

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Manage Competencies

December 2002

PeopleSoft 8.8
Human Resources PeopleBook:
Manage Competencies
SKU HRMS88HMC-B 1202

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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

See *Using PeopleSoft Applications*.

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

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

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

PeopleSoft Application Fundamentals

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

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact CPI at 800 888 3559.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

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

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources Manage Competencies Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

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 Human Resources PeopleBook: Manage Competencies* 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.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

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

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured.

Chapters	Description
Getting Started...	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.
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.

Chapters	Description
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 Manage Competencies

This chapter provides an overview of PeopleSoft Human Resources Manage Competencies business processes and discusses implementation tasks.

Understanding Manage Competencies Business Processes

PeopleSoft Human Resources Manage Competencies business processes are:

- Track competencies
- Track accomplishments

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

PeopleSoft Human Resources Manage Competencies Implementation Tasks

The Manage Competencies table-loading implementation includes the following:

- Set up PeopleSoft HRMS fundamental tables.
- Set up core PeopleSoft Human Resources Manage Competencies tables.
- Set up additional PeopleSoft Human Resources Manage Competencies tables.

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

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

The steps discussed in this section suggest an order in which you define the information in your core Manage Competencies 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:

- Track competencies
- Track accomplishments

Step	Reference
1. Create competency type categories.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Competencies, page 11
2. Define competency rating codes.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Competencies, page 11
3. Define specific competencies and competency elements.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Competencies, page 11
4. Define the proficiency levels and related criteria for competencies.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Competencies, page 11
5. Define school information.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments, page 24
6. Define licenses and certificates required by your organization.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments, page 24
7. Define professional organizations and memberships and occupational related tests.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments, page 24
8. Define honors and awards.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments, page 24

Step	Reference
9. Define languages and language codes.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments, page 24

Setting Up Additional PeopleSoft Human Resources Manage Competencies Tables

These steps define information in additional Manage Competencies tables. The information that you define in your core tables lays the foundation for this Manage Competencies-specific set up.

Setting up these additional tables prepares your system to support these business processes and tasks:

- Tracking additional accomplishments data for Japan.
- Tracking National Vocational Qualifications (NVQ) data for the United Kingdom.

Step	Reference
1. (JPN) Define faculties and associated sub-faculties and majors.	Chapter 3, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments, page 24
2. (GBR) Define National Vocational Qualifications (NVQ) awarding bodies.	Chapter 8, “(GBR) Managing National Vocational Qualifications,” Setting Up NVQ Information, page 97
3. (GBR) Define NVQ units and elements.	Chapter 8, “(GBR) Managing National Vocational Qualifications,” Setting Up NVQ Information, page 97
4. (GBR) Create NVQ codes and associate awarding bodies.	Chapter 8, “(GBR) Managing National Vocational Qualifications,” Setting Up NVQ Information, page 97
5. (GBR) Define NVQs by the associated units.	Chapter 8, “(GBR) Managing National Vocational Qualifications,” Setting Up NVQ Information, page 97

CHAPTER 2

Understanding PeopleSoft Human Resources Manage Competencies

This chapter provides an overview of PeopleSoft Human Resources Manage Competencies and discusses:

- PeopleSoft Human Resources Manage Competencies business processes.
- PeopleSoft Human Resources Manage Competencies integrations.
- Use of competencies for gap/match analysis.
- Use of competencies to manage employee training.
- Common elements used in this PeopleBook.

PeopleSoft Human Resources Manage Competencies

PeopleSoft Human Resources Manage Competencies business process provides you with the ability to track employee competencies and accomplishments, to apply your specific evaluation criteria to each, and to apply your own levels of importance to each. Once you implement the system, you can not only list the skills and accomplishments of each employee, but also qualify each to a role, job, or training regime within your organization.

A competency/accomplishment profile is a set of competencies and/or accomplishments that will define a particular role or that are designated to be assessed for an individual. You assemble competency and accomplishment profiles for roles to establish proficiency levels for employees and job candidates. Competency and accomplishment profiles help you perform gap and match analysis for planning employee career and training needs and for filling positions and team assignments.

PeopleSoft Human Resources Manage Competencies Business Processes

PeopleSoft Human Resources Manage Competencies supports the following business processes:

- Track competencies

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

In tracking employee competencies, you define key competencies, perform gap/match analysis and set up training programs.

- Track accomplishments

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

In tracking employee accomplishments, you record your employees' educational achievements, language skills, licenses and certifications.

PeopleSoft Human Resources Manage Competencies Integrations

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

PeopleSoft Human Resources (HR) 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.

We cover integration considerations in this PeopleBook.

See Also

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

Using Competencies for Gap/Match Analysis

You can match employees to roles, roles to employees, teams to projects, and new-hire candidates to open roles. You can award points to employees, applicants, or teams based on their assigned competencies, competency proficiency ratings, and accomplishments. You can also weight the evaluation in favor of the important values you've assigned to each competency and accomplishment.

To implement Manage Competencies for gap and match analysis, you can:

- Set up match evaluation types.
- Perform matching processes to match employees to roles, roles to employees, and teams to projects.
- Search your database for job candidates who match open jobs/roles.

Using Competencies to Manage Employee Training

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

To implement Manage Competencies for managing employee training, you can:

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

Common Elements Used in This PeopleBook

Competency

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

Accomplishment

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

CHAPTER 3

Setting Up Competencies and Accomplishments

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

- Set up competencies.
- Set up sub-competencies.
- Import competency data.
- Set up educational qualifications and accomplishments.
- Run competency and accomplishment reports.

Understanding Competencies

Competencies are directly related to an employee's current role and may encompass skills, abilities, knowledge, or behavior, such as experience with office equipment, knowledge of special manufacturing processes, or a background in financial planning.

Unlike accomplishments, competencies are measured or evaluated using a rating model that you define (one employee might have more sophisticated computer skills than another, for example).

The system stores setup data for competencies in a table called `COMPETENCY_TBL`.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “(USF) Administering Personnel Action Requests”

Integration with ePerformance and eDevelopment

Manage Competencies shares competency data with PeopleSoft ePerformance and eDevelopment. All three applications provide a method for rating employee competencies:

- Manage Competencies enables human resources administrators to enter competency ratings on the Competency Rating page.
- ePerformance enables the evaluation of an employee's competencies as a part of the performance management process.
- eDevelopment enables employees to complete a self-assessment of their own competencies independent of the performance management process.

Sub-competencies

A competency can have one or more sub-competencies. If you're using PeopleSoft ePerformance, you can evaluate employees on both competencies and sub-competencies. We explain how to define sub-competencies in this chapter.

Rating Models

Rating models define the values that can be used to rate an employee's performance or level of proficiency in a competency. If you're using PeopleSoft ePerformance, you can also use rating models to define values for rating sections of a performance document as well as rating overall performance.

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

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

Review Bands

When you create a rating model, you can define a review band that associates each rating with a range of points. For example, employees who earn from 81 to 90 points, receive a rating of B; while employees who earn from 91 to 100 points receive a rating of A.

Methods of Defining Competency and Sub-Competency Data

Two options are available for defining competency and sub-competency data:

- Import data from selected third-party suppliers.

You can import rating model definitions, competency definitions, proficiencies. If you have licensed ePerformance you can import data for development tips, and Results Writer text for competencies and sub-competencies.

- Manually define competencies and sub-competencies.

We discuss both methods in this chapter.

Understanding Accomplishments

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

The system stores setup table data for accomplishments in the installation record ACCOMP_TBL.

Setting Up Competencies

This section discusses how to:

- Set up rating models.
- Define competency elements.
- Define individual competencies.
- (Optional) Create proficiency descriptions.
- (Optional) Associate elements with competencies.
- Locate and review competency information.
- (Optional) Set up a competency tree.

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

Prerequisites

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

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

Pages Used to Set Up Competencies

Page Name	Object Name	Navigation	Usage
Rating Model Table	RATING_MDL_TBL	Set Up HRMS, Common Definitions, Competencies, Rating Model	Define a set of alphabetic or numeric codes for ranking an employee's degree of expertise or experience in a competency. You can define a single rating model for your entire organization or build multiple models for different projects or departments.
Competency Types	CM_TYPE_TABLE	Set Up HRMS, Common Definitions, Competencies, Competency Types, Competency Types	Create competency types, or broad categories of competencies relevant to particular positions or projects. While you don't have to define types in general, you must define them to build and maintain competency trees.
Competency Criteria	PERF_CRITERIA_TBL	Set Up HRMS, Common Definitions, Competencies, Competency Criteria	Establish and define performance criteria for job and competency element rating. Performance criteria establish guidelines for evaluating competencies and competency elements.
Competency Element	CM_ELEMENT_TABLE	Set Up HRMS, Common Definitions, Competencies, Competency Element	Define all of the valid competency elements.
Competency Table	COMPETENCY_TABLE	Set Up HRMS, Common Definitions, Competencies, Competencies, Competency Table	Record skills, abilities, knowledge or behaviors pertinent to jobs in your organization. Note. (GBR) To establish NVQ (National Vocational Qualifications) units, use the Unit page in the Workforce Development, Competency Management, Define NVQ UK, Units and Elements navigation path.
Competencies - Proficiency Descriptions	CM_RATING_DESCRS	Set Up HRMS, Common Definitions, Competencies, Competencies, Proficiency Descriptions	Define the proficiency statements that describe the rating levels for a given competency. Only one proficiency statement is permitted for each rating level.

Page Name	Object Name	Navigation	Usage
Competencies – Element	NVQ_UNITELEMENTS	Set Up HRMS, Common Definitions, Competencies, Competencies, Element	(GBR) If using NVQ functionality, associate elements with competencies.
Competency Summary	CM_COMPETENCY_SUMM	Set Up HRMS, Common Definitions, Competencies, Competency Summary, Competency Summary	Review and modify the different competency categories or types that you've established.

See Also

PeopleSoft 8.8 ePerformance PeopleBook

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training

Setting Up Rating Models

Access the Rating Model Table page.

Rating Model

Rating Model: PSCM

Description
Find | View All
First 1 of 1 Last

***Effective Date:** 01/01/1980 31
Status: Active + -

***Description:** Competency Management Scale

Short Description: Comp Mgmt ☐ **Review Band**

Ratings
Customize | Find
First 1-6 of 6 Last

General | Review Points

*Rating	*Description	Short Description	Numeric Rating	Career Strength/ Development		
0	0-None	None	0.00	Developmnt	+	-
1	1-Little	Little	1.00	Developmnt	+	-
2	2-Fair	Fair	2.00	Developmnt	+	-
3	3-Good	Good	3.00	Strength	+	-
4	4-Very Good	Very Good	4.00	Strength	+	-
5	5-Expert	Expert	5.00	Strength	+	-

Rating Model page – General tab

Review Band

Select this check box if you want to define this rating model as a Review Band Rating model.

Note. To use the JPN Grade Advance Candidate List and the JPN Salary Increase processes, the performance reviews in ePerformance must use a Review Band Rating model for overall review ratings.

See *PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, “(JPN) Updating Salaries for Japan”.

General Tab

Define all possible rating levels that can be used to evaluate an employee when this rating model is used. At least two rating levels are required. You can add as many rows as necessary.

