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PeopleSoft Enterprise ePerformance 9.0 PeopleBook

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- 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 elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

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 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.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

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

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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.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise 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 *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

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Typographical Convention or Visual Cue	Description
[ ] (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 Enterprise 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.

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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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.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.

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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.

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PeopleSoft Enterprise ePerformance Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise ePerformance.

PeopleSoft Enterprise 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 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in ePerformance operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook.*

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 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:

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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.

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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.

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CHAPTER 1

Getting Started with ePerformance

This chapter discusses:

- ePerformance overview.
- ePerformance business processes.
- ePerformance integrations.
- ePerformance implementation.

ePerformance Overview

ePerformance is a self-service evaluation management application for managers, employees, and human resources (HR) administrators. You can use ePerformance as a tool for planning, collaboration, communication, assessment, and monitoring evaluations for two purposes: performance and development.

Performance evaluations typically assess and plan employee performance to meet current job requirements and administer salary treatments; while development evaluations are used to assess and plan employee development needs either because of gaps in the skill set that is required for a current job or to meet future requirements.

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance or development goals with enterprise objectives, through assessing and rewarding employee performance results within the right behaviors.

Note. Throughout this PeopleBook, we refer to evaluation as a generic process name that includes both performance and development processes. The term *performance* in this PeopleBook is used to mean both performance and development, unless otherwise stated.

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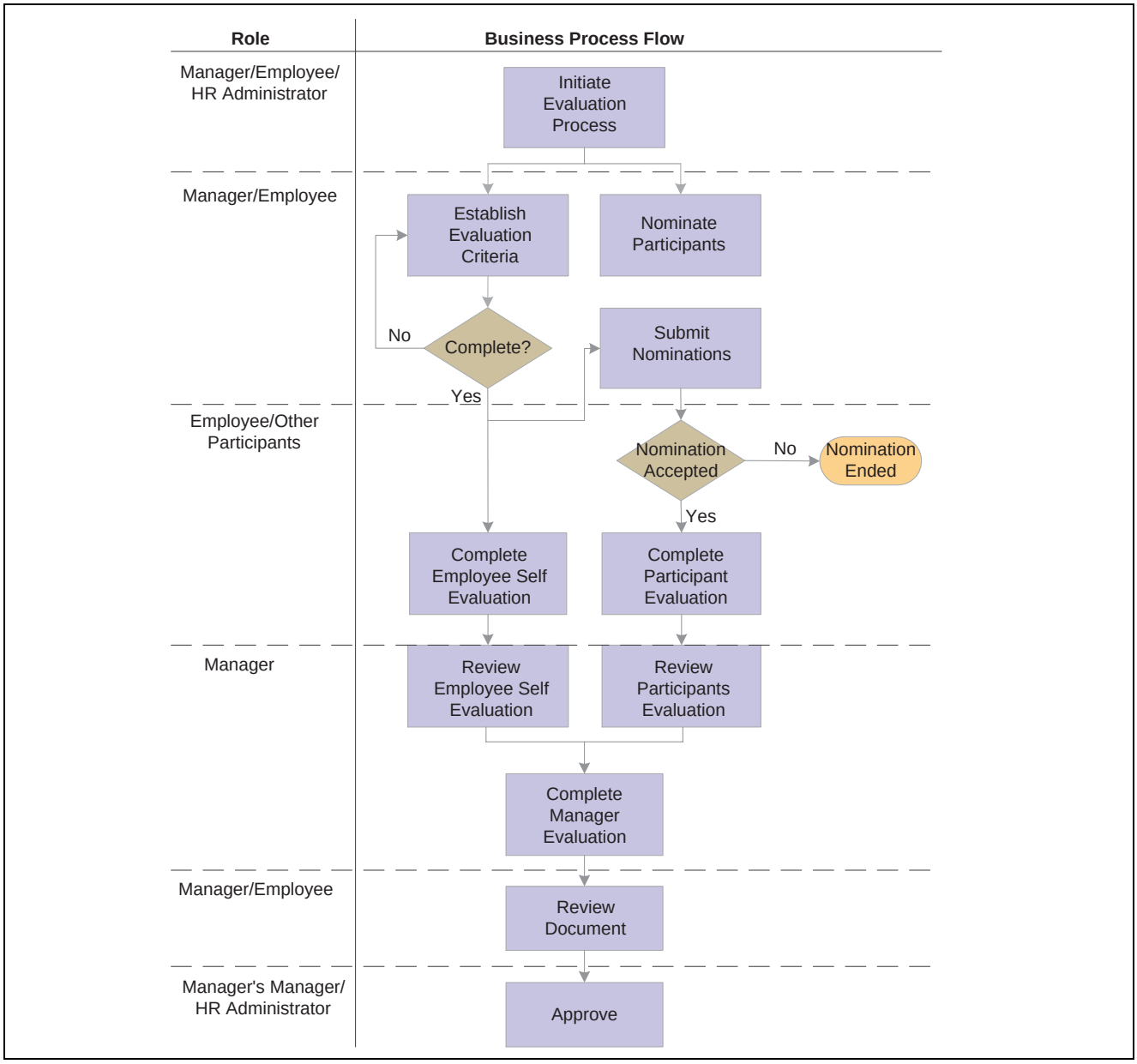
ePerformance provides you with the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes. With this application, you can:

