

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Plan Careers and Successions

December 2002

PeopleSoft 8.8
Human Resources PeopleBook:
Plan Careers and Successions
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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.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

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 psftpress@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>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

Typographical Convention or Visual Cue	Description
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.
. . . (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	
	<i>Using PeopleSoft Applications</i>
	<i>PeopleSoft Process Scheduler</i>

PeopleSoft 8.8 Human Resources Plan Careers and Successions 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 8.8 Human Resources PeopleBook: Plan Careers and Successions* provides you with implementation and processing information for your PeopleSoft Human Resources 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.

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 Human Resources Plan Careers and Successions

This chapter provides an overview of PeopleSoft Human Resources Plan Careers and Successions business processes and discusses:

- PeopleSoft Human Resources Plan Careers and Successions integrations.
- PeopleSoft Human Resources Plan Careers and Successions implementation tasks.

Plan Careers and Successions Business Processes

The following lists the processes for PeopleSoft Human Resources Plan Careers and Successions:

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

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

Implementing PeopleSoft Human Resources Plan Careers and Successions

The Plan Careers and Successions table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Plan Careers and Successions 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.

Important! The order in which you set up tables required to implement PeopleSoft Human Resources Plan Careers and Successions may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Plan Careers and Successions core application, then several tables specific to the country or industry you operate in, followed by additional Plan Careers and Successions 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

The Plan Careers and Successions business process 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 Plan Careers and Successions business process 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"
2. Set up PeopleSoft Human Resources fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Getting Started With PeopleSoft HRMS"

Setting Up Core PeopleSoft Human Resources Plan Careers and Successions Tables

The steps discussed in this section suggest an order in which you define the information in your core Plan Careers and Successions 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:

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

Step	Reference
1. Define relevant geographic areas for job relocation in career planning components.	Chapter 3, "Planning Careers," Setting Up Career Planning, page 9
2. Define the default career path for a job code.	Chapter 3, "Planning Careers," Setting Up Default Career Paths, page 10
3. Create the position hierarchy before setting up succession plans.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions</i> , "Setting Up Positions," Creating Positions

CHAPTER 2

Understanding PeopleSoft Human Resources Plan Careers and Successions

This chapter provides an overview of PeopleSoft Human Resources Plan Careers and Successions and discusses:

- Business processes supported by PeopleSoft Human Resources Plan Careers and Successions.
- PeopleSoft Human Resources Plan Careers and Successions integrations.

PeopleSoft Human Resources: Plan Careers and Successions

PeopleSoft Human Resources Plan Careers and Successions provides you with the tools you need to plan and manage employee career and succession data. It enables you to create career paths for individual employees or associate default career paths with job codes. The integration with succession planning enables you to monitor key positions and development of potential candidates for each position. In addition, Plan Careers and Successions provides tools to assist in employee training and development while tracking goals and progress along the way.

Plan Careers and Successions Business Processes

PeopleSoft Human Resources Plan Careers and Successions supports career planning and succession planning for your business. Additional functionality supports USF business requirements.

To create career plans using the Plan Careers business process in PeopleSoft Human Resources, use the job information and competency data from the pages on the Workforce Administration and Workforce Development menu groups.

Understanding Career Planning

A PeopleSoft Human Resources career plan enables you to:

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

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

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

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

- Devise a training plan for the employee.

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

- Create a development plan.

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

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

Recording Input From Multiple Sources

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

See Also

Chapter 4, "Planning Successions," page 33

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments"

(USF) Understanding Career Planning

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

Once you create a career plan, the system:

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

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

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

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

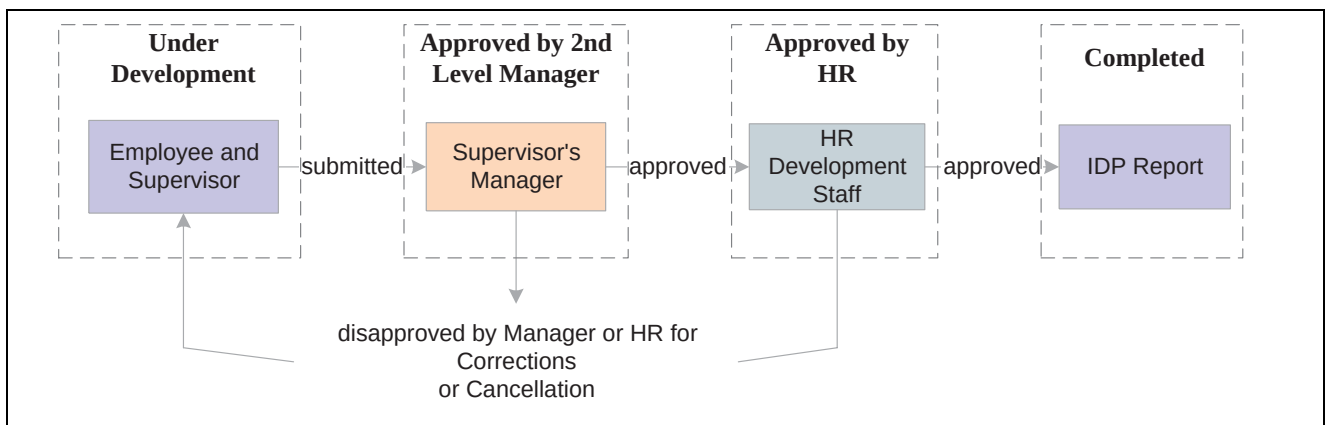
The career plan process includes a sequence of steps, which can be designed to meet requirements. For example, a path might include:

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

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

Career Plan Process

The following diagram provides an overview of the career plan process. This is a general example.



