



PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies

April 2005

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Contents

General Preface

About This PeopleBook Preface	.xi
PeopleSoft Application Prerequisites.....	.xi
PeopleSoft Application Fundamentals.....	.xi
Documentation Updates and Printed Documentation.....	.xii
Obtaining Documentation Updates.....	.xii
Ordering Printed Documentation.....	.xii
Additional Resources.....	.xiii
Typographical Conventions and Visual Cues.....	.xiv
Typographical Conventions.....	.xiv
Visual Cues.....	.xv
Country, Region, and Industry Identifiers.....	.xvi
Currency Codes.....	.xvi
Comments and Suggestions.....	.xvi
Common Elements Used in PeopleBooks.....	.xvii

Preface

PeopleSoft Enterprise Human Resources 8.9 Manage Competencies Preface.....	.xix
PeopleSoft Products.....	.xix
HRMS Application Fundamentals.....	.xix
PeopleBook Structure.....	.xix
Common Elements Used in This PeopleBook.....	.xxi

Chapter 1

Getting Started with Manage Competencies.....	1
Manage Competencies Overview.....	1
Manage Competencies Business Processes.....	1
Manage Competencies Integrations.....	2
Manage Competencies Implementation.....	2

Chapter 2

Setting Up Competencies and Accomplishments.....	5
Understanding Competencies.....	5

Competencies.....	5
Sub-competencies.....	6
Rating Models.....	6
Competency and Sub-Competency Data Setup.....	6
Gap/Match Analysis.....	7
Integration with ePerformance and eDevelopment.....	7
Integration with Administer Training.....	7
Understanding Accomplishments.....	7
Setting Up Competencies.....	8
Prerequisites.....	8
Pages Used to Set Up Competencies.....	8
Setting Up Rating Models.....	10
Defining Competency Elements.....	13
Defining Individual Competencies.....	14
Creating Proficiency Descriptions.....	15
Associating Elements with Competencies.....	16
Locating and Reviewing Competency Information.....	16
Setting Up Competency Trees.....	17
Setting Up Sub-Competencies.....	18
Pages Used to Set Up Sub-Competencies.....	18
Defining Sub-competencies.....	18
Defining Proficiency Statements for a Sub-competency.....	19
Importing Competency Data.....	19
Working with Third-Party Vendors.....	20
Working with File Identifiers.....	20
Preparing to Import Data.....	21
Importing Data.....	21
Setting Up Educational Qualifications and Accomplishments.....	21
Pages Used to Set Up Educational Qualifications and Accomplishments.....	22
Tracking Schools.....	23
Tracking Degrees.....	24
Tracking Licenses and Certifications.....	24
(JPN) Recording Additional Education-Related Information.....	25
Running Competency and Accomplishment Reports.....	26
Pages Used to Run the Competency and Accomplishment Reports.....	26
Running the Accomplishment Listing Report.....	26

Chapter 3

Assigning Competencies and Accomplishments to Roles.....	29
Understanding Clusters.....	29
Common Elements Used in This Chapter.....	30
Setting Up Clusters and Job Families.....	30
Pages Used to Set Up Clusters and Job Families.....	30
Assigning Competencies to a Cluster.....	30
Assigning Accomplishments to a Cluster.....	31
Assigning Clusters, Competencies, and Accomplishments to Roles.....	32
Pages Used to Assign Clusters, Competencies, and Accomplishments to Roles.....	33
Assigning Clusters to Roles.....	33
Assigning Rank to Clusters.....	34
Assigning Competencies to Roles.....	35
Ranking Competencies.....	36
Rating Competencies.....	36
Assigning Accomplishments to Roles.....	37
Ranking Accomplishments.....	39

Chapter 4

Tracking Employee Competencies and Accomplishments.....	41
Understanding Competency and Accomplishment Tracking.....	41
Entering Employee Competencies.....	41
Pages Used to Enter Employee Competencies.....	42
Assigning Competency Evaluation IDs.....	45
Assigning Competencies to Employees.....	46
Synchronizing with Plan Careers.....	47
Defining Proficiency Levels for Assigned Competencies.....	48
Verifying Competency Tracking Methods.....	49
Entering Employee Accomplishments.....	50
Pages Used to Track Employee Accomplishments.....	51
Tracking Educational Background.....	55
Tracking Professional Education and Training.....	55
Tracking Licenses and Certifications.....	58
Tracking Professional Memberships.....	59
Tracking Language Abilities.....	59
Tracking Significant Special Projects.....	59
Tracking Test Results.....	60
Running Employee Competency and Accomplishment Reports.....	61
Pages Used to Run the Employee Competency and Accomplishment Reports.....	61

Chapter 5

Performing Gap and Match Analyses on a Workforce.....	63
Understanding Gap and Match Analyses.....	63
Point Awards and Importance Levels.....	63
Multiple Evaluations.....	66
Setting Up Match Evaluation Types.....	67
Page Used to Set Up Match Evaluation Types.....	67
Defining Match Evaluation Types.....	67
Matching Employees to Roles.....	68
Pages Used to Match Employees to Roles.....	70
Specifying a Role and Analyzing Cluster Matches.....	70
Viewing Cluster Details.....	72
Analyzing Competency Matches.....	72
Viewing Competency Match Details.....	73
Analyzing Accomplishment Matches.....	74
Performing a Gap Analysis on the Employee and Role.....	75
Matching Roles to Employees.....	76
Pages Used to Match Roles to Employees.....	77
Specifying an Employee and Analyzing Cluster Matches.....	77
Analyzing Competency Matches.....	78
Viewing Competency Match Details.....	79
Analyzing Accomplishments.....	80
Performing a Gap Analysis on the Role and Employee.....	81
Matching Teams to Projects.....	82
Pages Used to Match Teams to Projects.....	83
Setting Up Employee Teams.....	83
Analyzing Team Competency Matches.....	84
Analyzing Team Accomplishment Matches.....	85
Searching for Job Candidates.....	85
Page Used to Search for Job Candidates.....	86
Conducting a Competency Search.....	86

Chapter 6

Using Competencies to Manage Training.....	89
Understanding Competencies and Training.....	89
Managing Competencies with Training.....	90
Pages Used to Assign Competencies to Other Training Options.....	91
Tracking Other Training.....	91
Searching for Courses.....	92

Chapter 7

(GBR) Managing National Vocational Qualifications.....	93
Understanding NVQs.....	93
Setting Up NVQ Information.....	95
Pages Used to Set Up NVQ Information.....	96
Defining NVQ Elements.....	96
Defining NVQ Units.....	97
Associating Elements With Units.....	98
Creating NVQ Codes and Assigning Awarding Bodies.....	98
Specifying Units for NVQs.....	99
Enrolling Employees in NVQs and Tracking Progress.....	99
Pages Used to Enroll Employees and Tracking Progress.....	100
Entering Employee NVQ Data.....	100
Tracking Employee Progress.....	101
Creating an NVQ Training Plan.....	102
Reviewing NVQ Summaries.....	102
Pages Used to Review NVQ Information.....	103
Reviewing All the NVQs Associated With an Employee.....	103
Reviewing All Employees Associated With an NVQ.....	103
Running NVQ Reports.....	104
Pages Used to Run NVQ Reports.....	105
Running the Initialize Plan Process.....	105
 Glossary of PeopleSoft Terms.....	 107
 Index	 129

About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, <https://www.peoplesoft.com/corp/en/login.jsp>

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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.

If the note is preceded by *Important!*, the note 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.

Cross-References

PeopleBooks provide cross-references either under 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.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources 8.9

Manage Competencies Preface

This preface discusses:

- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Manage Competencies

HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in Manage Competencies operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface”

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

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 used in the PeopleBook, if necessary.
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 documentation 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.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) 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.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
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.

Common Elements Used in This PeopleBook

Competency

Competencies are skills, abilities, knowledge, or behaviors that are directly related to an employee's current role. Competencies are measured using a scale that you define.

Accomplishment

Accomplishments are tangible, typically one-time, achievements such as a degree, license, language, test score, honor or award, or membership. Unlike competencies, accomplishments are not measurable.

CHAPTER 1

Getting Started with Manage Competencies

This chapter discusses:

- Manage Competencies overview.
- Manage Competencies business processes.
- Manage Competencies integrations.
- Manage Competencies implementation.

Manage Competencies Overview

Manage Competencies enables you to track worker competencies and accomplishments, to apply specific evaluation criteria to each, and to apply levels of importance to each. Once you implement the system, you can list the skills and accomplishments of each worker as well as qualify each worker to a role, job, or training program within your organization.

Competency and accomplishment profiles are sets of competencies and accomplishments that define particular roles or that are designated to be assessed for individuals. You assemble competency and accomplishment profiles for roles to establish proficiency levels for workers and job candidates. Competency and accomplishment profiles enable you to perform gap and match analysis for planning worker career and training needs and for filling positions and team assignments.

Manage Competencies Business Processes

PeopleSoft Human Resources Manage Competencies provides these business processes:

- Track competencies.
- Track accomplishments.

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

See Also

[Chapter 4, “Tracking Employee Competencies and Accomplishments,” page 41](#)

Manage Competencies Integrations

Manage Competencies integrates with these PeopleSoft applications:

- HRMS applications.
- Other PeopleSoft applications.
- Third-party applications.

