PeopleSoft®

PeopleSoft 8.8
Resume Processing PeopleBook

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Resume Processing PeopleBook
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Contents

General Preface
About This PeopleBook v
PeopleSoft Application Prerequisites v
PeopleSoft Application Fundamentals v
Related Documentation vi
Obtaining Documentation Updates vi
Ordering Printed Documentation vi
Typographical Conventions and Visual Cues vii
Typographical Conventions vii
Visual Cues viii
Comments and Suggestions ix
Common Elements in These PeopleBooks ix

Preface
PeopleSoft Resume Processing Preface xi
PeopleSoft Application Fundamentals xi
PeopleBook Structure xi

Chapter 1
Getting Started With PeopleSoft Resume Processing 1
PeopleSoft Resume Processing Business Processes 1
Implementing PeopleSoft Resume Processing 1
Setting Up PeopleSoft HRMS Fundamental Tables 2
Setting Up Core PeopleSoft Resume Processing Tables 2

Chapter 2
Understanding PeopleSoft Resume Processing 3
PeopleSoft Resume Processing Integrations 3
Understanding How Resume Processing Works 3
Using Resume Processing with Apply for Job 6
Understanding the Extraction Process 7
The Extraction Process for Automatic Resume Entry 7
The Extraction Process for Apply for Job 7

Initialize Resume Processing Process....8
Apply for Job PeopleCode....9
Resume Extractor....9
Inbound Business Interlink....10
FTP Server....11

Chapter 3
Setting Up PeopleSoft Resume Processing....13
Understanding PeopleSoft Resume Processing Setup....13
Setting Up PeopleSoft Resume Processing Directories....13
Setting Up Your FTP Server and URLs....15
Setting Up Resume Processing Parameters....16
Page Used to Configure Resume Processing Parameters....16
Defining System Parameters....16
Defining the Email Messages....19

Chapter 4
Processing Resumes....21
Processing Incoming Resumes....21
Understanding Resume Processing....21
Pages Used to Manually Process Resumes....22
Starting Resume Processing....22
Processing Hard Copy Resumes....22
Processing Soft Copy Resumes....22
Processing Resumes With Lower Confidence Levels....23
Pages Used to Process Resumes with Lower Confidence Levels....23
Viewing the Resume Queue....23
Processing Resumes in the Queue....25
Running Auto Populate Cleanup....27
Pages Used to Run Auto Populate Cleanup....27

Glossary of PeopleSoft Terms....29

Index....41

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.
Italics	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 0, not the letter *O*.
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 *See.* 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 Resume Processing Preface

This preface discusses:

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

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

PeopleSoft Application Fundamentals

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

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

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

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

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

CHAPTER 1

Getting Started With PeopleSoft Resume Processing

This chapter provides an overview of PeopleSoft Resume Processing business processes and discusses:

- PeopleSoft Resume Processing integrations.
- PeopleSoft Resume Processing implementation tasks.

PeopleSoft Resume Processing Business Processes

PeopleSoft Resume Processing supports the following business processes:

- Applicant data extraction.
- Automatic population of data in Apply for Job.
- Resume queue processing.

We cover these business processes in this PeopleBook.

Implementing PeopleSoft Resume Processing

The Resume Processing table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Resume Processing application tables.

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

Note. The order in which you set up tables required to implement PeopleSoft Resume Processing may vary; each individual application isn't necessarily set up in sequence. The order in which you complete setup may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Resume Processing requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define in these tables lays the foundation for the Resume Processing setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook,* "Getting Started With PeopleSoft HRMS."

Setting Up Core PeopleSoft Resume Processing Tables

The steps discussed in this section suggests an order in which you set up Resume Processing information. The information that you defined in your fundamental tables lays the foundation for this setup.

Completing these steps prepares your system to support these business processes:

- Applicant data extraction.
- Automatic population of Apply for Job.
- Resume queue processing.

Step	Reference
1. Set up the Recruit Workforce business process.	PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Getting Started With PeopleSoft Human Resources: Recruit Workforce".
2. (Optional) If you're using Resume Processing with eRecruit, set up PeopleSoft eRecruit.	PeopleSoft 8.8 eRecruit PeopleBook, "Getting Started With PeopleSoft eRecruit".
3. Set up Resume Processing directories.	• *PeopleSoft Resume Processing Handbook* located on Customer Connection • Chapter 3, "Setting Up PeopleSoft Resume Processing," page 13.
4. Set up your FTP server and FTP server URLs.	Chapter 3, "Setting Up PeopleSoft Resume Processing," Setting Up Your FTP Server and URLs, page 15.
5. Define Resume Processing installation options.	PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Setting Up eRecruit Manager Desktop," Defining System Parameters.
6. Schedule the Initialize Resume Processing process.	Chapter 3, "Setting Up PeopleSoft Resume Processing," page 13.
7. Set up the email messages that are issued to applicants.	Chapter 3, "Setting Up PeopleSoft Resume Processing," page 13.

CHAPTER 2

Understanding PeopleSoft Resume Processing

This chapter provides an overview of PeopleSoft Resume Processing.

PeopleSoft Resume Processing Integrations

PeopleSoft Resume Processing integrates with the following PeopleSoft applications:

- Human Resources (sends and receives data)
- eRecruit Manager Desktop (sends and receives data)
- eRecruit (sends and receives data)

We cover integration considerations in the implementation chapter in this PeopleBook.

Understanding How Resume Processing Works

The purpose of PeopleSoft's Resume Processing is to pull information from the applicant's resume and automatically populate fields in:

- Applicant Data component in HRMS-Recruit Workforce.
- Apply for Job transaction in eRecruit.

Resume Processing accepts resumes in different languages and a variety of formats, including Microsoft Word documents, ASCII, Portable Document Format (PDF), Multipurpose Internet Mail Extensions (MIME), and HTML.

PeopleSoft Resume Processing accepts resumes from two sources:

- A designated email account.

  You set up a central email account that is used exclusively for receiving resumes. PeopleSoft Resume Processing monitors this account, and whenever a new email is received, the system starts extracting applicant information from the email body text or attachment.

- The PeopleSoft Resume Processing input directories.

  The system automatically detects new resumes in these directories and starts the extraction process. Typically, resumes are added to the input directories in two ways:

- By Optical Character Recognition (OCR) software.

  Resumes received by fax or in the mail are scanned and processed by OCR software to create an electronic resume. To feed these resumes into PeopleSoft Resume Processing, direct the output of your OCR software to a resume processing input directory.

- By a recruiting administrator.

  For example, an administrator receives a resume file on disk and copies the file to an input directory.

