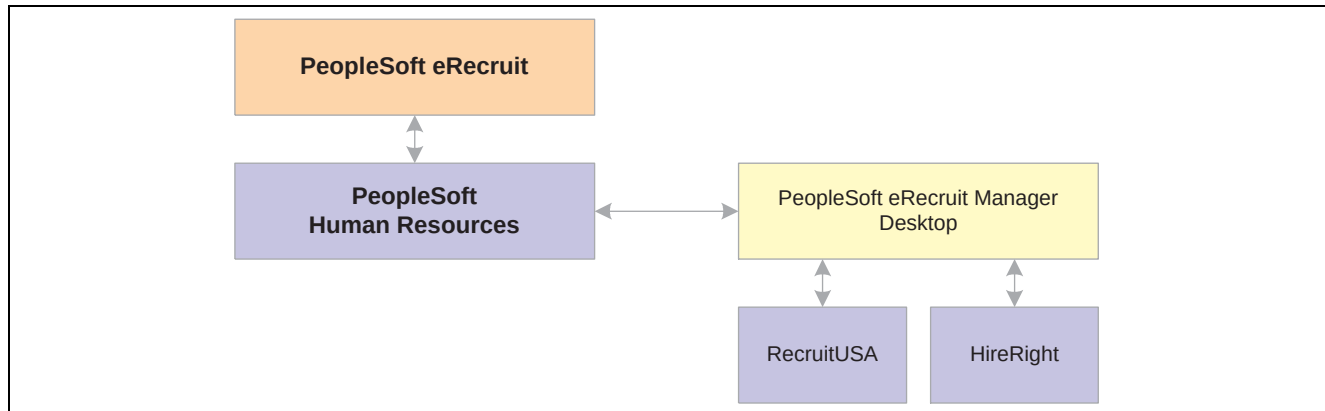
- Hiring applicants.

After managers and recruiters have selected applicants to fill their openings, they can request pre-employment checks on applicants. By integrating your system with HireRight, managers and recruiters can request a variety of checks on external applicants, such as reference checking or assessment tests. Managers and recruiters can also enter job offers, approve job offers, and prepare for new hires.

You can integrate PeopleSoft eRecruit Manager Desktop with PeopleSoft eRecruit, which provides a robust suite of Web-enabled transactions for internal and external applicants.

PeopleSoft eRecruit Manager Desktop Integrations

PeopleSoft eRecruit Manager Desktop integrates with the following applications:



PeopleSoft eRecruit Manager Desktop integration flow with other applications

We cover integration considerations in this PeopleBook.

Moving Around eRecruit Manager Desktop

There are two ways to access the eRecruit Manager Desktop self-service transactions:

- Manager homepage
- Standard menu navigation path

Homepage

The homepage presents a simple user interface design and direct navigation for the end user.

Manage Recruiting Activities Home



Requisitions

Create and post new job requisitions, or view the activity and status of existing ones.

[Create Job Requisition](#)

[Clone Requisition](#)

[Review Requisition Status](#)

[Review Job Postings](#)

[Post Requisitions to Internet](#)

[Maintain Requisition Activity](#)



Applicants

Find applicants by searching the database and saving your results. Review the search results by job requisition or by search criteria that you have specified and saved. Search for applicants on the internet, or link an applicant to a job requisition.

[Search for Internal Applicants](#)

[Review Search Results by Requisition](#)

[Review Results by Search Name](#)

[Search Internet For Applicants](#)

[Link Requisition to Applicant](#)

eRecruit Manager Desktop homepage (1 of 2)



Interviews

Select and schedule applicants to interview, or view your interview schedule or the team's schedule. Complete an interview evaluation form for a recently interviewed applicant, or review the questionnaire results for an applicant.

[Select Applicants for Interview](#)

[Schedule Interview](#)

[Review Interview Calendar](#)

[View Interview Team Calendar](#)

[Create Interview Evaluations](#)

[Review Interview Evaluation](#)

[Review Questionnaire Results](#)



Hire Preparation

Perform a pre-employment or background check, review references, prepare a job offer, or prepare for an employee's first day at work.

[Request Pre-Employment Requests](#)

[Review References](#)

[Prepare Job Offer](#)

[Approve Job Offer](#)

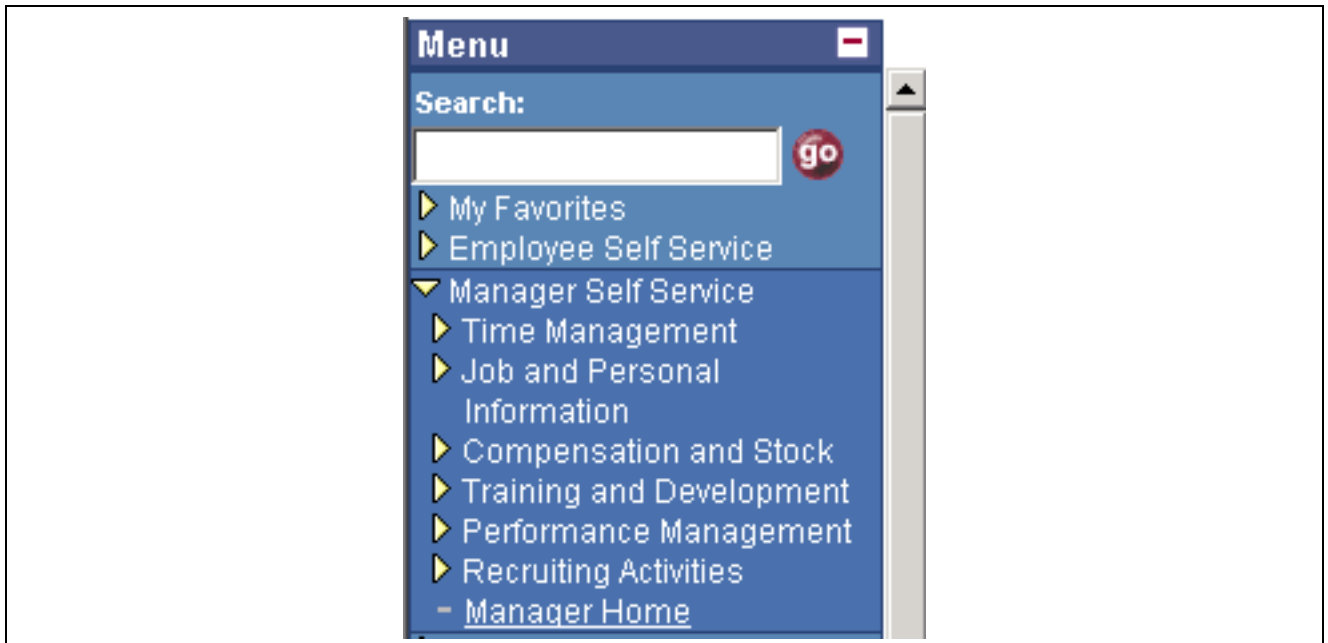
[Review Job Offer](#)

[Prepare for New Hire](#)

eRecruit Manager Desktop homepage (2 of 2)

Standard Menu Navigation

The standard menu driven navigation path is the traditional PeopleSoft access method. Menu navigation is used throughout this PeopleBook to describe how to access a page.



Standard navigation path

Understanding Roles and Security

User roles and security determine:

- The self-service transactions that users can access.
- The information that users can view.

Self-service transactions are targeted to specific roles, such as manager and recruiter.

User profiles determine default access to transactions. You create user profiles on the Maintain Security page in the User Profile component. You assign a role to each user profile.

Profiles are linked to access control lists. Each access control list identifies the pages that users can access. To modify access to specific Web pages for each role, you modify the access control list.

You also define which data the user can access in the user profile.

Setting Up Approvals Workflow for Self-Service Transactions

Many self-service transactions are designed to take advantage of workflow functions. The most common of these is approvals workflow. Approvals workflow processes situations where a request, such as a job requisition request, is submitted by a manager.

Approvals workflow routes this request to one or more people who must approve or deny the request. If an approver approves the request, the system routes the request to the next approver. If the request is denied, the request is not routed any further, and the system notes that the request was denied.

Managers can view the approval status of some types of requests with the help of self-service transactions that have been designed to display this status.

CHAPTER 3

Setting Up eRecruit Manager Desktop

This chapter describes how to set up:

- eRecruit installation parameters.
- Recruit USA
- HireRight

Setting Up the eRecruit Manager Installation Options

This section describes how to set up the various parameters for eRecruit Manager Desktop.

Page Used to Set Up the eRecruit Manager Homepage

Page Name	Object Name	Navigation	Usage
eRecruit Installation Options	ER_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, eRecruit Installation	Define parameters for your recruitment applications.

Defining System Parameters

Access the eRecruit Installation Options page.

eRecruit Installation Settings

Last Assigned Ids	
Last Duplicate Set Id:	
Last Applicant Id Assigned:	58
Last Registration Id Assigned:	218
Last Resume Number Used:	
Last Job Requisition # Used:	290067
Last Referral Track Id:	2

Apply for Job Self Service	
Apply On-Line URL:	
Job Search Agent Results URL:	
Resume Template Id:	RESUME_TMPL_DEF
Days Job Search Agent Active:	999 ☐ Auto Populate

eRecruit Installation Options page (1 of 2)

Resume Processing Configuration		Find View All	First	1 of 1	Last
*Resume Language:	US English	☒ Default			
*Root Directory (Process Scheduler):	C:\RESUME_PROCESSING\EN-US				
*Root FTP site:	RP_ROOT_FTP_EN-US				
*Extractor FTP site:	RP_EXTRACTOR_FTP_EN-US				
Auto Populate Extractor FTP:					
Confidence Threshold:	Medium				

Resume Processing Queue	
☒ Validate Work Experience	☒ Validate Education

Pre-Employment	
☐ Show Adjudication	☒ View Results

eRecruit Installation Options page (2 of 2)

Last Assigned IDs

Use these fields to specify the number that the system uses to start assigning IDs for various recruitment records. This group box is fully documented in the PeopleSoft Human Resources – Recruit Workforce PeopleBook.

Apply for Job Self Service

This group box is used by the Apply for Job transaction in eRecruit and is fully documented in the PeopleSoft eRecruit PeopleBook.

Resume Processing Configuration

This group box is used if you have purchased PeopleSoft Resume Processing. It defines various parameters necessary for Resume Processing. This group box is fully documented in the PeopleSoft Resume Processing PeopleBook.

Pre-Employment

Complete the following fields for eRecruit Manager Desktop.

Show Adjudication

If you have integrated your system with HireRight, select this check box to make the Meets Standards check box visible to managers, recruiters, and recruiting administrators.

View Results

If you have integrated your system with HireRight, select this check box to make the View Results button on the Pre-Employment Requests page visible to managers, recruiters, and recruiting administrators.

The View Results button takes the user to a detailed page of the pre-employment inquiry at HireRight's site.

Setting Up RecruitUSA

This chapter discusses setting up RecruitUSA. RecruitUSA enables you to post jobs to multiple job boards through one easy to use interface.