Rating Enter an alphabetic or numeric code for the rating. This is sometimes referred to as the *qualitative rating*.

Numeric Rating This field is used by PeopleSoft ePerformance only. Enter a numeric value for the rating, if applicable.

The value you enter has two purposes:

- For sections of a performance document that use the average calculation method, the system uses this value to calculate the section’s average or weighted average. It also uses this value to calculate the average rating for each item in the section (when sub-items exist).
- If you select the Show Rating Numerics check box on the Usage/Roles page of the Template Definition component, the value you enter here displays next to the rating on the performance document. This feature is useful when ratings are alphabetic.

See *PeopleSoft 8.8 ePerformance PeopleBook*, “Designing Performance Documents,” Understanding Methods for Calculating Review Ratings.

Career Strength/Development The system uses this value when transferring competency profiles between the Manage Competencies and Plan Careers business processes.

Select *Development* (development) if the rating indicates an area that needs more skill development, education, or training.

Select *Strength* if the rating indicates an area of strength.

You can click a link on the Career Plan - Career Strength/Develop Areas page or the Competency Assignment page to transfer this value from the Plan Careers business process to the Manage Competencies business process and vice versa.

See *PeopleSoft 8.8 Human Resources PeopleBook: Plan Careers and Successions*, “Planning Careers,” Ranking Employee Potential.

Review Points Tab

Access the Rating Model Table page – Review Points tab.

Ratings							
General		Review Points					
*Rating	Review Points	From Points	To Points	Eligibility Points			
0	0	0	1	0.0	+	-	
1	1	2	4	0.0	+	-	
2	2	5	7	0.0	+	-	
3	3	8	10	0.0	+	-	
4	4	11	13	0.0	+	-	
5	5	14	15	0.0	+	-	

Rating Model Table page – Review Points tab

Complete the fields on this tab if you want to associate a number of points, or a points range with each rating level defined on the General tab.

Rating

The rating entered on the General tab displays here. If you change this value, the system automatically updates the Rating field on the General tab to match.

Review Points

Enter a number from 0 to 999 for the rating.

For ePerformance, this field applies when:

- Section calculation use Summation method. The system uses the review points that you enter here in its calculations.

For example, you set up A as a Rating field with a value of 100 for review points and B as a Rating field with a value of 70 as the review points. If a manager gives a rating of A for an item on a review and B for another item, the system uses the 100 for the first item and 70 for the second. If there are only these two items in a section, the total points for this section will be 170 points. To determine the overall rating, the system calculates the total point for each section and then add the section totals together to arrive at the overall points.

Note. To use the Automated Step Increase process, the Summation method is required.

- In Competency Management, use the matching function to determine how well an employee matches the competencies for a given role. The matching function uses the review points that you enter here.

See [Chapter 6, “Performing Gap and Match Analyses on Your Workforce,” Matching Employees to Roles, page 70](#).

See *PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries, “Administering Salary Plans, Grades, and Steps”*.

From Points and To Points

Define a range of points to associate with this rating. These points are used to convert summed-up points to either a Review Band or a qualitative rating.

A Review Band is really the same as a qualitative rating, instead of being directly assigned, it's calculated by summing points, then finding the entry in this table that contains a range of From/To points that encloses the summed points.

If Review Band is checked ON, you must enter a value in the To Points field. When the calculation method is Review Band, the system uses these fields to resolve the number of total points in a review to a qualitative rating. When the calculation method is Summation, the system uses these fields to resolve the number of total section points or total review points to a qualitative rating.

Eligibility Points

If applicable, enter the number of points used by the *Shohkaku* (JPN), or Grade Advance eligibility feature of the Plan Salaries business process. This is used only if the Appl for Grade Advance Prc check box is selected on the JPN Review Definition

See *PeopleSoft 8.8 ePerformance PeopleBook*, “Defining Basic Settings and Tables,” Creating a Review Definition.

See *PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, “(JPN) Updating Salaries for Japan”.

Federal tab

Access the Rating Model page – Federal tab.

Ratings					
General		Review Points	Federal		
*Rating	OPM Rating		RIF Years		
1	1		0	+	-
2	2		0	+	-
3	3		0	+	-
4	4		0	+	-
5	5		0	+	-

Rating Model Table page – Federal tab

This tab appears only when Federal is selected on the Products page and the user is logged on as a Federal user.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Installing PeopleSoft HRMS,” Selecting PeopleSoft Applications for Your Installation.

OPM Rating (Office of Personnel Management)

(USF) Select the OPM rating that correlates with the rating level. This field is used for reporting to the Central Personnel Data File (CPDF).

RIF Years (Reduction in Force years)

(USF) Enter the number of RIF Years associated with this rating level.

See Also

[Chapter 6, “Performing Gap and Match Analyses on Your Workforce,” page 65](#)

[Chapter 5, “Tracking Employee Competencies and Accomplishments,” Synchronizing the Plan Careers and Manage Competencies Business Processes, page 49](#)

Defining Competency Elements

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

Access the Competency Element page.

Competency Element page

Satisfaction Method

Identifies how this element can be satisfied or achieved. Valid values are *Attend Training Course*, *Dispensation Given*, *Off the Job Training*, *On the Job Training*, *Possess License/Certificate*, *Recognition of Prior Learning*, and *Supervisor Assessment*.

Title

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

Criteria Code

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

Defining Individual Competencies

Access the Competency Table page.

Competency Table | Proficiency Descriptions | Element

Competency: 0100

***Description:** Abstract thinking

Short Description: Abstract

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

***Category:** Ability

***Content Supplier:** Customer Defined

Comments: Able to analyze multi-faceted concepts determining a sound solution. Able to think "out-of-the-box". Uses innovative solutions to solve problems.

Competency Types [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

*Type	Description
INTEL	Intellectual

Competency Table page

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

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

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

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

Creating Proficiency Descriptions

Access the Competencies – Proficiency Descriptions page.

Competencies – Proficiency Descriptions page

You must set up competencies before you can define proficiency descriptions.

Review Rating

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

See Also

PeopleSoft 8.8 ePerformance PeopleBook

Associating Elements with Competencies

Access the Element page.

Element page

Element Code

Select elements, defined on the Element Table, to further define a competency through associated elements. For example, the competency Product Expertise might have Knowledge of Competitor's Products as one of the elements.

Locating and Reviewing Competency Information

Access the Competency Summary page.

Competency Summary

Competency Category:
OR
Competency Type: Communication

Competencies			
Competency	Description	*Category	
0152	Debates issues unabrasively	Ability	-
0153	Articulate & concise	Skill	-
0154	Organize & present ideas well	Skill	-
0242	Shows honesty & integrity	Other	-
0250	Informs Superiors	Ability	-
0502	Communication Skills	Ability	-
5015	Delivering Oral Presentations	Skill	-
FJC027	Strong customer service ethic	Ability	-

Competency Summary page

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

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

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

Setting Up Competency Trees

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

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

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

You can build as many competency trees as necessary.

Using Competency Trees

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

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

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

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

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security,” Creating and Modifying Security Trees

PeopleTools PeopleBook: PeopleSoft Tree Manager

Setting Up Sub-Competencies

This section discusses how to:

- Define sub-competencies.
- Define proficiency statements for a sub-competency.

Pages Used to Set Up Sub-Competencies

Page Name	Object Name	Navigation	Usage
Sub-Competency	EP_SUB_COMP_TBL1	Set Up HRMS, Common Definitions, Competencies, Sub-Competencies, Sub-Competency	Create sub-competencies for a competency. Sub-competencies can be used in PeopleSoft ePerformance Management. Define sub-competencies before defining competency proficiencies.
Sub-Competencies – Proficiency Descriptions	EP_SUB_PROF_TBL	Set Up HRMS, Common Definitions, Competencies, Sub-Competencies, Proficiency Descriptions	Define the proficiency statements that describe the rating levels for a given sub-competency. Only one proficiency statement is permitted for each rating level.

Defining Sub-competencies

Access the Sub-Competency page.

Sub-Competency page

Level The rating levels are determined by the rating model used by the related competency.

Defining Proficiency Statements for a Sub-competency

Access the Sub-competencies - Proficiencies Descriptions page.

Sub-Competencies – Proficiency Descriptions page.

Note. This page is similar to the Competency Proficiencies - Proficiencies page.

See [Chapter 3, “Setting Up Competencies and Accomplishments,” Creating Proficiency Descriptions, page 18.](#)

Importing Competency Data

PeopleSoft has established partnerships with several third-party vendors from which you can purchase any or all of the following types of competency-related data: competency and sub-competency definitions, development tips, rating model tables, and content for the Results Writer. As of this writing, the authorized vendors are: Knowledge Point, Lominger, and PDI.

PeopleSoft Integration Broker technology receives vendor-supplied data in the form of comma delimited flat files. The flat files are imported into PeopleSoft Human Resources using the Inbound File Publish Application Editor (AE) process. You do not need to develop an interface to load third-party content into the system—we deliver all integration functionality with the application.

Follow the procedures in this section to import data.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

File Identifiers

The following table lists file identifiers for the inbound file rules. You'll use Inbound File Publish process to import the content of these files, as applicable.

File Identifier	Description
EP COMPETENCY	Competencies
EP COMP DEV	Competency development tips
EP COMP PROF	Competency proficiencies
EP DEV TIP	Development tips
EP RATING MDL	Rating model definitions
EP REVW RATING	Rating model ratings
EP SUB COMP	Sub-competencies
EP SUB DEV	Sub-competency development tips
EP SUB PROF	Sub-competency proficiencies
EP SUB WRT	Sub-competency Results Writer text

Preparing to Import Data

Before you can import data, you need to perform the following steps:

1. Activate messages.

Use the File Inbound page to set the status of each message (transaction) to *Active*.

2. (Optional) Change the default directory for the incoming files.

The default directory is C:\temp. To select a different directory, complete the Inbound File field on the File Inbound page.

Importing Data

1. For each file identifier, initiate the publish process.

The publish process converts the flat file to a message.

- a. Select Define Integration Rules, Process Integration Rules, Inbound File Publish.
- b. Create a run control and initiate the process.

See *PeopleTools PeopleBook: PeopleSoft Enterprise Integration*

2. Confirm that the process is complete through Process Monitor.

Setting Up Educational Qualifications and Accomplishments

This section discusses how to track employee accomplishments, including:

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

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

Note. You can access the Degree Table page from several menus, including Enterprise Learning, Competency Management, and Workforce Administration. The Degree Table page is discussed.