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

Manage Competencies Implementation

PeopleSoft Enterprise Setup Manager for HRMS and Campus Solutions enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Manage Competencies also provides component interfaces to help you load data from your existing system into Manage Competencies tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	References
CM_CRITERIA_TBL	CM_CRITERIA_TBL	See Chapter 2, “Setting Up Competencies and Accomplishments,” page 5.
CM_ELEMENT_TBL	CI_CM_ELEMENT_TBL	See Chapter 2, “Setting Up Competencies and Accomplishments,” page 5.
COMPETENCY_TBL	COMPETENCY_TBL	See Chapter 2, “Setting Up Competencies and Accomplishments,” page 5.
COMPETENCIES	CI_COMPETENCIES	See Chapter 4, “Tracking Employee Competencies and Accomplishments,” page 41.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface”

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for HRMS and Campus Solutions 8.9 PeopleBook.

CHAPTER 2

Setting Up Competencies and Accomplishments

This chapter provides overviews of competencies and accomplishments and discusses how to:

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

Understanding Competencies

This section discusses:

- Competencies.
- Sub-competencies.
- Rating models.
- Competency and sub-competency data setup.
- Gap/match analysis.
- Integration with PeopleSoft Enterprise ePerformance and PeopleSoft Enterprise eDevelopment.
- Integration with PeopleSoft Enterprise Human Resources Administer Training.

Competencies

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

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “(USF) Administering Personnel Action Requests”

Sub-competencies

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

Rating Models

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

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

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

Review Bands

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

Competency and Sub-Competency Data Setup

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

- Import data from selected third-party suppliers.

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

- Manually define competencies and sub-competencies.

We discuss both methods in this chapter.

Gap/Match Analysis

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

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

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

Integration with ePerformance and eDevelopment

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

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

Integration with Administer Training

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

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

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

Understanding Accomplishments

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

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

Setting Up Competencies

To set up competencies, use the following components: Rating Model (RATING_MDL_TBL), Competency Types (CM_TYPE_TABLE), Competency Criteria (CM_CRITERIA_TBL), Competency Element (CM_ELEMENT_TBL), and Competency Summary (COMPETENCY_SUMM).

This section lists prerequisites and discusses how to:

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

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

Prerequisites

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

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

Pages Used to Set Up Competencies

Page Name	Object Name	Navigation	Usage
Rating Model	RATING_MDL_TBL	Set Up HRMS, Common Definitions, Competencies, Rating Model	Define a set of alphabetic or numeric codes for ranking an employee's degree of expertise or experience in a competency. You can define a single rating model for your entire organization or build multiple models for different projects or departments.

Page Name	Object Name	Navigation	Usage
Competency Types	CM_TYPE_TABLE	Set Up HRMS, Common Definitions, Competencies, Competency Types, Competency Types	Create competency types, or broad categories of competencies relevant to particular positions or projects. While you don't have to define types in general, you must define them to build and maintain competency trees.
Competency Criteria	PERF_CRITERIA_TBL	Set Up HRMS, Common Definitions, Competencies, Competency Criteria, Performance Criteria	Establish and define performance criteria for job and competency element rating. Performance criteria establish guidelines for evaluating competencies and competency elements.
Competency Element	CM_ELEMENT_TABLE	Set Up HRMS, Common Definitions, Competencies, Competency Element	Define all of the valid competency elements.
Competency Table	COMPETENCY_TABLE	Set Up HRMS, Common Definitions, Competencies, Competencies, Competency Table	Record skills, abilities, knowledge or behaviors pertinent to jobs in your organization. Note. (GBR) To establish NVQ (National Vocational Qualifications) units, use the Unit page in the Workforce Development, Competency Management, Define NVQ UK, Units and Elements navigation path.
Competencies - Proficiency Descriptions	CM_RATING_DESCRS	Set Up HRMS, Common Definitions, Competencies, Competencies, Proficiency Descriptions	Define the proficiency statements that describe the rating levels for a given competency. Only one proficiency statement is permitted for each rating level.
Competencies - Element	NVQ_UNITELEMENTS	Set Up HRMS, Common Definitions, Competencies, Competencies, Element	(GBR) If using NVQ functionality, associate elements with competencies.
Competency Summary	CM_COMPETENCY_SUMM	Set Up HRMS, Common Definitions, Competencies, Competency Summary, Competency Summary	Review and modify the different competency categories or types that you've established.

See Also

PeopleSoft Enterprise ePerformance 8.9 PeopleBook

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training

Setting Up Rating Models

Access the Rating Model page.

Rating Model

Rating Model: PSCM

Description Find | View All First 1 of 1 Last

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

*Description: Competency Management Scale

Short Description: Comp Mgmt ☐ Review Band

Ratings Customize | Find | First 1-6 of 6 Last

General Review Points

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

Rating Model page - General tab

Review Band

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

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, “(JPN) Updating Salaries for Japan”.

General Tab

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

- Rating** Enter an alphabetic or numeric code for the rating. This is sometimes referred to as the *qualitative rating*.
- Numeric Rating** This field is used by PeopleSoft ePerformance only. Enter a numeric value for the rating, if applicable.
- The value you enter has two purposes:
- For sections of a performance document that use the average calculation method, the system uses this value to calculate the section's average or weighted average. It also uses this value to calculate the average rating for each item in the section (when sub-items exist).
 - If you select the Show Numeric Ratings/Points check box on the Rules/Roles page (EP_TMPL_DEFN3) of the Template Definition component, the value you enter here displays next to the rating on the performance document. This feature is useful when ratings are alphabetic.
- Career Strength/Development** The system uses this value when transferring competency profiles between the Manage Competencies and Plan Careers business processes.
- Select *Development* (development) if the rating indicates an area that needs more skill development, education, or training.
- Select *Strength* if the rating indicates an area of strength.
- You can click a link on the Career Plan - Career Strength/Develop Areas page or the Competency Assignment page to transfer this value from the Plan Careers business process to the Manage Competencies business process and vice versa.
- See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Plan Careers and Successions*, "Planning Careers," Ranking Employee Potential.

Review Points tab

Access the Rating Model page – Review Points tab.

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

Rating Model page – Review Points tab

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

Rating	The rating entered on the General tab displays here. If you change this value, the system automatically updates the Rating field on the General tab to match.
Review Points	Enter a number from 0 to 999 for the rating. For ePerformance, this field applies when: • Section calculation use Summation method. The system uses the review points that you enter here in its calculations. For example, you set up A as a Rating field with a value of 100 for review points and B as a Rating field with a value of 70 as the review points. If a manager gives a rating of A for an item on a review and B for another item, the system uses the 100 for the first item and 70 for the second. If there are only these two items in a section, the total points for this section will be 170 points. To determine the overall rating, the system calculates the total point for each section and then add the section totals together to arrive at the overall points. Note. To use the Automated Step Increase process, the Summation method is required. • In Competency Management, use the matching function to determine how well an employee matches the competencies for a given role. The matching function uses the review points that you enter here. See Chapter 5, “Performing Gap and Match Analyses on a Workforce,” Matching Employees to Roles, page 68. See <i>PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting</i>, “Administering Salary Plans, Grades, and Steps”.
From Points and To Points	Define a range of points to associate with this rating. These points are used to convert summed-up points to either a Review Band or a qualitative rating. A Review Band is really the same as a qualitative rating, instead of being directly assigned, it’s calculated by summing points, then finding the entry in this table that contains a range of From/To points that encloses the summed points. If Review Band is checked ON, you must enter a value in the To Points field. When the calculation method is Review Band, the system uses these fields to resolve the number of total points in a review to a qualitative rating. When the calculation method is Summation, the system uses these fields to resolve the number of total section points or total review points to a qualitative rating.
Eligibility Points	If applicable, enter the number of points used by the <i>Shohkaku</i> (JPN), or Grade Advance eligibility feature of the Plan Salaries business process. This is used only if the Appl for Grade Advance Prc check box is selected on the JPN Review Definition. See <i>PeopleSoft Enterprise ePerformance 8.9 PeopleBook</i>, “Defining Basic Settings and Tables,” Defining Reviews. See <i>PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting</i>, “(JPN) Updating Salaries for Japan”.

Federal tab

Access the Rating Model page - Federal tab.

*Rating	OPM Rating	RIF Years		
1	1	0	+	-
2	2	0	+	-
3	3	0	+	-
4	4	0	+	-
5	5	0	+	-

Rating Model page – Federal tab

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

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up and Installing PeopleSoft HRMS,” Selecting PeopleSoft Applications for Your Installation.

OPM Rating (Office of Personnel Management rating)

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

RIF Years (Reduction in Force years)

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

See Also

[Chapter 5, “Performing Gap and Match Analyses on a Workforce,” page 63](#)

[Chapter 4, “Tracking Employee Competencies and Accomplishments,” Synchronizing with Plan Careers, page 47](#)

Defining Competency Elements

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

Access the Competency Element page.

Competency Element

Element Code: KGEL1

Element Table Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1990 ***Status:** Active + -

***Description:** NVQ Element 1

***Satisfaction Method:** On the Job Training

Title: NVQ Element 1

Criteria Customize | Find First 1 of 1 Last

#	*Criteria Code	Description
1		

+ -

Competency Element page

Satisfaction Method

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

Title

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

Criteria Code

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

Defining Individual Competencies

Access the Competency Table page.

Competency Table | Proficiency Descriptions | Element

Competency: 0100

***Description:** Abstract thinking

Short Description: Abstract

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

***Category:** Ability

***Content Supplier:** Customer Defined

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

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

*Type	Description
INTEL	Intellectual

+ -

Competency Table page

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

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

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

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

Creating Proficiency Descriptions

Access the Competencies - Proficiency Descriptions page.

Competencies - Proficiency Descriptions page

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

Review Rating

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

See Also

PeopleSoft Enterprise ePerformance 8.9 PeopleBook

Associating Elements with Competencies

Access the Element page.

Element page

Element Code

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

Locating and Reviewing Competency Information

Access the Competency Summary page.