Prerequisites

Enter into a contractual agreement with RecruitUSA. Establish account names and get a URL address.

Pages Used to Set Up RecruitUSA

Page Name	Object Name	Navigation	Usage
Merchant Profile	MERCHANTID	Set Up HRMS, Common Definitions, Merchant Profile	Enter detailed information about the supplier.
Merchant Category	MERCHANTCAT	Set Up HRMS, Common Definitions, Merchant Profile, Merchant Category	Enter detailed information about the supplier.
Create Merchant Accounts	MERCHANT_ACCT	Set Up HRMS, Common Definitions, Create Merchant Account	Enter detailed information about the supplier.
Account Setup Details	MERCHANT_ACCT_DTL	Click the Details link on the Create Merchant Accounts page	Select the business units, regulatory regions, or companies for the account.
User Override	MERCHANT_ACCT_OVRD	Click the Override link on the Create Merchant Accounts page.	Select the user (operator) IDs of the users who will use the merchant account.

Activating RecruitUSA as a Supplier

To activate RecruitUSA:

1. Access the Merchant Profile page and select RecruitUSA.
The system populates the RecruitUSA data in the component.
2. Enable RecruitUSA transactions on the Merchant Profile page.
 - a. On the Merchant Profile page, select the Merchant Enabled check box.
 - b. On the Merchant Category page, enter the following information:

Field	Enter
Merchant Category	JOBBOARD
Merchant Website URL	Enter the URL you received from RecruitUSA.

3. Define the URLs for the PSFT_HR node.
 - a. PeopleTools, Utilities, Use, URL Maintenance.
 - b. Add a URL identifier of your choice.
 - c. In the URL field, enter the URLs that acts as the gateway for the PSFT_HR node in your organization's system.

This is the destination for RecruitUSA to post back to. There may be multiple URLs depending on how many web servers have a gateway configured for the PSFT_HR node. Enter each of these in this page.

4. Associate accounts with RecruitUSA on the Create Merchant Accounts page.
5. Define the URL for the Apply for Job self-service transaction.
 - a. Select PeopleTools, Utilities, Use, URL Maintenance.
 - b. Add a URL identifier of your choice.
 - c. In the URL field, enter the URL for the page on your organization's internet website where external applicants can access the Apply for Job self-service transaction.

The URL is sent to RecruitUSA for inclusion in your posting to online job boards. Applicants viewing the job board use this URL to apply online for the position.

6. Add the Apply for Job URL to the eRecruit Installation Options page.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Tools and Utilities, "Merchant Integration" Maintaining Merchant Information

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," URL Maintenance

Setting Up RecruitUSA Accounts

Access the Create Merchant Accounts page.

Create Merchant Accounts

Merchant ID: HIRERIGHT HireRight

Find | View All First 1 of 1 Last

*Effective Date: 01/01/2001

Account Set-Up Type

☒ All ☐ Business Unit ☐ Regulatory Region ☐ Company ☐ User

Account Name	Description	URL Identifier	Auth Token	Confirm
ACCT1	ACCOUNT1	XTNT13_81		

Create Merchant Accounts page

Merchant ID

This is the supplier. For eRecruit Manager Desktop, there are two merchants you can integrate with, RecruitUSA and HireRight.

Account Set-Up Type

The account that the system uses to log users into HireRight or RecruitUSA can be the same for all job requisitions and users, or you can associate accounts with:

- Business units, regulatory regions, or companies. The system uses job requisition data to determine which business unit, regulatory region, or company applies.
- User IDs.

If the account is used for all job requisitions, select All.

Otherwise, select one of these options: Business Unit, Regulatory Region, or Company and click the Details or Override link.

Merchant Accounts**Account Name**

Enter the name of the account you set up with the merchant. The name must match exactly the account name that you agreed with the merchant.

Note. Before you delete any accounts on this page, be sure the account is not associated with an open requisition.

URL Identifier

Select the URL identifier that you used on the URL Maintenance page to set up your application message gateway URLs for the PSFT_HR node.

Details

Click to access the Account Set-Up Details page where you select the business units, regulatory regions, or companies for the account.

Override

Click if you want specific users to use the account regardless of the job requisition's attributes. The system displays the User Override page IDs where you select the user (operator) IDs.

Note. HireRight accounts must exist before you can access the HireRight website from PeopleSoft eRecruit Manager Desktop.

Setting Up HireRight

This section discusses how to set up HireRight as a supplier. HireRight enables you to make pre-employment checks.

Prerequisites

To begin you must enter into a contractual agreement with HireRight and:

1. Establish account names.
2. Receive a HireRight URL.
3. Establish whether you want automatic sign on.

Automatic sign on is set up by HireRight. If you enable this option, managers and recruiters with access to eRecruit Manager Desktop can access the HireRight website, provided you have created your merchant accounts (see step 4).

If you do not use automatic sign on, HireRight creates a user account for each person who will access the website from your organization. Only users authenticated by HireRight are logged into the HireRight site.

4. Establish the user ID that has HR Manager access to HireRight's website.

When users log into HireRight's site with HR Manager access, they can update the privileges of other users within your organization.

Activating HireRight as a Supplier

To set up pre-employment checks:

1. Enable HireRight transactions on the Merchant Profile page.
 - a. Select PeopleTools, Utilities, Use, Merchant Profile, and select HireRight.
 - b. The system populates the HireRight data in the component.
 - c. On the Merchant Profile page, select the Merchant Enabled check box.
 - d. On the Merchant Authentication page, complete these fields, Company ID, Company Authentication Token, and Merchant Website URL.
 - e. On the Merchant Category page, complete the Merchant Website URL.

2. Define the URL identifier for the gateway.

This is the URL used to transfer status updates and expense information from HireRight to PeopleSoft.

3. Enter details of your HireRight accounts on the Create Merchant Accounts page.
4. Set up Pre-Employment Requests on the eRecruit Installation Options page.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Tools and Utilities, “Merchant Integration”

Chapter 3, “Setting Up eRecruit Manager Desktop,” Pages Used to Set Up RecruitUSA, page 13

Chapter 3, “Setting Up eRecruit Manager Desktop,” Defining System Parameters, page 11

Setting Up AIRS SearchStation

This chapter discusses setting up AIRS SearchStation. AIRS SearchStation enables you to search various job boards for qualified applicants.

Prerequisites

Enter into a contractual agreement with AIRS SearchStation. Establish account names and get a URL address.

Pages Used to Set Up AIRS

Page Name	Object Name	Navigation	Usage
Create Merchant Accounts	MERCHANT_ACCT	Define Business Rules, Administer Suppliers, Use, Create Merchant Accounts	Enter details of your organization’s accounts. PeopleSoft uses these account details when logging users into the AIRS SearchStation website.
Account Users	MERCHANT_ACCT_OVRD	Click the Users link on the Create Merchant Accounts page	Select the users who will use the AIRS account.

Setting Up AIRS

To set up AIRS:

1. Enter into a contractual agreement with AIRS.
2. Enter details of your AIRS SearchStation accounts on the Create Merchant Accounts page.
3. Set up the email address that AIRS SearchStation will use to send applicant resumes to your organization.

To load an applicant into your PeopleSoft database, AIRS SearchStation sends an email with the applicant’s resume to the Resume Processing email account. To set up the email address in the AIRS SearchStation system:

- a. Navigate to the AIRS SearchStation website and log into your organization’s account using the Search Internet for Applicants. Click the Signon to AIRS SearchStation link.
- b. Click the Preferences link and enter the Resume Processing email address. This address is set up during installation of Resume Processing. Refer to the PeopleSoft Resume Processing and the Mohomine Resume Extractor installation guides for further information.

If you have multiple AIRS accounts, set up each account with the same email address.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Tools and Utilities, “Merchant Integration”

PeopleSoft Human Resources PeopleBook: Recruit Workforce, “Setting Up Recruit Workforce,” Defining System Parameters

Setting Up AIRS

Access the Create Merchant Accounts page.

Create Merchant Accounts

Merchant ID: AIRS AIRS SearchStation

Find | View All First 1 of 1 Last

*Effective Date: 01/01/2002 [Calendar Icon] [+] [-]

Account Set-Up Type

☒ All ☐ User

Merchant Accounts

*Account Name	Description	URL Identifier	Auth Token	Confirm
rwagner	PeopleSoft Test Acct	XTNT13_81	*****	*****

Create Merchant Accounts page

Merchant ID Select *AIRS*.

Account Set-Up Type Select one of these options:

All: Select if the same AIRS account is used by all your managers and recruiters.

User: Select if the AIRS account is restricted to specific user IDs. When you select this option, the system displays the Users link.

Merchant Accounts

Account Name Enter the name of the account you set up with AIRS. The name must match exactly the account name that you agreed.

URL Identifier Leave this field blank.

Auth Token (authentication token) Enter the password for your AIRS account. AIRS uses this to authenticate the account when the user signs on to the AIRS SearchStation website.

Confirm Enter the same authentication token again to confirm it.

Users Click to access the Account Users page where you select the users who will use the account.

Note. AIRS must set up your accounts before you can access the AIRS SearchStation website from PeopleSoft eRecruit Manager Desktop or the Recruit Workforce business process.

CHAPTER 4

Creating and Posting Job Requisitions

This chapter provides an overview of creating and posting job requisitions and describes how to:

- Create job requisitions.
- View job requisition status.
- Post job requisitions.
- View job postings.

Understanding Job Requisitions

There are two ways to create job requisitions:

- Using the Create Job Requisition transaction.
- Using the Clone Job Requisition transaction.

Note. The Clone Job Requisition is discussed fully in the PeopleSoft Human Resources-Recruit Workforce PeopleBook.

Managers and recruiters can create job requisitions, view the job postings and status of requisitions, and post the requisitions to online job boards.

Job requisitions contain full details of the job opening, including a job description, details of the standard hours and working pattern, and the qualifications and competencies required.

Hiring managers, recruiters, and recruiting administrators create job requisitions. Recruiting administrators use Job Requisition Data, which is included in PeopleSoft Human Resources. This gives recruiting administrators access to all job requisition fields and screening details.

The Create Job Requisition transaction provided in eRecruit Manager Desktop is similar to the Job Requisition Data page, giving managers and recruiters access to a subset of the job requisition fields. The key differences between the self-service transaction and Job Requisition Data are as follows:

- Salary plan and grade.

Self-service users cannot assign the salary plan and grades to a requisition.

- Screening criteria.

To simplify the transaction, self-service users can set up one type of screening only, whereas recruiting administrators can define Preliminary and Final screening requirements.

- Status changes.

Changes to approval status and the requisition status are processed automatically for self-service users, whereas recruiting administrators can manually update status.

- Workflow approval.

Workflow is provided with the self-service transaction for approving job requisitions. After a job requisition is created, it is forwarded to the authorizer and then the recruiter for approval.

You configure the Create Job Requisition self-service transaction using the Requisition Options page, to omit pages that aren't applicable to your organization and specify the ordering of the pages.

Prerequisites

To set up the Create Job Requisition self-service transaction:

1. Create your requisition template.

The pages and the order in which those pages display is determined by the templates you create.