Pages Used to Set Up Educational Qualifications and Accomplishments

Page Name	Object Name	Navigation	Usage
School Type Table	SCHOOL_TYPE_TBL	Set Up HRMS, Common Definitions, School Information, School Types, School Type Table	Set up codes for the types of schools employees might have attended: high schools, universities, or professional schools, for example.
School Table	SCHOOL_TABLE	Set Up HRMS, Common Definitions, School Information, Schools, School Table	Create codes for specific schools. The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.
Degree Table	DEGREE_TABLE_GBL	Set Up HRMS, Common Definitions, School Information, Degrees, Degree Table	Define degree types and the years of study associated with them. Use the values that you enter in this table to track information about employee qualifications in the Education pages.
Major Table	MAJOR_TABLE	Set Up HRMS, Common Definitions, School Information, Majors, Major Table	Include areas of study most commonly associated with school degrees or certificates.
Education Level Achieved Table	EDLVL_ACHV_TBL	Set Up HRMS, Common Definitions, School Information, Education Level Achieved, Education Level Achieved Table	Define codes for different levels of education. Use these values to assign and track employee education, training and accomplishments.
Faculty Table JPN (faculty table Japan)	FACULTY_TABLE_JPN	Set Up HRMS, Common Definitions, School Information, Faculty Table JPN, Faculty Table JPN	Define faculties, and associate sub-faculties and majors with them.
Honor/Award Table	HONOR_AWARD_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Honors and Awards, Honor/Award Table	Track professional distinctions, corporate awards, competitions, and so forth.
Language Table	LANGUAGE_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Languages, Language Table	Define codes to track employee language abilities. Note. When setting up multilingual courses, if the instructor's primary language is not defined, the instructor will not be associated with the language.

Page Name	Object Name	Navigation	Usage
License/Certification Table	LICENSE_CERTIF_TBL	Set Up HRMS, Common Definitions, Accomplishments, Licenses and Certifications, License/Certification Table	Define any required licenses or certificates for jobs in your organization.
Membership Table	MEMBERSHIP_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Memberships, Membership Table	Define codes for professional organizations, special clubs, or other associations.
Test Table	TEST_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Test Table, Test Table	Create codes for standard tests, such as typing, programming aptitude, or mathematical tests, that you administer to job applicants or employees.

Tracking Schools

Access the School Table page.

School Table

School Code: KGS002

***Description:** ☒ **Public** ☐ **Private**

Short Description:

Country: United Kingdom

County: Cambridgeshire

▼  **Australia**

Higher Education

Institute Type:

School Table page

Country

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

Tracking Degrees

Access the Degree Table page.

Degree Table

Degree: BA

***Description:** Bachelor of Arts

Short Description: BA

Years Of Education:

Education Level: 4 Yrs Coll

Country:

▼  Germany

Field Of Study:

Type Of Study:

Duration (Months):

▼  French Public Sector

Level:

Degree Table page

Years of Education	Enter the number of years required to obtain the degree.
Education Level	Specify the education level achieved when the degree is earned.
Country	Indicate the country where the degree is earned.
(DEU) Germany	
Field of Study	Select <i>Commercial</i> , <i>Industrial</i> , or <i>Technical</i> .
(FRA) France	
Level	Select <i>2Y HEd</i> , <i>3Y HEd</i> , <i>4Y HEd</i> , <i>5Y + > HEd</i> , <i>HSD</i> , <i>LeavCertif</i> , <i>TSC and Alt</i> and <i>VTC and Alt</i> .

Tracking Licenses and Certification

Access the License/Certification Table page.

License/Certification Table

License/Certificate CPA

*Description: Certified Public Accountant

Short Title: CPA

*Renewal Required: No

Renewal Period:

License/Certification Table page

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

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

(JPN) Recording Additional Education-Related Information

Access the Faculty Table JPN page.

Faculty Table JPN

Faculty Code: KJ002

Faculty Information

*Faculty Description: Faculty of Economics

*Faculty Short Description: Econ

Major Category: Humanities

Sub-Faculty Information

Customize | Find | First 1-2 of 2 Last

	*Sub-Faculty Code	*Sub-Faculty Description	*Sub-Faculty Short Description		
1	KJ01	Department of Economics	Econ	+	-
2	KJ02	Department of Management	Mgmt	+	-

Faculty Table JPN page

Major Category Select *Humanities* or *Sciences*.

The value that you select here is the default major category wherever you select this faculty, for example, on the Professional Ed. and Training page. You can also override the default.

Sub-Faculty Code

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

Running Competency and Accomplishment Reports

This section discusses how to generate listings of your competency and accomplishment tables.

Pages Used to Run the Competency and Accomplishment Reports

Page Name	Object Name	Navigation	Usage
Competency Listing – Run Control	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Competencies, Competency Listing	Run the Competency Listing report (PER537) that lists competency types and the competencies associated with each type; also lists descriptions and categories.
Accomplishment Listing	RUNCTL_PER538	Set Up HRMS, Common Definitions, Accomplishments, Accomplishment Listing	Run the Accomplishment Listing report (PER538) that lists all defined accomplishments. The report does not include NVQs for the UK.
Licenses and Certifications – Run Control	PRCSRUNCNTL	Enterprise Learning, Course Reports, Licenses and Certifications	Run the License/Certification Table report (PER704) that lists codes assigned to defined licenses and certifications.

Running the Accomplishment Listing Report

Access the Accomplishment Listing page.

Accomplishment Listing

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) **Run**

Language: English ▼

Report Request Parameter(s)

- ☒ Degree Detail
- ☒ License/Certification Detail

Accomplishment Listing page

Degree Detail Select to include full details of a degree.

License/Certification Detail Select to include full details of licenses and certifications.

CHAPTER 4

Assigning Competencies and Accomplishments to Roles

This chapter provides an overview of clusters, lists common elements, and discusses how to:

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

Understanding Clusters

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

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

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

It is common to use clusters in the following scenarios:

- Positions sharing common competencies.

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

- Team-based environments.

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

- Skill-based pay environments.

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

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

Common Elements Used in This Chapter

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

Setting Up Clusters and Job Families

This section discusses how to:

- Assign competencies to a cluster.
- Assign accomplishments to a cluster.

Pages Used to Set Up Clusters and Job Families

Page Name	Object Name	Navigation	Usage
Cluster Competencies	CM_CLST_COMP_TABLE	Set Up HRMS, Common Definitions, Competencies, Clusters, Cluster Competencies	Assign competencies included in a cluster.
Cluster Accomplishments	CM_CLST_ACMP_TABLE	Set Up HRMS, Common Definitions, Competencies, Clusters, Cluster Accomplishments	Define the accomplishments included in a cluster.

Assigning Competencies to a Cluster

Access the Cluster Competencies page.

Cluster Competencies

Cluster Accomplishments

Competency Cluster: FMGRS

Description: Managers

Short Description: Managers

Comments: Generic Managerial Competency Model.

Competencies					
*Competency	Description	*Importance	*Proficiency		
0102	Conceptual thinking	3-Average	3-Good	+	-
0151	Directiveness/Assertiveness	4-Above Average	3-Good	+	-
0201	Accountability for decisions	4-Above Average	3-Good	+	-
0206	Developing others	4-Above Average	3-Good	+	-
0209	Team leadership	3-Average	3-Good	+	-
0600	Achievement Orientation	5-High	3-Good	+	-
0601	Impact and Influence	5-High	3-Good	+	-

Cluster Competencies page

Competencies

Importance

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

Proficiency

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

Assigning Accomplishments to a Cluster

Access the Cluster Accomplishments page.

Cluster Competencies

Cluster Accomplishments

Competency Cluster: FMGRS Managers

Accomplishments					
Accomplishment	Description	Importance			
1007	General Aptitude Test	3-Average	+	-	
1009	Business English	4-Above Average	+	-	
1016	Complex Problem Solving	4-Above Average	+	-	

Cluster Accomplishments page

Importance

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs,” Setting Up Job Families

Assigning Clusters, Competencies, and Accomplishments to Roles

This section discusses how to:

- Assign clusters to roles.
- Assign rank to clusters.
- Assign competencies to roles.
- Rank competencies.
- Rate competencies.
- Assign accomplishments to roles.
- Rank accomplishments.

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

Page Name	Object Name	Navigation	Usage
Assign Clusters	CM_ROLE_CLST_ASGN	Workforce Development, Competency Management, Assign Role Competencies, Clusters, Assign Clusters	Assign clusters to a selected role.
Cluster Detail	CM_CLUSTER_SEC	Workforce Development, Competency Management, Assign Role Competencies, Clusters, Assign Clusters Click Cluster on the Assign Clusters page.	View the competencies and accomplishments assigned to the cluster and the relative importance of each one. For competencies, you can also view the proficiency level required.
Rank Clusters	CM_ROLE_CLST_IMP	Workforce Development, Competency Management, Assign Role Competencies, Clusters, Rank Clusters	Allocate an importance level to each cluster assigned to a selected role.
Assign Competencies	CM_ROLE_COMP_ASGN	Workforce Development, Competency Management, Assign Role Competencies, Competencies, Assign Competencies	Assign individual competencies to a selected role.
Rank Competencies	CM_ROLE_COMP_IMP	Workforce Development, Competency Management, Assign Role Competencies, Competencies, Rank Competencies	Allocate an importance level to each competency assigned to a selected role.
Rate Competencies	CM_ROLE_COMP_PROF	Workforce Development, Competency Management, Assign Role Competencies, Competencies, Rate Competencies	Define the proficiency level required for each competency assigned to a selected role.
Assign Accomplishments	CM_ROLE_ACMP_ASGN	Workforce Development, Competency Management, Assign Role Competencies, Accomplishments, Assign Accomplishments	Assign individual accomplishments to a selected role, such as language skills, professional memberships, or licenses.
Rank Accomplishments	CM_ROLE_ACMP_IMP	Workforce Development, Competency Management, Assign Role Competencies, Accomplishments, Rank Accomplishments	Allocate an importance level to each accomplishment assigned to a selected role.

Assigning Clusters to Roles

Access the Assign Clusters page.

Assign Clusters | **Rank Clusters**

Assign Clusters Find | View All First 1 of 1 Last

SetID: SHARE **Job Task:** K10001 Project Management

***Effective Date:** 01/01/1980

Default From

Job Family Job Code

Assigned Clusters Customize | Find | View All | First 1 of 1 Last

Description	Detail
☐	Cluster

Source Clusters Customize | Find | View All | First 23 of 1-7 of Last

Cluster	Description	Detail
☐ FHSPRF	Human Service Professionals	Cluster
☐ FMGRS	Managers	Cluster
☐ FSALES	Salespeople	Cluster
☐ H0PM1	Management	Cluster
☐ H0PM2	Technical Developer	Cluster
☐ HXCLUS	Manage Comp Test	Cluster
☐ HXMGR1	Self Service CM testing	Cluster

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Assign Clusters page

Default From

Job Family

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

Job Code

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

Assigned Clusters

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

Cluster

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

Source Clusters

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

Add and Delete Buttons



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



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

Assigning Rank to Clusters

Access the Rank Clusters page.

Rank Clusters

SetID: SHARE Job Code: 310005 Consultant-Junior

Effective Date: 01/01/1980

Order By: Importance Cluster

Assigned Clusters

Cluster	Description	Importance
KCONS	Consultancy	★★★★★ Average

Rank Clusters page

Assigned Clusters

Cluster

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

Importance

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

Assigning Competencies to Roles

Access the Assign Competencies page.

Assign Competencies

Competency Profiles

SetID: SHARE Job Code: 800010 Secretary-Senior

Effective Date: 01/01/1980

Default From: Job Family Job Code

Assigned Competencies

Category	Competency	Hiring Requirements	Tenure Requirements	Promotion Requirements
☐ Ability	Takes initiative & follows up	N	N	N
☐ Other	Customer Service Orientation	N	N	N
☐ Knowledge	Computer Literacy	N	N	N
☐ Knowledge	HRIS Experience	N	N	N
☐ Skill	Multi-Tasking	N	N	N

Source Competencies

Competency	Description

Assign Competencies page

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

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

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

Assigned Competencies

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

Source Competencies

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

Add and Delete Buttons



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



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

Ranking Competencies

Access the Rank Competencies page.