- Generate evaluations.
- Establish evaluation criteria.
- Manage multiple participants.
- Enter evaluation data, including notes, ratings, weights, and comments.
- Consolidate feedback from multiple sources into the manager/mentor's evaluation.
- Submit the manager/mentor evaluation for review and approval.

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ePerformance Business Processes

This diagram illustrates the flow of ePerformance business processes — assuming that the document template implements the establish criteria, multi-participant, review, and approval processes.



ePerformance business process flow

The ePerformance business process includes these steps:

Note. Depending on how you configure the business process, some of these steps are optional.

1. The manager, employee, or HR administrator initiates the process by creating documents.

   Employees can only create documents for themselves; managers can create documents for employees or groups that report to them; HR administrators can create documents for groups of employees.

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See Chapter 5, "Generating Documents," page 73.

2. (Optional) The employee or manager modify the document's evaluation criteria and agree on the criteria that are established.

   Criteria modifications include: adding free-form or predefined criteria, modifying the text of document criteria, or removing criteria. If integrating with Learning Management, you can add learning activity. Upon completion of this step, managers and employees can begin work on their evaluations.

   See Chapter 6, "Modifying Evaluation Criteria," page 93.

3. (Optional) The employee or manager nominates participants to provide additional feedback.

   See Chapter 7, "Nominating and Tracking Multi-Source Participants," page 105.

4. (Optional) After nominations are complete and the evaluation criteria are finalized, nominations are submitted to nominees by either the employee or manager.

   When a nominee accepts a nomination, a participant evaluation is created for them.

5. Employees, managers, and (optionally) other participants complete their respective evaluations.

   This step consists of rating evaluation items and entering comments.

   See Chapter 8, "Entering Comments and Ratings on Evaluations," page 117.

6. The manager views average ratings and consolidates feedback into their evaluation.

   During this step, the manager can optionally make use of several tools: notes that they entered pertaining to the evaluation; comments from other evaluators pertaining to the evaluation; development tips that are based upon competencies and sub-competencies; results writer statements that are based on competencies and sub-competencies; average consolidated ratings from other evaluators pertaining to the evaluation; and a language checker that checks language for objectionable terms.

   See Chapter 9, "Consolidating Feedback from Evaluators," page 137.

   Note. Depending on the document template definition, these tools are also available to employees and other participants. However, the manager makes primary use of these tools when completing an evaluation.

7. (Optional) The manager sends the evaluation to the employee for review.
8. (Optional) The manager submits the evaluation for approval.

   See Chapter 10, "Managing Reviews and Approvals," page 151.