Competency Summary

Competency Category:

OR

Competency Type: Communication

Competencies		Customize Find View All	First 1-8 of 8 Last
Competency	Description	*Category	
0152	Debates issues unabrasively	Ability	-
0153	Articulate & concise	Skill	-
0154	Organize & present ideas well	Skill	-
0242	Shows honesty & integrity	Other	-
0250	Informs Superiors	Ability	-
0502	Communication Skills	Ability	-
5015	Delivering Oral Presentations	Skill	-
FJC027	Strong customer service ethic	Ability	-

Competency Summary page

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

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

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

Setting Up Competency Trees

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

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

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

You can build as many competency trees as necessary.

Using Competency Trees

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

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

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

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

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

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

Setting Up Sub-Competencies

To set up sub-compenencies, use the Sub-Competencies component (EP_SUB_COMP_TBL).

This section discusses how to:

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

Pages Used to Set Up Sub-Competencies

Page Name	Object Name	Navigation	Usage
Sub-Competency	EP_SUB_COMP_TBL1	Set Up HRMS, Common Definitions, Competencies, Sub-Competencies, Sub-Competency	Create sub-competencies for a competency. Sub-competencies can be used in PeopleSoft ePerformance Management. Define sub-competencies before defining competency proficiency values.
Sub-Competencies - Proficiency Descriptions	EP_SUB_PROF_TBL2	Set Up HRMS, Common Definitions, Competencies, Sub-Competencies, Proficiency Descriptions	Define the proficiency statements that describe the rating levels for a given sub-competency. Only one proficiency statement is permitted for each rating level.

Defining Sub-competencies

Access the Sub-Competency page.

Sub-Competency **Proficiency Descriptions**

Competency: H0LOM101 Test - Action Oriented

Sub-Competency: A

***Title:** Drives hard, shows initiative

Level:

Long Description: (254 characters)

Sub-Competency page

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

Defining Proficiency Statements for a Sub-competency

Access the Sub-competencies - Proficiencies page.

Sub-Competency **Proficiency Descriptions**

Competency: H0LOM101 Test - Action Oriented

Sub-Competency: A Drives hard, shows initiative

Proficiencies Detail Find | View All First 1 of 7 Last

***Review Rating:** 1-2-A Serious Issue

Proficiency Statement: (254 characters)

Sub-Competencies - Proficiency Descriptions page.

Note. This page is similar to the Competency - Proficiency Descriptions page.

See [Chapter 2, “Setting Up Competencies and Accomplishments,” Creating Proficiency Descriptions, page 15.](#)

Importing Competency Data

This section discusses how to:

- Work with third-party vendors.

- Work with file identifiers.
- Prepare to import data.
- Import data.

Working with Third-Party Vendors

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

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

Follow the procedures in this section to import data.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

Working with File Identifiers

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

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

File Identifier	Description
EP SUB PROF	Sub-competency proficiencies
EP SUB WRT	Sub-competency Results Writer text

Preparing to Import Data

Before you can import data, perform the following steps:

1. Activate messages.

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

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

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

Importing Data

To import data, perform the following steps:

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

The publish process converts the flat file to a message.

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

See *Enterprise PeopleTools PeopleBook: PeopleSoft Integration Testing Utilities and Tools*

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

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

Setting Up Educational Qualifications and Accomplishments

To set up educational qualification and accomplishments, use the following components: School Types (SCHOOL_TYPE_TABLE), Schools (SCHOOL_TABLE), Degrees (DEGREE_TABLE), Majors (MAJOR_TABLE), Education Level Achieved (EDLVL_ACHV_TBL), Faculty Table JPN (FACULTY_TABLE_JPN), Honors and Awards (HONOR_AWARD_TABLE), Languages (LANGUAGE_TABLE), Licenses and Certifications (LICENSE_CERTIF_TBL), Memberships (MEMBERSHIP_TABLE), and Test Table (TEST_TABLE).

This section discusses how to:

- Track schools.
- Track degrees.
- Track licenses and certifications.
- (JPN) Record additional education-related information.

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

Pages Used to Set Up Educational Qualifications and Accomplishments

Page Name	Object Name	Navigation	Usage
School Type Table	SCHOOL_TYPE_TBL	Set Up HRMS, Common Definitions, School Information, School Types, School Type Table	Set up codes for the types of schools employees might have attended: high schools, universities, or professional schools, for example.
School Table	SCHOOL_TABLE	Set Up HRMS, Common Definitions, School Information, Schools, School Table	Create codes for specific schools. The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.
Degree Table	DEGREE_TABLE_GBL	Set Up HRMS, Common Definitions, School Information, Degrees, Degree Table	Define degree types and the years of study associated with them. Use the values that you enter in this table to track information about employee qualifications in the Education pages.
Major Table	MAJOR_TABLE	Set Up HRMS, Common Definitions, School Information, Majors, Major Table	Include areas of study most commonly associated with school degrees or certificates.
Education Level Achieved Table	EDLVL_ACHV_TBL	Set Up HRMS, Common Definitions, School Information, Education Level Achieved, Education Level Achieved Table	Define codes for different levels of education. Use these values to assign and track employee education, training and accomplishments.
Faculty Table JPN (faculty table Japan)	FACULTY_TABLE_JPN	Set Up HRMS, Common Definitions, School Information, Faculty Table JPN, Faculty Table JPN	Define faculties, and associate sub-faculties and majors with them.
Honor/Award Table	HONOR_AWARD_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Honors and Awards, Honor/Award Table	Track professional distinctions, corporate awards, competitions, and so forth.

Page Name	Object Name	Navigation	Usage
Language Table	LANGUAGE_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Languages, Language Table	Define codes to track employee language abilities. Note. When setting up multilingual courses, if the instructor's primary language is not defined, the instructor will not be associated with the language.
License/Certification Table	LICENSE_CERTIF_TBL	Set Up HRMS, Common Definitions, Accomplishments, Licenses and Certifications, License/Certification Table	Define any required licenses or certificates for jobs in your organization.
Membership Table	MEMBERSHIP_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Memberships, Membership Table	Define codes for professional organizations, special clubs, or other associations.
Test Table	TEST_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Test Table, Test Table	Create codes for standard tests, such as typing, programming aptitude, or mathematical tests, that you administer to job applicants or employees.

Tracking Schools

Access the School Table page.

School Table

School Code: KGS002

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

Short Description:

Country: United Kingdom

County: Cambridgeshire

▼ **Australia**

Higher Education

Institute Type:

School Table page

Country

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

Tracking Degrees

Access the Degree Table page.

Degree Table

Degree:BA

*Description: Bachelor of Arts

Short Description:BA

Years Of Education:

Education Level:4 Yrs Coll

Country:

Germany

Field Of Study:

Type Of Study:

Duration (Months):

French Public Sector

Level:

Degree Table page

Years of Education

Enter the number of years required to obtain the degree.

Education Level

Specify the education level achieved when the degree is earned.

Country

Indicate the country where the degree is earned.

(GER) Germany

Field of Study

Select *Commercial*, *Industrial*, or *Technical*.

(FRA) France

Level

Select *2Y HEd*, *3Y HEd*, *4Y HEd*, *5Y + > HEd*, *HSD*, *LeavCertif*, *TSC* and *Alt* and *VTC* and *Alt*.

Tracking Licenses and Certifications

Access the License/Certification Table page.

24

PeopleSoft Proprietary and Confidential

License/Certification Table

License/Certificate CPA

***Description:**

Short Title:

***Renewal Required:** ▼

Renewal Period: ▼

License/Certification Table page

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

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

(JPN) Recording Additional Education-Related Information

Access the Faculty Table JPN page.

Faculty Table JPN

Faculty Code: KJ002

Faculty Information

***Faculty Description:**

***Faculty Short Description:**

Major Category: ▼

Sub-Faculty Information [Customize](#) | [Find](#) | First ◀ 1-2 of 2 ▶ Last

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

Faculty Table JPN page

Major Category Select a major category value.

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

Sub-Faculty Code

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

Running Competency and Accomplishment Reports

This section discusses how to run the accomplishment listing report.

Pages Used to Run the Competency and Accomplishment Reports

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

Running the Accomplishment Listing Report

Access the Accomplishment Listing page.

Accomplishment Listing

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

Language: English ▼

Report Request Parameter(s)

- ☒ Degree Detail
- ☒ License/Certification Detail

Accomplishment Listing page

- Degree Detail** Select to include full details of a degree.
- License/Certification Detail** Select to include full details of licenses and certifications.

CHAPTER 3

Assigning Competencies and Accomplishments to Roles

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

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

Understanding Clusters

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

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

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

It is common to use clusters in the following scenarios:

- Positions sharing common competencies.

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

- Team-based environments.

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

- Skill-based pay environments.

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

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

Common Elements Used in This Chapter

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

Setting Up Clusters and Job Families

To set up clusters and job families, use the Clusters component (CM_CLUSTER_TABLE).

This section discusses how to:

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

Pages Used to Set Up Clusters and Job Families

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

Assigning Competencies to a Cluster

Access the Cluster Competencies page.

Cluster Competencies

Cluster Accomplishments

Competency Cluster: FMGRS

Description: Managers

Short Description: Managers

Comments: Generic Managerial Competency Model.

Competencies					Customize	Find	First	1-7 of 7	Last
*Competency	Description	*Importance	*Proficiency						
0102	Conceptual thinking	3-Average	3-Good	+	-				
0151	Directiveness/Assertiveness	4-Above Average	3-Good	+	-				
0201	Accountability for decisions	4-Above Average	3-Good	+	-				
0206	Developing others	4-Above Average	3-Good	+	-				
0209	Team leadership	3-Average	3-Good	+	-				
0600	Achievement Orientation	5-High	3-Good	+	-				
0601	Impact and Influence	5-High	3-Good	+	-				

Cluster Competencies page

Competencies

Importance

Select a rating to indicate how important this competency is in relation to the other competencies within the cluster.