2. Define those people who can approve job requisitions and the roles a recruiter can hold.

See Also

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Creating Recruitment Templates"

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Setting Up Recruit Workforce"

Creating Job Requisitions

This section provides a list of the pages used by recruiters and managers to create a job requisitions. Remember, the pages that hiring managers and recruiters actually see and the order of those pages is determined by the templates you set up for your organization.

Pages Used to Create Job Requisitions

Page Name	Object Name	Navigation	Usage
Create Job Requisition	HR_DEV_REQ_LAUNCH	Manager Self Service, Recruiting Activities, Job Requisitions/Postings, Create Job Requisition	Lists the manager or recruiter's current open requisitions. Users can select a requisition to update, or click the Add button to create a new requisition.

Page Name	Object Name	Navigation	Usage
Choose Recruitment Template	ER_REQ_REC_TMPLT	Click Add a New Job Requisition from the Create Job Requisition page.	Managers and recruiters select a recruitment template that defines which pages are included in the Create Job Requisition transaction and the ordering of the pages.
Requisition Job Information	HR_REQ_JOBINFO_MGR	Click Continue from the Create Job Requisition: Choose Recruitment Template page. Click an existing job requisition from the Create Job Requisition page.	Managers and recruiters set up basic job information, such as position or job code, regulatory region, business unit, and number of job openings.
Federal Job Requisition Information	GVT_HR_REQ_JBINMGR	Click Continue from the Create Job Requisition: Choose Recruitment Template page. Click an existing job requisition from the Create Job Requisition page.	For U.S. Federal government installations. Managers and recruiters set up set up basic job information, such as position and job code, business unit, locations and number of job openings, and employment conditions.
Requisition Authorization	HR_REQ_AUTH_MGR	Click the Next link.	Used to specify the people responsible for creating the requisition, authorizing the requisition, and recruiting for the position.
Minimum Job Requirements	HR_REQ_MINJOB_MGR	Click the Next link.	Managers and recruiters specify basic requirements of the job, such as whether the job is part-time or full-time, regular or temporary, and the standard working hours. For each of these basic requirements, managers and recruiters specify whether a requirement is mandatory.
Federal Minimum Requirements	GVT_HR_REQ_MINJMGR	Click the Next link.	For U.S. Federal government installations. Managers and recruiters enter a desired start date and specify any restrictions on recruiting such as citizenship status required, minimum and maximum age, and gender.
Desired Education and Experience	HR_REQ_EDUCEXP_MGR	Click the Next link.	Used to specify the education and work experience required for the job. Managers and recruiters can define multiple combinations of work experience and education levels.

Page Name	Object Name	Navigation	Usage
Desired Accomplishments	HR_REQ_ACCOMP_MGR	Click the Next link.	Used to define the accomplishments required for the job requisition.
Accomplishments Transfer - Default Accomplishments	HR_REQ_SELECT_ACCM	Click the Select from Default Accomplishment link from the Desired Accomplishments page.	Managers and recruiters can view and copy accomplishments set up for the selected position or job code.
Federal Desired Accomplishments	GVT_HR_REQ_ACMPMGR	Click the Next link.	For U.S Federal government installations. Used to define the accomplishments required for the job requisition.
Screening Questions	ER_REQ_PRE_QUES	Click the Next link.	Used to select the screening questions that are associated with the requisition. When applicants apply online, they answers the questions listed here and their scores are used in requisition screening. Note. You can only define screening questions if you have installed PeopleSoft eRecruit.
Desired Competencies	HR_REQ_COMP_MGR	Click the Next link.	Used to define the competencies required for the job requisition.
Federal Desired Competencies	GVT_HR_RQ_COMP_MGR	Click the Next link.	For U.S Federal government installations. Used to define the competencies required for the job requisition.
Competencies Transfer - Default Competencies	HR_REQ_SELECT_COMP	Click the Select from Default Competencies link on the Desired Competencies page.	Managers and recruiters can view and copy competencies set up for the selected position or job code.
Requisition Posting Information	HR_REQ_POSTINF_MGR	Click the Next link.	Lists the posting descriptions for the requisition.
Posting Description Detail	HR_REQ_POSTDS_MGR	Click the Edit or Add a New Posting Description from the Requisition Posting Information page.	Managers and recruiters add posting descriptions for the requisition.
Federal Posting Description Details	GVT_HR_REQ_PSTDMGR	Click the Next link.	For U.S Federal government installations. Managers and recruiters add posting descriptions for the requisition.
Requisition Posting Destination	HR_REQ_POSTDST_MGR	Click the Next link.	Lists the job postings made for the requisition.

Page Name	Object Name	Navigation	Usage
Posting Destination Details	HR_REQ_POSTDTL_MGR	Click the Edit or Add New Posting Destination link on the Requisition Posting Destination page.	Used to record the types of job postings made for the requisition.
Proposed Interview Team	ER_REQ_INTVW_TEAM	Click the Next link.	Used to create an interview team.
Requisition Summary	ER_REQ_SUMMARY_MGR	Click the Next link.	Presents the user with all the job requisition information entered on the other pages in the transaction. The manager or recruiter reviews and edits the data.
Federal Requisition Summary	GVT_ER_RQ_SMRY_MGR	Click the Next link.	For U.S. Federal government installations. Presents the user with all the job requisition information entered on the other pages in the transaction. The manager or recruiter reviews and edits the data.
Requisition Submission	HR_REQ_SUBMIT_MGR	Click the Next link.	Used by these users for different purposes: • The originator, or creator, of a job requisition submits a requisition for approval using this page. The system routes the requisition to the person who authorizes the requisition. • The authorizer approves the requisition or denies authorization. The system routes approved requisitions to the recruiter. • The recruiter uses this page to approve or deny authorization.

Viewing Job Requisition Status

Managers and recruiters use the Requisition Status transaction to review the status history of their job requisitions. The page shows the number of applicants at each stage in the recruitment process and lists the changes to the status of the requisition.

Pages Used to View Job Requisition Status

Page Name	Object Name	Navigation	Usage
Job Requisition Status History	ER_REQ_STS_SUMM1	Recruiting Activities, Job Requisitions/Postings, Job Requisition Status History	Review the status history for a selected requisition.

Understanding Posting Job Openings to Online Job Boards

Recruiting administrators, managers, and recruiters can post job requisitions to online job boards if the job requisitions meet the following criteria:

- The requisition status is open or reopened.
- The requisition is active.
- The requisition is fully approved.
- The requisition has been designated for external posting to job boards on the Requisition Posting Destination page.
- The current date is the same or later than the posting start date on the Requisition Posting Destination page.
- The manager or recruiter is the originator, recruiter, or authorizer of the job requisition. This restriction does not apply to recruiting administrators.

RecruitUSA is a job board aggregator that manages your subscription to multiple job boards of your choice. During this transaction, your user and job requisition data are transferred to a series of pages hosted by RecruitUSA to complete the transaction. The RecruitUSA transaction collects from you any additional data required by the job boards that you select. Upon completion of the RecruitUSA transaction, you are returned to the PeopleSoft page from which you initiated the posting. RecruitUSA then sends the job posting to the selected job boards and processes the billing for subscriptions.

Enterprise Integration Points Between PeopleSoft eRecruit Manager Desktop and RecruitUSA

PeopleSoft eRecruit Manager Desktop uses the ER_JB_REQDATA business interlink to connect to the RecruitUSA website to post job openings.

After job openings have been posted, the system uses the RECRUITUSA application message to receive costs from RecruitUSA and inserts the costs in the job requisition expense record.

The application message is delivered inactive. In PeopleSoft Application Designer, set the status of these message to *Active*, and set the status of the RECRUITUSA message channel to *Run*.

See *EIP Catalog database on the Customer Connection website under Open Integration Framework in the Documentation section*.

Prerequisites

To set up job postings:

1. (optional) Create job posting descriptions
2. Set up RecruitUSA.

See Also

PeopleSoft Human Resources PeopleBook: Recruit Workforce,” Creating Recruitment Templates”

PeopleSoft Human Resources PeopleBook: Recruit Workforce, “Setting Up Recruit Workforce”

Pages Used to Post to Job Boards

Page Name	Object Name	Navigation	Usage
New Postings	ER_JBRD_REQ_SELECT	Recruiting, Job Requisitions/Postings, Post Job Regs to Internet	Recruiting administrators, managers, and recruiters use this page to select job requisitions to post to job boards.
Post Requisitions to the Internet	ER_JOBBOARD_SELECT	Manager Self Service, Recruiting Activities, Job Requisitions/Postings, Post Requisitions to Internet	Recruiting administrators, managers, and recruiters use this page to select job requisitions to post to job boards.
Confirm Selections	ER_OUTGOING_JBDATA	Click the Confirm tab from the New Postings or Select Requisitions page.	Confirm requisitions selected and to submit them to RecruitUSA for posting to job boards.
Job Board History	JOBBOARD_HISTORY	Click the Job History tab from the New Postings page.	Recruiting administrators use this page to view the transaction history of the job board that you selected when you access the page.

Selecting Job Requisitions to Post

Access the New Postings or Select Requisitions page.

New Postings

Confirm Selections

Job Board History

Merchant ID: RECRUITUSA

Description: RecruitUSA

*Job Requisition	Description	Transaction Code	Last Transaction		
290021	Manager-Compensation/Benefits	Add	Add	08/13/2001 11:40:00.000000AM	
290022	Specialist-HRIS	Add			

Continue

New Postings page

The system displays the merchant ID and description.

Job Requisition # (job requisition number)

Select a requisition that you want to post to online job boards.

Transaction Code

Select a transaction code that describes your current activity with this requisition. Valid values are as follows:

- *Add:* You want to add this requisition as a new posting to job boards. This is the system default.
- *Update:* The job requisition was modified since posting to job boards. Use this to submit modified requisition information entered in the Create Job Requisition transaction. You cannot modify your job board selections for a requisition.
- *Delete:* You want to delete the job requisition from the job boards.

If there is any expense involved in the add or modify transaction, the system updates the Job Requisition Expense page for this transaction.

Last Transaction

The system displays the last transaction for the selected requisition.

Continue

When you have selected all the requisitions that you want to post, click this button to access the Confirm Selections page, where you confirm your selections and submit the requisitions to RecruitUSA.

Confirming Selections

Access the Confirm Selections page.

[New Postings](#) [Confirm Selections](#) [Job Board History](#)

Confirm Selections



Review the job requisitions that you have elected to post to job boards. If you are happy with your elections, click Post. If you decide that you do not want to post a job requisition to job boards, select the check box and click Remove.