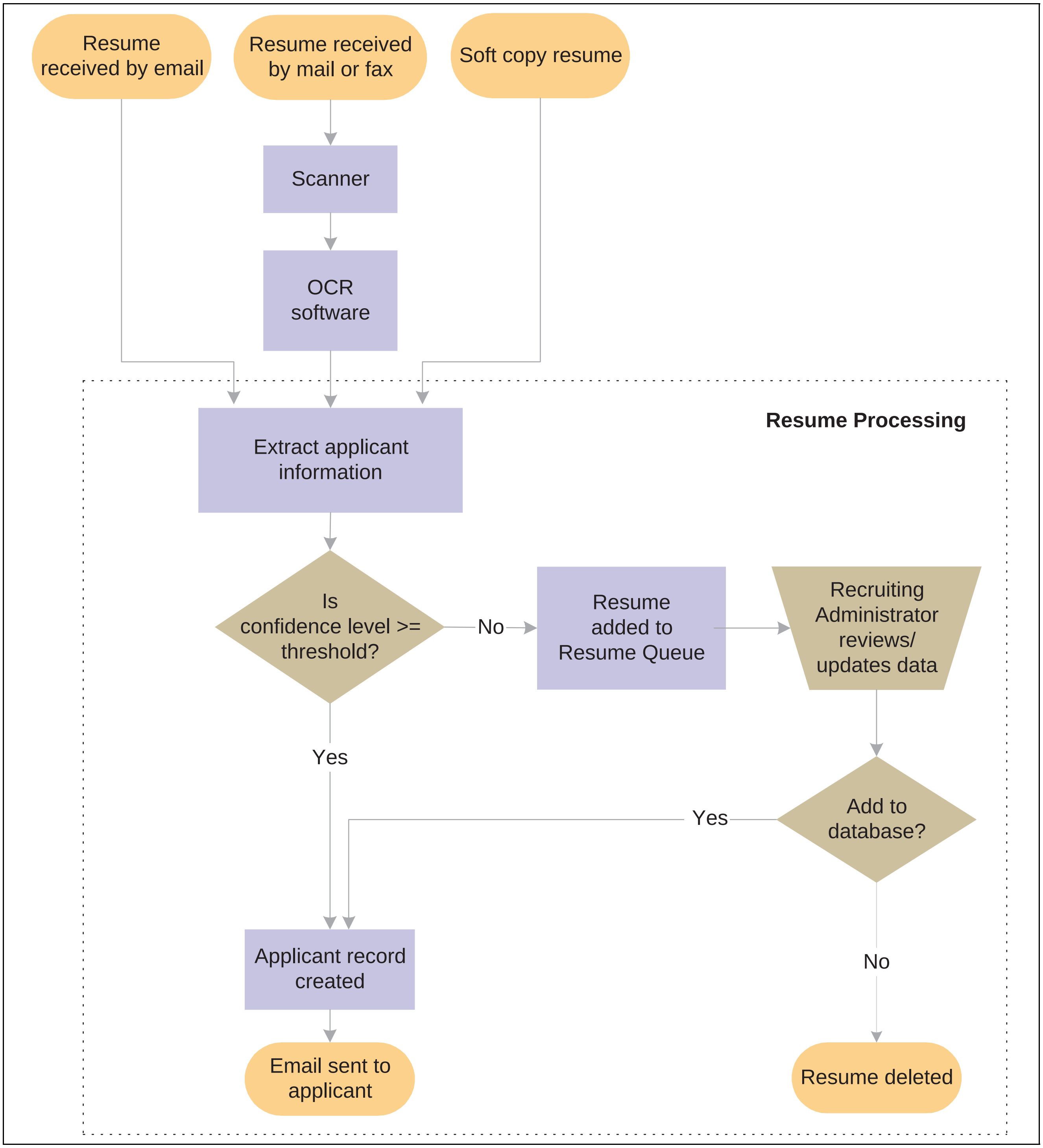
Note. OCR software is not part of the PeopleSoft Resume Processing system and must be installed and configured separately.

The extraction process extracts the following information from an applicant's resume:

- Contact information: applicant name, home address, telephone numbers, and email address.
- Prior work experience.
- Education and qualifications.
- Full resume text.

The extracted information is evaluated and assigned a confidence level. If the confidence level is greater than or equal to the confidence level you have set up, an applicant records is created and an email is sent to the applicant. The email includes the Uniform Resource Locator (URL) addresses where applicants can access and update their resumes using Apply for Job transaction.

The following illustrates how PeopleSoft Resume Processing automates resume entry:



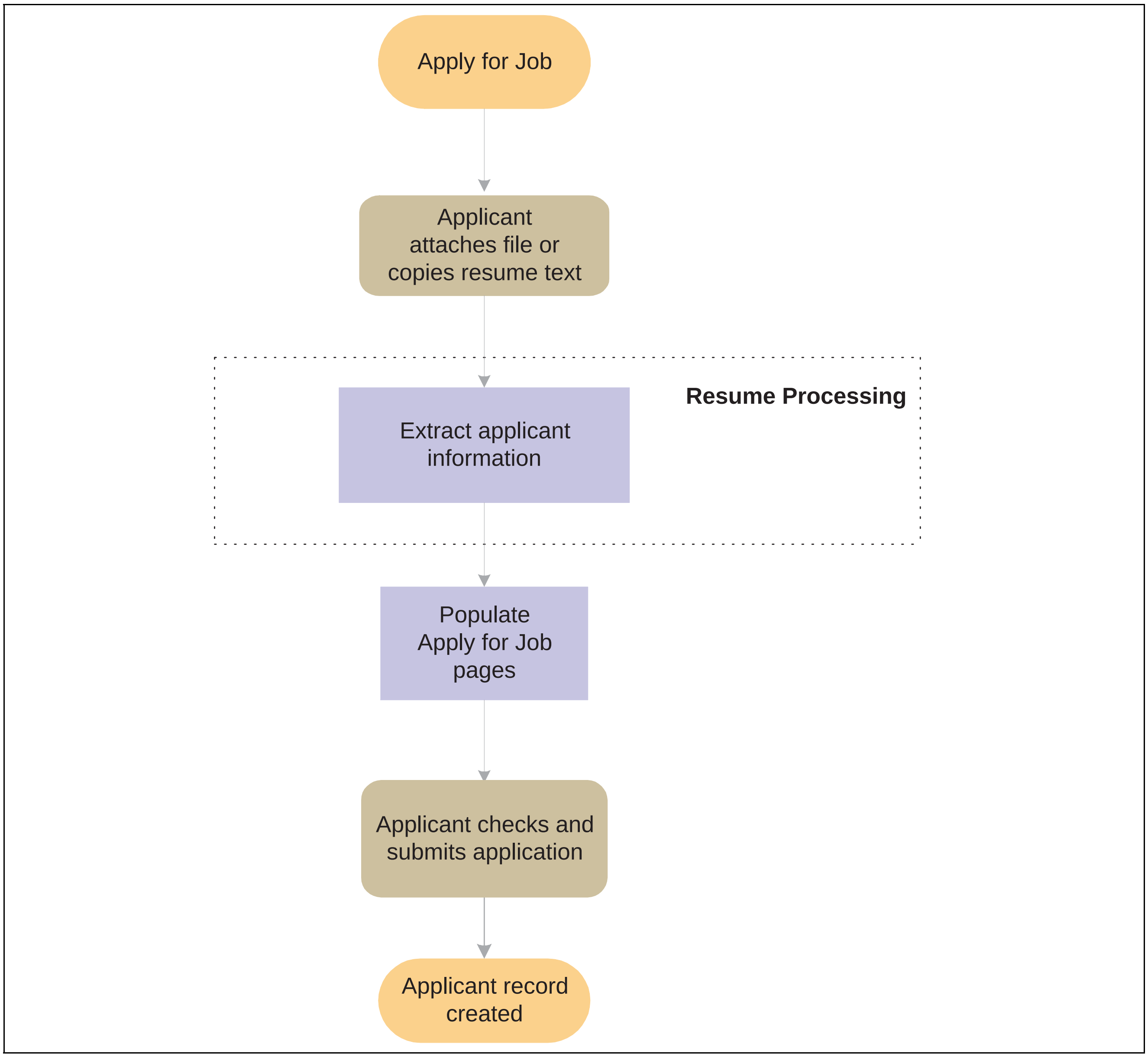
Overview of PeopleSoft Resume Processing

Using Resume Processing with Apply for Job

When you use PeopleSoft Resume Processing to populate fields in Apply for Job, the self-service transaction initiates the extraction process.

Once the extraction is complete, the self-service transaction uses the extracted data to prepopulate the Apply for Job fields for the applicant. Because applicants check and update the results of the extraction before the information is submitted, the confidence level is ignored by Apply for Job. The system populates the fields regardless of the confidence level.