The rating values are from *1-Low*, to *5-High*, with a default value of *3-Average*.

Proficiency

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

Assigning Accomplishments to a Cluster

Access the Cluster Accomplishments page.

Cluster Competencies

Cluster Accomplishments

Competency Cluster: FMGRS Managers

Accomplishments					Customize	Find	First	1-3 of 3	Last
Accomplishment	Description	Importance							
1007	General Aptitude Test	3-Average	+	-					
1009	Business English	4-Above Average	+	-					
1016	Complex Problem Solving	4-Above Average	+	-					

Cluster Accomplishments page

Importance

Select a rating to indicate how important this competency is in relation to the other competencies within the cluster.

The rating values are from *1-Low*, to *5-High*, with a default value of *3-Average*.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Jobs,” Defining Job Families

Assigning Clusters, Competencies, and Accomplishments to Roles

This section discusses how to:

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

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

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

Assigning Clusters to Roles

Access the Assign Clusters page.

Assign Clusters **Rank Clusters**

Assign Clusters Find | View All First 1 of 1 Last

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

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

Default From

Job Family Job Code

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

Description	Detail
☐	Cluster

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

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

Assign Clusters page

Default From

Job Family

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

Job Code

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

Assigned Clusters

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

Cluster

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

Source Clusters

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

Add and Delete Buttons



(add button)

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



(delete button)

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

Assigning Rank to Clusters

Access the Rank Clusters page.

Rank Clusters Find | View All First 1 of 1 Last

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

Effective Date: 01/01/1980

Assigned Clusters Customize | Find First 1 of 1 Last

Cluster	Description	Importance
		3-Average

Rank Clusters page

Assigned Clusters

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

Importance Select a rating to indicate how important this competency is in relation to the other competencies within the cluster.

The rating values are from *1-Low*, to *5-High*, with a default value of *3-Average*.

Assigning Competencies to Roles

Access the Assign Competencies page.

Assign Competencies Rank Competencies Rate Competencies

Competency Profiles Find | View All First 1 of 1 Last

SetID: SHARE **Job Code:** 800010 Secretary-Senior

Effective Date: 01/01/1980

Default From

Job Family Job Code

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

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

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

Competency	Description
☐	

Assign Competencies page

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

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

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

Assigned Competencies

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

Source Competencies

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

Add and Delete Buttons



(add button)

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



(delete button)

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

Ranking Competencies

Access the Rank Competencies page.

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

Rank Competencies page

Importance

Select a rating to indicate how important this competency is in relation to the other competencies within the cluster.

The rating values are from *1-Low*, to *5-High*, with a default value of *3-Average*.

Rating Competencies

Access the Rate Competencies page.

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

Rate Competencies page

Assigned Competencies

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

Competency	The system populates the competency code and name from the Competency Table.
Importance	The system populates the importance from the Competencies - Rank Competencies page.
Rating	Select a rating. The ratings vary according to the rating model used to measure the competency.

Assigning Accomplishments to Roles

Access the Assign Accomplishments page.

Assign Accomplishments | **Rank Accomplishments**

Accomplishments Find | View All First 1 of 1 Last

SetID: SHARE **Job Code:** 800010 Secretary-Senior

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

Default From

[Job Family](#) Job Code

Assigned Accomplishments Customize | Find | View All | First 1-2 of 2 Last

	Category	Accomplishment
☐	Degree	Diploma in Business
☐	Degree	Associate of Business Admin

Category Degree **Accomplishment**

Source Accomplishments Customize | Find | View All | First 1-7 of 45 Last

	Accomp	Description
☐	A	Advanced Level
☐	AA	Associate of Arts
☐	AAS	Associate of Applied Science
☐	AE	Associate of Engineering
☐	AS	Associate of Science
☐	BA	Bachelor of Arts
☐	BBA	Bachelor of Business Admin

Assign Accomplishments page

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

Default From

Job Family

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

Job Code

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

Assigned Accomplishments

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

Accomplishment

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

Source Accomplishments

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

Add and Delete Buttons



(add button)

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



(delete button)

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

Ranking Accomplishments

Access the Rank Accomplishments page.

Rank Accomplishments

SetID: SHARE Job Code: 800010 Secretary-Senior

Effective Date: 01/01/1980

Accomplishment	Description	Importance
DBU	Diploma in Business	4-Above Average
ABA	Associate of Business Admin	3-Average

Rank Accomplishments page

Assigned Accomplishments

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

CHAPTER 4

Tracking Employee Competencies and Accomplishments

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

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

Understanding Competency and Accomplishment Tracking

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

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

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

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

Entering Employee Competencies

This section discusses how to:

- Assign competency evaluation IDs.
- Assign competencies to employees.
- Synchronize with PeopleSoft Enterprise Human Resources Plan Careers.
- Define proficiency levels for assigned competencies.
- Verify competency tracking methods.

Pages Used to Enter Employee Competencies

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

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

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

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

Assigning Competency Evaluation IDs

Access the Competency Evaluation page.

Competency Evaluation | Competency Assignment | Competency Rating | Competency Verification

Griffiths, Martina Rae Employee EmpID: KC0001

Competency Evaluation Find | View All First 1 of 1 Last

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

*Evaluation Type: Approved/Official

Review Date: 07/05/1999 ☒ Review Active ☐ From Performance Document

Reviewer ID:

Reviewer Name:

☐ Reviewer is Approved

Competency Evaluation page

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

Evaluation ID

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

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

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

Licenses and Certifications

Click to display the Licenses and Certifications page.

Evaluation Type

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

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

Review Date

Enter the date the review took place.

Review Active

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

From Performance Document

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

Reviewer ID and Reviewer Name

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

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

Reviewer is Approved

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

See Also

[Chapter 5, "Performing Gap and Match Analyses on a Workforce," page 63](#)

Assigning Competencies to Employees

Access the Competency Assignment page.

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

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

Find | View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

[Populate from Job](#)

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

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

Search by: Category Ability Type Communicate

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

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

Competency Assignment page

Link to Career Planning

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

Populate from Job

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

Assigned Competencies

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

Competency Search

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

Source Competencies

The Source Competencies group box lists competency search results.

Adding Competencies

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

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

Synchronizing with Plan Careers

Access the Plan Careers/Manage Competencies Link page.

Plan Careers / Manage Competencies Link

Tendulkar,Indira

ID: KG0001

Empl Rcd#: 0

The selected competencies will be transferred to Plan Careers.

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

Select All

OK

Cancel

The selected competencies will be transferred to Manage Competencies.

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

Select All

Plan Career / Manage Competencies Link page

Each group box lists the competencies that you have assigned to the employee, either from the Competencies - Competency Assignment page or the Career Strength/Develop Areas page.

Strgth/Develop
(strength/development area)

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

Select All

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

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

Defining Proficiency Levels for Assigned Competencies

Access the Competency Rating page.

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

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

Competency Evaluation Find | View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

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

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

Competency Rating page

Assigned Competencies

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

Effective Date

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

Interest Level

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

Detail

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

Verifying Competency Tracking Methods

Access the Competency Verification page.

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

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

Competency Verification Find | View All First ◀ 1 of 1 ▶ Last

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

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

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

Competency Verification page

Assigned Competencies

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

Entering Employee Accomplishments

This section discusses how to:

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

Pages Used to Track Employee Accomplishments

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

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

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

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

Tracking Educational Background

Access the School Education page.

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

School Education page

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

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

Area of Study Enter a major and grade.

Tracking Professional Education and Training

Access the Professional Ed. and Training page.

School Education

Professional Ed. and Training

Campbell,Barry RobertEmployeeEmplID: KC0015

Professional Education

FindFirst1 of 1Last

Country:USAUnited States

*Degree:

Date Acquired

Major Code:

School Code:

Educator:

State:

Average Grade:

Major:

School:

Terminal Degree

Graduated

Minority Institution

Germany

Australia

Japan

French Public Sector

Training

CustomizeFindFirst1 of 2Last

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

Professional Ed. and Training page (1 of 2)

The screenshot displays a web form titled "Professional Ed. and Training page (2 of 2)". It is organized into four main sections, each with a country flag icon and a title:

- Germany:** Contains fields for "Practical Grade:" and "Theoretical Grade:", each with an input box. To the right is a checkbox labeled "Internal Professional Education".
- Australia:** Contains two sub-sections:
 - Higher Education:** A single field for "Educational Level:" with a dropdown menu.
 - Australian Public Service:** Contains fields for "Minor Code:" (with a search icon), "Minor:" (with an input box), and "Education Level:" (with a dropdown menu showing "Not Given").
- Japan:** Contains fields for "Faculty Code:" (with a search icon), "Faculty:" (with an input box), "Sub-Faculty Code:" (with a search icon), "Sub-Faculty:" (with an input box), and "Major Category:" (with a dropdown menu).
- French Public Sector:** Contains a field for "Subject:" (with an input box and a search icon).

Professional Ed. and Training page (2 of 2)

Degree, Date Acquired, Average Grade, and Graduated

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

Major Code and School Code

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

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

Training

Course Title and School Name

If the employee has completed additional professional training courses, enter the course titles and school names. Add additional rows as necessary.

(GER) Germany

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

(AUS) Australia – Higher Education

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

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

(AUS) Australia – Australian Public Service

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

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

(JPN) Japan

Faculty Code Select a faculty code.

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

Sub-Faculty Code Select a sub-faculty code.

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

Tracking Licenses and Certifications

Access the Licenses and Certifications page.