Assign Competencies
Rank Competencies
Rate Competencies

Rank Competency
Find | View All
First 1 of 1 Last

SetID: SHARE Job Code: 800010 Secretary-Senior

Effective Date: 01/01/1980

Order By
Importance Competency

Assigned Competencies
Find | View All
First 1-5 of 5 Last

Competency	Description	Importance					
0200	Takes initiative & follows up	★	★	★	★	★	Above Avg
0700	Customer Service Orientation	★	★	★	★	★	Average
2001	Computer Literacy	★	★	★	★	★	Below Avg
4011	HRIS Experience	★	★	★	★	★	Above Avg
4014	Multi-Tasking	★	★	★	★	★	Average

Rank Competencies page

Importance

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

Rating Competencies

Access the Rate Competencies page.

Competency	Description	Importance	*Rating
0200	Takes initiative & follows up	4-Above Average	4-Very Good
0700	Customer Service Orientation	3-Average	3-Good
2001	Computer Literacy	2-Below Average	Fully Successful
4011	HRIS Experience	4-Above Average	2-Fair
4014	Multi-Tasking	3-Average	3-Good

Rate Competencies page

Assigned Competencies

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

Competency

The system populates the competency code and name from the Competency Table.

Importance

The system populates the importance from Competencies - Rank Competencies page.

Rating

Select a rating. The ratings vary according to the rating model used to measure the competency.

Assigning Accomplishments to Roles

Access the Assign Accomplishments page.

Assign Accomplishments page

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

Default From

Job Family

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

Job Code

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

Assigned Accomplishments

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

Accomplishment

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

Source Accomplishments

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

Add and Delete Buttons



(add button)

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



(delete button)

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

Ranking Accomplishments

Access the Rank Accomplishments page.

Rank Accomplishments

SetID: SHARE Job Task: K10002 Business Process Analysis

Effective Date: 01/01/1980

Order By: Accomplishment Importance

Assigned Accomplishments

Accomplishment	Description	Importance	Average
1005	Customer Service Skills	☆☆☆	Average
HRA	Human Resources Association	☆☆☆	Average

Rank Accomplishments page

Assigned Accomplishments In the Assigned Accomplishments group box, the system lists the accomplishments you assigned to the role on the Accomplishments - Assign Accomplishments page. Use the Cluster Accomplishments page to view the ranking of accomplishments that are assigned to the role as a part of a cluster.

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

CHAPTER 5

Tracking Employee Competencies and Accomplishments

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

- Enter employee competencies.
- Enter employee accomplishments.
- Run employee competency and accomplishment reports.

Understanding Competency and Accomplishment Tracking

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

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

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

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

See Also

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

Entering Employee Competencies

This section discusses how to:

- Assign competency evaluation IDs.
- Assign competencies to employees.

- Synchronize the Plan Careers and Manage Competencies business processes.
- Define proficiency levels for assigned competencies.
- Verify competency tracking methods.

Pages Used to Enter Employee Competencies

Page Name	Object Name	Navigation	Usage
Competency Evaluation	CM_COMPETENCY_EVL1	• Workforce Development, Competency Management, Track Person Competencies, Competencies, Competency Evaluation • Enterprise Learning, Result Tracking, Update Competencies/Accomps, Competencies, Competency Evaluation • Workforce Development, Career Planning, Track Competencies/Accomps, Competencies, Competency Evaluation • Organizational Development, Succession Planning, Review Competencies/Accomps, Competencies, Competency Evaluation • Organizational Development, Succession Planning USF, Review Competencies/Accomps, Competencies, Competency Evaluation	Establish Evaluation IDs for use in performance reviews.

Page Name	Object Name	Navigation	Usage
Competency Assignment	CM_PERS_COMP_ASGN	• Workforce Development, Competency Management, Track Person Competencies, Competencies, Competency Assignment • Enterprise Learning, Result Tracking, Update Competencies/Accomps, Competencies, Competency Assignment • Workforce Development, Career Planning, Track Competencies/Accomps, Competencies, Competency Assignment • Organizational Development, Succession Planning, Review Competencies/Accomps, Competencies, Competency Assignment • Organizational Development, Succession Planning USF, Review Competencies/Accomps, Competencies, Competency Assignment	Enter employee competencies. If you have set up competency profiles for your job codes or positions, you can use these profiles to populate employee competencies. Note. Before you assign competencies, you must set up competency codes on the Competency Table.
Plan Careers / Manage Competencies Link	COMP_STRDVLP_SEC	Workforce Development, Competency Management, Track Person Competencies, Competencies, Competency Assignment Click Link to Career Planning on the Competency Assignment page.	Synchronize competency data between the Plan Careers and the Manage Competencies business processes. Note. With PeopleSoft Human Resources, you can add employee competency data in both these processes. To keep data consistent, transfer competency information between them.

Page Name	Object Name	Navigation	Usage
Competency Rating	CM_PERS_COMP_PROF	• Workforce Development, Competency Management, Track Person Competencies, Competencies, Competency Rating • Enterprise Learning, Result Tracking, Update Competencies/Accomps, Competencies, Competency Rating • Workforce Development, Career Planning, Track Competencies/Accomps, Competencies, Competency Rating • Organizational Development, Succession Planning, Review Competencies/Accomps, Competencies, Competency Rating • Organizational Development, Succession Planning USF, Review Competencies/Accomps, Competencies, Competency Rating	Record employees' level of expertise for each competency assigned to them, and record their interest in developing each competency. Note. Before assigning ratings to employees, you must define ratings on the Rating Model Table and assign rating models to competencies on the Competency Table.

Page Name	Object Name	Navigation	Usage
Competency Verification	COMPETENCIES	• Workforce Development, Competency Management, Track Person Competencies, Competencies, Competency Verification • Enterprise Learning, Result Tracking, Update Competencies/Accomps, Competencies, Competency Verification • Workforce Development, Career Planning, Track Competencies/Accomps, Competencies, Competency Verification • Organizational Development, Succession Planning, Review Competencies/Accomps, Competencies, Competency Verification • Organizational Development, Succession Planning USF, Review Competencies/Accomps, Competencies, Competency Verification	Track how you verified competencies assigned to employees. Also record when employees acquired the competencies assigned to them, how recently they used each competency, and their total experience in each competency

Assigning Competency Evaluation IDs

Access the Competency Evaluation page.

Competency Evaluation page

Use this page to track 360-degree feedback if your organization uses this evaluation method. In 360-degree feedback, several people, such as subordinates or peers in addition to the manager, evaluate an employee on one's specified competencies.

Evaluation ID

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

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

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

Licenses and Certifications

Click to display the Licenses and Certifications page.

Evaluation Type

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

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

Review Date

Enter the date the review took place.

Review Active

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

From Performance Document

This check box is selected if the competency evaluation originated from PeopleSoft ePerformance.

Reviewer ID and Reviewer Name

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

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

Reviewer is Approved

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

See Also

[Chapter 6, "Performing Gap and Match Analyses on Your Workforce," page 65](#)

Assigning Competencies to Employees

Access the Competency Assignment page.

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

Competency Assignment Find | View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

Populate from Job

Assigned Competencies Customize | Find | View All | First 1-6 of 6 Last

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

Search by: Category: Ability Type: Communicate

Source Competencies Customize | Find | View All | First 1-4 of 4 Last

Description
☐ Debates issues unabrasively
☐ Informs Superiors
☐ Communication Skills
☐ Strong customer service ethic

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Competency Assignment page

Link to Career Planning

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

Populate from Job

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

Assigned Competencies

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

Competency Search

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

Source Competencies

The Source Competencies group box lists competency search results.

Adding Competencies

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

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

Synchronizing the Plan Careers and Manage Competencies Business Processes

Access the Plan Careers/Manage Competencies Link page.

Plan Careers / Manage Competencies Link

Tendulkar,Indira

ID: KG0001

Empl Rcd#: 0

The selected competencies will be transferred to Plan Careers.

Manage Competencies			
	Eval Type	Competency	Strgth/Develop
☐	Exec Comm	Leader in field	Developmnt
☐	Exec Comm	Current on industry trends	Strength
☐	Exec Comm	Motivate & lead people	Strength
☐	Exec Comm	Accountability for decisions	Strength
☐	Exec Comm	Creative thinking	Strength
☐	Exec Comm	Conceptual thinking	Strength

Select All

OK

Cancel

The selected competencies will be transferred to Manage Competencies.

Career Planning			
	Eval Type	Competency	Rating
☐	Exec Comm	Expertise	Very Good
☐	Exec Comm	Forecasting	Expert
☐	Exec Comm	Budgeting	Fair

Select All

Plan Career / Manage Competencies Link page

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

Strgth/Develop
(strength/development area)

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

Select All

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

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

Defining Proficiency Levels for Assigned Competencies

Access the Competency Rating page.

Griffiths, Martina Rae Employee **EmplID:** KC0001

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

Competency Evaluation Find | View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

Assigned Competencies Customize | Find | View All | First 1-6 of 6 Last

Competency	Effective Date	Proficiency	Interest Level	Detail		
Takes Initiative & follows up	06/01/2000	3-Good	2-No Preference	Detail	+	-
Customer Service Orientation	06/01/2000	4-Very Good	2-No Preference	Detail	+	-
Typing	06/01/2000	5-Expert	2-No Preference	Detail	+	-
Computer Literacy	06/01/2000	Unacceptable	2-No Preference	Detail	+	-
HRIS Experience	06/01/2000	2-Fair	2-No Preference	Detail	+	-
Multi-Tasking	06/15/2000	2-Fair	2-No Preference	Detail	+	-

Competency Rating page

Assigned Competencies

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

Effective Date

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

Interest Level

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

Detail

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

Verifying Competency Tracking Methods

Access the Competency Verification page.

Competency Evaluation
Competency Assignment
Competency Rating
Competency Verification

Griffiths, Martina Rae
Employee
EmplID: KC0001

Competency Verification
Find | View All
First 1 of 1 Last

Evaluation ID/Type: 01 Approved **Name:**

Assigned Competencies
Customize | Find | View All
First 1 of 6 Last

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

Competency Verification page

Assigned Competencies

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

Entering Employee Accomplishments

This section discusses how to:

- Track educational background.
- Track professional education and training.
- Track licenses and certifications.
- Track professional memberships.
- Track language abilities.
- Track significant special projects.
- Track test results.

Pages Used to Track Employee Accomplishments

Page Name	Object Name	Navigation	Usage
School Education	SCHOOL_EDUCATION	- Enterprise Learning, Result Tracking, Update Competencies/Accomps, Education, School Education - Workforce Development, Competency Management, Track Person Competencies, Education, School Education - Workforce Development, Career Planning, Track Competencies/Accomps, Education, School Education - Organizational Development, Succession Planning, Review Competencies/Accomps, Education, School Education - Organizational Development, Succession Planning USF, Review Competencies/Accomps, Education, School Education	Document an employee's educational background. You must set up school types on the School Type Table to use this page.