   Note. Depending on the review and approval process that is defined in the document template, the final two steps might occur in reverse order.

Administrative Processes

These administrative processes occur on an as-needed basis and are outside of the evaluation processes:

- Transfer evaluations
- Change evaluation status
- Cancel evaluations
- Delete evaluations
- Enter preliminary ratings

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- View evaluation contents

  See Chapter 11, "Performing Administrative Tasks," page 163.

Monitoring Evaluations

HR administrators can monitor the status of evaluations and view a summary of the results with various reports and tools, including the following:

- Missing Documents report
- Late Documents report
- Status Summary chart
- Rating Distribution Summary chart

  See Chapter 12, "Using Inquiry Pages," page 175.

ePerformance Integrations

Through integration with a broad suite of workforce performance and development applications, organizations can link performance evaluations and assessments to workforce plans, individual career plans, development, rewards, and reporting. ePerformance integrates with other PeopleSoft business solutions, as well as third-party integration by delivering both standard and generic integration points.

ePerformance integrates with these PeopleSoft applications:

- Human Resources - ePerformance documents use many of the common component tables to supply the basic data.
- Planning Salaries - The Merit Increase process uses data from the employee's performance document.
- Profile Manager - ePerformance uses the content catalog and profile types to supply content for performance and development documents. Evaluation critieria from the employee's performance document can update the employee's profile.
- Learning Management - ePerformance documents can have learning sections that display a list of learning relevant to the current performance evaluation period. Managers and employees can access Learning Management from a document to search for or add learning for the employee.

The implementation chapters of this PeopleBook discuss integration considerations.

See Also

Appendix B, "Integrating with PeopleSoft Enterprise Learning Management," page 195

ePerformance Implementation

Setup Manager 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.

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

Other Sources of Information

In the planning phase of an implementation, you can take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

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CHAPTER 2

Setting Up ePerformance

This chapter discusses how to:

- Define system settings.
- Work with Manage Profiles business process
- Work with approvals.
- Modify self-service pages and email notifications.
- Work with Learning Management.

Defining System Settings

To define system settings for ePerformance, use the General Settings (EP_INSTALLATION) component.

This section provides an overview of system settings in ePerformance and discusses how to define system settings.

Understanding System Settings

System settings control certain processing options. You can modify these delivered system settings to meet your business needs:

- Whether users can generate documents in languages other than the base language.
- Debug settings.
- Starting number for document ID generation.
- Fields that appear on the page from which users select documents.
- The email notifications that the system generates.