Job Requisition Queue

[Find](#) | [View All](#) [First](#) [1 of 2](#) [Last](#)

Job Requisition:	290021	Transaction Code:	Add
Job Description:	Manager-Compensation/Benefits		
City:	New York	☐	Remove
Required Open Date:	08/13/2001		
Originator:	Locherty,Betty		
Recruiter:	Griffiths,Martina Rae		

Confirm Selections page (1 of 3)

Additional Requisition Information		Find View All	First 1 of 2 Last
Contact Name:	Locherty,Betty		
Regular/Temporary:	Regular		
Location Information			
City:	New York		
Location State:	NY		
Postal Code:	07666		
Company Information			
Address 1:	500 George Washington Pkway		
Address 2:			
City:	New York		
Postal Code:	07666		
State:	NY		
Country:	US		
Contact Email		Find View All	First 1 of 1 Last
Email Address:			

Confirm Selections page (2 of 3)

The screenshot displays a web interface for confirming job requisition selections. It is divided into two main sections: 'Contact Phone' and 'Job Posting Descriptions'.

Contact Phone Section:

- Buttons: [Find](#), [View All](#), [First](#), [1 of 1](#), [Last](#)
- Phone Type: Business
- Phone Number: 416/360-2938

Job Posting Descriptions Section:

- Buttons: [Find](#), [First](#), [1-3 of 3](#), [Last](#)
- Three job descriptions are listed, each with a 'Type:' label and a 'Description:' text area with scrollbars.

Job Description 1:

- Type:
- Description: Manager-Compensation/Benefits
- Text: Are you interested in the exciting world of compensation and benefits ? If so,

Job Description 2:

- Type:
- Description: We are expecting the successful applicant to have a certified benefits manager status

Job Description 3:

- Type:
- Description: The responsibilities for this job are significant. You will have responsibility for ...

Confirm Selections page (3 of 3)

Job Requisition Queue

Job Requisition # (job requisition number)	The system displays the requisitions that you selected for posting and the Job Description.
Transaction Code	The system displays the code you entered on the New Postings or Select Requisitions page. You can change it here.
Required Open Date	The system enters the Required Open Date from the Posting Destinations page.
Originator	The person who created the requisition.
Recruiter	The person responsible for recruiting for the requisition.
Remove	Select this check box to mark a requisition for removal from the list. After marking requisitions for removal, click this button to remove selected requisitions from the list of postings.
Post	After you confirm the list of requisitions, click this button to submit the requisitions to RecruitUSA.

Additional Requisition Information

The system displays information about the job requisition. You provided most of this information when you created the requisition. Contact data comes from the Personal Data record.

Contact Name	The name of the person designated as recruiter on the Requisition Authorization page or Requisition Data page.
Contact Email	The business email of the recruiter.
Contact Phone	The business phone of the recruiter.
Job Posting Descriptions	The system populates the RecruitUSA job posting with the following job posting description types: • <i>Resp</i> (responsibilities), <i>Dep Mrkt</i> (department marketing), and <i>Closing</i> (closing statement) are copied to the RecruitUSA Job Description field. • <i>Mkt State</i> (marketing statement) is used to populate the RecruitUSA Company Profile field. • <i>Quals</i> (qualifications) is used to populate the RecruitUSA Qualifications field.

Note. Other description types are not transferred to RecruitUSA.

Viewing Job Board History

Access the Job Board History page.

View Job Board History

Merchant ID: RECRUITUSA

Description: RecruitUSA

Requisition Posting History Find | View All First 1 of 3 Last

Job Requisition: 290021 Manager-Compensation/Benefits

Transaction	Action Date/Time	Cost
Add	08/13/2001 11:40:00.000000AM	550.00

Job Board History page

Job Requisition # (job requisition number)	The system displays all requisitions that have been posted to job boards.
Transaction	The system lists the history of actions taken on this requisition and displays the date and time that each action was taken.
Cost	The system displays the cost associated with the action. This information is supplied by RecruitUSA.

Completing the RecruitUSA Transaction

After you click the Continue button on the Confirm Selections page, the system takes you to the RecruitUSA website. There you can select the specific job boards for the posting, provide additional information required for the specific job boards that you select, review the posting costs, and confirm the posting.

When you click the OK button on the last RecruitUSA page, the system returns you to the PeopleSoft page where you can select additional requisitions to post. Recruiting administrators return to the New Postings page. Managers and recruiters return to the Select Requisitions page.

For more information about RecruitUSA pages, refer to RecruitUSA documentation.

Viewing Job Postings

Managers and recruiters use the View Job Postings transaction to review job postings for their job requisitions. Managers and recruiters have access to the job requisitions where they are named as originator, recruiter, or authorizer, regardless of the current status of the requisition.

Managers and recruiters can search for job postings based on these criteria:

- Requisition status
- Job category
- Location
- Keywords
- Miscellaneous parameters

Job posting information is defined when you create job requisitions.

See Also

Chapter 4, “Creating and Posting Job Requisitions,” Understanding Job Requisitions, page 21

Pages Used to View Job Postings

Page Name	Object Name	Navigation	Usage
View Job Postings	HR_JOB_POST_L	Manager Self Service, Recruiting Activities, Job Requisitions/Postings, View Job Postings Self Service, Recruiter, Tasks, View Job Postings	Managers and recruiters use this page to search for job requisitions.
Job Description	HR_JOB_POST_D	Click a job requisition on the View Job Postings page.	View detailed information about a specific job posting.

CHAPTER 5

Searching for Qualified Applicants

This chapter explains the features PeopleSoft eRecruit Manager Desktop provides for finding qualified applicants and how to link those applicants to job requisitions.

Understanding PeopleSoft's Search for Applicants Processing

Finding qualified applicants for your job requisitions is a major task for your recruiting staff. Where do you go to find people who match your job criteria? PeopleSoft offers three features.

- Search for Applicants enables you to search resumes and applicant information already in your HR database.
- Auto-Match enables you to schedule applicant searches to run automatically at specific times.
- Search the Internet for Applicants enables you to search various internet sites for applicants that match your positions.

Searching for Applicants

This section provides an overview of the Search for Applicants transaction and explains how to use the Search for Applicant feature.

Understanding Search for Applicants

You can search for qualified applicants already in your HR database using the Search for Applicants page. The search can be based on the job requisition description or specific criteria such as:

- Resume text.
- Education, competencies, and accomplishments.
- Work experience.
- Addresses.
- Referral sources.
- Applicant types.
- Applicant date range.

Once the search criteria is set, you have the option of saving this search criteria for later use.

Search for Applicants can be useful when some applicant data fields are not complete, because you can search the applicant's resume for specific keywords.

Using Search for Applicants:

To use the Search for Applicants transaction:

1. Run the Applicant Index.

Before you can search for applicants you must build the Applicant index. The system retrieves data from HR database and writes the information to a flat file. The Verity software indexes this flat file. This is called the Verity Collection.

You must run this process on a routine basis. The results from the Search for Applicant transaction are only as accurate as this Applicant Index. The HR database is significantly impacted every time you run Applicant Purge, Duplicates Processing, or Resume Processing. If you don't maintain the Applicant Index you may be pointing to information no longer in the HR database.

Note. After the Applicant Index is built for the first time, you can continue to use the Search for Applicants transaction while updating the Applicant Index.

2. Review the results of the search.

If you don't get the results you are expecting there are two things to check. Make sure your search criteria isn't too stringent and check when the last time you ran the Applicant Index.

Note. To compare applicants who are already linked to a job requisition, use Requisition Screening. Requisition Screening is most effective where applicants have completed the application online and all areas are entered completely.

Optimizing Performance

To optimize performance:

1. Make sure the collection files, attachments files, process scheduler, and database servers are located on the same server or as physically close as possible.
2. When you build the Applicant Index using Create New, limit the size of the collection files by limiting the application date range.
3. After you run the Applicant Index once using the Create New option, use the Update Existing option for subsequent runs. After every 10th run, the system will automatically defragment the file.
4. Make sure you periodically purge your applicant database.

Pages Used by Search for Applicants

Page Name	Object Name	Navigation	Usage
Applicant Index	ER_SRCH_RUN_INDEX	Recruiting, Identify/Process Applicants, Identify Candidates, Applicant Index	The recruiting administrator uses this page to schedule the Applicant Index process that builds an index based on the applicant data in your PeopleSoft Human Resources system. The Applicant Index must exist before users can use the Search for Applicants or Auto-Match transactions.
Search for Applicants	ER_APPLCNT_SRCH	Recruiting, Identify/Process Applicants, Identify Candidates, Search for Applicants Manager Self Service, Recruiting Activities, Applicant Search, Search for Applicants Recruiting, Assigned Recruiter Activities, Applicant Search, Search for Applicants	Search for applicants that may be suitable for a job requisition. If the search returns applicants that meet your requirements, you can link the applicants to a requisition.
Add Saved Search	ER_SRCH_APP_SAVED	Click the Save Search Criteria link on the Search for Applicants page	Save the search criteria. Enter a search name for the search criteria, a description, and comments.

Page Name	Object Name	Navigation	Usage
Search Results by Results Name	ER_SRCH_RESULTS	- Click on the Search Results button on the Search for Applicants page. - Recruiting, Identify/Process Applicants, Identify Candidates, Search Results by Search Name Manager Self Service, Recruiting Activities, Applicant Search, Search Results - Recruiting, Assigned Recruiter Activities, Applicant Search, Search Results - Recruiting, Identify/Process Applicants, Identify Candidates, Search Results by Search Name - Manager Self Service, Recruiting Activities, Applicant Search, Search Results - Recruiting, Assigned Recruiter Activities, Applicant Search, Search Results	View results of search.
Search Results by Job Requisition	ER_SRCH_RSLTS_REQ	- Recruiting, Identify/Process Applicants, Identify Candidates, Search Results by Job Requisition - Manager Self Service, Recruiting Activities, Applicant Search, Search Results by Job Requisition - Recruiting, Assigned Recruiter Activities, Applicant Search, Search Results by Job Requisition	Displays the results of searches that were previously linked to a selected job requisition.
View Criteria	ER_RSLTS_CRITERIA	Click the View Criteria link on the Search Results page	Displays the criteria that was used to run Search for Applicants.

Building the Applicant Index

Access the Applicant Index page.

Run Control ID: OCTOBER [Report Manager](#) [Process Monitor](#) **Run**

Resume Search Collection

☒ **Create New** **From Application Date:** 

☐ **Update Existing**

Attachment Temp Directory:

Enter directory for storing resume attachments temporarily for this process. There should be enough space to hold all resume attachments.

Applicant Index page

Resume Search Collection The process runs in two modes. Select the mode that you want to use.

Create New Builds the Verity collection from the specified date entered in the From Application Date field.

Update Existing Add, update, and delete entries in an existing Verity collection.

Attachment Temp Directory If you have set up an attachment directory for the Apply for Job self-service transaction to store resumes, enter the location of the file server where the attachments are stored. If you store resumes in the database, enter a temporary path to a file server that can be used to store the resumes temporarily during the Applicant Index process.

This path should be relative to the PeopleSoft Process Scheduler. Make sure that all machines that run the Applicant Index process have access to this directory.

Searching for Applicants

Access the Search for Applicants page.

Search for Internal Applicants

Enter search criteria in the following fields and press the "Search" button to find results. For a more limiting search, select the "All" drop down value. For a less limiting search, select the "Any" drop down value.

To load saved search criteria, enter the name of the search in the Search Name field.