Page Name	Object Name	Navigation	Usage
Professional Ed. and Training (professional education and training)	EDUCAT_TRAIN_GBL	- Enterprise Learning, Result Tracking, Update Competencies/Accomps, Education, Professional Ed. and Training - Workforce Development, Competency Management, Track Person Competencies, Education, Professional Ed. and Training - Workforce Development, Career Planning, Track Competencies/Accomps, Education, Professional Ed. and Training - Organizational Development, Succession Planning, Review Competencies/Accomps, Education, Professional Ed. and Training - Organizational Development, Succession Planning USF, Review Competencies/Accomps, Education, Professional Ed. and Training	Record professional qualifications and other training. You must set up degree codes, major codes, school codes, and faculty codes to use this page.
Licenses and Certifications	LICENSES_CERTIFS	- Enterprise Learning, Result Tracking, Update Competencies/Accomps, Licenses and Certifications, Licenses and Certifications - Workforce Development, Competency Management, Track Person Competencies, Licenses and Certifications, Licenses and Certifications - Workforce Development, Career Planning, Track Competencies/Accomps, Licenses and Certifications, Licenses and Certifications - Organizational Development, Succession Planning, Review Competencies/Accomps, Licenses and Certifications, Licenses and Certifications	Record pertinent licenses or certificates. For example, if an employee in Finance and Accounting has a CPA license, you can enter the information here. You must set up license/certification codes on the License/Certification Table to use this page.

Page Name	Object Name	Navigation	Usage
Memberships	MEMBERSHIPS	- Enterprise Learning, Result Tracking, Update Competencies/Accomps, Memberships, Memberships - Workforce Development, Competency Management, Track Person Competencies, Memberships, Memberships - Workforce Development, Career Planning, Track Competencies/Accomps, Memberships, Memberships - Organizational Development, Succession Planning, Review Competencies/Accomps, Memberships, Memberships	Record employee membership in professional organizations. You must set up membership codes on the Membership Table to use this page.
Languages	LANGUAGES	- Enterprise Learning, Result Tracking, Update Competencies/Accomps, Languages, Languages - Workforce Development, Competency Management, Track Person Competencies, Languages, Languages - Workforce Development, Career Planning, Track Competencies/Accomps, Languages, Languages - Organizational Development, Succession Planning, Review Competencies/Accomps, Languages, Languages - Workforce Administration, Global Assignments, Assignee Qualifications, Languages, Languages	Enter the languages employees are proficient in, particularly those pertinent to their jobs or to your industry. To use this page, you must set up language codes on the Language Table.

Page Name	Object Name	Navigation	Usage
Honors and Awards	HONORS_AWARDS	• Workforce Development, Competency Management, Track Person Competencies, Honors and Awards, Honors and Awards • Workforce Development, Career Planning, Track Competencies/Accomps, Honors and Awards, Honors and Awards • Organizational Development, Succession Planning, Review Competencies/Accomps, Honors and Awards, Honors and Awards	Record honors or awards your employees have received. To use this page, you must set up codes for honors and awards on the Honor/Award Table.
Significant Special Projects	SPECIAL_PROJECTS	• Workforce Development, Competency Management, Track Person Competencies, Track Person Competencies, Significant Special Projects, Significant Special Projects • Workforce Development, Career Planning, Track Competencies/Accomps, Significant Special Projects, Significant Special Projects	Track projects that benefit your organization or an employee's own professional standing.
Test Results	TEST_RESULTS_PANEL	• Enterprise Learning, Result Tracking, Update Competencies/Accomps, Test Results, Test Results • Workforce Development, Competency Management, Track Person Competencies, Track Person Competencies, Test Results, Test Results • Organizational Development, Succession Planning, Review Competencies/Accomps, Test Results, Test Results • Organizational Development, Succession Planning USF, Review Competencies/Accomps, Test Results, Test Results	Track test results, such as typing, programming aptitude, or mathematical tests. You must set up test codes on the Test Table to use this page.

Tracking Educational Background

Access the School Education page.

The screenshot shows the 'School Education' page for employee Campbell, Barry Robert (EmplID: KC0015). The page has two tabs: 'School Education' (selected) and 'Professional Ed. and Training'. The 'School Education' section includes fields for Country (USA), School Type (UNK), Date Acquired, Average Grade, School Code, School Name, and State. Below these is a table for 'Area of Study' with columns for 'Area of Study' and 'Grade'. The page also shows navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last'.

School Education page

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

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

Area of Study Enter a major and grade.

Tracking Professional Education and Training

Access the Professional Ed. and Training page.

School Education

Professional Ed. and Training

Campbell,Barry RobertEmployeeEmplID: KC0015

Professional Education

FindFirst1 of 1Last

Country:USAUnited States

*Degree:

Date Acquired

Major Code:

School Code:

Educator:

State:

Average Grade:

Major:

School:

Terminal Degree

Graduated

Minority Institution

Germany

Australia

Japan

French Public Sector

Training

CustomizeFindFirst1 of 2Last

Course Title	School Name	Course Date
PeopleTools 1		09/11/2000

Professional Ed. and Training page (1 of 2)

The screenshot displays a web form titled "Professional Ed. and Training page (2 of 2)". It is organized into sections for different countries, each with a dropdown arrow and a flag icon.

- Germany:** Includes fields for "Practical Grade:" and "Theoretical Grade:", each with a text input box. To the right is a checkbox labeled "Internal Professional Education".
- Australia:** Contains two sub-sections:
 - Higher Education:** Features a dropdown menu labeled "Educational Level:".
 - Australian Public Service:** Includes a "Minor Code:" field with a search icon, a "Minor:" field, and an "Education Level:" dropdown menu currently set to "Not Given".
- Japan:** Includes fields for "Faculty Code:" and "Sub-Faculty Code:", each with a search icon. To the right are corresponding "Faculty:" and "Sub-Faculty:" text input fields. Below these is a "Major Category:" dropdown menu.
- French Public Sector:** Includes a "Subject:" field with a search icon.

Professional Ed. and Training page (2 of 2)

Degree, Date Acquired, Average Grade, and Graduated

Select the degree the employee has earned, followed by the date the degree was obtained and the average grade. If the employee has graduated, select the check box.

Major Code and School Code

Select codes for the employee's major and school. The system automatically populates additional information based on the codes you select. If no code exists, enter the information manually.

If you select another country code after you've already selected a state code, the system clears the value in the State field.

(DEU) Germany

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

(AUS) Australia – Higher Education

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

Education Level

Select the highest education level achieved by the employee.

(AUS) Australia – Australian Public Service

Minor Code and Minor Select the minor code from the values provided. If the minor does not have a code associated with it, enter the minor in the Minor field.

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

(JPN) Japan

Faculty Code Select a faculty code.

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

Sub-Faculty Code Select a sub-faculty code.

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

(FRA) French Public Sector

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

Add additional rows as necessary.

Tracking Licenses and Certifications

Access the Licenses and Certifications page.

Licenses and Certifications

Campbell, Barry Robert Employee EmplID: KC0015

Licenses and Certifications Find | View All First 1 of 1 Last

[Competency](#) + -

*License/Certificate Code:	PAC	Programmer Analyst Certificate
Issue Date:	11/04/2002	
License #:	PAC-112587	
Issued By:	Berkeley - University of CA	
Expiration Date:		
☒ License Verified ☐ Renewal in Progress		

Issued In

Country:	USA	State:	
-----------------	-----	---------------	--

Licenses and Certifications page

Country and State

Displays the country code indicated in this user's preferences. You can select the state where the license was issued.

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

Tracking Professional Memberships

Access the Memberships page.

Memberships

Campbell,Barry Robert

Employee

EmplID: KC0015

Memberships									
*Organization	Description	Membership Date	Mandate	Mandate Position	Mandate Begin Date	Mandate End Date			
ASM	Association for Systems Mgmt	02/04/20					+	-	
ETG	Eastern Technology Group	05/01/20					+	-	

Memberships page

Mandate

Enter the mandate.

Mandate Position

Enter the mandate position.

Tracking Language Abilities

Access the Languages page.

Languages

Campbell,Barry Robert

Employee

EmplID: KC0015

Languages										
*Language	Native	Translator	Teacher	Speak	Read	Write	Evaluation Date			
EN	English	☒	☐	☒	High	High	High	11/02/1984	+	-
FR	French	☐	☒	☒	High	High	High	11/02/1984	+	-

Languages page

Native

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

Translator

Select if the person can translate this language.

Teacher

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

Tracking Significant Special Projects

Access the Significant Special Projects page.

Significant Special Projects

Campbell, Barry Robert Employee EmplID: KC0015

Special Projects Find | View All First 1 of 1 Last

Employer: Cisco

***Date Completed:** 04/01/2002

Description: Generated router testing prototype.

Significant Special Projects page

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

Tracking Test Results

Access the Test Results page.

Test Results

Campbell, Barry Robert Employee EmplID: KC0015

Test Results Customize | Find | View All First 1-2 of 2 Last

*Test	Descr	Test Date	Score	Passed
1011	Language Translation			☐
1006	Accounting Aptitude Test			☐

Test Results page

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

Running Employee Competency and Accomplishment Reports

This section discusses how to generate a report of your employees' competencies and a listing of employees who need to renew a license or certificate.

Pages Used to Run the Employee Competency and Accomplishment Reports

Page Name	Object Name	Navigation	Usage
Competency Inventory	RUNCTL_PER011	Workforce Development, Competency Management, Track Person Competencies, Competency Inventory	Run the Competency Inventory report (PER011) that lists employees in a department and their competencies. Run the Refresh Employees Table process before running this report to include any new employees and their associated competencies. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report.
License/Certificate Report	RUNCTL_CMM007	Workforce Development, Competency Management, Track Person Competencies, Licenses/Certificate Renewal, License/Certificate Report	Run the Licenses, Certificates Renewal report (CMM007) that lists employees who need to renew a license or certificate.

CHAPTER 6

Performing Gap and Match Analyses on Your Workforce

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

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

Understanding Gap and Match Analyses

You run different inquiries to match:

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

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

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

The system assigns the following values to importance levels:

Importance	Points
High	5
Above Average	4

Importance	Points
Average	3
Below Average	2
Low	1
None	0

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

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

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

Assigning Employee Points for Accomplishments

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

Assigning Employee Points for Competencies

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

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



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



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



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

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

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

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

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

See Also

[Chapter 4, "Assigning Competencies and Accomplishments to Roles," page 31](#)

[Chapter 5, "Tracking Employee Competencies and Accomplishments," page 43](#)

[Chapter 3, "Setting Up Competencies and Accomplishments," page 9](#)

Multiple Evaluations

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

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

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

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

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

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

Competency	Importance	Points Assigned	Rating Req'd	EE Rating	Employee Match	EE Points
Communication	High	5	5	4.67	Yellow	0
Leadership	Average	3	4	3.33	Yellow	0
Interpersonal Effectiveness	Above Average	4	3	5	Green +	4
Planning	Low	1	3		No light	0
Decision Making	Above Average	4	2	2.67	Green	4

Competency	Importance	Points Assigned	Rating Req'd	EE Rating	Employee Match	EE Points
Adaptability to Change	Below Average	2	3	1.67	Red	0
		Total Match = 19				EE Points = 8

Setting Up Match Evaluation Types

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

Page Used to Set Up Match Evaluation Types

Page Name	Object Name	Navigation	Usage
Match Evaluation Types	CM_MATCH_INSTR	Workforce Development, Competency Management, Match Competencies to Roles, Match Evaluation Types, Match Evaluation Types	Define the types of inquiries a user can run and the evaluation types a user can access. Evaluation types and user access must be set up to run the match analyses.