The following diagram shows how you can use PeopleSoft Resume Processing with the Apply for Job self-service transaction:



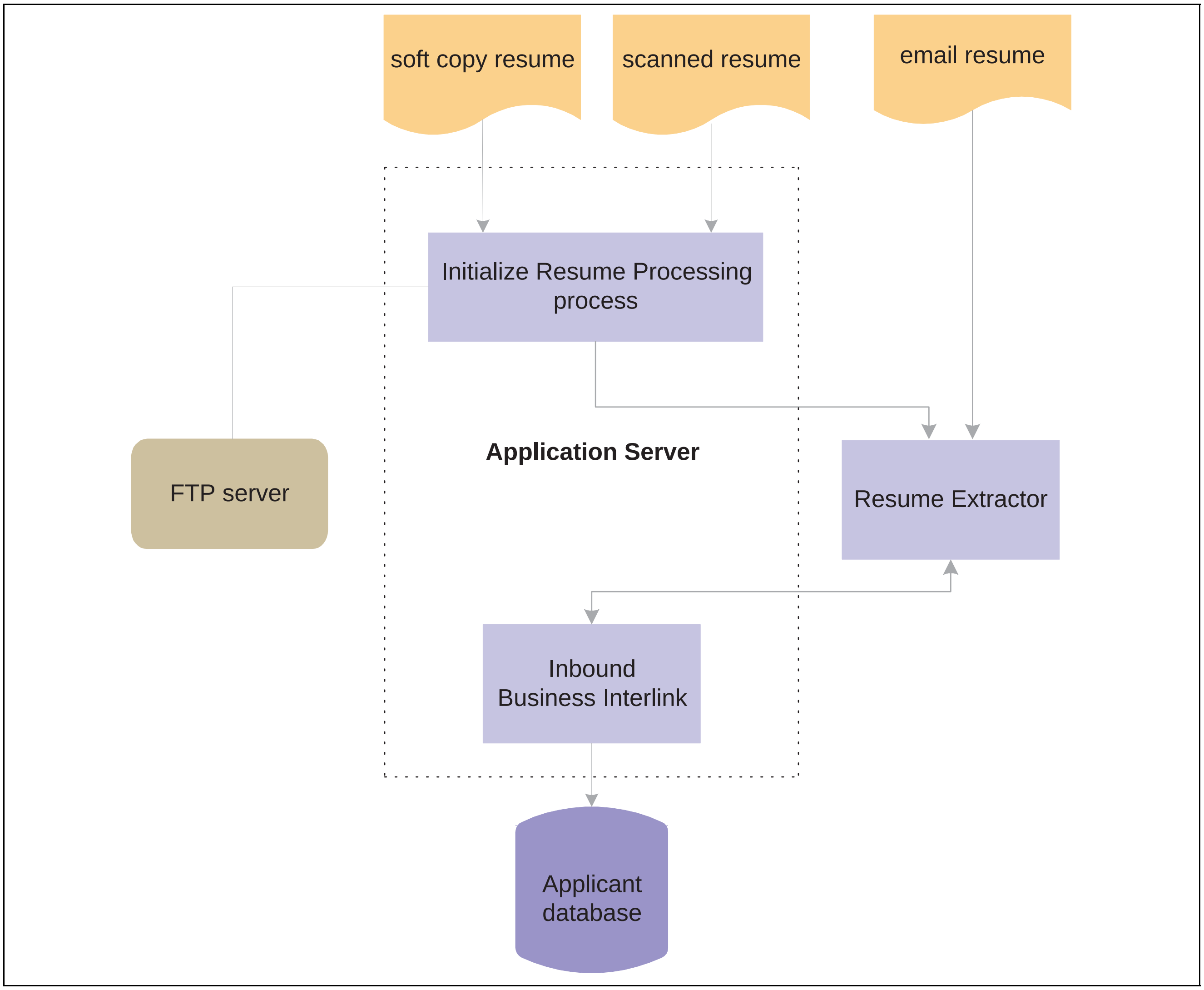
PeopleSoft Resume Processing and Apply for Job

Understanding the Extraction Process

Before you can set up resume processing, you need to understand how the system extracts applicant data from resumes. The extraction process varies depending on how you're using PeopleSoft Resume Processing.

The Extraction Process for Automatic Resume Entry

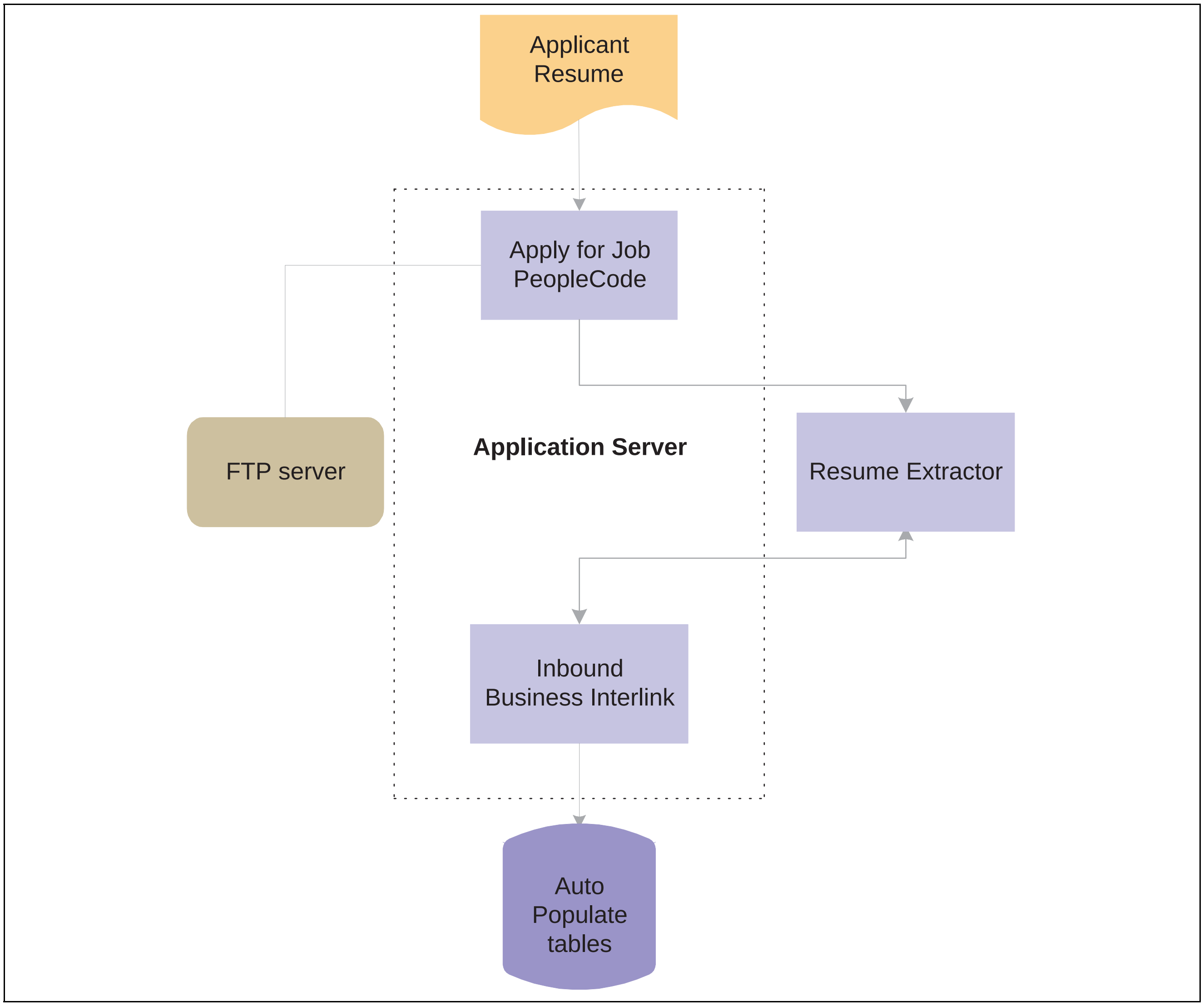
The following illustration outlines the extraction process if you're using PeopleSoft Resume Processing to process resumes you received by email, in soft copy, or hard copy:



Extraction Process for Automatic Resume Entry

The Extraction Process for Apply for Job

If you're using PeopleSoft Resume Processing to populate Apply for Job, the extraction process is shown below:



The Apply for Job Extraction Process

Initialize Resume Processing Process

The Initialize Resume Processing process (RP_INIT) runs at regular intervals, checking the Resume Processing input directories for new resumes for details of directories required). When the process finds a new resume it does the following:

1. Renames the resume, based on the Last Resume Number Used field on the eRecruit Installation Options page.

   Resume file names are of the form: resume_<resume_number>. This ensures that resumes have a unique filename. The process moves the renamed resume to the Resume Processing output directory.