The career plan approval process

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

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

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

Understanding Succession Planning

This section describes:

- The succession planning process.
- Searching for candidates.

Succession Planning Process

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

1. Set up a list of possible succession candidates.
The system provides candidate data on employees for whom the job code or position has been identified as a potential career move. Add employees or nonemployees (including external candidates) to consider.
2. Finalize the successor list.
If you need additional information about particular employees, access several pages that provide succession-related information.
3. Review succession plans, and implement training and development plans.
You may discover employees who are blocked from moving to a new position by incumbents. Implement training and development programs to provide blocked employees with alternative career paths.

Searching for Candidates

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

See Also

[Chapter 4, "Planning Successions," Building a Graphical Succession Hierarchy for Key Positions, page 41](#)

[Chapter 4, "Planning Successions," Searching for Additional Internal and External Candidates, page 40](#)

PeopleSoft Human Resources Plan Careers and Successions Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

PeopleSoft Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

Integrating the Plan Careers and Manage Competencies Business Processes

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

Integrating the Plan Careers and Plan Successions Business Processes

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

Career plans are not a prerequisite for creating succession plans. However, if you set up career plans, you can automate the process of identifying candidates for any key position. Using the Create Succession Plan component, click the Initialize button on the Candidates page and the system generates a list of people who have the selected key position in their career path. Using succession plans in conjunction with career plans enables you to plan employee training and development in readiness for planned moves.

CHAPTER 3

Planning Careers

This chapter discusses how to:

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

Setting Up Career Planning

This section covers how to:

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

Complete these tasks before setting up employee career plans.

Common Element Used in This Chapter

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

Page Used to Set Up Career Planning

Page Name	Object Name	Navigation	Usage
Geog Pref Tbl (geographic preference table)	GEOG_PREF_TBL	Set Up HRMS, Product Related, Workforce Development, Define Career Planning, Geographic Preference	Define relevant geographic areas for job relocation in career planning components.

Setting Up Global and Local Country Control Tables

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

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

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

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

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

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding PeopleSoft HRMS System Data Regulation”

Setting Up Job Codes and Default Training Programs

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs,” Defining Job Function Codes

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training, “Defining Training Courses and Programs”

Setting Up Default Career Paths

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

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

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

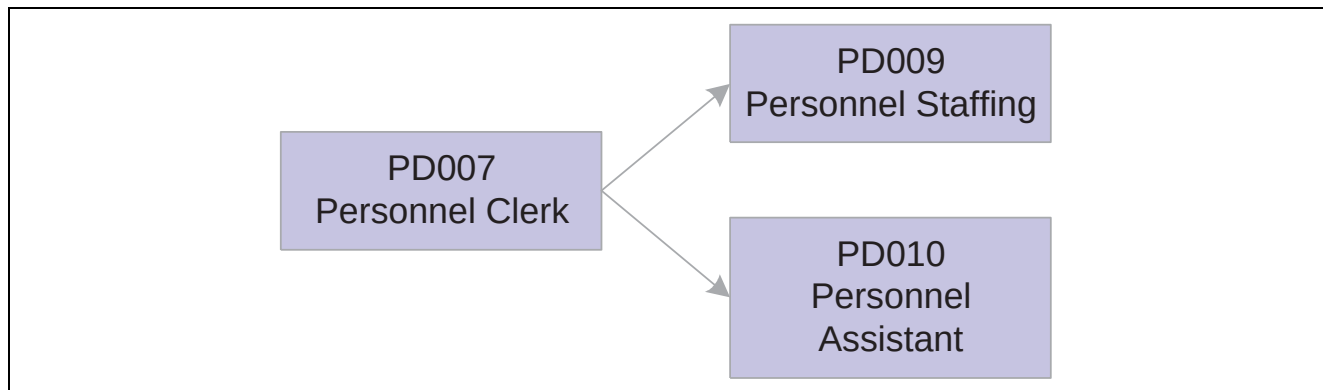
Overview of Career Move Levels

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

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

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

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



Optional moves from current job

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

Page Used to Set Up Default Career Paths

Page Name	Object Name	Navigation	Usage
Career Path Table	CAREER_PATH_TBL	Set Up HRMS, Product Related, Workforce Development, Define Career Planning, Career Path Table	Define the default career path for a job code.

Defining Default Career Paths for Job Codes

Access the Career Path Table page.

Career Path Table

Business Unit: FDGBU **Job Code:** FJC037 Work Unit Supervisor

Description:

Default Salary Details

SetID: FEDPS	Sal Plan: 0000	Grade: 08	Manager Level: Other
---------------------	-----------------------	------------------	-----------------------------

Career Move Find | View All First 1 of 2 Last

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

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

Opt #	Business Unit	Job Code	Short Job Title	Short Name	Short Name	SetID	Plan	Grade
1	PSFED	FJC044		Other				

Career Path Table page

Default Salary Details

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

Career Move

Career Move	Select a career move level. <i>First Move from Current Job</i> defines the first move from the selected job code, and <i>Ninth Move from Current Job</i> is the last move. You can include multiple job codes for any career move to reflect moves at the same management level and moves up the management hierarchy.
Opt # (option number)	Enter a number if there is more than one job code option for the selected career-move level. Use the option number to sort the job codes.
Job Code	Select the job code for the career move level.