Defining Match Evaluation Types

Access the Match Evaluation Types page.

Match Evaluation Types

User ID: HCO_KUZ008

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

*Search Type: Role/Person

*Evaluation Type		
Supervisor/Manager	+	-
Approved/Official	+	-

*Search Type: Competency Search

*Evaluation Type		
Supervisor/Manager	+	-
Self	+	-
Mentor	+	-

Match Evaluation Types page

Search Type

Select one or both search types.

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

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

Evaluation Type

Select evaluation types.

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

If *Self* Evaluation Type is selected, only self evaluations that have been approved by the employee's manager will be included in the matching/searching process.

Matching Employees to Roles

This section discusses how to:

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

Pages Used to Match Employees to Roles

Page Name	Object Name	Navigation	Usage
Cluster Match	CM_PERSON_CLUSTER1	Workforce Development, Competency Management, Match Competencies to Role, Person to Role, Cluster Match	Specify the role (position, job code, or job task) with which you want to compare the employee.
Cluster Detail	CM_PERSON_CLST_SEC	- Click the Competency Cluster link on the Person to Role Match - Cluster Match page. - Click the Competency Cluster link on the Role to Person Match - Cluster Match page.	View details of the employee's ratings for competencies and accomplishments in the selected cluster.
Competency Match	CM_PERSON_ROLE	Workforce Development, Competency Management, Match Competencies to Role, Person to Role, Competency Match	See how well the employee matches the individual competencies and competency clusters required for a given role.
Competency Match Detail	CM_COMP_MATCH_SEC	Workforce Development, Competency Management, Match Competencies to Role, Person to Role, Competency Match Click Competency Match Detail on the Competency Match page.	View details of the employee's ratings in each competency assigned to the role.
Accomplishment Match	CM_PERSON_ROLE2	Workforce Development, Competency Management, Match Competencies to Role, Person to Role, Accomplishment Match	See how well the employee matches individual and cluster accomplishments against a given role.
Gap-Fit Measurement	CM_PERSON_ROLE3	Workforce Development, Competency Management, Match Competencies to Role, Person to Role, Gap-Fit Measurement	Compare an employee's ratings in each required competency against the rating expected for the role and see the percentage difference. The sum of these percentages gives you an overall indication of how well the employee fits the requirements of the role.

Specifying a Role and Analyzing Cluster Matches

Access the Person to Role Match - Cluster Match page.

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
Branson, Merideth		Employee		EmpID: B-BARET198			
Business Unit: GBIBU		Position Number: 19000230		Director-Finance			
		Job Code:					
		Job Task:					
Match Analysis							
Total Match:		4		out of		27	
Competency Match:		0				21	
Accomplishment Match:		4				6	
Role Cluster							
				Customize Find		First 1 of 1 Last	
Cluster		Importance		EE Complete		Competency Cluster	
		Average		☒		Competency Cluster	

Person to Role Match - Cluster Match page

When you select the role, the system analyzes how well the employee matches the required competency clusters. If no clusters are assigned to a role, the system still returns results on this page.

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

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

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

Match Analysis

Total Match

Indicates the employee's points out of the total points possible for the role. This calculation includes points for both clusters and individual competencies and accomplishments.

This total is weighted for the importance of each competency or accomplishment assigned to the role. All items are considered in this total including both individual competencies and accomplishments as well as those competencies and accomplishments assigned to clusters associated with this role.

Competency Match

Indicates how many of the total points are from competencies.

Accomplishment Match

Indicates how many of the total points are from accomplishments.

Role Cluster

EE Complete (employee complete)

Automatically selected if the employee has all the required competencies and accomplishments assigned to the cluster.

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

Viewing Cluster Details

Access the Cluster Detail page.

Cluster Detail

Cluster:

Assigned Competencies

Find | View AllFirst1 of 1Last

Competency	Importance	EE Competency:
------------	------------	----------------

Assigned Accomplishments

Find | View AllFirst1 of 1Last

Accomplishment	Importance	EE Accomplishmt:
		

Cluster Detail page

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

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

Analyzing Competency Matches

Access the Person to Role Match - Competency Match page.

Cluster MatchCompetency MatchAccomplishment MatchGap-Fit Measurement

Branson, MeridethEmployeeEmplID: B-BARET198

Match Analysis

Competency Match:0 out of:0

[Competency Match Detail](#)

Total Competencies:0

Competencies not ranked:0

Competencies

Find | View AllFirst1 of 1Last

Competency	Importance		Training Scheduled	
	Average	+   	☐	Competency Training

Person to Role Match - Competency Match page

Match Analysis

- Competency Match

Indicates the number of competency points an employee has out of a total possible number of competency points required by the role.
- Competency Match Detail

Click to view the breakdown of each competency and how it matches up between the person and the role.
- Total Competencies

Lists the number of employee competencies that match the competencies required for the role.
- Competencies not ranked

Lists the number of competencies required by the role that are not included in the employee’s evaluations.

Competencies

- Competency

Lists competencies assigned to the role, from highest to lowest importance.
- Importance

Importance levels are assigned on the Cluster Table - Cluster Competencies page or the Role Competency - Rank Competencies page.
- Training Scheduled

Automatically selected if the employee is already scheduled for training in this competency.
- Competency Training

Click to see if any available training courses target the competency.

Viewing Competency Match Details

Access the Competency Match Detail page.

Competency Match Detail

Branson,Merideth

Employee

EmplID: B-BARET198

Competency Match Detail			
		Find View All	First 1 of 1 Last
Competency	Required Points	EE Review Points	Importance Match
			0

Competency Match:

0

Competency Match Detail page

Required Points

Each rating in a rating model has points associated with it. Required Points are derived from the Rating (a points translation of the Rating) given to the Competency for the specified role. The number of points are specified for each Rating using the Review Points field in the Rating Model.

EE Review Points
(employee review points)

Lists the employee's points rating for the competency. Employee Review Points are the points translation of the Rating given to the employee for that competency, and these points are specified for each Rating using the Review Points field in the Rating Model.

Importance Match

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

Analyzing Accomplishment Matches

Access the Person to Role Match - Accomplishment Match page.

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
Branson,Merideth				Employee		EmplID: B-BARET198	
Match Analysis							
Accomplishment Match:		0 out of		0			
Total Accomplishments:		0		0			
Accomplishments							
				Customize Find		View All 	
						First  1 of 1  Last	
Accomplishment		Importance		Category		Employee Accomplishment	
		Average					

Person to Role Match - Accomplishment Match page

Match Analysis

Accomplishment Match	Indicates the number of accomplishment points an employee has out of total possible number of accomplishment points required by the role. Points are derived from the Rating (points translation of the Rating) given to the accomplishment for the specified role. The number of points are specified for each Rating using the Review Points field in the Rating Model.
Total Accomplishments	Lists the number of employee accomplishments that match the accomplishments required for the role.

Accomplishments

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

Performing a Gap Analysis on the Employee and Role

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

Cluster Match					Competency Match					Accomplishment Match					Gap-Fit Measurement																																							
Branson,Merideth										Employee										EmplID: B-BARET198																																		
Match Analysis																																																						
Total Competencies:										0					Total Points:										0					out of					0					% Fit:					0.00									
Gap-Fit Analysis																																																						
															Customize Find View All 															First  1 of 1  Last																								
Competency															Importance										EE Review Points										Required Points										% Proficiency Deficiency									
															Average																														0.00									

Person to Role Match - Gap-Fit Measurement page

Match Analysis

Total Competencies	Shows the number of competencies that are assigned to the role.
Total Points	Indicates how many points the employee has out of the total possible for the role. These values do not include points associated with accomplishments.
% Fit (percent fit)	Expresses the employee's points as a percentage of the total possible. The system only includes points associated with competencies in this calculation. For example, if the employee has 5 points and the total possible for the role is 20 points, the % Fit is 25%.

Gap-Fit Analysis

EE Review Points (employee review points)	Lists the employee's points rating for the competency. For example, if you use the PSCM rating model, a rating of 5 has an associated review points value of 5.
Required Points	Each rating in a rating model has points associated with it. Points are derived from the Rating (a points translation of the Rating) given to the Competency for the specified role. The number of points are specified for each Rating using the Review Points field in the Rating Model.
% Proficiency Deficiency (percent proficiency deficiency)	Shows the percentage difference between the employee's rating and the rating required for the role. The system divides the EE review points by required points and converts the result into a percentage. For example, if EE Review Points is 3 but the role has Required Points of 4, the % Proficiency Deficiency is 75%. If an employee's rating exactly matches the required rating, % Proficiency Deficiency is 100%. A percentage less than 100% indicates the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

Matching Roles to Employees

This section discusses how to:

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

Pages Used in Matching Roles to Employees

Page Name	Object Name	Navigation	Usage
Cluster Match	CM_ROLE_CLUSTER1	Workforce Development, Competency Management, Match Competencies to Roles, Role to Person, Cluster Match	Specify an employee to compare the selected role to see how well the employee matches required clusters.
Competency Match	CM_ROLE_PERSON	Workforce Development, Competency Management, Match Competencies to Roles, Role to Person, Competency Match	See how the employee matches both individual competencies and competency clusters.
Competency Match Detail	CM_ROLE_PERSON_SEC	Workforce Development, Competency Management, Match Competencies to Roles, Role to Person, Competency Match Click Competency Match Detail on the Role to Person Match - Competency Match page.	View details of the employee's ratings in each competency assigned to the role.
Accomplishment Match	CM_ROLE_PERSON2	Workforce Development, Competency Management, Match Competencies to Roles, Role to Person, Accomplishment Match	See how well an employee's accomplishments fit those required for the role.
Gap-Fit Measurement	CM_ROLE_PERSON3	Workforce Development, Competency Management, Match Competencies to Roles, Role to Person, Gap-Fit Measurement	Compares an employee's ratings in each required competency against the rating expected for the role, and calculates the percentage difference. The sum of these percentages gives you an overall indication of how well the employee fits the requirements of the role.

Specifying an Employee and Analyzing Cluster Matches

Access the Role to Person Match - Cluster Match page.

Cluster Match	Competency Match	Accomplishment Match	Gap-Fit Measurement
SetID:	SHARE	Job Task:	K10004 PeopleSoft Financials Project
EmplID:	B-BARET194 Q Bentley,Angela		
Match Analysis			
Total Match:	0	out of:	24
Competency Match:	0		18
Accomplishment Match:	0		6
Role Cluster			
		Customize Find View All	First ◀ 1 of 1 ▶ Last
<u>Cluster</u>	<u>Importance</u>	EE Complete	<u>Competency Cluster</u>
	Average	☒	Competency Cluster

Role to Person Match - Cluster Match page

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

EmplID (employee ID)

Select an employee.

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

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

See Also

[Chapter 6, "Performing Gap and Match Analyses on Your Workforce," Specifying a Role and Analyzing Cluster Matches, page 72](#)

Analyzing Competency Matches

Access the Role to Person Match - Competency Match page.