The screenshot shows the 'Licenses and Certifications' page for employee Campbell, Barry Robert (EmplID: KC0015). The page has a header with the employee name and ID. Below the header, there is a search bar and navigation links. The main content area displays details for a specific license/certificate. The details include the License/Certificate Code (PAC), Issue Date (11/04/2002), License # (PAC-112587), Issued By (Berkeley - University of CA), and Expiration Date. There are also checkboxes for 'License Verified' (checked) and 'Renewal in Progress' (unchecked). At the bottom, there is a section for 'Issued In' with fields for 'Country' (USA) and 'State'.

Licenses and Certifications page

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

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

Tracking Professional Memberships

Access the Memberships page.

Memberships

Jehin
CC0008

Memberships							
*Organization	Description	Membership Date	Mandate	Mandate Position	Mandate Begin Date	Mandate End Date	
AIT	Association Intl Toastmasters	07/01/20					

Add

Memberships page

Mandate Enter the mandate.

Mandate Position Enter the mandate position.

Tracking Language Abilities

Access the Languages page.

Languages

Ralph Crowe
CC0001

Languages								
*Language Code		Native	Translator	Teacher	Speak	Read	Write	Evaluation Date
FR	French	☐	☒	☐	High	High	Moderate	10/05/2004
GE	German	☐	☐	☐	High	Moderate	Low	10/05/2004
EN	English	☐	☐	☐	High	High	High	10/05/2004

Languages page

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

Translator Select if the person can translate this language.

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

Tracking Significant Special Projects

Access the Significant Special Projects page.

Significant Special Projects

Campbell, Barry Robert Employee **EmplID:** KC0015

Special Projects Find | View All First 1 of 1 Last

Employer: Cisco

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

Description: Generated router testing prototype.

Significant Special Projects page

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

Tracking Test Results

Access the Test Results page.

Test Results

Ronald Greene AA0037

Tests Find | View All First 1 of 1 Last

***Test ID:** GRE Graduate Record Exam ☐ Checklist Item Update

Defaults for Components

Test Date: 09/09/2004 **Data Source:** ETS **Acad Level:** Master

Test Components Customize | Find | View All First 1-3 of 3 Last

	*Component	Score	%tile	*Test Date	*Data Source	*Acad Level	Letter Score	Date Loaded	Index	Std Admin		
1	VERB	710.00	97	09/09/2004	ETS	Master		09/09/2004		☒	+	-
2	QUAN	630.00	53	09/09/2004	ETS	Master		09/09/2004		☒	+	-
3	WR	5.50	86	09/09/2004	ETS	Master		09/09/2004		☒	+	-

Test Results page

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

Running Employee Competency and Accomplishment Reports

This section discusses the pages used to run the employee competency and accomplishment reports.

Pages Used to Run the Employee Competency and Accomplishment Reports

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

CHAPTER 5

Performing Gap and Match Analyses on a Workforce

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

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

Understanding Gap and Match Analyses

This section discusses:

- Point awards and importance levels.
- Multiple evaluations.

Point Awards and Importance Levels

You run different inquiries to match:

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

However, all inquiries are performed the same way. The system awards points to employees, applicants, or teams based on their assigned competencies, competency proficiency ratings, and accomplishments. The system weights the evaluation in favor of the importance values that you assign to each competency and accomplishment.

The system assigns the following point values to importance levels:

Importance Level	Points
High	5
Above Average	4
Average	3
Below Average	2
Low	1
None	0

The following table shows the competency requirements for a human resources (HR) specialist position and the points awarded for each competency:

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

The *total match* value for a position represents the maximum number of points available if the employee meets all the requirements. In the preceding example, the total match equals 19 (the sum of the points in the Points Assigned column). Points are assigned differently for accomplishments and competencies.

Employee Points for Accomplishments

Accomplishment points are calculated by the system. If the accomplishment exists in an employee's profile, the system awards points to the employee based on the importance value that you assign to the accomplishment.

Employee Points for Competencies

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

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

Here are the match indicator icons:



A blue filled circle indicates that the employee possesses the required competency and has the required proficiency rating. If the employee's rating is more than one level higher than the rating required for the role, the system displays a plus sign (+) beside the circle.



A green half-filled circle indicates that the employee has a rating that is one level lower than that required for the role.



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

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

Note. You can change the match indicator icon images by using PeopleSoft Application Designer.

The following table shows an example of the ratings required for an HR specialist position, and it shows a hypothetical employee profile. The competencies in the profile are assigned to the PSCM rating model. The Match Indicator column shows describes the icon that appears for the particular scenario.

Competency	Required Rating	Employee Rating	Match Indicator
Communication	5	5	Blue filled circle
Leadership	4	3	Green half-filled circle
Interpersonal Effectiveness	3	5	+ Blue filled circle
Planning	3	1	Red circle outline
Decision Making	2	3	Blue filled circle
Adaptability to Change	3	None	None

See Also

[Chapter 3, “Assigning Competencies and Accomplishments to Roles,” page 29](#)

[Chapter 4, “Tracking Employee Competencies and Accomplishments,” page 41](#)

[Chapter 2, “Setting Up Competencies and Accomplishments,” page 5](#)

Multiple Evaluations

If multiple people evaluate an employee or group of employees, each evaluation might include different competencies, competency ratings, and accomplishments.

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

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

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

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

The following table shows the results if this employee is compared with the HR specialist position. The Employee Match column describes the icon that appears for the particular scenario.

Competency	Importance	Points Assigned	Rating Required	Employee Rating	Employee Match	Employee Points
Communication	High	5	5	4.67	Green half-filled circle	0
Leadership	Average	3	4	3.33	Green half-filled circle	0
Interpersonal Effectiveness	Above Average	4	3	5	+ Blue filled circle	4
Planning	Low	1	3		None	0

Competency	Importance	Points Assigned	Rating Required	Employee Rating	Employee Match	Employee Points
Decision Making	Above Average	4	2	2.67	Blue filled circle	4
Adaptability to Change	Below Average	2	3	1.67	Red circle outline	0

The total points value for the HR Specialist position is 19 (the sum of the values in the points assigned column). The employee earns the points for a competency when their rating meets or exceeds the required rating for the position being evaluated. In this case, the employee met or exceeded the required rating for two competencies. The combined point value for those two competencies is 8. Therefore, the employee's total points for evaluation against the HR Specialist position is 8.

Setting Up Match Evaluation Types

To set up match evaluation types, use the Match Evaluation Types component (MATCH_TYPES).

This section discusses how to define match evaluation types.

You must set up match evaluation types that correspond to the users for whom you want to run match analyses. Evaluation types determine which evaluations are included in each analysis.

Page Used to Set Up Match Evaluation Types

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

Defining Match Evaluation Types

Access the Match Evaluation Types page.

Match Evaluation Types page

Search Type

Select one or both search types.

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

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

Evaluation Type

Select evaluation types.

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

If *Self* is selected as the evaluation type, only self-evaluations that have been approved by the employee's manager are included in the matching and searching process.

Matching Employees to Roles

This section discusses how to:

- Specify a role and analyze cluster matches.
- View cluster details.

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

Pages Used to Match Employees to Roles

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

Specifying a Role and Analyzing Cluster Matches

Access the Person to Role Match - Cluster Match page.

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

Merideth Branson Person ID: B-BARET198

Business Unit: GBIBU Position Number: 19000230 Director-Finance

Job Code:

Job Task:

Match Analysis			
Total Match:	0	out of	27
Competency Match:	0		21
Accomplishment Match:	0		6

Role Cluster Customize Find First 1 of 1 Last			
Cluster	Importance	EE Complete	Competency Cluster
	Average	☒	Competency Cluster

Person to Role Match - Cluster Match page

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

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

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

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

Match Analysis

Total Match

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

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

Competency Match

Indicates how many of the total points are from competencies.

Accomplishment Match

Indicates how many of the total points are from accomplishments.

Role Cluster

EE Complete (employee complete)

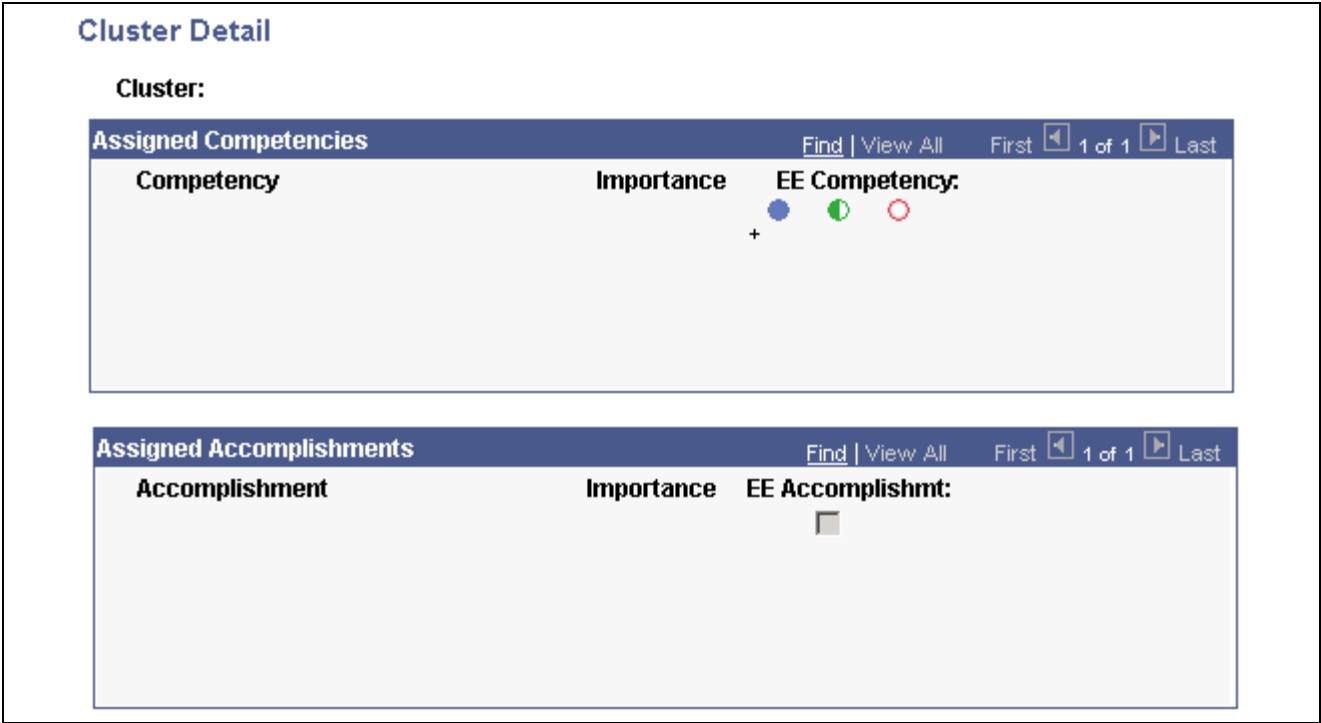
Indicates if the employee has all the required competencies and accomplishments assigned to the cluster.