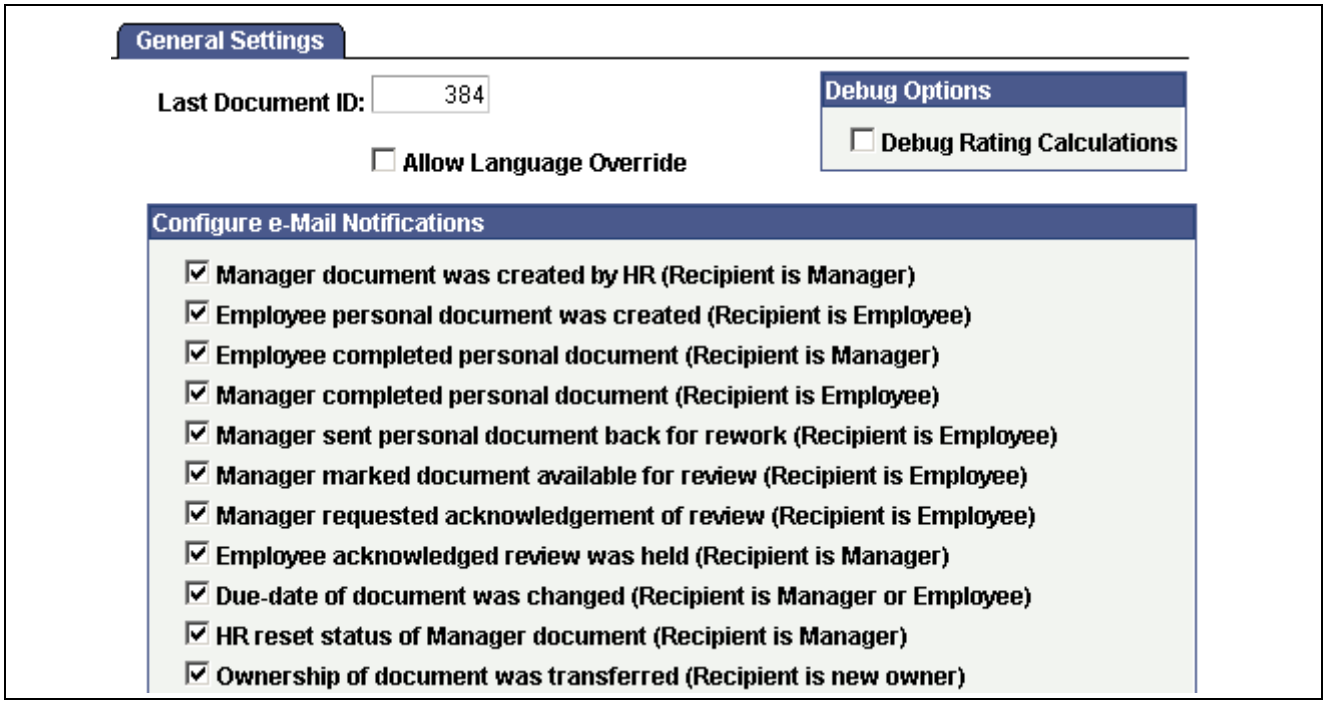
Page Used to Define System Settings

Page Name	Object Name	Navigation	Usage
General Settings	EP_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, ePerformance: General Settings, General Settings	Define system settings.

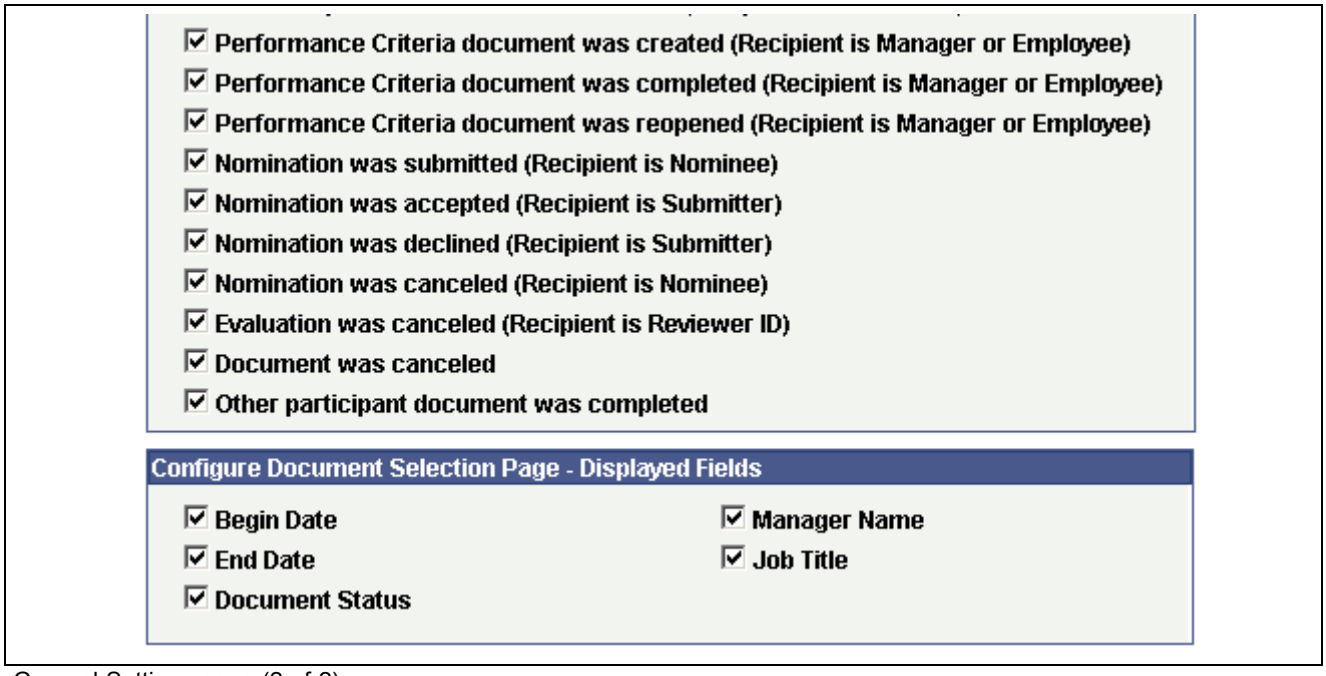
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Defining System Settings