Cluster Match
Competency Match
Accomplishment Match
Gap-Fit Measurement

SetID: SHARE Job Task: K10004 PeopleSoft Financials Project
EmplID:

Match Analysis
Competency Match: 0 out of: 18 [Competency Match Detail](#)
Total Competencies: 0 6 Competencies not ranked: 0

Competencies Find | View All First 1-5 of 6 Last

Competency	Importance	Training Scheduled
PS Resource Management	Above Avg	☐
PS Projects	Above Avg	☐
PS General Ledger	Average	☐
GL-Payroll Interface	Average	☐
PeopleCode	Below Avg	☐

Role to Person Match - Competency Match page

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

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

See Also

[Chapter 6, “Performing Gap and Match Analyses on Your Workforce,” Analyzing Competency Matches, page 74](#)

Viewing Competency Match Details

Access the Competency Match Detail page.

Competency Match Detail

SetID: SHARE **Job Task:** K10004 PeopleSoft Financials Project

EmplID:

Competency Match Detail			
Competency	Required Pts	EE Review Points	Match
PS Resource Management	3		0
PS Projects	4		0
PS General Ledger	2		0
GL-Payroll Interface	3		0
PeopleCode	4		0
PS nVision Reporting	1		0

Competency Match Detail page

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

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

Analyzing Accomplishments

Access the Role to Person Match - Accomplishment Match page.

Cluster Match **Competency Match** **Accomplishment Match** **Gap-Fit Measurement**

SetID: SHARE **Job Task:** K10004 PeopleSoft Financials Project

EmplID:

Match Analysis			
Accomplishment Match:	0	out of:	6
Total Accomplishments:	0		2

Accomplishment Detail				
Accomplishment	Importance	Category	Employee Accomplishment	Post-Graduate Degree
Integrated Resource Management	Average	License or Certification	☐	
Procurement Management	Average	License or Certification	☐	

Role to Person Match - Accomplishment Match page

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

Match Analysis

Accomplishment Match	Indicates the number of accomplishment points an employee has out of total possible number of accomplishment points required by the role. Points are derived from the Rating (a points translation of the Rating) given to the accomplishment for the specified role. The number of points are specified for each Rating using the Review Points field in the Rating Model.
Total Accomplishments	Lists the number of employee accomplishments that match the accomplishments required for the role.

Accomplishment

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

Performing a Gap Analysis on the Role and Employee

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

Cluster Match	Competency Match	Accomplishment Match	Gap-Fit Measurement	
SetID: SHARE Job Task: K10004 PeopleSoft Financials Project				
EmplID:				
Match Analysis				
Total Competencies: 6 Total Points: 0 out of: 17 % Fit: 0.00				
Gap-Fit Analysis				
Customize Find View All First ◀ 1-5 of 6 ▶ Last				
Competency	Importance	EE Review Points	Required Points	% Proficiency Deficiency
PS Resource Management	Above Avg		3	0.00
PS Projects	Above Avg		4	0.00
PS General Ledger	Average		2	0.00
GL-Payroll Interface	Average		3	0.00
PeopleCode	Below Avg		4	0.00

Role to Person Match - Gap-Fit Measurement page

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

See Also

Chapter 6, “Performing Gap and Match Analyses on Your Workforce,” Performing a Gap Analysis on the Employee and Role, page 77

Matching Teams to Projects

This section discusses how to:

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

Pages Used to Match Teams to Projects

Page Name	Object Name	Navigation	Usage
Employee Teams	EE_TEAMS	Workforce Development, Competency Management, Match Competencies to Roles, Create Employee Teams, Employee Teams	Set up employee teams.
Competency Match	CM_TEAM_ROLE	Workforce Development, Competency Management, Match Competencies to Roles, Team to Job Task, Competency Match	Compare the competencies assigned to a job task with the competency profiles of team members.
Competency Match Details	CM_TEAM_ROLE_SEC	Workforce Development, Competency Management, Match Competencies to Roles, Team to Job Task, Competency Match Click Competency Match Detail on the Competency Match page.	View the team members with the competency at the required proficiency.
Accomplishment Match	CM_TEAM_ROLE2	Workforce Development, Competency Management, Match Competencies to Roles, Team to Job Task, Accomplishment Match	Compare the accomplishments required by a job task with the team members' accomplishments.
Accomplishment Match Detail	CM_TEAM_ROLE2_SEC	Workforce Development, Competency Management, Match Competencies to Roles, Team to Job Task, Accomplishment Match Click Accomplishment Match Detail on the Accomplishment Match page.	View a list of the team members with the required accomplishment.

Setting Up Employee Teams

Access the Employee Teams page.

Employee Teams

Team Code:

KU02

*Description:

Project Managers

Short Name:

Proj Mgrs

Team Members

Customize | Find | View All |

First 1-8 of 8 Last

*EmpID	Name		
KU0012	Martin, Allan		
KU0023	Finnes, Richie		
KU0043	Sims, Evelyn		
KU0057	Luis, Jennifer		
KU0083	Matheson, Karena		
KU0090	Ryzhikov, Jeff		
KU0102	Donahue, Edmund		
KU0103	Davidson, Colin		

Employee Teams page

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

Analyzing Team Competency Matches

Access the Competency Match page.

Competency Match

Accomplishment Match

Team:

Project Managers

Business Unit:

GBIBU

Job Task:

Total Points:

0 out of 0

Competency Points:

0 0

Competency Detail

Customize | Find |

First 1 of 1 Last

Competency	Importance	Team Competency	Number of Employees	Competency Detail
			0	Competency Detail

Competency Match page

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

- Total Points

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

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

Automatically selected if any member of the team has the competency at the required proficiency.
- Number of Employees

Lists how many team members have the competency at the required proficiency level.
- Competency Detail

Click to see which team member has the required competency.

Analyzing Team Accomplishment Matches

Access the Accomplishment Match page.

Competency Match

Accomplishment Match

Team:

Project Managers

Business Unit:

GBIBU

Job Task:

Total Points:

0

out of

0

Accomplishment Points:

0

0

Team Accomplishment

Customize | Find | View All | 

First  1 of 1  Last

Accomplishment	Importance	Team Accomplishment	Number of Employees	Accomplishment Detail
	Average			Accomplishment Detail

Accomplishment Match page

- Total Points

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

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

Automatically selected if any team member has the required accomplishment.
- Number of Employees

Lists how many team members have the accomplishment.
- Accomplishment Detail

Click to see which team member has the required accomplishment.

Searching for Job Candidates

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

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

Page Used to Search for Job Candidates

Page Name	Object Name	Navigation	Usage
Competency Search	CM_SEARCH_ALL	- Workforce Development, Competency Management, Perform Competency Search, Search All, Competency Search – All - Workforce Development, Competency Management, Perform Competency Search, Search Applicants, Competency Search - Applicants - Workforce Development, Competency Management, Perform Competency Search, Search Contractors, Competency Search - Contractor - Workforce Development, Competency Management, Perform Competency Search, Search Employees, Competency Search-Employees	Search for employees, contractors, and applicants who have the competencies and accomplishments required for a selected role.

Conducting the Search

Access the Competency Search - All page.

Competency Search - All

Position Number: 19000230 Director-Finance

Minimum Competency Match: out of 21

Total Match (with Accomplishments) 27



Competency Search Results
Customize | Find 
First  1-10 of 10  Last

ID	Name	Status	Competency Match	Total Match	Interest Level
KU0007	Locherty, Betty	Employee	18	22	32
KU0011	Seto, Patrick	Employee	4	4	2
KU0016	Strunsky, Joanna	Employee	4	4	2
KU0039	Quilligan, Shawn	Employee	4	4	2
KU0066	Kim, Justine	Employee	4	4	2
KU0075	Martignoni, David	Employee	4	4	2
KU0076	Lee, Mei	Employee	4	4	2
KU0100	Osborn, Courtney	Employee	4	4	2
KU0103	Davidson, Colin	Employee	4	4	2
KU0107	Doyle, Emma	Employee	4	4	2

Competency Search - All page

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

Minimum Competency Match

Indicate the minimum number of points a candidate must have to qualify for this position.

Total Match (with Accomplishments)

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



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

Competency Search Results

ID

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

Competency Match

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

Total Match

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

Interest Level

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

CHAPTER 7

Using Competencies to Manage Training

This section provides an overview of competencies and training and discusses how to manage competencies with training.

Understanding Competencies and Training

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

The functionality to manage competencies and training is split between the Manage Competencies and Administer Training business processes. The following table lists Administer Training pages.

Page	Navigation	Usage
Course Table	Set Up HRMS, Product Related, Enterprise Learning, Courses	Assign competencies when you create courses. Define course information. Identify course prerequisites. Target competencies. Specify standard equipment and materials required to administer courses. After you set up the courses and assign competencies, you can set up training programs and search for courses based on competency.

Page	Navigation	Usage
Training Program Table	Set Up HRMS, Product Related, Enterprise Learning, Program Information, Training Program Table	Group courses into logical progressions. Associate the training programs with job codes on the Job Code Table page or with projects within the Manage Competencies business process.
Training History	Enterprise Learning, Training Reports, Student Training History	Track the training employees have taken or plan to take. This includes both in-house course sessions and external courses for employees.

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

See Also

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

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

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Manage Competencies Reports

Managing Competencies with Training

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

This section discusses how to:

- Track other training.
- Search for courses.

Page Used to Assign Competencies to Other Training Options

Page Name	Object Name	Navigation	Usage
Non Course Table Competencies	CM_NON_CRSE_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Non-Course Training, Non Course Table Competencies	Track training that does not involve taking a course or attending a class, such as CD-ROM presentations or self-paced training guides.
Competency Training	COMP_TRAINING	- Workforce Development, Competency Management, Perform Competency Search, Review Competency Training - Click Competency Training on the Person to Role Match – Competency Match page.	Search for training courses that address a selected competency.

Tracking Other Training

Access the Non Course Table Competencies page.

Non Course Table Competencies

Training ID: KU0004

***Description:** Emergency Response Training

Short Description: Emerg Resp

***Media Type:** Seminar

Comments: This seminar includes both a 30-minute film and guest speaker which covers an introduction to emergency response, emergency response team organization and procedures, command and control (concepts of the nationally recognized Incident Command System).

Target Competencies
Customize | Find |
1 of 1
First
Last

*Competency	Description		
1118	Emergency Preparedness	+	-

Non Course Table Competencies page

Media Type

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

Competency

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

Searching for Courses

Access the Competency Training page.

Competency Training

Competency: 0102 Conceptual thinking

Course Training
Find | View All
First ◀ 1 of 1 ▶ Last

Course	Session	Course Dates	Max Students	Enrolled
				0

Non Course Training
Find | View All
First ◀ 1 of 1 ▶ Last

Other Training	Media Type

Competency Training page

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



(Enroll Into Course Session)

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

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

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

CHAPTER 8

(GBR) Managing National Vocational Qualifications

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

- Set up NVQ information.
- Enroll employees in NVQs and track progress.
- Review NVQ summaries.
- Run NVQ reports.

Understanding NVQs

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

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

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

- Tending animals, plants, and land.
- Extracting and providing natural resources.
- Constructing.
- Engineering.
- Transporting.
- Providing health, social, and protective services.
- Providing goods and services.
- Manufacturing.
- Providing business services.
- Developing and extending knowledge and skill.
- Communicating.