Search Name: 

[Search Tips](#)

Search Criteria

Search: **Language Code:**

Match Resume to Requisition

Please select either a job requisition **or** enter text in the Resume Text field. If you choose a requisition, the Search Engine will use the job requisition description to find a matching resume.

Job Requisition #: 

--OR--

Resume Text:

Search for Applicants page (1 of 3)

Additional Resume Criteria

Accomplishments:

Competencies:

Education:

Work Experience:

Applicant Criteria

City:

State:

Country:

Referral Source:

Applicant Type:

From:  (example: 12/31/2000)

To:  (example: 12/31/2000)

Search

Save Search Criteria

Need New Search for Applicants page (2 of 3)

Search Results					
Score	Applicant ID	Application Date	Name	City	Select
100%	A0000048	06/10/2002	Shadbolt,Terry		☐
100%	A0000052	08/15/2002	Dunsmuir,Peter	Bend	☐
100%	A0000057	10/02/2002	Freeman,Garner	Minneapolis	☐
100%	AN0100	03/28/2002	Tobago,Lucien D.	Madison	☐
100%	AN0103	04/22/2002	Thom,Melissa	Sechelt	☐
100%	AN0104	04/22/2002	Chavez,Javier	Stockton	☐
100%	AN0105	04/22/2002	Pittman,Elmer	Kamloops	☐
100%	AN0106	04/22/2002	Wilson,Gary	Kamloops	☐
100%	AN0107	04/22/2002	Manley,Patricia	Valemount	☐
100%	AN0109	04/22/2002	Rose, Frank	Saskatoon	☐
100%	N00650	09/30/2002	Gold,Gary	Los Angeles	☐

Customize | Find | View All | First 1-11 of 11 Last

Save Results

You may choose to associate an applicant(s) to a requisition. To do this, select the applicants from the results list, select a requisition and click the "Link" button.

Job Requisition:

Search for Applicants page (3 of 3)

Search Name

If you have previously saved a set of search criteria that you want to use again, select the search name.

Search

If you want applicants to match all of the criteria, select *All*. Otherwise, select *Any* and the system displays applicants that match any one of the criteria. However, if a date range is entered both dates must be matched even if *Any* is selected.

Match Resume to Requisition

Complete one of the following fields if you want to search applicants' resume text for keywords.

Job Requisition

Select the job requisition if you want to base the search on keywords in the job posting description. The system selects significant keywords from the responsibility and qualification posting description types.

Resume Text

Enter the words or phrase that you want to search for in:

- The resume text field in applicant data.
- Applicants' resumes attached to their application.

Additional Resume Criteria	Use this group box if you want to search for applicants with specific competencies, accomplishments, work experience, or education. The system searches applicant competency, accomplishment, work experience, and education fields for the keywords you specify.
Applicant Criteria	Use this group box if you want to search selected fields in applicant data. Complete one or more fields.
City	To search for applicants living in specific cities, enter the city names in this field.
State	To search for applicants living in a certain area, enter one or more state, province, or region. Because address formats vary by country, the system searches all the appropriate address fields for applicants whose address contains the state, province, or region you enter in this field.
Country	To search for applicants living in specific countries, enter the names of the countries or the country codes.
Referral Source	To search for applicants who were referred to your organization from specific sources, select the referral source from the list of options.
Applicant Type	To limit the search to one type of applicant, select <i>Employee</i> , <i>Ext Appl</i> (external applicant), or <i>Non-Empl</i> (non-employee).
From and To	To search for applicants that applied within a certain period, enter the start of the period in From and the end date in the To field. To ensure you always use applicants' current details, the search returns applicants only if their most recent application falls within the start and end date that you enter. If an applicant applied to your organization within these dates, but later submitted new details after the end date, the applicant is not included in the results.
Search	Initiates the search and the results are displayed in the Search Results area.
Save Search Criteria	Click to save your search criteria. The system displays the Saved Search page where you enter the name you want assigned to this search criteria.
Search Results	Displays the results of the search.
Score	The applicant's score is a percentage returned by the Verity search engine and is for information only. The score is based on the number of occurrences of the keywords that you entered and where the keywords were found. In general, the score indicates how well the applicant matches the criteria. For more information about how Verity calculates the score, refer to the Verity documentation.
Select	Select the check box next to any applicants who you want to link to an open job requisition.
Save Results	Click to save the search results. The system displays the Search Results by Name page. It is on this page where you enter the name you want the system to associate with these results.

Job Description

If you want to link any of the applicants to a job opening, select the requisition from the list of open requisitions. Hiring managers and recruiters are only able to link applicants to their own requisitions.

Link

Click this button to link applicants to the job requisition specified. The system links the applicants to the requisition, sets their statuses to *Route*, and creates routing records with the originator as the person to whom the applicants are routed.

Saving and Viewing Search Results

Access the Search Results by Results Name page.

Search Results by Results Name

Search Results Name: SOFTWAREEXP

Results Saved: 06/11/2002 11:20:15.000000AM Betty Locherty

Comments:

[View Criteria](#)

Apply To			
*Job Requisition	Posting Title		
290035	Business Analyst	+	-

Search Results			
Score	Applicant ID	Application Date	Name
82%	A0034	03/12/2001	Vrooman, Grete
96%	AN0044	02/15/2001	Biddles, Samuel Sydney
80%	AN0053	05/02/2001	Rae, Norma

Search Results by Results Name page

This page is used to save search results and to results from previously saved search results. To save the search results, you must enter the Search Results Name and select a Job Requisition.

Search Results Name

The name of the search results.

Results Saved

The date and time that the results were saved and the person who saved the results.

View Criteria

Click this link to display the View Criteria page. This page displays the criteria that was used for the search.

Apply to

This group box enables you to associate results with a job requisition. You must enter at least one job requisition number, but you can enter more.

Search Results

This group box displays the applicants returned by the search.

Score This is a value assigned by the Verity search process and Indicates how well the applicant matched the criteria.

Viewing Search Results by Job Requisition

Access the Search Results by Job Requisition page.

Search Results by Job Requisition

Job Requisition: 290035 Business Analyst

Saved Searches Linked to Requisition			
Search Name	Results Saved	Name	
SOFTWAREEXP	06/11/2002 11:20:15.000000AM	Betty Locherty	View Criteria

Applicants Linked to Requisition in Saved Searches				
Applicant ID	Application Date	Name	Score	Search Name
AN0044	02/15/2001	Biddles, Samuel Sydney	96%	SOFTWAREEXP
A0034	03/12/2001	Vrooman, Grete	82%	SOFTWAREEXP
AN0053	05/02/2001	Rae, Norma	80%	SOFTWAREEXP

Viewing Search Results by Job Requisition page

Search Results Name This group box lists the saved search results that are linked to the selected job requisition.

Search Results This group box displays the applicants returned by the search.

Score This is a value assigned by the Verity search process and Indicates how well the applicant matched the criteria.

Automatically Matching Applicants to Job Requisitions

This section provides an overview of Auto-Match and explains how to:

- Define the parameters for running Auto-Match.
- Define additional parameters for running Auto-Match.
- View the results from the Auto-Match search.

Understanding Auto-Match

Auto-Match is a feature that builds off the Search for Applicants feature. Whereas Search for Applicants is a single, real-time search of the HR database, Auto-Match enables you to automatically search the HR database at regular scheduled times and email the results to the recruiter. You can search for applicants based on:

- Job requisition descriptions

- Competencies
- Accomplishments
- Saved search criteria

You define the parameters for Auto-Match on two setup pages. When you run the Auto-Match, the system searches the HR database for applicants that match the criteria. If applicants are found that match the criteria, a workflow is triggered that sends emails to the recruiters responsible for the requisitions. Recruiters can view the results of the auto-match search and link applicants to the job requisitions.

Note. You can also add a job requisition to the auto-match criteria through a link on the Job Requisition Data –Job Posting page.

Once you have added a job requisition to the auto-match criteria, the system warns you if you make changes to the fields in the job requisition data or the saved search criteria that are used in the auto-match process. You can restart the Auto-match process for the amended job requisition.

See Also

Search for Applicants

Job Requisition

Prerequisites for Auto-Match

Before you run Auto-Match you must:

1. Install the Verity software.
2. Run Applicant Index.

See Also

Search For Applicants

Pages Used by Auto-Match

Page Name	Object Name	Navigation	Usage
Auto-match Search Criteria	ER_AUTOMATCH_TBL	Setup HRMS, Product Related, Recruiting, Auto-Match Criteria	Define the default parameters for Auto-Match.
Job Requisition Criteria	ER_AM_REQ_SEC	Click the Criteria link on the Auto-Match Search Criteria page. Click the Auto-Match Criteria link on the Job Requisition – Job Posting page.	Define specific job requisition parameters for Auto-Match.
Auto-Match Search	RUNCNTL_ER_AM	Recruiting, Identify/Process Applicants, Auto-Match Search	Schedule the Auto-Match process. To run the process at regular intervals, select a recurrence value. You may set up your own unique recurrence through the Process Scheduler.
Auto-Match Search Results	ER_AUTOMTCH_RESULT	Recruiting, Identify/Process Applicants, Auto-Match Results	View the results of the auto-match process and link applicants to the job requisition.

Defining the Auto-Match Criteria

Access the Auto-Match Search Criteria page.

Auto-Match Search Criteria

Default Criteria

Language Code: English ▼

Consider applications received within the last

☐ Days
 ☒ Weeks
 ☐ Months
 ☐ Years

Include Applicant Types

☒ External Applicant
 ☒ Employee
 ☒ Non-Employee

Statuses to Exclude

***Disposition**

▼
+
-

Job Requisition Criteria

*Job Req	Restart				
290069	☐	Job Requisition Details	Criteria	+	-
290068	☐	Job Requisition Details	Criteria	+	-

Auto-Match Search Criteria page

Consider applications received within the last

Use this group box to define the earliest application date you want to include in your search. Only applicants who applied between this date and the current date are included in the auto-match search results.

The system calculates the earliest application date by subtracting the entered number of Days, Weeks, Months, or Years.

Include Applicant Types

Select the types of applicants you want included in the search.

Statuses to Exclude

If you want to exclude applicants with specific status, add the Disposition here. You can have more than one.

Job Requisition Criteria

This group box displays the job requisitions for which you want auto-match to search for applicants. You can add or remove job requisitions from the list. You can only include approved job requisitions.

Job Requisition Details

Click to display Requisition Summary page, which lists the detailed information for the job requisition.

Criteria

Click to display the Job Requisition Criteria page where you set up the criteria to use for the selected requisition.

Defining Job Requisition Criteria

Access the Job Requisition Criteria page.

Job Requisition Criteria

Job Requisition: 290069

Last Run On:

Language Code: ▼

Consider applications received within the last

☐ ☐ Days ☐ Weeks ☐ Months ☐ Years

Include Applicant Types

☒ Ext Applicant ☒ Employee ☒ Non-Employee

End Date Indicator

☒ End on Requisition Close Date

☐ End on Specified Date

☐ End on Max Posting Close Date

Search

☒ Search Job Req Descriptions

☐ Search Competencies

☐ Search Accomplishments

Stored Search Name:

OK Cancel

Job Requisition Criteria page

Consider applications received within the last

Use this group box to define the earliest application date you want to include in your search. Only applicants who applied between this date and the current date are included in the auto-match search results.