Access the General Settings page.



General Settings page (1 of 2)



General Settings page (2 of 2)

Last Document ID Enter the number from which the system begins generating document IDs. The system automatically generates the document ID by adding 1 to the Last Document ID.

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Warning! Entering a value that is lower than the value that appears can cause unpredictable results.

Allow Document Language Override Select this check box to enable document generation in a language other than the user's preferred language. If this check box is clear, the system generates all documents in the user's preferred language.

The base language is defined using the Manage Installed Languages page in PeopleTools.

Debug Options

Debug Rating Calculations Select this check box to have the system generate a debug/trace log every time it calculates the ratings in an evaluation. HR ePerformance administrators use the Debug/Trace Results page to review the results of each calculation performed for an evaluation.

This helps track down any unexpected results when you build templates and test the configuration.

Warning! Producing the debug/trace log can have a significant impact on system performance. Select this option only if you are testing the ePerformance configuration or debugging a suspected calculation problem.

Configure Email Notifications

Select the check box next to each event type for which you want the system to automatically generate and send notices.

Configure Document Selection Page - Displayed Fields

Select the fields to appear in the document list from which self service users select documents.

See Chapter 5, "Generating Documents," Accessing Documents, page 86.

Working with Manage Profiles

This section provides overviews the rating models, content catalog, and profile types.

Using Rating Models

ePerformance using rating models to rate an employee's performance or level of proficiency. Rating models define the qualitative values, such as A, B, and C, or 1, 2, and 3, that the system uses to rate or score and employee's performance.

Rating models are assigned to the sections that make up performance or development documents. Managers, employees, and peers can then select an appropriate rating that best reflects the employee's performance in that area.

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Ratings can have expanded descriptions that can be used to further describe the behavior one exhibits when performing at a specific proficiency level. These expanded descriptions display on the performance or development document.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog," Defining Rating Models.

Using the Content Catalog

ePerformance uses content types and content items defined in the content catalog to identify the items by which employees are measured. Content types are used as categories for grouping similar content items. Content items are the specific things you want to measure.

Content types are associated with the sections that form the structure of a document template and performance or development document. ePerformance uses content types to define the category of content items that can be added to document templates and performance documents. The following list are some of the content types delivered and typically used by ePerformance:

- MISSION

  Mission statements express an organization's purpose and vision. Typically, senior management defines and the board of directors or senior staff approve of an organization's mission statement. Business units might also establish mission statements to help guide the creation of initiatives, goals, and responsibilities. You can include one or more mission statements as items on performance documents, but more often, you'll include this on performance documents for informational purposes only.

- INITIATIVE

  Initiatives are high-level plans, activities, or goals that support an organization's mission statement and define its direction. Initiatives usually guide the creation of goals and responsibilities. An organization may have multiple initiatives at any point in time.

- GOAL

  Goals and objectives are specific results to accomplish. Typically, these statements describe a target that will be met or a condition that will exist when the desired outcome is accomplished.

- RESP

  Responsibilities are usually based on job function. These are often broken down to specific tasks.

- COMPETENCY

  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.