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

Creating Career Plans

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

This section covers how to:

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

Pages Used to Create Career Plans

Page Name	Object Name	Navigation	Usage
Career Plan	CAREER_PLAN1	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Plan	Enter employee preferences for jobs and geographic locations; indicate availability to move into new positions.
Career Path	CAREER_PLAN2	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path	Define an employee's career path; modify a default career path; create a customized job progression.
Current Career Position Descr	CAREER_POSN_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path Click the Position Long Description link on the Career Path page.	View a description of the position selected on the Create Career Plan - Career Path page.
Current Career Job Descr	CAREER_JOBCD_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path Click Jobcode Long Description link on the Career Path page.	View a description of the job code selected on the Create Career Plan - Career Path page.
(USF) Federal Potential Future Positions	GVT_CAR_PLN2_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path Click the Federal Data link.	Add further information about the career path specified on the Career Plan - Career Path page.
(USF) Federal Data / Print IDP Actions	GVT_CAR_PLN2_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path, Federal Data link Click Federal Data/Print IDP.	Submit the career plan for approval; print the completed plan.
Career Ranking and Potential	CAREER_PLAN3	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan	Show how employees compare to their peers and indicate their potential.
Career Goals	CAREER_PLAN4	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan	Enter short and long-term goals for employees.

Page Name	Object Name	Navigation	Usage
Career Mentoring	CAREER_PLAN5	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan	Assign career mentors.
Federal Coaching/Mentor Information	GVT_CAR_PLN5_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Mentoring Click the Federal Data button.	Add further information about the career goal specified on the employee's Career Mentoring page.
Career Strength/Develop Areas	CAREER_PLAN6	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Strength/Development Areas	Record and evaluate an employee's career strengths and developmental areas.
Plan Careers/Manage Competencies Link	CAREER_STRDVLP_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Strength/Develop Areas Click the Link to Competencies link.	Synchronize competency data between the Plan Careers and Manage Competencies business processes.
Career Training Plan	CAREER_PLAN7	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Training Plan	Enter or update a training program for the selected employee; use the default training program for the employee job code or create a custom program.
Career Development Plan	CAREER_PLAN8	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Development Plan	Help employees improve in developmental areas before their next performance review or career planning session.
(USF) Federal Career Plan Information	GVT_CAR_PLN8_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Development Plan Click the Federal button.	Add further information about the career developmental goal specified on the Career Development Plan page.

Entering Employee Job, Location, and Availability Preferences

Access the Career Plan page.

The screenshot displays the 'Career Plan' page for Employee Jones, Jane (EmplID: B-BU101). The page is divided into several sections:

- Top Navigation:** Career Plan (selected), Career Path, Career Ranking and Potential, Career Goals, Career Mentoring.
- Employee Information:** Jones, Jane; Employee; EmplID: B-BU101.
- Career Plan Section:**
 - *Effective Date: 11/01/2002
 - Date Available: [Empty]
 - Career Plan Review Date: [Empty]
 - Projected Retirement Date: 10/01/2044
- Employee Willing To:**
 - ☐ Relocate
 - ☐ Take International Assignment
 - ☐ Travel
- Desired Work Sites:**
 - First Choice:**
 - Business: GBIBU (search icon)
 - Unit: [Empty] (search icon)
 - Location: [Empty] (search icon)
 - Second Choice:**
 - Business: GBIBU (search icon)
 - Unit: [Empty] (search icon)
 - Location: [Empty] (search icon)
- Obstacles to Mobility:**
 - *Obstacles to Mobility: [Empty] (search icon)
- Geographic Preferences:**
 - *Geographic Preferences: [Empty] (search icon)
- International Preferences:**
 - *Country: [Empty] (search icon)

Career Plan page

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

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

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

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

Defining an Employee Career Path

Access the Career Plan - Career Path page.

Career Plan **Career Path** **Career Ranking and Potential** **Career Goals** **Career Mentoring**

Santos, Emma ID: B-BU140 Empl Rcd#: 0

Career Path Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 Career Plan Review Date: **Career Path** + -

Business Unit: BN1BU Cobra Business Unit
 Job Code: B1007 Fin Anal Department: B009 Regression
 Position: Location: Corp HQ Sal Plan: BCCB Grade:
 Supervisor Lvl:

Evaluation Type Find | View All First 1 of 1 Last

*Evaluation Type:

Potential Future Positions Find | View All First 1 of 1 Last

*Career Move Option # Target Date + -

Position Position Long Description *Readiness
 Business Unit Manager Level
 Department Sal Plan: Grade:
 Job Code Jobcode Long Description

Career Path page

Career Path

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

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

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

Evaluation Type

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

Evaluation Type Select an evaluation type to indicate who is evaluating the information on the employee. This is populated with *Approved/Official* if you clicked the Career Plan button. To use the evaluation in Plan Successions, you must select *Approved/Official*.