The system calculates the earliest application date by subtracting the entered number of Days, Weeks, Months, or Years.

The system automatically populates with the information you entered on the Auto-Match Search Criteria page.

Include Applicant Types

Select the types of applicants you want included in the search.

The system automatically populates the fields with the information you entered on the Auto-Match Search Criteria page.

End Date Indicator

Use this group box to define the date on which auto-search will no longer include the job requisition in the search process. You can select from:

- The requisition closing date.
- A date you specify.
- The latest job posting closing date.

Search

Select the criteria you want the auto-match process to search applicants for in the HR database. Select from:

Search Job Req Descriptions. The system uses keywords from the responsibility and qualification posting descriptions from the job posting.

Search Competencies. Search for applicants that match the competencies included in the job requisition.

Search Accomplishments. Search for applicants that match the accomplishments included in the job requisition.

Stored Search Name. Uses a saved search criteria entered in Search for Applicants. If you use a saved search criteria, the other options are unavailable for selection. If the saved search has applicant types selected or a specified from date, these field override the values enter in the Include Applicant Types and End Date Indicator fields.

Viewing Auto-Match Results

Access the Auto-Match Search Results page.

Auto-Match Search Results

You may choose to associate an applicant(s) to a requisition. To do this, select the applicants from the results list, select a requisition and click the "Link" button.

Job Requisition #: [290069](#)
☐ **Restart**
Sort By:

Search Results
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

Select	Score	Applicant ID	Name	Applic Dt	City	
☐	77%	A0041	Ms Emily Latrell	03/30/2001	London	Criteria

☒ [Select All](#)
☐ [Clear All](#)

Auto-Match Search Results page

Restart

Select if you want delete the current auto-match results and rerun the search. Generally, you choose this option if the search criteria has changed for the job requisition.

Search Results

Displays the results of the search.

Criteria

Click this link to display the View Criteria page. This page displays the criteria that was used for the search.

Link

Click to link the selected applicants to the job requisition.

Remove from Results List

Click to remove the selected applicants from the list. However, if you restart the process again and the removed applicants are matched to the requisition again, they will appear on the page again.

Searching the Internet for Applicants

This sections provides an overview of the Search Internet for Applicants transaction and explains how to:

- Set up the accounts.
- Search for and download applicants.

Prerequisites

Set up AIRS SearchStation as a supplier.

Understanding Search Internet for Applicants

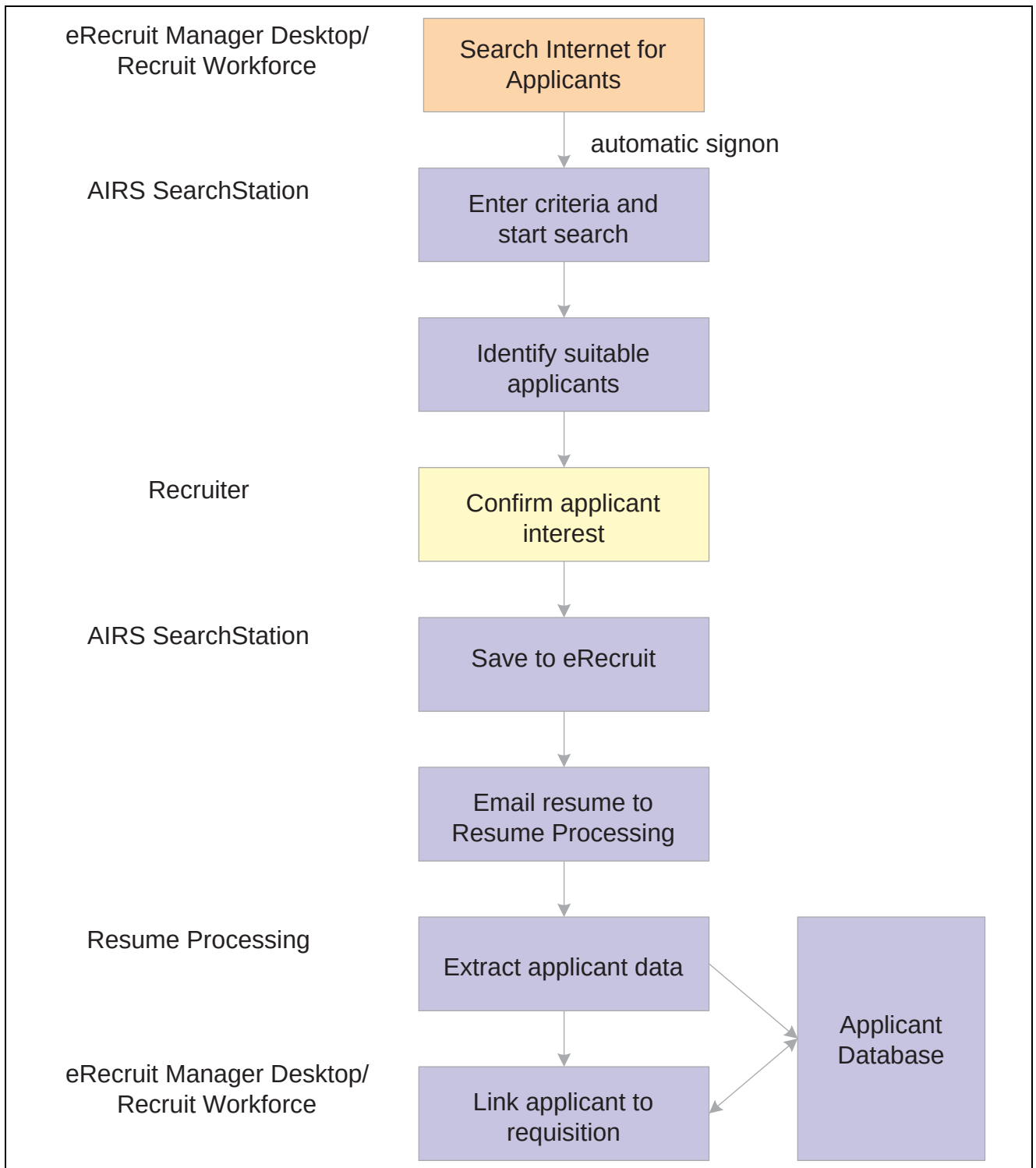
Increasingly the internet is a rich source of resumes of potential applicants. PeopleSoft eRecruit Manager Desktop provides the ability to search the internet for applicants in partnership with AIRS SearchStation. Linking your PeopleSoft system to AIRS SearchStation enables your recruitment staff to search for external applicants with the right experience and skills, in the right location.

AIRS SearchStation is a web-based tool that searches various locations on the internet for applicant information, including job boards, resume banks, and newsgroups.

Users access AIRS SearchStation using Search Internet for Applicants. This transaction is available to:

- Hiring managers and recruiters from eRecruit Manager Desktop.
- Recruiting administrators from the Human Resources Recruit Workforce business process.

The following diagram shows how the integration works:



Overview of the Internet Search

Searching the internet:

To search the internet for applicants:

1. Use the AIRS SearchStation website to enter your search criteria and start the search.

2. Contact the applicants identified by the search to find out if they are interested in applying to your organization.
3. Load the interested applicants into your PeopleSoft database.

From the AIRS SearchStation website, select the applicants and click the Save to eRecruit link. The AIRS system sends the applicants' resumes by email to the address you've set up for Resume Processing. Resume Processing automatically extracts the applicant data and inserts this information into your PeopleSoft applicant data tables.

4. Link the new applicants to open requisitions either using Applicant Activity or the self-service transaction Link Requisition to Applicant.

Searching the Internet and Loading Applicants

To search the internet and load applicants to your database:

1. Access the Search Internet for Applicants transaction.
2. From the Search Internet for Applicants page, click the Signon to AIRS SearchStation link.
The system automatically transfers you to the AIRS SearchStation website. The search page is displayed.
3. Enter the search criteria and click GO! to start your search.

Check the applicants returned by AIRS and identify potential candidates. You can save details of applicants you plan to contact using the AIRS SearchStation options Save to Folder and Save to Disk.

4. Contact the applicants who you want to link to your requisitions using the contact details provided in the applicants' resumes.
5. Once you have confirmed who is interested in applying to your organization, load the applicants' details into your PeopleSoft database as follows:
 - a. Navigate to the AIRS SearchStation website (as explained in step 1) and display the applicant information.
 - b. Click the Save to eRecruit link.

The AIRS system displays the default email address previously set up. Accept the default address.

AIRS SearchStation emails the selected applicants' resumes to your Resume Processing account. PeopleSoft Resume Processing extracts applicant data from the resume and inserts it into the applicant data tables.

Note. The time taken to load applicant details is dependent on the configuration of your system and your network.

See Also

PeopleSoft Resume Processing PeopleBook

AIRS SearchStation documentation for full details of the AIRS SearchStation pages and options

CHAPTER 6

Organizing Interviews

This chapter explains how managers and recruiters:

- Select applicants for interview.
- Define interview schedules.
- Enter interview results.
- Review interview results.

Selecting Applicants for Interviews

Managers and recruiters use the Select Applicant for Interview transaction to select applicants who go forward to the interview stage.

Users select a job requisition and the system lists the applicants whose disposition is *Route*. This includes applicants who passed requisition screening, were linked to a requisition from the Search for Applicants transaction, or passed the U.S. Federal government screening processes.

If there are no applicants who are ready for interview, or interviews are already scheduled, the system links users to the View Interview Schedule or Search for Applicants transactions.

Pages Used in the Select Applicant for Interview Transaction

Page Name	Object Name	Navigation	Usage
Select Applicant for Interview	ER_SEL_APP_INTVW	• Manager Self Service, Recruiting Activities, Interviews, Select Applicant for Interview • Recruiting, Assigned Recruiter Activities, Interviews, Select Applicant for Interview	Displays a list of screened applicants for the selected requisition. The manager or recruiter chooses whether to interview, hold, or reject the applicant. The page includes a link to the Schedule Interview transaction. Only those applicants that a recommendation of Schedule Interview from the originating manager will be displayed.
Save Confirmation	EO_SAVE_CONFIRM	Click Save on the Select Applicant for Interview page	Confirms the changes made on the Select Applicant for Interview page.

Scheduling Interviews

Managers and recruiters schedule interviews using the Schedule Interviews transaction.

The self-service transaction restricts managers and recruiters to requisitions for which they are named as recruiter, originator, or authorizer. The system lists the user's open requisitions that have applicants with a disposition of *Interview*.

Pages Used to Schedule Interview Transaction

Page Name	Object Name	Navigation	Usage
Schedule Interview	ER_INTVW_SCHED	Manager Self Service, Recruiting Activities, Interviews, Schedule Interview Recruiting, Assigned Recruiter Activities, Interviews, Schedule Interviews	Select interviewer, date, time, and location for the interview. Managers or recruiters can select the Notify Interview Team and Notify Applicant check boxes to send an email notifying interviewers and applicants of their interview schedule.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Interviewing Applicants,” Scheduling Interviews

Viewing Interview Schedules

Managers and recruiters use these transactions to view details of interviews scheduled:

- Interview Schedule.