NVQ competence levels include the following:

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

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

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

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

Setting Up NVQ Information

This section discusses how to:

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

Pages Used to Set Up NVQ Information

Page Name	Object Name	Navigation	Usage
Awarding Body	NVQ_AWARD_TBL	Workforce Development, Competency Management, Define NVQ UK, Award Body, Awarding Body	Define name and location information for NVQ awarding bodies.
Element Table	CM_ELEMENT_TABLE	Workforce Development, Competency Management, Define NVQ UK, Elements, Element Table	Define elements to associate with NVQs.
Unit	COMPETENCY_TABLE	Workforce Development, Competency Management, Define NVQ UK, Units and Elements, Unit	Record skills, abilities, knowledge and other NVQ requirements pertinent to jobs in your organization. More information on established units can be found in the National Database of Vocational Qualifications. Note. Though this page is similar to the Competency Table, use the Unit page for NVQ setup as specific validations related to NVQs are executed from this component.
Unit and Elements	NVQ_UNITELEMENTS	Workforce Development, Competency Management, Define NVQ UK, Units and Elements, Unit and Element	Define NVQ units.
NVQ Details	NVQ_DETAILS	Workforce Development, Competency Management, Define NVQ UK, NVQs, NVQ Details	Create NVQ codes and specify awarding bodies for each NVQ. You must set up codes for the NVQ awarding bodies to use this page.
NVQ Units	NVQ_NVQUNITS	Workforce Development, Competency Management, Define NVQ UK, NVQs, NVQ Units	Specify the units that make up the specified NVQ. You must set up NVQ unit codes to use this page.

Defining NVQ Elements

Access the Element Table page.

Element Table

Competency Element

Element Code: KGEL1

Element Table

Find | View All First 1 of 1 Last

*Effective Date:

01/01/1990

*Status:

Active

+

-

*Description:

NVQ Element 1

*Satisfaction Method:

On the Job Training

Title:

NVQ Element 1

Element Table page

Satisfaction Method Select the method to satisfy the requirements for this element.

Defining NVQ Units

Access the Unit page.

Unit

Unit and Elements

NVQ Unit: KGUNIT1

Unit Title: NVQ Unit 1

Short Description: NVQ Unit 1

*Rating Model: NVQ UK - NVQ Model

*Category: NVQ - Unit

Description:

Unit page

Note. Awarding bodies and elements must be set up before defining units.

Unit Title Enter a title for the NVQ unit. The specific default Rating Model is NVQ.

Important! Do not modify the NVQ Rating Model definition as this affects validations required by the tracking component.

Associating Elements With Units

Access the Unit and Elements page.

Unit and Elements

NVQ Unit: KGUNIT1

Title: NVQ Unit 1

Elements		Customize	Find	View All	First	1-3 of 3	Last
*Element Code	Description						
KGEL1	NVQ Element 1				+	-	
KGEL3	NVQ Element 3				+	-	
KGEL5	NVQ Element 5				+	-	

Unit and Elements page

Element

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

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

Creating NVQ Codes and Assigning Awarding Bodies

Access the NVQ Details page.

NVQ Details

NVQ: ADMIN_1

Title: Business Administration **Level:** 1

Expiry Date: 07/31/2001

Accreditation			
*Reference	*Awarding Body		
Q1018481	BTEC	Edexcel BTEC	+
Q1018483	CG	City and Guilds of London Institute	+

NVQ Details page

Title

Enter the title as specified by the NVQ.

Expiry Date

Enter the date on which current NVQ details will be reviewed by the awarding bodies.

Reference and Awarding Body

Select one or more awarding bodies. Enter the corresponding reference numbers for each one as provided by the NVQ.

Specifying Units for NVQs

Access the NVQ Units page.

NVQ Details

NVQ Units

NVQ:

ADMIN_1

Title:

Business Administration

Level:

1

Units Required					
Number	Unit		Title	Optional	
1	ADMIN_1			☐	+ -
2	FILING			☐	+ -
3	H&S			☒	+ -

NVQ Units page

Units Required

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

The units specified on the NVQ Units page will be used in the tracking process on the Plan NVQ Units page with the Populate NVQ Units button.

Enrolling Employees in NVQs and Tracking Progress

This section discusses how to:

- Enter employee NVQ data.
- Track employee progress.
- Create NVQ training plans.

Pages Used to Enroll Employees and Tracking Progress

Page Name	Object Name	Navigation	Usage
Employee NVQs	NVQ_EMPLNVQS	Workforce Development, Competency Management, Define NVQ UK, Enroll NVQ, Employee NVQs	Record details of employees who have registered for an NVQ course. You must set up the NVQ Table - NVQ Details Setup page to use this page.
Review NVQ	NVQ_REVIEW	Workforce Development, Competency Management, Define NVQ UK, Track NVQ, Review NVQ	Review employee progress through NVQs.
Plan NVQ Units	NVQ_UNIT_PLAN	Workforce Development, Competency Management, Define NVQ UK, Track NVQ, Plan NVQ Unit	Set up an overall plan of the NVQ units that the employee will take and view the elements that make up the units. You must set up the NVQ Table and NVQ Units and Elements to use this page.
Unit Detail	NVQ_UNIT_PLAN_SEC	Workforce Development, Competency Management, Define NVQ UK, Track NVQ, Plan NVQ Unit Click Detail on the Plan NVQ Units page.	Record the date when the employee is expected to start the unit, and actual start and completion dates.
Element Detail	NVQ_EMPLELEM_SEC	Workforce Development, Competency Management, Define NVQ UK, Track NVQ, Plan NVQ Unit Click Detail on the Plan NVQ Units page. Click Detail on the Unit Detail page.	Enter the date when the employee is expected to start the element, and actual start and completion dates.

Entering Employee NVQ Data

Access the Employee NVQs page.

Employee NVQs

Hoxley,Tobi

Employee

EmplID: KG0010

NVQ Status

Find | View All | First 1 of 1 Last

*NVQ: HRADMIN

Level: 5

Title: Human Resources Administration

Status: Enrolled

Start: 11/05/2002

Completed:

Certificate Award Date:

Registration Details

Registration Date: 10/10/2002

Registration Number: 5897123



Employee NVQs page

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

Registration Details

Enter the registration date and number.

Tracking Employee Progress

Access the Review NVQ page.

Review NVQ

Plan NVQ Units

O'Flaherty,Seamus Patrick

ID: KG0005

NVQ: Business Administration

Level: 1

Status:

NVQ Tracking

Find | View All

First 1 of 1 Last

Review Date

09/01/1999

+

-

Type

Review

Reviewer

KG0002

Hopkins,Dewi

Description:

Successful Review.

Review NVQ page

Review Date Enter the next review date.

Type Select a review type.

Reviewer Select a reviewer.

Description Enter comments here.

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

Creating an NVQ Training Plan

Access the Plan NVQ Units page.

Review NVQ

Plan NVQ Units

O'Flaherty,Seamus Patrick

ID: KG0005

NVQ: Business Administration

Level: 1

Status:

NVQ Tracking

Find | View All

First 1 of 1 Last

Review Date:

09/01/1999

Unit	Title	Optional	Status	Detail	Description
1 ADMIN_1		☐	3	Detail	
2 FILING		☐	3	Detail	

Plan NVQ Units page

Units

Select a unit that the employee wants to take, is taking, or has taken. The Optional check box is automatically selected if the unit isn't mandatory.

Note. Any additions or deletions to the units for the NVQs must be done on the NVQ Details and NVQ Units pages.

Detail

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

Reviewing NVQ Summaries

This section discusses how to:

- Review all NVQs associated with an employee.
- Review all employees associated with an NVQ.

Pages Used to Review NVQ Information

Page Name	Object Name	Navigation	Usage
Employee Summary	NVQ_SUMMARY1	Workforce Development, Competency Management, Review NVQ Information UK, NVQs by Employee, Employee Summary	View all NVQs associated with an employee.
Qualification	NVQ_SUMMARY2	Workforce Development, Competency Management, Review NVQ Information UK, NVQs by Qualification, Qualification	View the employees associated with an NVQ.

Reviewing All the NVQs Associated With an Employee

Access the Employee Summary page.

Employee Summary

Jones,Ramina

ID: KG0008

NVQ: NVQ 1

Level: 1

Status: Enrolled

View Options

All

Completed

Submitted

In Progress

Planned

Remaining

NVQ Status

	NVQ Unit	Status	Started	Planned	Submitted	Completed	Optional
1	KGUNIT1 NVQ Unit 1	In Progress					☐
2	KGUNIT2 NVQ Unit 2	Submitted					☐

Employee Summary page

The system lists all the NVQ units sorted by status and date. Click the button in View Options to see only those units of a given status.

Reviewing All Employees Associated With an NVQ

Access the Qualification page.

Qualification

NVQ: NVQ 1

Level: 1

View Options

All

Enrolled

Achieved

Prior

Cancelled

NVQ Status

ID		Status	Started	Completed
KG0008	Jones,Ramina	Enrolled	01/01/2000	

Qualification page

The system lists all the employees associated with this NVQ, sorted by status and date. Click the button in View Options to see only those units of a given status.

Running NVQ Reports

This section discusses how to run the Initialize Plan process.

Note. You must run the Initialize Plan process before running the Employee Plan (NVQ006) report.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Manage Competencies Reports

Pages Used to Run NVQ Reports

Page Name	Object Name	Navigation	Usage
NVQ001	PRCSRUNCNTL	Workforce Development, Competency Management, NVQ Reports UK, Employee Status	Run the (GBR) UK NVQ - Employee Status report (NVQ001). This report lists employees assigned to an NVQ and their status.
NVQ002	PRCSRUNCNTL	Workforce Development, Competency Management, NVQ Reports UK, Unit Listing	Run the (GBR) UK NVQ - Unit Listing report (NVQ002) that lists all defined NVQ units.
NVQ003	PRCSRUNCNTL	Workforce Development, Competency Management, NVQ Reports UK, NVQ Listing	Run the (GBR) UK NVQ - NVQ Listing report (NVQ003) that lists all defined NVQ units.
NVQ004	PRCSRUNCNTL	Workforce Development, Competency Management, NVQ Reports UK, Unit/Element	Run the (GBR) UK NVQ – Unit/Element Listing report (NVQ004) that lists the elements associated with NVQ units.
NVQ005	RUNCTL_NVQ005	Workforce Development, Competency Management, NVQ Reports UK, Initialize Plan, NVQ005	Run the Initialize Plan process for a selected employee. Note. This SQR process must be run to generate the UK NVQ – Employee Plan report.
NVQ006	PRCSRUNCNTL	Workforce Development, Competency Management, NVQ Reports UK, Employee Plan	Run the (GBR) UK NVQ - Employee Plan report (NVQ006). This report summarizes an employee’s NVQ Unit plan (defined on the Track NVQ - Plan NVQ Units page). First run the NVQ - Initialize Plan process to generate this report.

Running the Initialize Plan Process

Access the NVQ005 page.

NVQ005

Run Control ID: 123

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Report Request Parameter(s)

EmplID: B-BARET194

Bentley,Angela

NVQ005 page

Language

Automatically populated based on the run control ID that you selected.
Overrides the default language if necessary.

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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