Potential Future Positions

Career Move Select the career move to define.

1st Move is the first step in the career path. It defines the job that the employee will move to from the current job and when the employee will be ready for that job. You can define up to nine moves. *9th Move* is the final step in the employee's career path. It defines the ninth job move from the current job.

Opt # (option number) If you decide to include more than one job code in a career-move level, insert an option number to sort the job codes in the preferred order.

Position If you're driving part or all of PeopleSoft Human Resources by position, select a position number from the available options.

When you move out of this field, the system completes the Business Unit, Department and Job Code fields. It also displays the job title, salary plan, grade, manager level, and function associated with this position.

If you're using partial position management and change your mind about using a position in this career move, delete the position number.

Position Long Description Click to access the Current Career Position Descr page where you can see a description of the selected position. This link is active only after you select a position.

Readiness Select your estimate of the employee's readiness for such a move from the drop-down list:

1–2 yrs: (1–2 years) The employee will be ready for the move within the next two years.

3–5 yrs: (3–5 years) The employee will be ready for the move in three to five years.

Emergency: If the employee is overdue for a job move and needs to move as soon as possible.

Ready Now: If the employee is ready for the move now.

Retirement: If the employee will not move to another position after this; for example, those who are nearing retirement age.

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

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

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

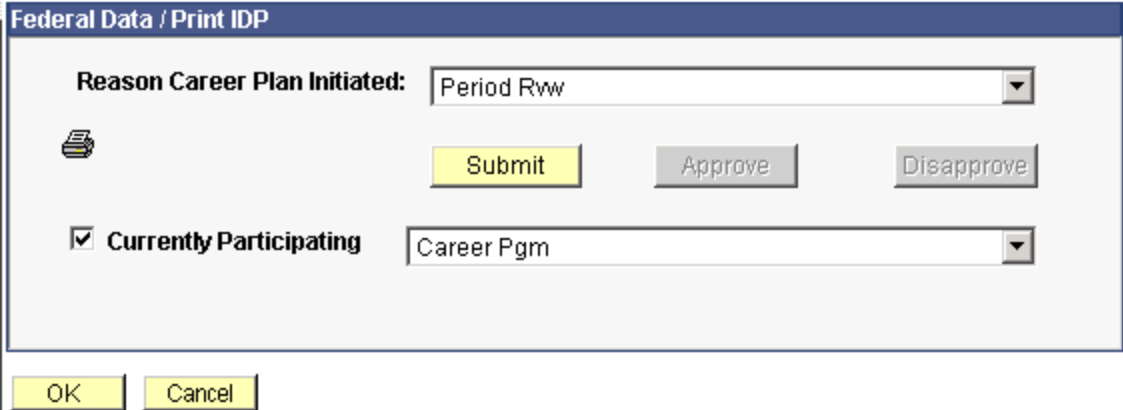
Department	If you know it, select a department for the job. This field is optional. You create departments in the Department table. The setID determines the departments that you see.
Job Code	Select the job code for the career move from the available options. When you select a job code and move out of the field, the system displays the associated job title, salary plan, grade, manager level, and function. You use the Job Code table to create job codes.
Jobcode Long Description	Click to access the Current Career Job Descr (current career job description) page, where you can see a description of the selected job. This link is active only after you select a job code.

See Also

[Chapter 4, “Planning Successions,” page 33](#)

(USF) Submitting and Printing the Career Plan

Access the Federal Data/Print IDP Actions page.



Federal Data/Print IDP Actions page

Reason Career Plan Initiated	Select a reason for the career plan. Valid values are <i>BU Agree</i> (bargaining unit agreement), <i>Car Ladder</i> (career ladder), <i>Car Prgm</i> (career program), <i>Dec Prgm</i> (developmental program), <i>Employee</i> (employee requested), <i>Period Rvw</i> (periodic review), and <i>Supv</i> (supervisor requested).
Currently Participating	Select if the employee is participating in a developmental program and select the program from the list of available options.

(USF) Adding Career Path Information

Access the Federal Potential Future Positions page.

Federal Potential Future Positions

Potential Future Positions

Date Need Identified: 

Reason:  ☐ **Self-Development**

Status:  ☐ **Required**

Estimated Cost: **Actual Cost:**

Federal Potential Future Positions page

Date Need Identified Enter the date that the career move was agreed to.

Self-Development Select if this is part of the employee's self-development activities.

Required Select if the move is required.

Ranking Employee Potential

Access the Career Plan - Career Ranking and Potential page.

Career Plan **Career Path** **Career Ranking and Potential** **Career Goals** **Career Mentoring** **Career Strength/Develop Areas**

Santos, Emma ID: B-BU140 Empl Rcd#: 0

Career Ranking and Potential Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 **Career Plan Review Date:**  

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Force Ranking Customize | Find | View All  First 1 of 1 Last

*Review Date	Rank	Out of	Rank Type	Description
10/01/2002 			Function	

Career Potential Customize | Find | View All  First 1 of 1 Last

*Review Date	*Rating	Reviewer Comments
12/30/2002 	Promote	

Career Ranking and Potential page

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

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

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

Entering Career Goals

Access the Career Plan - Career Goals page.