This transaction is available to hiring managers to display their interview schedule.

- Interview Schedule (Reqn).

This transaction enables managers and recruiters to view all interviews scheduled for a selected requisition.

Pages Used in the View Interview Schedule Transactions

Page Name	Object Name	Navigation	Usage
My Interview Schedule	ER_INTVW_SCHED_MGR	Manager Self Service, Recruiting Activities, Interviews, Interview Schedule	View the current week's interview schedule. Managers can view other weeks using Previous and Next buttons.
Interview Schedule	ER_INTVW_SCHED_REQ	Manager Self Service, Recruiting Activities, Interviews, View Interview Team Schedule Recruiting, Assigned Recruiter Activities, Interview, View Interview Team Schedule	View a list of interviews scheduled for applicants linked to a selected requisition.
Schedule Notes	ER_INTCOM_REQ_SEC	Click Schedule Notes on the Interview Schedule page.	View comments entered by the recruiter when setting up the interview.

Entering Interview Results

Managers and recruiters use the Interview Evaluations transaction to enter their evaluation of the applicant. They assign a rating, enter their recommendations, and enter additional comments.

If you have PeopleSoft eRecruit installed, other interviewers can complete interview evaluations online using the employee Interview Evaluations self-service transaction.

To make the final recommendation, the recruiter, authorizer, or originator of the job requisition uses the Interview Evaluation Summary transaction.

Prerequisites

Recruiting administrators create evaluation forms using the Interview Evaluation Definition page in PeopleSoft Human Resources and link them to recruitment templates.

Pages Used to Enter Interview Evaluations

Page Name	Object Name	Navigation	Usage
Applicant Interview Evaluation List	ER_INT_EVL_LST	• Manager Self Service, Recruiting Activities, Interview, Create Interview Evaluations • Recruiting, Assigned Recruiting Activities, Interviews, Create Interview Evaluations	Select the applicant from the list of applicants interviewed by the manager or recruiter. The system lists applicants where the user is named as an interviewer and the interview date is the current date or earlier.
Interview Evaluation Form	ER_INTVW_EVL_FORM	Click applicant name on the Applicants Interview Evaluations List page	Rate the applicant in predefined areas and give an overall rating and recommendation.
Recommendation Reasons	ER_INTVW_EVL_RSNS	Click the Recommendation Reasons link on the Interview Evaluation Form page.	Display the reasons associated with the recommendation selected on the Interview Evaluation. Interviewers choose the reason for their recommendation.

Reviewing Interview Results

After all the interviewers have completed the interview evaluation form, the hiring manager or recruiter makes the final decision whether to make a job offer to an applicant.

Managers and recruiters use the Interview Evaluation Summary to view a summary of all the interviewers' evaluations for an applicant. They select a final recommendation and reason for the applicant and the system updates the applicant's disposition according to the status rules defined in your system.

Pages Used in the Interview Evaluation Summary Transaction

Page Name	Object Name	Navigation	Usage
Interview Evaluation Summary List	ER_JOB_REQ_LST	• Manager Self Service, Recruiting Activities, Interview, Review Interview Evaluation • Recruiting, Assigned Recruiter Activities, Interviews, Review Interview Evaluation	Select an applicant. The system displays a list of applicants linked to the user's open requisitions who have been evaluated by one or more interviewers. This includes interview evaluation forms that have been saved or submitted.
Interview Evaluation Summary	ER_INTVW_EVAL_SUMM	Click View Summary on the Interview Evaluation Summary List page.	View a summary of individual interviewers' ratings and recommendations for the applicant. From here, the manager or recruiter clicks the Evaluation link to view the completed evaluation form for each interviewer. The manager or recruiter selects a final recommendation and reason.

CHAPTER 7

Managing Applicants

This chapter provides an overview of the recruitment process and explains how to:

- Link applicants to requisitions.
- Track requisition activity.
- View questionnaire results.
- View applicants' references.

Linking Applicants to Requisitions

This section provides an overview to the Link Requisition to Applicant transaction and explains how to link applicants to requisition.

Understanding Linking Applicants to Requisitions

Sometimes you may have an applicant that hasn't been tied to a job requisition. Once the applicant is in your applicant data files, you can link the applicant to one or more job requisitions as follows:

- Hiring managers and recruiter use the Link Requisition to Applicant self-service transaction from eRecruit Manager Desktop. You may bypass screening by checking the Bypass Screening check box. This changes the applicant's status to *Route*.
- Recruiting administrators use Applicant Activity from the Recruit Workforce business process.

See Also

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Managing Applicants" Tracking Applicants

Page Used to Link Applicants to Requisitions

Page Name	Object Name	Navigation	Usage
Link Requisition to Applicant	ER_LNK_REQ2APP	- Manager Self Service, Recruiting Activities, Applicant Search, Link Requisition to Applicant - Recruiting, Assigned Recruiter Activities, Applicant Search, Link Requisition to Applicant	Select the requisitions to which you want to link the new applicant.

Linking Applicants

Access the Link Requisition to Applicant page.

Link Requisition to Applicant

Click on the "Selected" checkbox to select the requisition to link to this applicant. Click on the "Bypass Screening" checkbox if you want to additionally bypass screening for this applicant. Then click the "Link to Applicant" button to link the selected Requisition(s) to the Applicant.

Applicant ID: A0000045 **Applicant Type:** External Applicant

Name: Miller, Jan

Requisition Applied For			
Application Date	Job Requisition	Posting Title	Disposition
08/14/2001	290037		070-Offer

Open Requisitions			
Selected	Bypass Screening	Job Requisition	Posting Title
☐	☐	290069	Assistant Manager
☐	☐	290068	Event Coordinator

Link Requisition to Applicant page (1 of 2)

☐	☐	100026	
☐	☐	100025	
☐	☐	100024	

[Link to Applicant](#)

Link Requisition to Applicant page (2 of 2)

Selected

Select this check box for each job requisition you want to link the applicant to.

Bypass Screening

Select this check box to bypass the screening stage. This sets the applicant's disposition to *Route* for that requisition. Applicants with a

route disposition can be selected for interview. If you don't select this check box the system sets the disposition to *Applied*.

Add Click this button to link the applicant to the selected requisitions.

Tracking Requisition Activity

When you've selected suitable applicants and narrowed down the applicant list to a manageable size, you can start reviewing remaining applicants in detail.

Use Requisition Detail to view:

- Applicants who applied for the job requisition.
- Applicants whose details were routed to reviewers for consideration.
- Interview schedules for each applicant.

Recruiting administrators, hiring managers, or recruiters schedule interviews using the Schedule Applicant for Interview page.

- Interview results.

Interviewers submit their evaluation of applicants using the Interview Evaluation Form self-service transaction. From Requisition Detail, you can view each interviewers' overall rating and recommendations.

- Job offer information and applicants' responses to offers.
- Applicant expenses.

Pages Used to Track Requisition Detail

Page Name	Object Name	Navigation	Usage
Requisition Detail	ER_SS_REQ_ACTIVITY	• Manager Self Service, Recruiting Activities, Job Requisitions/Posting, Maintain Requisition Activity • Recruiting, Assigned Recruiter Activities, Job Requisitions/Posting, Maintain Requisition Activity	View the list of applicants at each stage in the recruitment process, from application, routing, interview, through to those applicants with job offers.

Viewing All Applicants

Access the Requisition Detail page.

Requisition Detail

This page is a central access point to job requisition data. Click any of the links below the icons to display the related applicant detail data. The numbers below the icons represent the count of applicants that exist for that category.

Job/Position Information

Job Req: [290058](#)

Status: 060-Intw

Date Opened: 10/02/2002

Position:

Department: Information Systems

Business Unit: NSWBU

Job Code: Web Developer



All Applicants

1



[Routings](#)

1



[Interview Schedules](#)

1



[Interview Results](#)

1



Offers

0



Expenses

0

All Applicants

Find | View All First 1 of 1 Last

Applicant ID	Applicant Name	Application Date	Applicant Type	Status Date	Short Description
A0000057	Garner Freeman	10/02/2002	External Applicant	10/02/2002	060-Intw

Requisition Detail page

The buttons in the middle of this page represent the recruitment stages. By clicking on the link below the button, managers and recruiters can access details of applicants linked to the requisition at each stage.

All Applicants

Lists all applicants who applied for the position.

Routings

Lists applicants whose details were routed to reviewers for consideration. From the routing list you can view details of the reviewers and their recommendations.

Interview Schedules

Lists applicants invited for interview and details of the interviews scheduled for each applicant.

Interview Results

Lists the applicants whose interviews are complete. From this list, you can view the interviewers' rating and recommendation.

Offers

Lists applicants who received a job offer. From here, you view the details of the applicants' job offers.

Expenses

View costs reimbursed to applicants related to the requisition.

The number below the link shows the number of applicants at that stage.

Viewing Questionnaire Results

After applicants have completed their online applications, managers and recruiters can review applicants' questionnaire results.

Applicants are awarded points for their answers to screening questions, which forms part of the requisition screening process. The points awarded are defined when the requisition is created.

Note. For U.S. Federal government installations, the points awarded for screening questions are informational only. They are not incorporated into the rating and ranking process.

See Also

Chapter 4, "Creating and Posting Job Requisitions," Understanding Job Requisitions, page 21

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Processing Applicants," Screening Applicants

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "(USF) Searching For Qualified Applicants"

Pages Used to View Questionnaire Results

Page Name	Object Name	Navigation	Usage
Questionnaire Results	ER_VW_QSTN_APP_LST	- Manager Self Service, Interview, Questionnaire Results - Recruiter Activities, Interview, Questionnaire Results	This page displays a list of applicants who have completed the questionnaire for the selected job requisition. The page includes the applicants' scores and the date that they completed the questionnaire.
Online Questionnaire	ER_QUESTIONNAIRE	Click the View Results link on the Questionnaire Results page.	View the selected applicant's questionnaire results. The system shows the applicant's answers, the score for each answer, and the total score.

Viewing Applicant References

Managers and recruiters use the References self-service transaction to view references provided by applicants, or to request references from applicants. Managers and recruiters can view applicant details only if the applicant is linked to one of their open requisitions.

Pages Used to View References

Page Name	Object Name	Navigation	Usage
References List	HR_APP_REF_DETAIL	Self Service, Manager, View, References Self Service, Recruiter, View, References	View a list of applicants for an open requisition and to select an applicant.
References	HR_APP_REF_DETAIL1	Click an applicant's name on the References List page.	View references for the selected applicant.
References Detail	HR_APP_REF_SBP	Click a reference name on the References page.	View the reference employer, telephone number, and any comments made by the reference.
Request Applicant References	APP_REF_EMAIL_ADDR	Click the Request Applicant References button on the References page	Managers and recruiters use this page to send an email to the applicant requesting references. The page lists the applicant's email addresses. If there are references already on file for the applicant, the manager nor recruiter will be able to request more references.