2. Creates an Extensible Markup Language (XML) control file that defines the filename and location of the new resume.

3. Adds the XML control file to the Resume Extractor INPUT_OUTPUT/CONTROL/REQUESTS directory.

4. Copies the renamed resume file to the Resume Extractor INPUT_OUTPUT/DATA directory.

   The Resume Extractor directories are set up when you install the Resume Extractor.

Note. The Initialize Resume Processing process isn't required for the Apply for Job extraction to work.

See Also

Chapter 4, "Processing Resumes," Processing Incoming Resumes, page 21

Apply for Job PeopleCode

PeopleCode in the Apply for Job self-service transaction performs the same function as the Initialize Resume Processing process, but it works in a different way. When applicants attach their resume file or copy their resume text, PeopleCode does the following:

1. If the applicant copied the text into Resume Text field, it creates a text file.
2. Creates an Extensible Markup Language (XML) control file that defines the filename and location of the resume.
3. Adds the XML control file to the Resume Extractor INPUT_OUTPUT/CONTROL/REQUESTS directory.
4. Copies the resume file to the Resume Extractor INPUT_OUTPUT/DATA directory.

You can use the same Resume Extractor directories for Apply for Job and the Initialize Resume Processing process. However, if you have a high volume of resumes you might have a separate installation of Resume Extractor dedicated to handling resumes from Apply for Job.

Resume Extractor

Resume Extractor extracts applicant data from resumes. The Resume Extractor software is installed separately and runs on only Windows NT or 2000. Depending on the volume of resumes your organization handles, you can install one copy of Resume Extractor to handle all resumes, or you can have a separate installation that handles resumes received from Apply for Job.

Resume Extractor starts its extraction process when:

- The Initialize Resume Processing process (RP_INIT) or the Apply for Job PeopleCode adds an XML control file to the Resume Extractor directory.

  Using the control file, the Resume Extractor can locate the new resume.
- An email is received in a designated email account.

  Resume Extractor monitors an email account that you define at installation. When it detects a new email, Resume Extractor extracts applicant data from the email body text or email attachment.

Resume Extractor extracts applicant data from the resume and calculates a confidence level that indicates the expected accuracy of the extraction.

Using the extracted data, Resume Extractor posts an XML request, via http, to the Inbound Business Interlink. This XML request defines the applicant data and the confidence level.

Confidence Level

The confidence level output by the Resume Extractor is a rating of the success of the extraction process.

When the extraction process goes well, the extracted attributes have a high accuracy. When the extraction process is less successful, the extracted attributes have a low accuracy. The confidence level is an indicator of the probability that the extracted attributes have a high accuracy. In general, the higher the confidence level, the more likely it is that the accuracy is also high. However, confidence level is not a measurement of accuracy.

Resume Extractor uses a number of factors to determine the confidence level, including:

- The probabilities of all words on the page.
- The context of those words.
- Sequence of attributes extracted.

In practical terms, if you set the confidence threshold to *Very High,* fewer resumes meet the threshold for automatic insertion into your applicant data table. However, those that meet or exceed the threshold are, on average, more accurate. Similarly, by setting the confidence threshold to *Low,* more resumes meet the threshold, but there are more mistakes, on average, in those additional resumes.

Note. The system ignores the confidence level returned if the extraction is initiated by Apply for Job.

See Also

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Setting Up eRecruit Manager Desktop," Defining System Parameters

Inbound Business Interlink

Business Interlinks enable PeopleSoft applications to pass data to and receive data from external systems in realtime. In PeopleSoft Resume Processing, an Inbound Business Interlink receives XML requests from the Resume Extractor. Here's how the Inbound Business Interlink works if the extraction is triggered by:

- Initialize Resume Processing process

  It compares the confidence level calculated by Resume Extractor with the confidence threshold that you defined for your system on the eRecruit Installation page.

  If the confidence level is equal to or greater than the confidence threshold, the Inbound Business Interlink creates an applicant ID and adds the applicant's data to the applicant data tables. It also sends an email notifying the applicant that his or her details have been added to your database.

  If the confidence level is less than the confidence threshold, the Inbound Business Interlink creates an applicant record in the temporary tables RP_QUEUE_APP, RP_QUEUE_PHN, RP_QUEUE_WRKEXP, and RP_QUEUE_EDU.

  A recruiting administrator processes the applicants in the temporary tables using the Resume Queue page, deciding whether to transfer the applicant to the applicant data tables.

- Apply for Job

  It creates applicant records in the temporary auto populate tables.

There is no setup for the Inbound Business Interlink as it is automatically set up during installation.

Enterprise Integration Point Between PeopleSoft Resume Processing and Resume Extractor

Technical details of the enterprise integration points (EIPs) are in the EIP catalog. The EIP for the Resume Processing inbound business interlink is PROCESS_RESUME.

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

See Also

Chapter 4, “Processing Resumes,” Processing Resumes With Lower Confidence Levels, page 23

FTP Server

The Initialize Resume Processing process (RP_INIT) uses a File Transfer Protocol (FTP) server to move the resume and control files. You must have an FTP server on the machine that run the Resume Extractor.

The FTP server is not part of the PeopleSoft Resume Processing application. You can use the FTP server of your choice.

CHAPTER 3

Setting Up PeopleSoft Resume Processing

This chapter discusses PeopleSoft Resume Processing setup and explains how to:

- Set up directories for PeopleSoft Resume Processing.
- Set up your FTP Server and URLs.
- Set up PeopleSoft Resume Processing parameters.
- Process new resumes.
- Define email messages.

Understanding PeopleSoft Resume Processing Setup

To set up your system to process resumes:

1. (Optional) If you are using the email functionality supported by Resume Processing, set up the resume processing root directory and subdirectories.
2. Configure system parameters using the eRecruit Installation Options page.

   Use the eRecruit Installation Options page to define parameters, such as the confidence threshold, and the location of the resume processing directories.
3. Install an FTP server and set up Uniform Resource Locators (URLs) for the FTP server.
4. Set up the frequency of the Initialize Resume Processing Process for resumes not received via email.
5. Set up the standard email message that is sent to applicants when their details are added to your database.
6. (Optional). Set up the frequency of the Auto Populate Cleanup process.

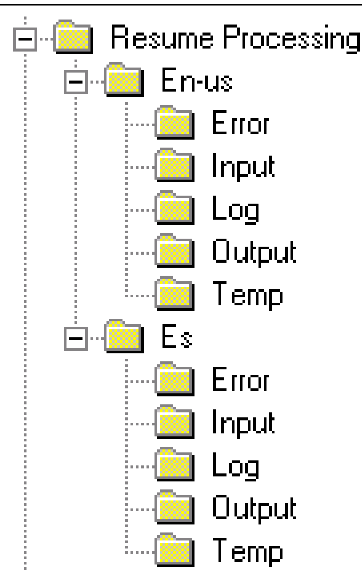
The setup steps are described in more detail in the sections that follow.

Setting Up PeopleSoft Resume Processing Directories

PeopleSoft Resume Processing requires a root directory and the following subdirectories:

Directory	Purpose
Input	Contains unprocessed resumes created by your Optical Character Recognition (OCR) software or added to the directory by an administrator. The Initialize Resume Processing process (RP_INIT) checks this directory for new resumes. This directory is not used by Apply for Job.
Output	Contains resume files that have been renamed by the Initialize Resume Processing process. The system uses this directory to retrieve a resume when users select View Original Resume from the resume queue. This directory is not used by Apply for Job.
Log	Contains log files created by the Initialize Resume Processing process and the Inbound Business Interlink. Apply for Job doesn't create log files. If errors occur in processing, the system displays an error message to the applicant.
Error	Contains resumes that RP_INIT couldn't process.
Temp	Contains temporary files created by the Initialize Resume Processing process and the Apply for Job transaction.