Santos, Emma ID: B-BU140 Empl Rcd#: 0

Career Goals Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 **Career Plan Review Date:**

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Short-Term Career Goals Customize | Find | View All First 1 of 1 Last

Estimated Completion Date	Actual Completion Date	Goal (Next 1 - 3 Years)
11/22/2002	10/28/2002	

Long-Term Career Goals Customize | Find | View All First 1 of 1 Last

Estimated Completion Date	Actual Completion Date	Goals (3 - 5 Years)
12/30/2002		

Import Long-Term Goals

Career Goals page

Actual Completion Date Enter the actual completion date when the employee achieves the goal.

Goal (Next 1 - 3 Years) If you're tracking employee reviews in PeopleSoft Human Resources, you can use the short-term goals that you enter here as the basis for short-term goals and objectives in employee reviews.

Import Long-Term Goals This button is for U.S. Federal users only.

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

Goals (3 - 5 Years) If you're tracking employee reviews in PeopleSoft Human Resources, you can use the long-term goals that you enter here as the basis for short-term goals and objectives in employee reviews.

Enter Career Mentoring Data

Access the Career Mentoring page.

[Career Plan](#) | [Career Path](#) | [Career Ranking and Potential](#) | [Career Goals](#) | **[Career Mentoring](#)**

Santos, Emma ID: B-BU140 Empl Rcd#: 0

Career Mentoring Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 **Career Plan Review Date:**

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Career Strength/Development Areas Customize | Find | View All First 1 of 1 Last

Name	*Mentor Type	*Estimated Date	Completion Date	Career Goal
Jane Jones	Supervisor	11/29/200		Financial Planning

Career Mentoring page

An employee can have multiple mentors of different types working towards different career goals.

Name	Enter the name of the employee's mentor.
Mentor Type	Select the type of mentor from the list.
Estimated Date	Enter the expected date of completion for this mentoring activity.
Completion Date	When complete, enter the completion date.
Career Goal	Enter the career goal for the employee to achieve through this mentor.

(USF) Adding Career Goal Information

Access the Federal Coaching/Mentor Information page.

Federal Coaching/Mentor Information

Federal Coaching/Mentoring Information	
Date Need Identified:	11/29/2002
☐ Self-Development	☒ Activity Required
Reason:	LC License Renewal Status: 5 In Progress
Estimated Cost:	300.00 Actual Cost:

Federal Coaching/Mentor Information page

Date Need Identified

Enter the date that the goal was agreed to.

Self-Development

Select if this is part of the employee's self-development. This indicates that the employee is paying the costs for this activity.

Activity Required

Select if the activity is mandatory.

Evaluating Employee Strengths and Developmental Areas

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

Santos, Emma ID: B-BU140 Empl Rcd#: 0 10/01/1965

Career Strength/Development Areas Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 Career Plan Review Date: [Link to Competencies](#) + -

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Strengths Find | View All First 1 of 1 Last

*Evaluation Type: Supervisor *Strength: 0110 Time Mgmt + -

Rating Model: PSCM Rating: 4-Very Good

Comment:

Developmental Areas Find | View All First 1 of 1 Last

*Evaluation Type: Self *Dev Area: 0101 Analytical + -

Rating Model: PSCM Rating: 2-Fair

Comment:

Career Strength/Development Areas page

Link to Competencies

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

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

Strengths**Strength**

Select the strength to evaluate from the list of competencies.

Rating Model

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

Rating

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

Developmental Areas**Dev Area** (developmental area)

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

Rating Model

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

Rating

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

Synchronizing Competency Data

Access the Plan Careers/Manage Competencies Link page.

Plan Careers / Manage Competencies Link

Jones,Rebekah
 ID: K0G001
 Empl Rcd#: 0

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

Manage Competencies			
Customize Find First 1-3 of 3 Last			
	Eval Type	Competency	Rating
☐	Approved	Ability to prioritize tasks	Strength
☐	Approved	Organize people and goal tasks	Strength
☒	Approved	Resource Planning	Strength

Career Planning		
Customize Find First 1-1 of 1 Last		
Eval Type	Competency	Type

Select All

Select All

OK

Cancel

Plan Careers/Manage Competencies Link page

Manage Competencies

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

Career Planning

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments," Entering Employee Competencies

Entering and Updating Training Programs

Access the Career Plan - Career Training Plan page.

Jones, Rebekah ID: K0G001 Empl Rcd Nbr: 0
 Career Training Plan Find | View All First 1 of 1 Last
 Effective Date: 11/01/2002 Career Plan Review Date: Training Plan
 Business Unit: GBIBU Global Business Institute BU
 Job Code: 140035 Analyst-Financial
 Department: 10000 Human Resources
 Supervisor Lvl:
 Training Program Find | View All First 1 of 1 Last
 Training Program:
 Training Plan Find | View All First 1 of 1 Last
 Sequence: Estimated Date: Completion Date:
 Course: Course Title:
 Required ☐ Internal/External Date Need Identified: 11/01/2002
 School: Name: Status:
 Reason: Estimated Cost: Actual Cost: Self-Development ☐