Once content types are defined, you can begin to link content items to content types. The following table is an example of how content types and items in the Content Catalog for ePerformance might be set up:

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MISSION	INITIATIVE	GOAL	RESP	COMPETENCY
• Leading supplier of paper products. • Superior customer value. • Renowned research university.	• Increase shareholder value. • Enhance customer productivity. • Deliver innovative solutions.	• Increase customer satisfaction by 10%. • Increase cash reserves. • Cut operational expenses by 3% by fiscal year end.	• Participate in quarterly close process. • Adhere to accounting standards. • Prepare quarterly and annual financial reports.	• Abstract thinking. • Analytical thinking. • Conceptual thinking.

If you need to create new content types and content items, the following table shows field mappings between Manage Profile and ePerformance:

This field in Manage Profiles maps	To this field in ePerformance
JPM_CAT_TYPE	EP_JPM_CAT_TYPE
JPM_CAT_ITEM_ID	EP_JPM_CAT_ITEM_ID
EFFDT	EFFDT
EFF_STATUS_DESCR	EFF_STATUS
JPM_DESCR90	EP_TITLE
RATING_MODEL	RATING_MODEL
JPM_DATE_1	EP_ITEM_DUE_DT
JPM_DATE_2	EP_ITEM_REMIND_DT
JPM_TEXT1325_1	EP_DESCR254
JPM_TEXT1325_2	EP_MEASURE

Note. ePerformance allows items to have sub-items associated to them. To accomplish this in the Manage Profiles business process you set up the relationship for the content item as a child of another content item.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog," Defining Content Items.

Using Profile Types

A profile type is a collection of content items that describe the qualitative attributes of a person or business entity. If a profile type is used to describe a person, it is called a person profile. If a profile type is used to describe a business entity, such as a job, business unit, or job family, it is referred to as a nonperson profile.

ePerformance can use profiles in three ways:

- To download content items from a nonperson profile into a document template.
- To download the content items from a nonperson profile into a performance or development document.

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- To update or create an employee's person profile.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Managing Profiles".

Working with Approvals and Reviews

ePerformance uses the Approval (PTAF_TXN) component to define its approval processes. There are five approvals process, three of which use the new approval framework. The three are:

- ManagerOnly

  This is a one-step approval process that routes the transaction to an approving manager.

- ManagerToAdmin

  This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance human resources administrator.

- AdminOnly

  This is a one-step approval process that routes the transaction to the ePerformance human resources administrator.

The approval process definition is linked to a document type using the Document Type page.

In addition to assigning the approval process definition to a document type, you also define when you want the employee review to occur within the performance process. Your choices are:

- Approval Before EE Review Held

  The system follows one of the approval processes and the document is approved before the manager discusses it with the employee.

- Approval After EE Review Held

  The system follows one of the approval processes and the document is approved after the manager discusses it with the employee.

- Approval. No EE Review Held

  The system follows one of the approval processes, but the manager does not review the document with the employee.

- No Approval. EE Review Held

  The system does not follow an approval processes, but the manager must review the document with the employee.

- No Approval. No EE Review Held

  The system does not follow an approval processes and the manager does not review the document with the employee.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals".

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Modifying Self-Service Pages and Email Notifications

This section list prerequisites for sending email notification and discusses:

- ePerformance text catalog settings.
- Text substitution.
- Notifications.

ePerformance provides standard text that appears on self-service pages and in automatically generated email notifications. The text catalog stores these text entries. You can modify the text catalog entries as needed or create new ones to meet business needs.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with Common Components," Configuring the Text Catalog

Prerequisites for Email Notifications

To ensure email and workflow notifications are working properly, complete the following steps:

1. Activate emails using the Worklist System Defaults page.
2. Define the method used to notify originator using the System Workflow Rules page.
3. Define user notification preferences.
4. Define user's email address on the Email Addresses page.
5. Select email user as a routing preference on the User Profiles - Workflow page.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions".

ePerformance Text Catalog Settings

ePerformance makes use of the text catalog for storing text that appears on self-service pages, including field labels, button names, links, page instructions, and warnings as well as the text and subject lines of automated email notifications. You can modify text that appears on a page or in an email message by editing text in the Text Catalog feature.