Competency Cluster

Click to view the competencies and accomplishments assigned to the cluster.

Viewing Cluster Details

Access the Cluster Detail page.



Cluster Detail page

- EE Competency** (employee competency)
- Displays the icon that indicates if the employee has the required rating for the competency.
- EE Accomplishmt** (employee accomplishment)
- Indicates whether the employee has the accomplishment.

Analyzing Competency Matches

Access the Person to Role Match - Competency Match page.

Cluster Match	Competency Match	Accomplishment Match	Gap-Fit Measurement
Merideth Branson		Person ID: B-BARET198	
Match Analysis			
Competency Match:	0	out of:	0
		Competency Match Detail	
Total Competencies:	0		0
		Competencies not ranked:	0
Competencies			
		Find View All First 1 of 1 Last	
Competency	Importance	Training Scheduled	
	Average	Competency Training	

Person to Role Match - Competency Match page

Match Analysis

Competency Match	Indicates the number of competency points that an employee has out of a total possible number of competency points required by the role.
Competency Match Detail	Click to view the breakdown of each competency and its match with the person and role.
Total Competencies	Displays the number of employee competencies that match the competencies required for the role.
Competencies not ranked	Displays the number of competencies required by the role that are not included in the employee's evaluations.

Competencies

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

Viewing Competency Match Details

Access the Competency Match Detail page.

Competency Match Detail
Merideth Branson
Person ID: B-BARET198

Competency Match Detail			
Competency	Required Points	EE Review Points	Importance Match
			0

Competency Match:
0

Competency Match Detail page

Required Points

Each rating in a rating model has points associated with it. Required points are derived from the rating (or rather a point translation of the rating) this is assigned to the competency for the specified role. You specify the number of points for each rating by using the Review Points field on the Rating Model page.

EE Review Points
(employee review points)

Displays the employee's point rating for the competency. Employee review points are the point translation of the rating that the employee receives for the competency, and these points are specified for each rating using the Review Points field on the Rating Model page.

Importance Match

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

Analyzing Accomplishment Matches

Access the Person to Role Match - Accomplishment Match page.

Cluster Match
Competency Match
Accomplishment Match
Gap-Fit Measurement

Merideth Branson
Person ID: B-BARET198

Match Analysis

Accomplishment Match:	0	out of	0
Total Accomplishments:	0		0

Accomplishments
Customize | Find | View All | 
First  1 of 1  Last

Accomplishment	Importance	Category	Employee Accomplishment	Post-Graduate Degree
	Average			

Person to Role Match - Accomplishment Match page

Match Analysis

Accomplishment Match	Indicates the number of accomplishment points an employee has out of total possible number of accomplishment points required by the role. Points are derived from the rating (or rather the point translation of the rating) that is assigned to the accomplishment for the specified role. The number of points are specified for each rating using the Review Points field on the Rating Model page.
Total Accomplishments	Displays the number of employee accomplishments that match the accomplishments required for the role.

Accomplishments

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

Performing a Gap Analysis on the Employee and Role

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

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

Person to Role Match - Gap-Fit Measurement page

Match Analysis

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

Gap-Fit Analysis

EE Review Points
(employee review points)

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

Required Points

Each rating in a rating model has points associated with it. Points are derived from the rating (or rather a point translation of the rating) that is assigned to the competency for the specified role. You specify the number of points for each rating by using the Review Points field on the Rating Model page.

% Proficiency Deficiency
(percentage proficiency deficiency)

Displays the percentage difference between the employee's rating and the rating required for the role. The system divides the employee review points by the required points and converts the result into a percentage. For example, if the value of the employee review points is 3 but the role requires a point value of 4, then the percentage proficiency deficiency is 75%.

If an employee's rating exactly matches the required rating, then the percentage proficiency deficiency is 100%. A percentage less than 100% indicates that the employee has not met the required rating, and a percentage greater than 100% indicates that the employee's rating exceeds the rating required for the role.

Matching Roles to Employees

This section discusses how to:

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

Pages Used to Match Roles to Employees

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

Specifying an Employee and Analyzing Cluster Matches

Access the Role to Person Match - Cluster Match page.

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

Role to Person Match - Cluster Match page

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

EmplID (employee ID) Select an employee.

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

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

See Also

Chapter 5, "Performing Gap and Match Analyses on a Workforce," Specifying a Role and Analyzing Cluster Matches, page 70

Analyzing Competency Matches

Access the Role to Person Match - Competency Match page.

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
SetID:	SHARE	Job Task:	K10004	PeopleSoft Financials Project			
EmplID:	B-BARET194	Angela Bentley					
Match Analysis							
Competency Match:	0	out of:	18	Competency Match Detail			
Total Competencies:	0		6	Competencies not ranked:	6		
Competencies							
				Find View All	First	1-5 of 6	Last
Competency	Importance	Training Scheduled					
PS Resource Management	Above Avg	☐					
PS Projects	Above Avg	☐					
PS General Ledger	Average	☐					
GL-Payroll Interface	Average	☐					
PeopleCode	Below Avg	☐					

Role to Person Match - Competency Match page

This page displays details of the selected role and employee ID.

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

See Also

[Chapter 5, “Performing Gap and Match Analyses on a Workforce,” Analyzing Competency Matches, page 72](#)

Viewing Competency Match Details

Access the Competency Match Detail page.

Competency Match Detail

SetID: SHARE **Job Task:** K10004 PeopleSoft Financials Project
EmplID: B-BARET194 Angela Bentley

Competency Match Detail			Find View All	First	1-6 of 6	Last
Competency	Required Pts	EE Review Points	Match			
PS Resource Management	3		0			
PS Projects	4		0			
PS General Ledger	2		0			
GL-Payroll Interface	3		0			
PeopleCode	4		0			
PS nVision Reporting	1		0			
Competency Match:			0			

Competency Match Detail page

This page displays the selected role and employee ID, along with the role description and the employee's name. The rest of the fields on this page are identical to the Person to Role Match - Competency Match Details page.

Analyzing Accomplishments

Access the Role to Person Match - Accomplishment Match page.

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

SetID: SHARE **Job Task:** K10004 PeopleSoft Financials Project
EmplID: B-BARET194 Angela Bentley

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

Accomplishment Detail					Customize Find View All	First	1-2 of 2	Last
Accomplishment	Importance	Category	Employee Accomplishment	Post-Graduate Degree				
Integrated Resource Management	Average	License or Certification	☐					
Procurement Management	Average	License or Certification	☐					

Role to Person Match - Accomplishment Match page

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

Match Analysis

- Accomplishment Match** Displays the number of accomplishment points that an employee has been awarded out of total possible number of accomplishment points required by the role. Points are derived from the rating (or rather a point translation of the rating) that is assigned to the accomplishment for the specified role. You specify the number of points for each rating by using the Review Points field on the Rating Model page.
- Total Accomplishments** Displays the number of employee accomplishments that match the accomplishments required for the role.

Accomplishment

- Accomplishment** Lists each accomplishment assigned to the role, from highest to lowest importance.
- Importance** Displays importance levels, which are assigned on the Role Accomplishment page or on the Cluster Table.
- Category** Displays the accomplishment category.
- Employee Accomplishment** Indicates whether the employee possesses the accomplishment.

Performing a Gap Analysis on the Role and Employee

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

Cluster Match		Competency Match		Accomplishment Match		Gap-Fit Measurement	
SetID:	SHARE	Job Task:	K10004	PeopleSoft Financials Project			
EmplID:	B-BARET194	Angela Bentley					
Match Analysis							
Total Competencies:	6	Total Points:	0	out of:	17	% Fit:	0.00
Gap-Fit Analysis							
Customize Find View All First 1-5 of 6 Last							
Competency	Importance	EE Review Points	Required Points	% Proficiency Deficiency			
PS Resource Management	Above Avg		3	0.00			
PS Projects	Above Avg		4	0.00			
PS General Ledger	Average		2	0.00			
GL-Payroll Interface	Average		3	0.00			
PeopleCode	Below Avg		4	0.00			

Role to Person Match - Gap-Fit Measurement page

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

See Also

Chapter 5, “Performing Gap and Match Analyses on a Workforce,” Performing a Gap Analysis on the Employee and Role, page 75

Matching Teams to Projects

This section discusses how to:

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

Pages Used to Match Teams to Projects

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

Setting Up Employee Teams

Access the Employee Teams page.