Career Training Plan page

Training Plan

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

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

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

Training Program

Training Program

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

Training Plan

Sequence	To set the course order, enter a sequence number. If this field is left cleared, courses appear in ascending chronological order by estimated completion date. To rearrange the courses on the list, enter sequence numbers for the courses in the order that they should appear. Save this information, close, and reopen the page. The courses will appear in the new order.
Completion Date	If the training course has been scheduled in Administer Training, the system will display the end date of the course in this field when the status changes to <i>Completed</i>. If you are tracking a training course that is not handled in Administer Training, enter the actual completion date when the employee completes the course or training.
Course	Select a course code from the list of available options. When you exit this field, the system enters the course title, the internal and external value, the school code, and the school name for the course. The system makes the fields unavailable; you can't change this information. If you've entered a course code and decide that you don't want to use it after all, delete your selection. When you exit this field, the system makes the other fields available.
Course Title	If you selected a course code, the system supplies the course title and makes this field unavailable. If the course is not in your course table, enter the course title.
Required	Select this check box if the course is mandatory.
Internal/External	If you selected a course code, the system completes this field and makes it unavailable. If you left the Course field cleared, select one of these options: <i>Internal:</i> If the course is held in-house. <i>External:</i> If an external vendor administers the course.
Dt Need Identified (date need identified)	The system autopopulates this field with the career plan date, which you can change if necessary.
School	If the course is <i>External</i> , select a school code, which you define in the School table. If the school isn't in your School table, leave this field cleared and complete the school Name field. When you select a course that is <i>Internal</i> , the system makes the School field unavailable.
Name	If you selected a school code, the system enters the school name and makes this field unavailable. If the school isn't in your School table, enter the school name.

USF fields

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training, “Defining Training Courses and Programs”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training, “Tracking Student Training”

(USF) Adding Information About a Career Developmental Goal

Access the Federal Career Plan Information page.

Federal Career Plan Information page

Self-Development

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

Date Need Identified

Enter the date that the goal was agreed to.

(USF) Approving a Career Plan

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

The process is the same for each page:

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

To open your worklist:

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

To approve a career plan request:

1. Access the page by accessing your worklist.

2. At the bottom of the page, click either Approve or Disapprove.

To approve a career path request:

1. Open your worklist.

The system prompts you for an employee ID.

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

To approve a career mentoring request:

1. Open your worklist.

The system prompts you for an employee ID.

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

To approve a career training plan request:

1. Open your worklist.

The system prompts you for an employee ID.

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

See Also

Chapter 3, “Planning Careers,” Creating Career Plans, page 13

Reviewing Career-Related Employee Data

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

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

This section covers how to view:

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

Pages Used to Review Career-Related Employee Data

Page Name	Object Name	Navigation	Usage
Employee Summary Data	EMPLOYEE_SUMMARY1	Workforce Development, Career Planning, Review Career Summaries, Employment	View current job, employment data and current employee personal information.
Career Assignment Summary	CAREER_SUMMARY	Workforce Development, Career Planning, Review Career Summaries, Career Assignments	See the job path that the employee has followed in the organization.
Immediate Family Summary	IMMEDIATE_FAMILY	Workforce Development, Career Planning, Review Career Summaries, Immediate Family	View employee's dependent and beneficiary information.
Compensation Summary	COMP_SUMMARY	Workforce Development, Career Planning, Review Career Summaries, Compensation	View summary compensation information.
Training Summary	TRN_STUDNT_CRS_SUM	Workforce Development, Career Planning, Review Career Summaries, Training	View summary training information.

Viewing the Employee Job Path

Access the Career Assignment Summary page.

Career Assignment Summary			
Name:	Davies,Craig R		EmplID: KC0021 Empl Rcd Nbr: 0
Company:	GBI GBI		Hire Date: 03/16/1980
Current Location:	Calgary		Country: CAN
Annual Rate:	55,000.00  CAD	Province: AB Alberta	

Career Summary				Find View All	First  1-2 of 2  Last
Effective Date:	06/01/1996	Business Unit:	GBIBU	Position Number:	
Department:	10000	Human Resources		Manager Level:	Non-Mgr Grade: 004
Job Code:	140080	Analyst-Systems		Job Function Code:	MIS
Supervisor Level:					
Effective Date:	03/16/1980	Business Unit:	CAN01	Position Number:	
Department:	11000	Information Systems		Manager Level:	Non-Mgr Grade: 004
Job Code:	140080	Analyst-Systems		Job Function Code:	MIS
Supervisor Level:					

Career Assignment Summary page

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

Viewing Summary Information

If additional employee information exists in PeopleSoft Human Resources, such as compensation history, training history, and information about the employee's immediate family, you can review it on the summary pages.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries, “Viewing and Reporting Summary Salary Data,” Understanding Compensation History

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Viewing Summary Workforce Information,” Viewing Employee Job History

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Hiring an Employee

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training, “Tracking Student Training,” Reviewing Training-Related Employee Data

Plan Careers Reports

The following reports are provided for Plan Careers and Successions.

Pages Used to Run Careers and Successions Reports

Page Name	Object Name	Navigation	Usage
Careerpath Run Control	RUNCTL_CAR001	Workforce Development, Career Planning, Career Reports, Career Plan	Enter an employee ID to run a career path report.
Runctl Career Training	RUNCTL_CAR002	Workforce Development, Career Planning, Career Reports, Career Training	Enter an employee ID to run a career training report.
IDP (individual development plan)	RUN_FGHR022	Workforce Development, Career Planning, Career Reports, Individual Development Plan	Enter the Employee ID and IDP date to run the report.