The text catalog is partitioned by the applications that use it, and each partition can store and access its data differently. To access the text catalog items that belong to ePerformance, enter HEP as the object owner identifier on the Maintain Text Catalog search page.

These are the unique settings that apply to ePerformance:

Sub ID

ePerformance partitions its text catalog entries by performance and development. To retrieve text catalog entries for development documents, enter

- *D* in the Sub ID field. To retrieve text catalog entries for performance documents, leave the field blank.
- leave the Sub ID field blank.

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Text Catalog Keys

ePerformance designates these four keys for storing and retrieving its entries:

Section Type Select the section type to which the text pertains, from the list of section types that you defined on the Section Definition page.

Author Type Select the evaluator role of the evaluation on which the text appears, from the list of role types that you defined on the Role Types page.

User Role Select the system role to which the text pertains, from the list of predefined system roles. This key is used to select text depending on the user's system privileges; for example, update or approve.

Document Status Select the status to which the text pertains: *Acknowledged, Available for Review, Cancelled, Completed, In Progress, Not Started,* or *Review Held.*

When the system retrieves text from the catalog, the section type key takes precedence over author type, author type takes precedence over user role, and user role takes precedence over document status.

Note. An empty key functions as a wildcard. Entries with wildcard keys pertain to all possible values for the key.

Example of Text Retrieval in ePerformance

For example, if you define two different instructional messages for completing the Goals section of a document, one message for employees and an alternate version for managers, you would define the four keys as shown in this table:

Text ID	Section Type (Key 1)	Author Type (Key 2)	User Role (Key 3)	Document Status (Key 4)
Any ID	Goal	Employee	Blank	Blank
Any ID	Goal	Manager	Manager	Blank

First, the system looks for entries with an exact match on Key 1 (section type). If it finds entries that match the key value (including the wildcard entry), it searches only those entries for the other values and picks up the best match. In this case, the section type for both entries is a wildcard, so the system looks at Key 2 (author type). It applies the same logic. Again, both values are wild cards, so both entries remain possibilities. Now, the system looks for a match on Key 3 (user role) and finds an exact match on Manager. The system only considers entries where Key 3 is blank if it can not find any match on the key.

Text Substitution

Text substitution in the Text Catalog feature works just like substitution in the PeopleTools Message Catalog. You supply the text values for the *tokens* in a PeopleCode function call at runtime. The values are replaced by parameters in the PeopleCode when the text is rendered on evaluations.

To use this feature, you must know PeopleCode. If you want to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, you also need to make corresponding changes to the PeopleCode that calls the Text Catalog feature retrieval functions, since this copies supplier values to use in place of the tokens.

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These are the tokens and the substitution text for each token that are delivered by ePerformance. You can insert up to five substitution tokens from the following list:

- %1: The document type from the Document Type table (EP_REVW_TYP_TBL).
- %2: The employee name formatted as first name, last name.
- %3: The employee ID.
- %4: The period begin date for the performance period.
- %5: The period end date for the performance period.
- %6: The due date of the evaluation.
- %7: The component link that transfers the user directly into the applicable evaluation.
- %8: The list of employees for whom an evaluation was successfully created during the background run.
- %9: The list of employees for whom evaluations were not created.
- %10: The Form-Create-Msg, which is one of two alternate messages that appear depending on the type of process that is run.

Notifications

This table lists the delivered text entries that ePerformance includes in system-generated email notifications and specifies when and to whom notices are sent. Most text entries have two versions, one with the suffix *_SBJ* for use in email subject lines and a corresponding entry with the suffix *_BDY* for use in the body of email messages. When a notification is triggered by a status change or an action request on an evaluation, the body text that is generated contains a link to the evaluation(s).