CHAPTER 8

Making Offers and Preparing to Hire

This chapter describes the process for making an offer and preparing to hire an applicant, and discusses how to:

- Create pre-employment checks.
- Prepare job offers.
- Approve job offers.
- View the job offer status.
- Preparing to hire.

Prerequisites

Before you begin:

- Set up HireRight as a supplier.
- Define job offer components and component types.

See Also

Setting Up eRecruit Manager Desktop, Setting Up HireRight as a Supplier

Understanding Job Offers

Many organizations run checks to verify that applicants have supplied accurate information. Linking your PeopleSoft system to HireRight enables your recruitment staff to request a variety of checks and view the results from PeopleSoft eRecruit Manager Desktop. The types of checks that are available through HireRight include background checks, reference checks, assessment testing, and drug testing.

Here's how the integration with HireRight works:

- Using the Pre-Employment Requests transaction, hiring managers, recruiters, and recruiting administrators are transferred to the HireRight website. Using predefined HireRight account information and user information, the system logs the user into HireRight automatically. The system displays an error message if HireRight cannot authenticate the information.
- Once at the HireRight site, users select the inquiries that they want to make for an applicant.

- Applicant data and user information is automatically transferred to HireRight. Users supply additional information required, or request that applicants provide the information.
- HireRight process the requests. The turnaround time for completing checks depends on the type of inquiry ordered. In some cases, HireRight must contact the applicant for information or approval to complete a check. Users track the status of their requests from PeopleSoft, which is kept current with the request status using application messaging.
- HireRight sends an email to the requester when the results are available. If View Results is enabled on the eRecruit Installation Options page, the requester uses the same Pre-Employment Requests transaction to view the results of the inquiries.
- On completion of all inquiries in a request, HireRight issues expense information which is automatically added to the Job Requisition Expenses table with an expense code of *Pre-Employ*.
- For criminal background checks, if Show Adjudication has been selected on the eRecruit Installation Options page, the requestor may also view summary adjudication results from HireRight.

Your PeopleSoft system stores records of the requests submitted, the status of requests, and cost information. The detailed results of inquiries are stored at the HireRight site.

After applicants have been interviewed and evaluated, managers and recruiters use Prepare Job Offer to enter job offer information.

The transaction displays a list of the requisitions for which applicants have been interviewed and evaluated. Managers and recruiters select a requisition from this list and select an applicant from a list of applicants linked to that requisition.

The transaction displays applicants who have passed the interview stage. This can occur in two ways:

- The recruiting administrator sets the applicant's disposition status to *Offer* from Applicant Activity.
- The manager or recruiter selects a recommendation of *Make Offer* on the Interview Evaluation Summary page.

The transaction doesn't include applicants with the correct status, if:

- They have received a job offer for another opening that is still in an *Open* status waiting for applicant action.
- A job offer has already been submitted for approval for the applicant and is waiting for final approval.

On the Job Offer page, managers and recruiters enter details of each component of the applicant's job offer, such as base salary, bonus payments, and other benefits. When the manager or recruiter submits the job offer, this initiates workflow to notify the person responsible for authorizing the job offer. The authorizer is identified in the Authorization ID field in job requisition data. If the authorizer is the person who entered the job offer, the system notifies the recruiter who gives final approval.

Enterprise Integration Points Between PeopleSoft eRecruit Manager Desktop and HireRight

The system uses the following business interlinks to connect to HireRight and receive status data on submission of a request:

EIP Name	Business Interlink Name	Usage
PREEMPLOYMENT ADMINISTRATION	ER_PREEMPLOYMENT_ADMIN	To connect users to the HireRight site to access the administrative functions.
PREEMPLOYMENT REQUEST	ER_PREEMPLOYMENT_REQUEST	To connect users to the HireRight site to request new pre-employment inquiries.
PREEMPLOYMENT RESULTS	ER_PREEMPLOYMENT_RESULT	To connect users to the HireRight site to view the results of pre-employment inquiries.
PREEMPLOYMENT STATUS SYNC	ISCRIP_T_PREEMPLOYMENT	When users save a request, HireRight posts the status of the request and eRecruit Manager Desktop updates its pre-employment status records.

After users have saved their requests, the system uses the following application messages to receive status updates and costs from HireRight:

EIP Name	Application Message Name	Usage
PREEMPLOYMENT EXPENSE	PREEMPLOYMENT_EXPENSE_ADD	HireRight publishes pre-employment inquiry costs. PeopleSoft eRecruit Manager Desktop inserts the costs in the job requisition expense record.
PREEMPLOYMENT STATUS ASYNC	PREEMPLOYMENT_STATUS_SYNC	HireRight publishes changes in pre-employment request status. PeopleSoft eRecruit Manager Desktop updates the status of its pre-employment request records.

See Also

EIP Catalog database on the Customer Connection website under Open Integration Framework in the Documentation section.

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Tracking Recruitment Expenses”

Administering HireRight

When your organization sets up an agreement with HireRight, you nominate a recruiting administrator or recruiter as the HR Manager for your organization. The HR Manager has access to the administration functions in HireRight to define the privileges of other users with access to HireRight.

For administration purposes, the HR Manager accesses the administration pages in HireRight using Merchant Administration.

For information about the HireRight administration functions refer to HireRight documentation.

Common Elements Used in This Section

Request Number	The system creates a request each time you access HireRight and select inquiries (checks) for an applicant. A request comprises one or more inquiries.
Inquiry Type	Type of check requested.
Status	The status of the request or an individual inquiry: <i>Draft</i> : the requester has selected the inquiry but not yet submitted it. <i>Submitted</i>: the requester has submitted the inquiry <i>Pending Applicant</i> : HireRight is contacting the applicant for information. <i>Complete</i>: the inquiry is complete but the requester hasn't viewed the results <i>Viewed</i>: the inquiry is complete and the results viewed. <i>Deleted</i>: a draft inquiry that was deleted without submission.
% Complete	The percentage of inquiries in a request that have a status of <i>Complete</i> or <i>Viewed</i> .

Page Used to Make Pre-Employment Checks

Page Name	Object Name	Navigation	Usage
Supplier Administration Links	MERCHANT_ADMIN	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Administration	Select HireRight from the list of merchants. The system transfers the user to the HireRight website.
Pre-Employment Requests	ER_APP_PREEMPL	Recruiting, Hire Applicants, Prepare for Hire, Request Pre-Employment Check	View a summary of requests previously submitted for a selected applicant. From here, recruiting administrators can: • Transfer to HireRight to view the results of the checks (if View Results is enabled). • Submit new checks.
Applicant List	ER_APP_PREEMPL_LST	Manager Self Service, Recruiting Activities, Hire Preparation, Request PreEmployment Checks Recruiting, Assigned Recruiter Activities, Hire Preparation, Request PreEmployment Checks	Select an applicant from the list of applicants linked to the manager's or recruiter's job requisitions.
Select Job Requisition to Apply Expenses	ER_APP_REQ_LST_SEC	Click New Request on the Pre-Employment Requests page Click New Request on the Applicant List page	Select the job requisition against which the cost of the requests are charged. This page appears if an applicant is linked to multiple job requisitions.
Pre-Employment Requests	ER_APP_PREEMPLH	Click View Results on the Applicant List page.	View a list of requests for the selected applicant. From here, managers and recruiters select a request to view, or submit a new request.
Pre-Employment Request Detail	ER_APP_PREEMPLD	Click a request on the Pre-Employment Requests page	View a summary of a request. This page lists the checks that were submitted and the status. If View Results is enabled on the eRecruit Installation Options page, managers and recruiters can transfer to HireRight to view the results of the checks or submit new checks.

Accessing HireRight

To access the HireRight website, access the Supplier Administration Links page.

Making Pre-Employment Checks

Here's how you make pre-employment checks:

1. Select the applicant.

Managers and recruiters select an applicant from those applicants linked to their open job requisitions. However, recruiting administrators can select any applicant.

The system displays a summary of existing requests submitted for the applicant, including requests submitted by other users in the organization. If View Results is enabled on your system, click the View Results button to transfer to the HireRight website where you can view the results of existing requests. The system hides the View Results button if this feature has been disabled on the eRecruit Installation Options page.

2. Click New Request to submit a new request.

If the applicant is linked to multiple job requisitions, select the job requisition that incurs cost of the checks.

PeopleSoft automatically transfers you to the HireRight website.

3. From the HireRight site, select the checks that you want to make and submit the request.

Click the Complete button to submit your request. When you click the Go Back button the system returns you to a PeopleSoft page where you can select another applicant.

This section explains the PeopleSoft pages only. For information about HireRight pages refer to the HireRight documentation.

Preparing, Approving, and Viewing Job Offers

This section describes the following self-service transactions which use the same pages:

- Prepare Job Offer
- Approve Job Offer
- Offer Status

Pages Used to Prepare, Approve, and View Job Offer Status

Page Name	Object Name	Navigation	Usage
Prepare Job Offer	ER_POSNAPFOR_LIST	• Manager Self Service, Recruiting Activities, Hire Preparation, Prepare Job Offer • Recruiting, Assigned Recruiter Activities, Hire Preparation, Prepare Job Offer	Select the applicant who will receive the job offer.
Approve Offer , View Job Offer	ER_OFFER	• Manager Self Service, Recruiting Activities, Hire Preparation, Approve Offer • Recruiting, Assigned Recruiter Activities, Hire Preparation, Approve Offer • Manager Self Service, Recruiting Activities, Hire Preparation, Offer Status • Recruiting, Assigned Recruiter Activities, Hire Preparation, Offer Status	This page either lists: • Applicants with job offers awaiting approval • The manager's or recruiter's job offer requests.
Varies by component	ER_OFFER_DTL	• Click the applicant name on the Prepare Job Offer page. • Click the applicant name on the Approve Job Offer page.	Depending on the transaction, this page is used for these purposes: • To enter job offer details for the selected applicant and initiate the approval process. • To approve or deny the request. The manager or recruiter can also enter any relevant comments. • To view a summary of the offer status. The system lists the people responsible for approving the job offer, status of the approval, and comments that they have entered.

Preparing for a New Hire

This transaction presents to the hiring manager or recruiter a list of applicants who have accepted job offers. From here, they can initiate pre-hire activities for that applicant to prepare for the anticipated start date of the applicant.

Recruiting administrators complete the hire process using Applicant Hire in PeopleSoft Human Resources.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Hiring Applicants”

Pages Used in Preparing for a New Hire

Page Name	Object Name	Navigation	Usage
Select Applicant	HR_PREHIRE_SUM_MGR	• Manager Self Service, Recruiting Activities, Hire Preparation, Prepare for New Hire • Recruiting, Assigned Recruiter Activities, Hire Preparation, Prepare For New Hire	View a list of applicants with Ready to Hire status and to select an applicant for new hire processing.
Process Pre-Hire	HR_PREHIRE_DTL_MGR	Click an applicant's name on the Select Applicant page	View pre-hire information and initiate the pre-hire process.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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