CHAPTER 4

Planning Successions

This chapter discusses how to:

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

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

Prerequisites

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

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

Setting Up Global and Local Country Control Tables

The core and local country setup tables, pages, and functionality described in this section are accessed from the Organizational Development menu group (Succession Planning menu). The core and local country functionality is accessed from the appropriate local country menus.

Succession planning uses data defined in the Manage Positions and Manage Competencies business processes. Manage Positions enables you to identify key positions. Then, create succession plans for key positions by creating succession lists in the Plan Successions business process.

Use the data from the Manage Competencies tables to identify candidates based on skill sets you define in the Plan Successions business process. Manage Competencies defines specific job-related competencies and accomplishments which can then be ranked and attributed to positions. The succession planning process then matches these position competencies with employee competencies to perform succession searches and rankings.

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

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Installing PeopleSoft HRMS”

Setting Up and Assigning Key Positions

Create the position hierarchy before setting up succession plans. Once the position hierarchy exists, identify the incumbent in each key position. View incumbent information from succession plans. Use the Key Positions pages to enter details of key positions. To access the Key Positions pages, select Organizational Development, Successions Planning, Key Positions.

Note. USF users should access the Key Positions pages using the Organizational Development, Successions Planning USF, Identify Key Positions navigation.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions,” Creating Positions

Setting Up Career Plans for High-Potential Employees

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

See Also

Chapter 3, “Planning Careers,” page 9

Adding External Candidates

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Setting Up Position Requirements

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

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

From the Succession Planning menu, select Define Key Positions to access the following pages to assign competencies and accomplishments:

- **Position Cluster**
Use the Position Cluster pages to assign clusters to a position. Use clusters for positions that share common requirements. For instance, all the mid-level management positions in the accounting and finance department require a group of the same competencies, such as leadership, motivation, planning, and communication.
- **Position Competency**
Use the Position Competency pages to assign individual competencies to a position and define the proficiency levels required for each competency.
- **Position Accomplishment**
Use the Position Accomplishment pages to assign individual accomplishments to a position.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Assigning Competencies and Accomplishments to Roles”

Tracking Employee Competencies and Accomplishments

Once you have set up the competencies and accomplishments for positions, compare candidates with the position requirements.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments”

Creating Succession Plans

There are three tasks involved in creating succession plans:

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

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

Pages Used to Create Succession Plans

Page Name	Object Name	Navigation	Usage
Succession Plan	SUCCESSION_PLAN1	Organizational Development, Succession Planning, Create Succession Plan, Succession Plan	Enter plan dates and select succession candidates.
Candidates	SUCCESSION_PLAN2	Organizational Development, Succession Planning, Create Succession Plan, Candidates	Use career path information to plan successions and indicate candidate readiness to move into a new position.
Slate	SUCCESSION_SLATE	Organizational Development, Succession Planning, Create Succession Plan, Slate	View the candidates that are slated to replace successors in their current positions.

Entering Succession Plan Data and Selecting Candidates

Access the Succession Plan page.

Succession Plan				Candidates	Slate
Position Number:	PUN7021	Director - Human Resources	Company:	NCY	
Supervisor Level:					
Business Unit:	EGNBU	City of Nelson Business Unit	Sal Plan/Grade/Step:		
Department:	10000	Human Resources	SAL	4	
Job Code:	420060	Director-Human Resources			
Succession Data Find View All First 1 of 1 Last					
*Effective Date:	11/01/2002				
Next Succession Plan Date:					
*Plan Status:	Proposed				
Projected Vacancy Date:					
Plan Incumbent					
EmplID:	PN014	Weider,Rosalie			
Date Available:					
Retire Dt:					
Short Name:					

Succession Plan page

Projected Vacancy Date

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

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

Indicating Candidate Readiness

Access the Succession Plan - Candidates page.

Succession Plan **Candidates** **Slate**

Position Number: 19000210 Director-Human Resources **Company:** GBI

Supervisor Level:

Business Unit: GBIBU Global Business Institute BU **Sal Plan/Grade/Step:** KU01 009

Department: 10000 Human Resources

Job Code: 420060 Director-Human Resources

Succession Data Find | View All First 1 of 1 Last

Effective Date: 01/01/2000 **Next Succession Plan Date:** Initialize + -

Plan Status: Proposed **Projected Vacancy Date:**

Succession Candidates Find | View All First 1 of 3 Last

Rank: 1 ***EmpID** KC0026 Johnson, Carol L + -

Target Date: [Calendar Icon] ***Readiness** 1 - 2 Yrs

Position: 19000600 **Business Unit** CAN01

Department: 14000 **Job Code** 600240 TrnDev Mgr

Sal Plan/Grade/Step: KC02 **Short Name**

Candidates page

Succession Data

Initialize

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

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

Succession Candidates

The Succession Candidates scroll area lists potential successors for the selected position. The succession planning process maintains static data and must be updated by creating new succession plans for each position as needed. Creating new succession plans prevents data from becoming outdated.