If you receive resumes in multiple languages, define a root directory for each language. For example, if you want to process resumes in American English and Spanish, the directory structure would look like this:



Example Resume Processing Directory Structure

In this example, these are the root directories:

- Resume Processing/En-us

- Resume Processing/Es

These are the directories for which you create FTP addresses using your FTP server.

Ensure that your FTP server has access to the resume processing root directories and subdirectories.

Note. The resume processing directories must be on the same machine as the Process Scheduler. Do not change the names of these subdirectories.

The Resume Extractor has separate directories that you set up during installation. This is explained in the PeopleSoft Resume Processing Handbook.

Setting Up Your FTP Server and URLs

To set up your FTP URLs:

1. Define FTP addresses that point to the Resume Extractor and Resume Processing directories.

   Use your FTP server to define FTP addresses that point to these directories:

   - Resume Processing root directories (one FTP address for each language)
   - Resume Extractor input-output directories (one FTP address for each language)
   - Resume Extractor input-output directory for Apply for Job.

2. If you have a separate installation of Resume Extractor to handle resumes from Apply for Job, set up an FTP address for that installation.

   Note. Don't include a port number in the FTP address. Use the default port assigned by your FTP server.

3. Define the URLs for the Resume Processing and Resume Extractor directories.

   URLs are defined on the URL Maintenance page. From PeopleTools, select Utilities, Use, URL Maintenance. PeopleSoft supply URL identifiers to use with Resume Processing. Select the URL identifier and complete the URL field as follows:

URL Identifier	URL field
RP_ROOT_FTP_*lang* (where *lang* is a language code such as EN or DE)	Define a URL for the root directory for each language you have defined. Enter the FTP address that points to the resume processing root directory for that language.

URL Identifier	URL field
RP_EXTRACTOR_FTP_*lang*	Define a URL for each language you want to process. Enter the FTP address that points to the Resume Extractor input-output directory for that language.
AUTOPOP_EXTRACTOR_FTP	This is optional. If you have a separate installation of Resume Extractor for Apply for Job, enter the FTP address of this Resume Extractor input-output directory.

Warning! If your FTP server defaults to the root directory of a file system, you must append the directory name to the FTP address. For example, suppose you have set up the FTP address ftp://attachment_address that points to the directory c:\resume_files. When you actually log in using the FTP server, it may default to c:\. If your FTP server does this, you would enter ftp://attachment_address/resume_files in the URL field.

See Also

PeopleTools PeopleBook: People Tools Data Management

Setting Up Resume Processing Parameters

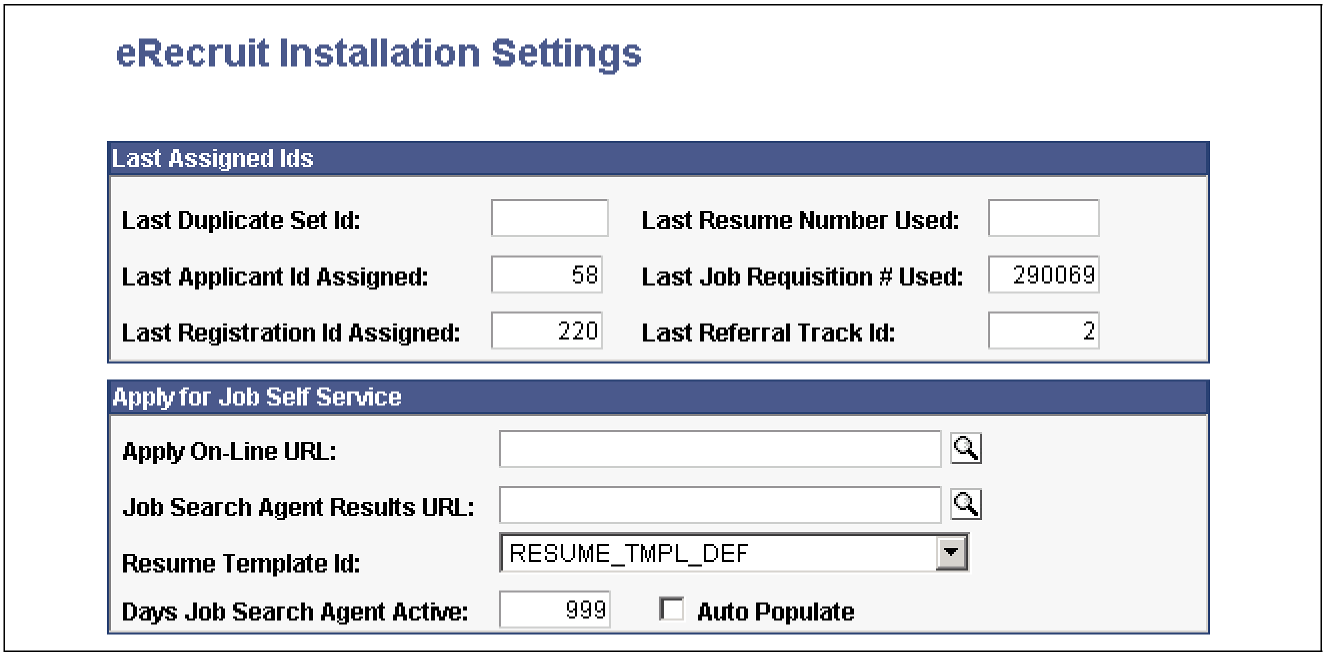
This section explains how to enter Resume Processing parameters.

Page Used to Configure Resume Processing Parameters

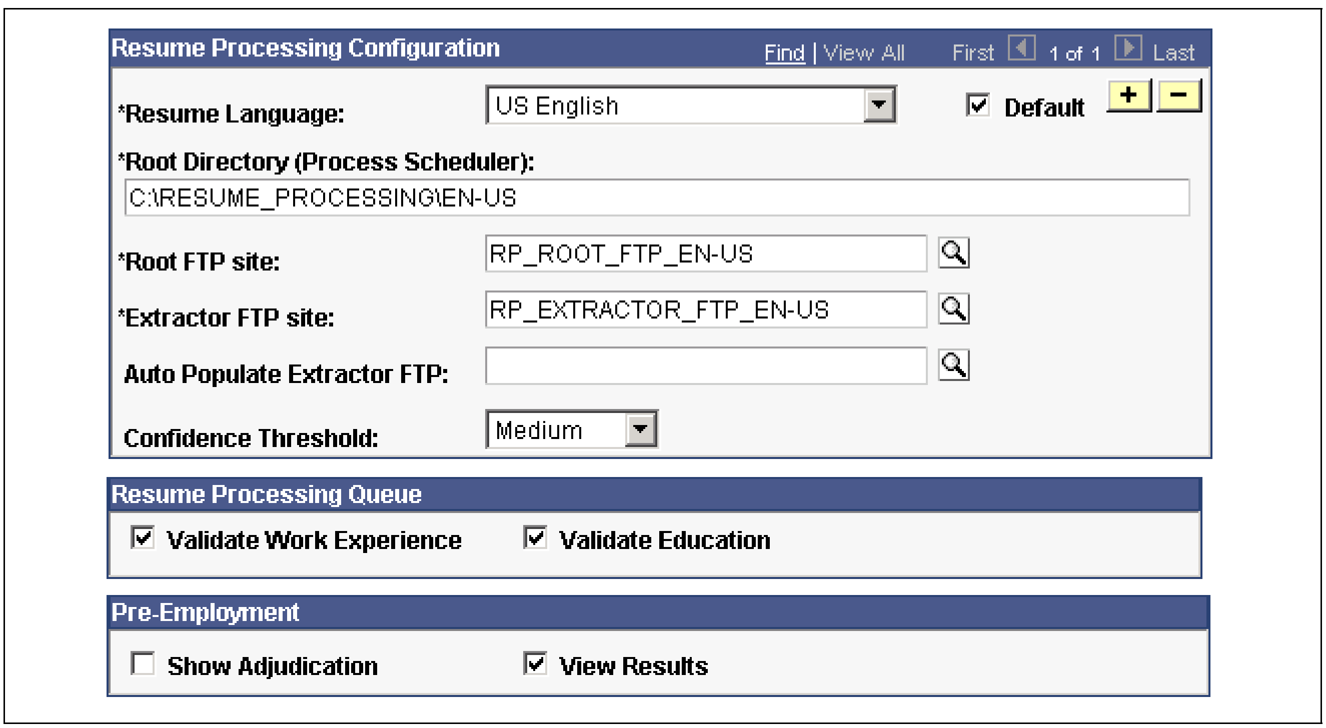
Page Name	Object Name	Navigation	Usage
eRecruit Installation Options	ER_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, eRecruit: Installation	Define resume processing recruitment applications.