Employee Teams

Team Code:

KU02

*Description:

Project Managers

Short Name:

Proj Mgrs

Team Members

Customize | Find | View All |

First 1-8 of 8 Last

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

Employee Teams page

Team Members

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

Analyzing Team Competency Matches

Access the Team to Job Task - Competency Match page.

Competency Match

Accomplishment Match

Team:

KU02

Project Managers

Business Unit:

GBIBU

Job Task:

Total Points:

0

out of

0

Competency Points:

0

0

Competency Detail

Customize | Find |

First 1 of 1 Last

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

Team to Job Task - Competency Match page

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

Total Points	Indicates how many points the team has earned out of the total points possible for the task.
Competency Points	Indicates how many of the total points are from competencies.
Team Competency	Indicates whether any member of the team has the competency at the required proficiency.
Number of Employees	Displays how many team members have the competency at the required proficiency level.
Competency Detail	Click to determine which team members have the required competency.

Analyzing Team Accomplishment Matches

Access the Team to Job Task - Accomplishment Match page.

Competency Match
Accomplishment Match

Team: Project Managers
Business Unit: GBIBU **Job Task:**

Total Points: 0 out of 0
Accomplishment Points: 0

Team Accomplishment				
Customize Find View All First 1 of 1 Last				
Accomplishment	Importance	Team Accomplishment	Number of Employees	Accomplishment Detail
	Average	☐		Accomplishment Detail

Team to Job Task - Accomplishment Match page

Total Points	Indicates how many points the team has out of the total points possible for the task.
Accomplishment Points	Indicates how many of the total points are from accomplishments.
Team Accomplishment	
Team Accomplishment	Indicates whether any team member has the required accomplishment.
Number of Employees	Displays how many team members have the accomplishment.
Accomplishment Detail	Click to determine which team members have the required accomplishment.

Searching for Job Candidates

This section discusses how to conduct a competency search.

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

Page Used to Search for Job Candidates

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

Conducting a Competency Search

Access the Competency Search - All page, or the Competency Search - Applicants, Competency Search - Contractor, or Competency Search - Employees pages.

Note. All of the Competency Search pages work the same way, but display data only for the role (applicants, contractor, or employees) that you select in the menu navigation when accessing the page.

Competency Search - All

Position Number: 19000230 Director-Finance

Minimum Competency Match: out of 21 

Total Match (with Accomplishments) 27

Competency Search Results					
Person Id	Name	Organizational Relationship	Competency Match	Total Match	Interest Level
KU0007	Betty Locherty	EMP	18	22	32
KU0011	Patrick Seto	EMP	4	4	2
KU0016	Joanna Strunsky	EMP	4	4	2
KU0039	Shawn Quilligan	EMP	4	4	2
KU0066	Justine Kim	EMP	4	4	2
KU0075	David Martignoni	EMP	4	4	2
KU0076	Mei Lee	EMP	4	4	2
KU0100	Courtney Osborn	EMP	4	4	2
KU0103	Colin Davidson	EMP	4	4	2
KU0107	Emma Doyle	EMP	4	4	2

Competency Search - All page

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

Minimum Competency Match

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

Total Match (with Accomplishments)

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



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

Competency Search Results
ID

Depending on the selected inquiry, the system displays the IDs of all employees, contractors, and applicants who meet your minimum requirements, and it ranks the qualified individuals by competency match and total match points.

Competency Match

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

Total Match

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

Interest Level

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

CHAPTER 6

Using Competencies to Manage Training

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

Understanding Competencies and Training

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

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

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

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training, “Defining Training Courses and Programs,” Training Programs

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training, “Tracking Student Training”

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Manage Competencies Reports

Managing Competencies with Training

This section discusses how to:

- Track other training.
- Search for courses.

Pages Used to Assign Competencies to Other Training Options

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

Tracking Other Training

Access the Non Course Table Competencies page.

Non Course Table Competencies

Training ID:

KU0004

*Description:

Emergency Response Training

Short Description:

Emerg Resp

*Media Type:

Seminar

Comments:

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

Target Competencies

Customize | Find |  First  1 of 1  Last

*Competency	Description		
1118 	Emergency Preparedness		

Non Course Table Competencies page

Media Type

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

Competency

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

Searching for Courses

Access the Competency Training page.

Competency Training

Competency: 0102 Conceptual thinking

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

Course	Session	Course Dates	Max Students	Enrolled
				0

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

Other Training	Media Type

Competency Training page

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



(Enroll Into Course Session)

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

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

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

CHAPTER 7

(GBR) Managing National Vocational Qualifications

This section provides an overview of NVQs and discusses how to:

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

Understanding NVQs

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

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

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

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

NVQ competence levels include the following:

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

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

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

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

Setting Up NVQ Information

To set up NVQ information, use the following components: Award Body (NVQ_AWARD_BODY), Elements (NVQ_ELEMENT_TBL), Units and Elements (NVQ_UNIT_DETAILS), and NVQs (NVQ_DETAILS).

This section discusses how to:

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

Pages Used to Set Up NVQ Information

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

Defining NVQ Elements

Access the Element Table page.

Element Table

Competency Element

Element Code:

KGEL1

Element Table

Find | View All First 1 of 1 Last

*Effective Date:

01/01/1990

*Status:

Active

+

-

*Description:

NVQ Element 1

*Satisfaction Method:

On the Job Training

Title:

NVQ Element 1

Element Table page

Satisfaction Method

Select the method to satisfy the requirements for this element.

Defining NVQ Units

Access the Unit page.

Unit

Unit and Elements

NVQ Unit:

KGUNIT1

Unit Title:

NVQ Unit 1

Short Description:

NVQ Unit 1

*Rating Model:

NVQ

UK - NVQ Model

*Category:

NVQ - Unit

Description:

Unit page

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

Unit Title

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

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

Associating Elements With Units

Access the Unit and Elements page.

Unit
Unit and Elements

NVQ Unit: KGUNIT1

Title: NVQ Unit 1

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

Unit and Elements page

Element

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

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

Creating NVQ Codes and Assigning Awarding Bodies

Access the NVQ Details page.

NVQ Details
NVQ Units

NVQ: ADMIN_1

Title: Business Administration

Level: 1

Expiry Date: 07/31/2001

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

NVQ Details page

Title

Enter the title as specified by the NVQ.

Expiry Date

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

Reference and Awarding Body

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

Specifying Units for NVQs

Access the NVQ Units page.

NVQ DetailsNVQ Units

NVQ:ADMIN_1

Title:Business Administration

Level:1

Units Required

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

NVQ Units page

Units Required

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

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

Enrolling Employees in NVQs and Tracking Progress

This section discusses how to:

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

Pages Used to Enroll Employees and Tracking Progress

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

Entering Employee NVQ Data

Access the Employee NVQs page.

Employee NVQs

Hoxley,Tobi Employee EmpID: KG0010

NVQ Status Find | View All First 1 of 1 Last

*NVQ: HRADMIN Level: 5

Title: Human Resources Administration

Status: Enrolled

Start: 11/05/2002 Completed: Certificate Award Date:

Registration Details

Registration Date: 10/10/2002

Registration Number: 5897123

NVQ

Employee NVQs page

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

Registration Details

Enter the registration date and number.

Tracking Employee Progress

Access the Review NVQ page.

Review NVQ Plan NVQ Units

O'Flaherty,Seamus Patrick ID: KG0005

NVQ: Business Administration Level: 1

Status:

NVQ Tracking Find | View All First 1 of 1 Last

Review Date: 09/01/1999

Type: Review

Reviewer: KG0002 Hopkins, Dewi

Description: Successful Review.

Review NVQ page

- Review Date

Enter the next review date.
- Type

Select a review type.
- Reviewer

Select a reviewer.
- Description

Enter comments.

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

Creating an NVQ Training Plan

Access the Plan NVQ Units page.

Review NVQ

Plan NVQ Units

O'Flaherty,Seamus Patrick

ID: KG0005

NVQ: Business Administration

Level: 1

Status:

NVQ Tracking

Find | View All

First

1 of 1

Last

Review Date: 09/01/1999

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

Plan NVQ Units page

- Units

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

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

Reviewing NVQ Summaries

This section discusses how to:

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

Pages Used to Review NVQ Information

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

Reviewing All the NVQs Associated With an Employee

Access the Employee Summary page.

Employee Summary

Jones,Ramina

ID: KG0008

NVQ: NVQ 1

Level: 1

Status: Enrolled

View Options

All

Completed

Submitted

In Progress

Planned

Remaining

NVQ Status

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

Employee Summary page

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

Reviewing All Employees Associated With an NVQ

Access the Qualification page.

Qualification

NVQ: NVQ 1 **Level:** 1

View Options

NVQ Status

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

Qualification page

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

Running NVQ Reports

This section discusses how to run the Initialize Plan process.

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Manage Competencies Reports

Pages Used to Run NVQ Reports

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

Running the Initialize Plan Process

Access the NVQ005 page.

NVQ005

Run Control ID: 123

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Report Request Parameter(s)

EmplID: B-BARET194

Bentley,Angela

NVQ005 page

Language

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

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

	PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
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.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
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.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. 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).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
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. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
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.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
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.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. 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.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
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.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i>.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollout structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.

document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects 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.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
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.

financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
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.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
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.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (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	Metastings are special expressions included in SQL string literals. The metastings, 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	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page 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.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan 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.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i>.
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.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
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 a Structured Query Report (SQR), a COBOL or Application Engine 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	A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.
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.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.
product line	The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
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.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
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.
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.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
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.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
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.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
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 key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
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.
speed key	See <i>communication key</i> .
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.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
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.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
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 time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
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 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.
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.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.
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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
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.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
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.
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.

XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . 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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

- Accomplishment Listing page 26
- Accomplishment Match Detail page 83
- Accomplishment Match page - Person to Role Match 70, 74
- Accomplishment Match page - Role to Person Match 77, 80
- Accomplishment Match page - Team to Job Task 83, 85
- accomplishments
 - analyzing person to role match 74
 - analyzing role to person match 80
 - analyzing team matches 85
 - Assign Accomplishments page 37
 - assigning to clusters 31
 - assigning to roles 29, 32, 37
 - controlling multiple evaluations 66
 - defining clusters 29
 - entering for employees 50
 - Languages page 59
 - Licenses and Certifications page 58
 - Memberships page 59
 - Professional Ed. and Training page 55
 - Rank Accomplishments page 39
 - ranking 39
 - School Education page 55
 - setting up 5, 21
 - setting up job families 30
 - setting up licenses 24
 - Significant Special Projects page 59
 - Test Results page 60
- tracking
 - certificates 58
 - certifications 24
 - educational background 55
 - educational training 55
 - employees 41
 - licenses 58
 - professional education 55
 - professional memberships 59
 - significant special projects 59
 - test results 60
- understanding 7
- additional documentation xii
- application fundamentals xi

- Assign Accomplishments page 33, 37
- Assign Clusters page 33
- Assign Competencies page 33, 35
- Awarding Body (GBR) page 96

C

- certificates, tracking 58
- certification
 - License/Certification Table page 24
 - tracking 24
- Cluster Accomplishments page 30, 31
- Cluster Competencies page 30
- Cluster Detail page 70, 72
- Cluster Detail page - Assign Clusters 33
- Cluster Match page - Person to Role Match 70
- Cluster Match page - Role to Person Match 77
- cluster matches, analyzing 70
- clusters
 - analyzing matches 77
 - Assign Clusters page 33
 - assigning accomplishments 31
 - assigning competencies 30
 - assigning to rank 34
 - assigning to roles 32, 33
 - Rank Clusters page 34
 - setting up 30
 - understanding 29
 - viewing details 72
- comments, submitting xvi
- common elements xvii
- competencies
 - analyzing
 - cluster matches 70, 77
 - competency matches 72, 78
 - team matches 84
 - Assign Competencies page 35
 - assigning
 - competencies 46
 - evaluation IDs 45
 - to clusters 30
 - to roles 29, 32, 35
 - associating elements 16
 - Competency Rating page 48

- conducting a search for 86
 - controlling multiple evaluations 66
 - creating proficiency descriptions 15
 - defining
 - clusters 29
 - elements 13
 - proficiency levels 48
 - rating models 6
 - entering for employees 41
 - locating and reviewing information 16
 - matching
 - employees to roles 68
 - roles to employees 76
 - teams to projects 82
 - performing employee to role gap analyses 75
 - performing role to employee gap analyses 81
 - performing workforce gap and match analyses 63
 - Plan Careers/Manage Competencies Link page 47
 - Rank Competencies page 36
 - ranking 36
 - Rate Competencies page 36
 - rating 36
 - searching for job candidates 85
 - setting up 5, 8, 14
 - setting up job families 30
 - setting up teams 83
 - setting up trees 17
 - See Also* competency trees
 - specifying an employee 77
 - specifying roles 70
 - sub-competencies 6
 - synchronizing with manage competencies 47
 - synchronizing with plan careers 47
 - tracking employees 41
 - training 89
 - understanding 5
 - verifying tracking methods 49
 - viewing cluster details 72
 - viewing match details 73, 79
 - competencies and training 89
 - competency and sub-competency data 6
 - Competency Assignment page 43, 46
 - Competency Criteria page 9
 - competency data, importing 19
 - Competency Element page 9, 13
 - Competency Evaluation page 42, 45
 - Competency Inventory page 61
 - Competency Match Detail page 77, 79, 83
 - Competency Match Detail page - Person to Role Match 70, 73
 - Competency Match page - Person to Role Match 70, 72
 - Competency Match page - Role to Person Match 77, 78
 - Competency Match page - Team to Job Task 83, 84
 - Competency Rating page 44, 48
 - Competency Search - All page 86
 - Competency Search - Applicants page 86
 - Competency Search - Contractor page 86
 - Competency Search - Employee page 86
 - Competency Search page 86
 - Competency Summary page 9, 16
 - Competency Table page 9, 14
 - Competency Training page 91, 92
 - competency trees
 - setting up 17
 - using 17
 - Competency Types page 9
 - Competency Verification page 45, 49
 - contact information xvi
 - courses, searching for 92
 - cross-references xv
 - Customer Connection website xii
- D**
- Degree Table page 22, 24
 - degrees, tracking 24
 - documentation
 - printed xii
 - related xii
 - updates xii
- E**
- eDevelopment 7
 - Education Level Achieved Table page 22
 - educational background 55
 - educational qualifications
 - entering additional information 25
 - Faculty Table JPN page 25
 - setting up 21
 - setting up licenses 24
 - tracking certifications 24

- tracking schools 23, 24
- Element Detail (GBR) page 100
- Element page - Competencies 9, 16
- Element Table (GBR) page 96
- Employee NVQs (GBR) page 100
- Employee Summary (GBR) page 103
- Employee Teams page 83
- ePerformance
 - Inbound File Publish Application Engine (AE) 20
 - integrating with competency management 7
- evaluation IDs 45
- evaluations 66

F

- Faculty Table JPN page 22, 25
- file identifiers, Inbound File Publish Application Engine (AE) 20

G

- gap analyses
 - performing 63, 81
 - performing for employees and roles 75
 - understanding 63
- Gap-Fit Measurement page - Person to Role Match 70, 75
- Gap-Fit Measurement page - Role to Person Match 77, 81
- glossary 107

H

- Honor/Award Table page 22
- Honors and Awards page 54

I

- import data preparation 21
- Inbound File Publish Application Engine (AE) 20
- Integration Broker technology 20

J

- job candidates 85
- job families 30

L

- Language Table page 23
- language, tracking abilities 59
- Languages page 53, 59

- License/Certificate Report page 61
- License/Certification Table page 23, 24
- licenses
 - License/Certification Table page 24
 - tracking 24, 58
- Licenses and Certifications - Run Control page 26
- Licenses and Certifications page 52, 58

M

- Major Table page 22
- Manage Competencies
 - business processes 1
 - integrations 2
 - overview 1
- match analysis 72
 - analyzing accomplishments 74
 - analyzing clusters 77
 - analyzing team 84, 85
 - defining evaluation types 67
 - matching employees to roles 68
 - matching teams to projects 82
 - performing 63
 - setting up evaluation types 67
 - setting up teams 83
 - viewing match details 79
- match details 73
- Match Evaluation Types page 67
- Membership Table page 23
- memberships 59
- Memberships page 53, 59
- MMA Partners xii
- multiple evaluations 66

N

- National Vocational Qualifications (GBR) 98
 - associating elements with units 98
 - creating a training plan 102
 - enrolling employees 99
 - entering data 100
 - initializing plan process 105
 - managing 93
 - reviewing 103
 - reviewing employees 103
 - reviewing summaries 102
 - running reports 104
 - setting up 95
 - specifying units 99

- tracking progress 99, 101
- understanding 93
- Non Course Table Competencies page 91
- notes xv
- NVQ (GBR), *See* National Vocational Qualifications (GBR)
- NVQ Details (GBR) page 96, 98
- NVQ Units (GBR) page 96, 99
- NVQ001 (GBR) page 105
- NVQ002 (GBR) page 105
- NVQ003 (GBR) page 105
- NVQ004 (GBR) page 105
- NVQ005 (GBR) page 105
- NVQ006 (GBR) page 105

P

- PeopleBooks
 - ordering xii
- PeopleCode, typographical conventions xiv
- PeopleSoft application fundamentals xi
- PeopleSoft Competency Management Scale (PSCM) 6
- Plan Careers / Manage Competencies Link page 43
- Plan Careers/Manage Competencies Link page 47
- Plan NVQ Units (GBR) page 100, 102
- prerequisites xi
- printed documentation xii
- Professional Ed. and Training page 52, 55
- Proficiency Descriptions page - Competencies 9, 15

Q

- Qualification (GBR) page 103

R

- Rank Accomplishments page 33, 39
- Rank Clusters page 33, 34
- Rank Competencies page 33, 36
- Rate Competencies page 33, 36
- Rating Model page 8, 10
- Rating Model page - Federal tab 13
- rating models
 - defining review bands 6
 - setting up 10
- related documentation xii

- reports
 - accomplishment 61
 - accomplishment listing 26
 - competency and accomplishment 26
 - employee competency 61
- review bands 6
- Review NVQ (GBR) page 100, 101
- Run Control page - Competency Listing 26

S

- School Education page 51, 55
- School Table page 22, 23
- School Type Table page 22
- schools
 - School Education page 55
 - School Table page 23
 - setting up qualifications and accomplishments 21
 - tracking 23
- Significant Special Projects page 54, 59
- sub-competencies 18
 - defining 18
 - defining proficiency statements 19
- Sub-Competencies - Proficiency Descriptions page 18
- Sub-Competency page 18
- suggestions, submitting xvi

T

- terms 107
- Test Results page 54, 60
- Test Table page 23
- third party 19
- tracking methods 49
- training
 - managing competencies 90
 - searching for courses 92
 - tracking 91
 - using competencies 89
- trees, setting up for competencies 17
- typographical conventions xiv

U

- Unit (GBR) page 96, 97
- Unit and Elements (GBR) page 96, 98
- Unit Detail (GBR) page 100
- United Kingdom, *See* National Vocational Qualifications (GBR)

Units and Elements page
 assigning awarding bodies 98
 creating codes 98

V

visual cues xv

W

warnings xv