Rank

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

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

Target Date

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

Readiness

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

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

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

Viewing Candidates for Specific Positions

Access the Succession Plan - Slate page.

The screenshot displays the 'Slate' tab of the Succession Plan interface. It shows details for a specific position and a list of ranked candidates.

Succession Plan | Candidates | Slate

Position Number: 19000210 Director-Human Resources
Supervisor Level:
Business Unit: GBIBU Global Business Institute BU
Department: 10000 Human Resources
Job Code: 420060 Director-Human Resources

Succession Data Find | View All First 1 of 1 Last

Effective Date: 01/01/2000 **Project Vacancy Date:** + -
Plan Incumbent: Aliverdi,Reza K **Projected Retirement Date:**
Readiness: **Potential:**

1st Ranked Candidates Slate Find | View 1 First 1-3 of 3 Last

EmplID	Name	Readiness:	Title	Position	Block
KC0026	Johnson,Carol L	1 - 2 Yrs	TrnDev Mgr	19000600	Y
KC0015	Campbell,Barry Robert	Ready Now	Train Spec	19000601	N
KU0114	Dell,Emmylou K	1 - 2 Yrs	Emplmnt Mgr	19000004	Y
KU0072	Mosley,Wayne	3 - 5 Yrs	Emplmnt Mgr	19000004	N

Slate page

In the 1st Ranked Candidates Slate scroll area, you see the selected candidates from the Candidates page, in the ranking order. The second and third levels show the people who are ranked first to succeed the candidates in their current positions. The system sorts the succession plan rows in ascending Position Number, descending Effective Date, ascending Rank, ascending Readiness, ascending Target Date and ascending Employee ID. In the example, Carol L Johnson (employee ID KC0026) is the first candidate for the position 19000210 (Director Human Resources). The first candidate to replace Carol Johnson in her current position 19000600 (Manager Training) is Barry Robert Campbell (employee ID KC0015).

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

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

The system checks the employee's readiness. If this is set at "2" (ready in three to five years), "E" (ready in an emergency) or "R" (retire in current position), then Blocked is set to "N" designating that this employee is not ready. If readiness is "0" (ready now) or "1" (ready in one to two years), the system checks the incumbent's readiness. If there is an incumbent but the incumbent has no row on the succession plan table for this or any other position, Blocked is set to "Y." If the incumbent has one or more rows on the succession plan table (any position) then the system checks the lowest readiness in all positions. If the incumbent's minimum readiness is set to "0" or "1," Blocked is set to "N"; otherwise, ("2", "E" or "R"), Blocked is set to "Y."

Setting Up Key Employee Training and Development Plans

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

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

See Also

Chapter 3, "Planning Careers," Entering and Updating Training Programs, page 25

Searching for Additional Internal and External Candidates

There are two tasks involved in searching for additional candidates:

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

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

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

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

For employees and nonemployees, assign competencies and accomplishments on the pages accessed from the Competency Management menu. For applicants, enter competency information on the pages accessed from the Recruiting menu. If your workforce competency data is accurate, initiate a search by selecting one of the following from the Succession Planning menu:

Competency Match - All	Searches both the workforce and applicant tables for people who match the requirements.
Competency Match - Employees	Searches the employee records.
Competency Match - Applicants	Searches the applicant records.
Competency Match - Contractors	Searches the nonemployee records.

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Performing Gap and Match Analyses on Your Workforce”

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

[Chapter 4, “Planning Successions,” Creating Succession Plans, page 36](#)

Viewing Summary Information for Candidates

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

Building a Graphical Succession Hierarchy for Key Positions

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

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

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

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

Notes on Security Access

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

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

Adding Details to a Succession Tree

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

SetID:
Tree Name:

SUCESSION_PLAN
Succession Tree

Effective Date:
Status:
Last Audit:

01/01/1980
Active
Valid Tree

[Save As](#)
[Tree Definition](#)
[Display Options](#)
[Print Format](#)
[Close](#)

19000001 > 19000500

[Collapse All](#) | [Expand All](#)

First Page
10 of 24
Last Page

19000001 - President & CEO

19000500 - VP-International Operations

19000210 - Director-Human Resources

19000029 - Manager-HR Systems

19000400 - VP-Sales & Services

19000300 - VP-Operations

19000024 - General Auditor

19000220 - Director-IT

Succession Tree

See Also

PeopleTools PeopleBook: PeopleTools Security

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Building Organization Charts”

Chapter 4, “Planning Successions,” Building a Graphical Succession Hierarchy for Key Positions, page 41

Accessing Career Plans and Related Employee Data

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

Using Details in Succession Trees

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

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

To add a detail to succession tree:

1. In PeopleSoft Tree Manager, open the succession tree and highlight the key position for which you want to add a detail.
2. Select Edit, Insert, Detail.
A dialog box appears.
3. Select the Dynamic Value Range check box, and click Save.

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

To hide the details in a succession tree:

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

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

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

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

Creating an Internal Resume

Create resumes using personal and job-related data stored in the system.

Page Used to Create an Internal Resume

Page Name	Object Name	Navigation	Usage
Run Control	RUNCTL_PER034	Organizational Development, Succession Planning, Create Internal Resume	Create a resume using the data stored for an employee's competencies, accomplishments and personal and job data.

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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