Defining System Parameters

Access the eRecruit Installation Options page.



eRecruit Installation Options page (1 of 2)



eRecruit Installation Options page (2 of 2)

Last Assigned IDs

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

Apply for Job Self Service

This group box defines the parameters used by the Apply for Job transaction in eRecruit. However, there is a field you must complete if you have purchased Resume Processing and plan to use the Auto Populate feature. The rest of the fields are fully documented in PeopleSoft eRecruit PeopleBook.

Auto Populate Select to enable automatic population of the Apply for Job self-service transaction. . When applicants attach their resume the system automatically extracts applicant data and completes fields in the Apply for Job pages.

You can only use this feature if you have PeopleSoft Resume Processing installed. You may also complete the Extractor FTP Site fields if Auto Populate uses a separate instance of the extractor.

Resume Processing Configuration

Complete this group box if you have installed PeopleSoft Resume Processing. PeopleSoft Resume Processing can handle resumes in multiple languages. Set up the following fields for each language.

Language Select the resume language.

Root Directory Enter the directory path name for the resume processing root directory for the selected Language from the perspective of the Process Scheduler.

Note. The Resume Processing directories must be on the same machine as the process scheduler.

Root FTP Site Select the URL of the FTP address that points to the resume processing root directory for the selected language. The URL identifiers supplied by PeopleSoft are named *RP_ROOT_FTP_lang,* where *lang* is a language code.

Extractor FTP Site Select the URL of the FTP address that points to the Resume Extractor input-output directory for the selected language. The URL identifiers supplied by PeopleSoft are named *RP_EXTRACTOR_FTP_lang.*

Auto Populate Extractor FTP (Optional) If a value is present, the system uses the instance of the extractor that corresponds to the FTP URL identifies. If blank, the system uses the extractor entered in the Extractor FTP Site field.

Confidence Threshold Select the threshold that determines if applicants are automatically added to your database. The options are *Very High, High, Medium,* and *Low* .

When Resume Extractor processes a resume, it assigns a confidence level that indicates the expected accuracy of the extracted information. The system enters an applicant directly into the applicant data tables if the assigned confidence level is equal to or greater than the confidence threshold that you select in this field.

If the confidence level is less than this threshold, the system adds the applicant to the resume queue.

For example, if you select *High,* resumes with a confidence level of *High* or *Very High* are automatically added to the database. Resumes with a confidence level *Medium, Low,* or less than low, are added to the resume queue.

Validate Work Experience Select if you want to automatically display the applicants' work history on the Resume Details page. If you clear the check box, the work experience section is collapsed initially and users must expand the section to review an applicant's work history.

Validate Education Select if you want applicants' education details to automatically display on the Resume Details page. If you clear the check box, the education section is collapsed initially and users must expand the section to review education details.

Defining the Email Messages

When resume processing creates new applicant records in the Applicant Data tables, it automatically sends emails using the email addresses extracted from the resumes and notifies the applicants that their resumes have been added to your database.

The email includes a URL address where applicants can access and update their resumes using the Apply for Job self-service transaction.

Note. Resume processing doesn't generate emails for resumes received from Apply for Job.

Before you start using resume processing, tailor the default message supplied by PeopleSoft for your organization. For example, you could add your organization name or include a contact name.

To set up resume processing email messages:

1. Make sure email is activated for workflow.

   From PeopleTools, select Workflow Administrator, Use, Workflow System Defaults. At the Worklist System Defaults page, select the Email Active check box.

2. Edit the default resume processing email.

   From PeopleTools, select Utilities, Use, Message Catalog. Select and update the message as follows:

   a. Select Message Set Number *1117*.

      The system displays the Message Catalog page.

   b. Select Message Number 12.

      In the Message Text field, enter the text you want to appear in the subject of the email. The default Message Text delivered by PeopleSoft includes the date that the resume was processed (parameter %1).

   c. Select Message Number 13.

      This message forms the body of the email. Update the Explanation field to personalize the message for your organization. The default Explanation delivered by PeopleSoft includes the applicant's first name (parameter %1), and the applicant's password (parameter %2). The password is system-generated, and gives applicants access to the Apply for Job self-service transaction. Do not delete the password parameter from the message.

See Also

PeopleTools PeopleBook: PeopleSoft Workflow, "Administering Workflow," Setting Workflow Defaults

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," Text Control

CHAPTER 4

Processing Resumes

This chapter describes how to:

- Process new resumes.
- Start processing resumes.
- Process hard copy resumes.
- Process soft copy resumes.
- Process resumes with lower confidence levels.

Processing Incoming Resumes

This section explains how to processing incoming resumes.

Understanding Resume Processing

The Initialize Resume Processing process (RP_INIT) is designed to run throughout the day to deal with new resumes. The default recurrence definition associated with this process is RP_INIT, which means the process runs every day at hourly intervals. Depending on the volume of resumes that your organization receives via fax or mail, you may want to run the process more or less frequently.

You can change the frequency at which the RP_INIT process runs on the Recurrence Definitions page in PeopleTools. On the Recurrence Definition page, find the Every fields in the Repeat group box and enter the new frequency and time unit (*Hours, Minutes,* or *Seconds*).

Once you have set up the schedule and started the Process Scheduler, the process runs automatically without user intervention.

The Initialize Resume Processing process creates a log file in the log directory so that you can check the results of the process.

Note. If you need to run Initialize Resume Processing manually at an unscheduled time, use the Initialize Resume Processing page.

Pages Used to Manually Process Resumes

Page Name	Object Name	Navigation	Usage
Initialize Resume Processing	PCSRUNCTRL	Recruiting, Identify/Process Applicants, Resumes, Request Adhoc Resume Process.	Runs the Initialize Resume Processing process.

Starting Resume Processing

To start the Resume Processing system:

1. Start your File Transfer Protocol (FTP) Server according to the instructions in your FTP server documentation.
2. Start the Resume Extractor, if necessary.

   When you install the Resume Extractor software, a Windows NT or 2000 service called Mohomine Resume Extractor is created. Normally, you don't need to manually start the service; it's set to automatically start if the machine is rebooted.

   However, if you need to restart the service, go to the Windows Start menu, Control Panel, Services. From the Services dialog box, select Mohomine Resume Extractor and click Start.
3. Start the Process Scheduler server from the PeopleSoft Process Scheduler Administration menu.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Processing Hard Copy Resumes

Resumes received via fax or mail must be scanned and processed by your optical character recognition (OCR) software before they can be submitted to PeopleSoft Resume Processing. You need to ensure that the files created by the OCR software are deposited in the appropriate input directory for the language of the resume.

New resumes are added to <RESUME_PROCESSING>/input, where <RESUME_PROCESSING> is a root directory defined on the eRecruit Installation Options page.

Refer to the documentation for your scanner and OCR software for setup information.

Processing Soft Copy Resumes

If you have a resume file that you want to process, move the file to the appropriate input directory <RESUME_PROCESSING>/input, where <RESUME_PROCESSING> is a root directory defined on the eRecruit Installation Options page.

See Also

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Setting Up eRecruit Manager Desktop," Defining System Parameters

Processing Resumes With Lower Confidence Levels

The extraction process assigns a confidence level that indicates the expected accuracy of the extracted information. When the confidence level is less than the confidence threshold specified on the eRecruit Installation Options page, the system does not automatically add the applicant to your applicant database. Instead, the applicant data is moved to temporary tables and the resume is added to a queue.

This section describes how to:

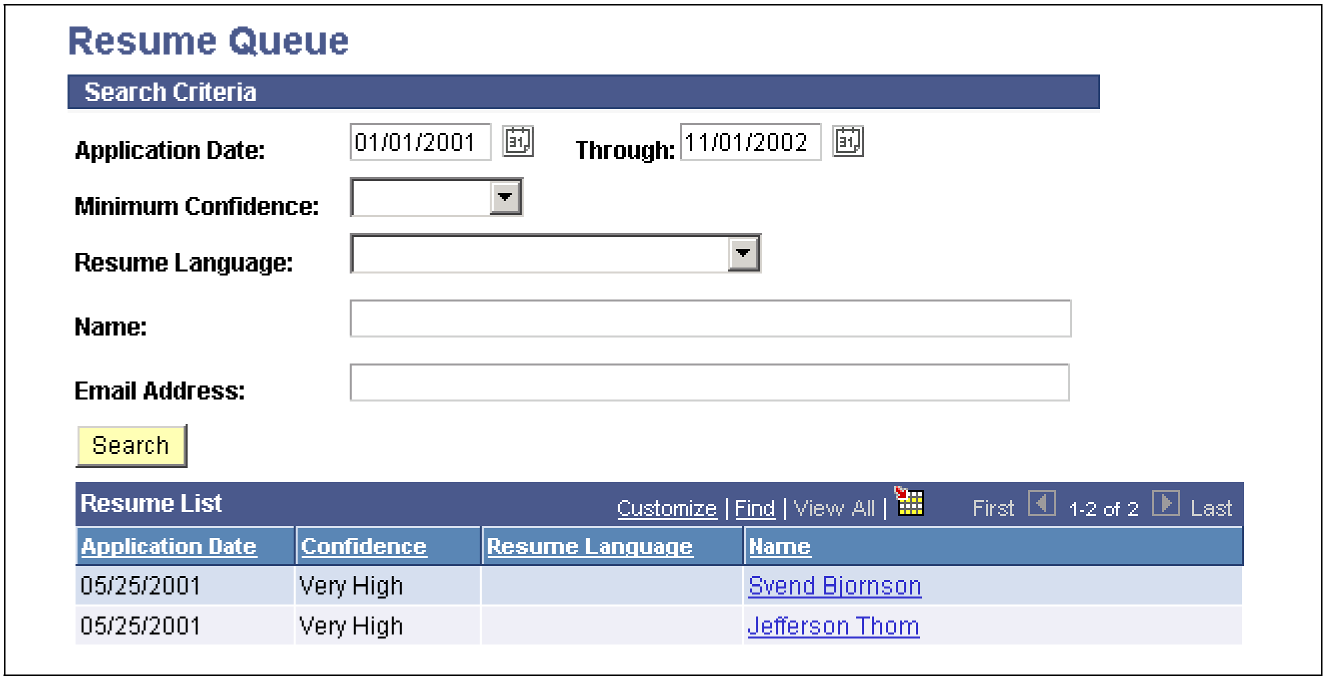
- View the resume queue.
- Process resumes in the queue.

Pages Used to Process Resumes with Lower Confidence Levels

Page Name	Object Name	Navigation	Usage
Resume Queue	RP_QUEUE	Recruiting, Identify/Process Applicants, Resumes, Resume Processing Queue	View a list of the processed resumes that are in the resume queue.
Resume Details	RP_QUEUE_DETAIL	Click the Name link on the Resume Queue page.	Review and update data extracted by Resume Extractor. If the data appears correct, click Submit to transfer it to your Applicant Data tables and create an ID for the applicant. Or click Delete to delete the data.
Work Experience Description	RP_QUEUE_WRK_SEC	Click the Description link on the Resume Details page.	Review and update the description of the applicant's work experience that was extracted from the resume.

Viewing the Resume Queue

Access the Resume Queue page.



Resume Queue page

Search Criteria

If you want to view a limited list of resumes in the resume queue, complete fields in Search Criteria. Otherwise, click Search to list all the resumes in the queue.

Application Date To search for resumes that were processed within a certain period, enter the start date in this field and the end date in the Through field.

Minimum Confidence To search for resumes with a particular confidence level, select the confidence level.

Remember that the resume queue includes only resumes with a confidence level below the confidence threshold specified on the eRecruit Installation Options page. All other processed resumes are automatically added to your database.

Resume Language To search for resumes based on a specific language, select a language from the list.

Name If you know the name of the applicant you want to process, enter the applicant's last name.

Email Address If you know the email address of the applicant you want to process, enter the address or partial address.

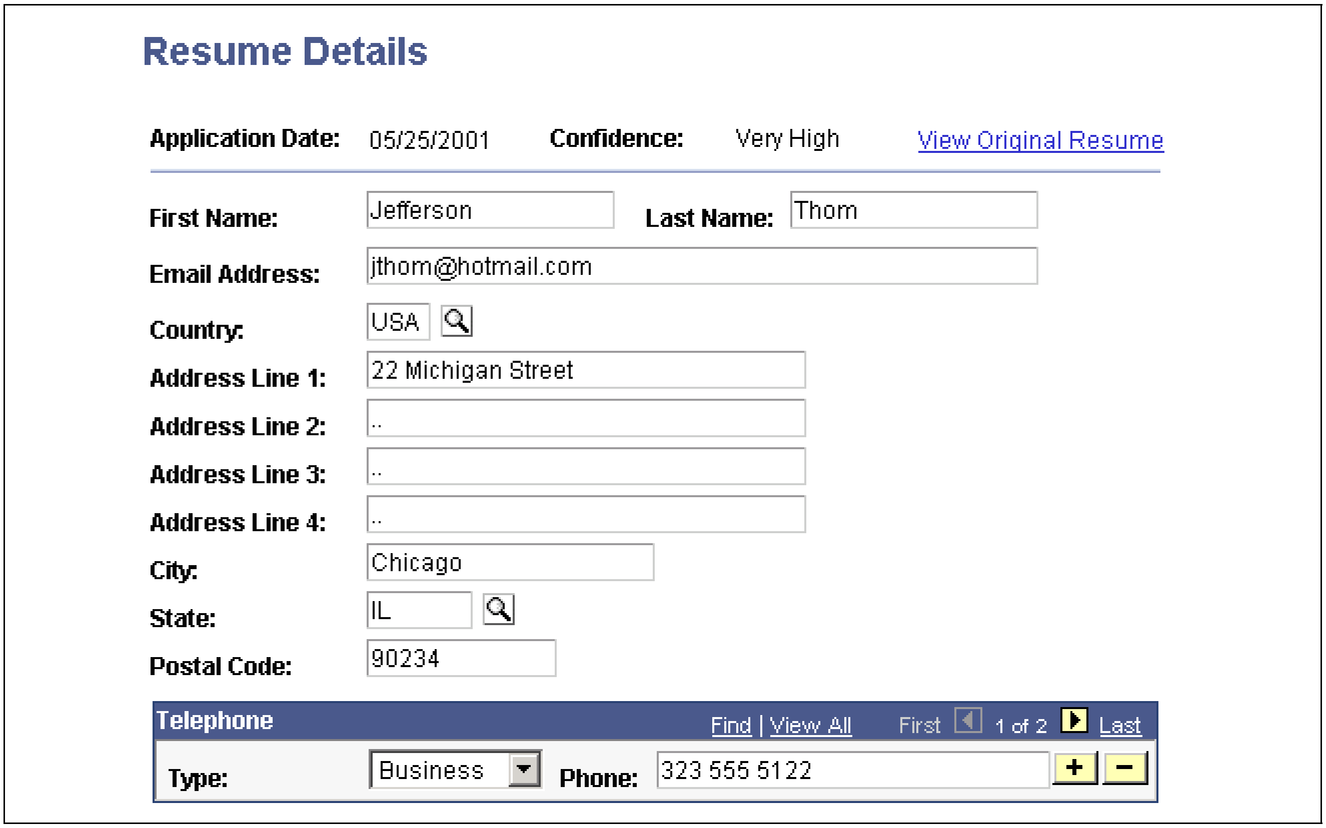
Search Click to search for resumes that match the criteria you specified.

Resume List

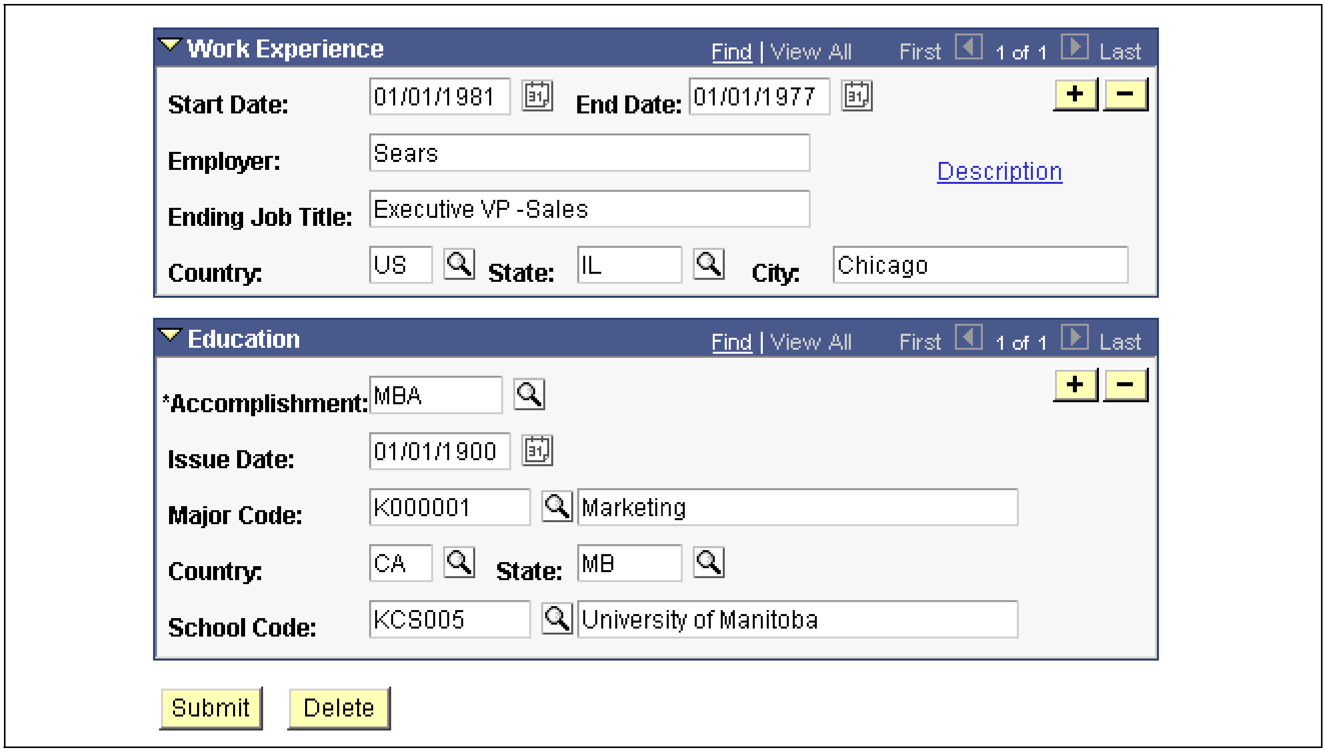
The system populates Resume List with resumes that match the search criteria you specified. Click Name to display the Resume Details page, where you can review the applicant's information.

Processing Resumes in the Queue

Access the Resume Details page.



Resume Details page (1 of 2)



Resume Details page (2 of 2)

Confidence The system displays the confidence level assigned by Resume Extractor. The confidence level indicates the expected accuracy of the extraction process.

View Original Resume Click this link to view the applicant's original file. The system opens a new browser window containing the resume in its original format. This is useful if you want to check whether the applicant's information has been extracted correctly.

Contact Information, Telephone, Work Experience, Education

Review the information in these fields and update any data that wasn't extracted correctly. The system uses the Email Address to send the applicant an email notification.

Description Click this link to view the description of the applicant's work experience.

Submit Click to transfer the applicant's details to your PeopleSoft database. The system displays a message showing the applicant ID created.

The system automatically sends an email to inform applicants that their details have been stored in your system. The email includes the Uniform Resource Locator (URL) addresses where the applicants can access and update their resumes.

Delete Click to delete the data. The system removes the applicant from the temporary tables.

See Also

Chapter 3, "Setting Up PeopleSoft Resume Processing," Defining the Email Messages, page 19

PeopleSoft 8.8 eRecruit Manager Desktop PeopleBook, "Setting Up eRecruit Manager Desktop," Defining System Parameters

Running Auto Populate Cleanup

The Auto Populate Cleanup process (RP_AP_CLEAN) deletes all rows over 2 days old in the following temporary tables:

- AUTOPOP_APP_TMP
- AUTOPOP_EDU_TMP
- AUTOPOP_PHN_TMP
- AUTOPOP_WRK_TMP

Depending on your volume of online applications, run this process manually on an ad-hoc basis or at a defined frequency.

If you want to run the process at regular intervals, define a recurrence definition for the process. Once you have set up the schedule and started the Process Scheduler, the process runs automatically without user intervention.

See Also

PeopleTools PeopleBook: Process Scheduler, "Process Scheduler Development," Setting Up Recurrence Definitions

Pages Used to Run Auto Populate Cleanup

Page Name	Object Name	Navigation	Usage
Auto Populate Cleanup	PRCSRUNCNTL	Recruiting, Identify/Process Applicants, Applicant Maintenance, Auto Populate Cleanup	Deletes old resumes from temporary tables.

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 anotherand 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 methodit 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 *sub-classification.*

clone In PeopleCode, to make a unique copy. In contrast, to *copy* 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 activitys 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 youre 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 valuesdynamic detailsdirectly 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 *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations 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 *Enterprise Incentive Management ledger.* 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, *event* 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 *activity.*

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 *rates*) 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 applicationfor 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 addressesfor 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 locationindicated by a *1* 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 *participant object.*

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 contextif 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 *Batch Processes.*

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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

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 takesemail 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 activitycharacteristics 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 *Structured Query Report (SQR).*

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 *basis* 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: http://serverx/InternetClient /InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_ 401k.PAGES.FieldFormula.iScript_Home401k

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.

Index

A

additional documentation vi
application fundamentals v
Apply for Job
  auto-populate 7
  auto-populate overview 6
auto populate
  cleanup 27
Auto Populate Cleanup page 27
AUTOPOP_EXTRACTOR_FTP 15

C

comments, submitting ix
common elements ix
confidence level 9, 23
Consolidated Publications Incorporated (CPI) vi
contact information ix
country-specific documentation viii
cross-references viii
Customer Connection Website vi

D

directories
  required 13
documentation
  country-specific viii
  printed vi
  related vi
  updates vi

E

electronic resumes 22
email
  applicants 19
enterprise integration point (EIP)
  Resume Extractor 10
eRecruit Installation Options page 16
extraction process
  overview 7

F

faxes 22
features 1
FTP Server 11
  setup 15

G

glossary 29

H

hard copy resumes 22

I

implementation process 1
Inbound Business Interlink 10
Initialize Resume Processing page 22
Initialize Resume Processing process 8, 21
integrating with other products 3

N

notes viii

P

paper resumes 22
PeopleBooks
  ordering vi
PeopleCode, typographical conventions vii
PeopleSoft application fundamentals v
prerequisites v
printed documentation vi

R

related documentation vi
Resume Details page 23, 25
Resume Extractor 9
resume processing
  extraction process 7
  overview 3
resume queue 23
Resume Queue page 23
resumes
  below confidence threshold 23
RP_EXTRACTOR_FTP 15
RP_INIT process 21
RP_ROOT_FTP 15

S

setting up
  core tables 2
  fundamental tables 2
setup
  overview 13
soft copy resumes 22
suggestions, submitting ix

T

terms 29
typographical conventions vii

U

URLs
  setup 15

V

visual cues viii

W

warnings ix
Work Experience Description page 23