Text Catalog ID	Recipient	Condition for Creating
ADHOC_BASE_SBJ ADHOC_BASE_BDY	Manager or Employee	An adhoc message is sent from the criteria document.
ADHOC_MAIN_SBJ ADHOC_MAIN_BDY	Manager or Employee	An adhoc message is sent from an evaluation.
ADHOC_NOM_SBJ ADHOC_NOM_BDY	Multi-participant Evaluation Candidate	An adhoc message is sent from the Nominate Participants page for an evaluation.
BASE-COMPLETE_SBJ BASE-COMPLETE_BDY	Manager or Employee	An establish criteria document is marked as completed.
BASE-CREATE_SBJ BASE-CREATE_BDY	Manager or Employee	An establish criteria document is created by either the manager, employee or ePerformance HR Administrator.
BASE-REOPEN_SBJ BASE-REOPEN_BDY	Manager or Employee	An establish criteria document is reopened by either the manager or employee.
CHG-DUEDATE_SBJ CHG-DUEDATE_BDY	Manager, Employee or Multi-Participant Reviewer	A manager or ePerformance HR administrator changes the due date of an evaluation.

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Text Catalog ID	Recipient	Condition for Creating
CHG-STATUS_SBJ CHG-STATUS_BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR administrator or manager resets the status of the evaluation to In Progress. This can happen if an evaluation is prematurely advanced to the next stage of the process.
CREATE-MGRDOC-SBJ CREATE-MGRDOC-BDY	Manager	An ePerformance HR administrator has generated documents using the batch process.
CREATE-ROLEDOC-SBJ CREATE-ROLEDOC-BDY	Employee	An ePerformance HR administrator has generated documents using the batch process.
DOC-CANCEL-SBJ DOC-CANCEL-BDY	Manager and Employee	An ePerformance HR Administrator or manager cancels the evaluation.
EE-ACKNOWLEDGE_SBJ EE-ACKNOWLEDGE_BDY	Manager	An employee acknowledges that they have reviewed the manager evaluation.
EMPDOC_COMPLT_SBJ EMPDOC_COMPLT_BDY	Manager	An employee marks the employee evaluation as completed.
EVAL_CANCEL_SBJ EVAL_CANCEL_BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR Administrator, manager or employee cancels an evaluation.
MGRDOC-COMPLT_SBJ MGRDOC-COMPLT_BDY	Employee	A manager marks the manager evaluation as completed.
NOM-ACCEPT_SBJ NOM-ACCEPT_BDY	Manager or Employee	A nominated employee accepts a nomination for a multi-participant evaluation.
NOM-CANCEL_SBJ NOM-CANCEL_BDY	Nominee	A nomination for a multi-participant evaluation is cancelled.
NOM-DECLINE_SBJ NOM-DECLINE_BDY	Manager or Employee	A nominated employee declines a nomination for a multi-participant evaluation.
NOM-SUBMIT_SBJ NOM-SUBMIT_BDY	Participants	Nominations to participate in multi-participant evaluations are sent to nominees.
OTHDOC-COMPLT_SBJ OTHDOC-COMPLT_BDY	Manager and/or employee	A participant in a multi-participant evaluation completes their evaluation.
RQST-ACK_SBJ RQST-ACK_BDY	Employee	A manager marks am evaluation as *Review Held*. This message is sent to the employee requesting that they formally acknowledge the evaluation.

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Text Catalog ID	Recipient	Condition for Creating
RQST-REVIEW_SBJ RQST-REVIEW_BDY	Employee	A manager changes the status of a manager evaluation to *Available for Review*.
TRANSFER-MGR_SBJ TRANSFER-MGR_BDY	New Manager	A manager or ePerformance HR transfers an evaluation to a new manager.

These notification messages are used in email body text only.

MGR-FAIL-LIST_BDY	Manager	An HR administrator creates manager and employee documents, but some employee documents are not created. This message lists the employees for whom documents were not created.
DO-NOT-RESPOND_BDY	Manager and Employee	This is used in all notices.

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CHAPTER 3

Setting Up Document Templates

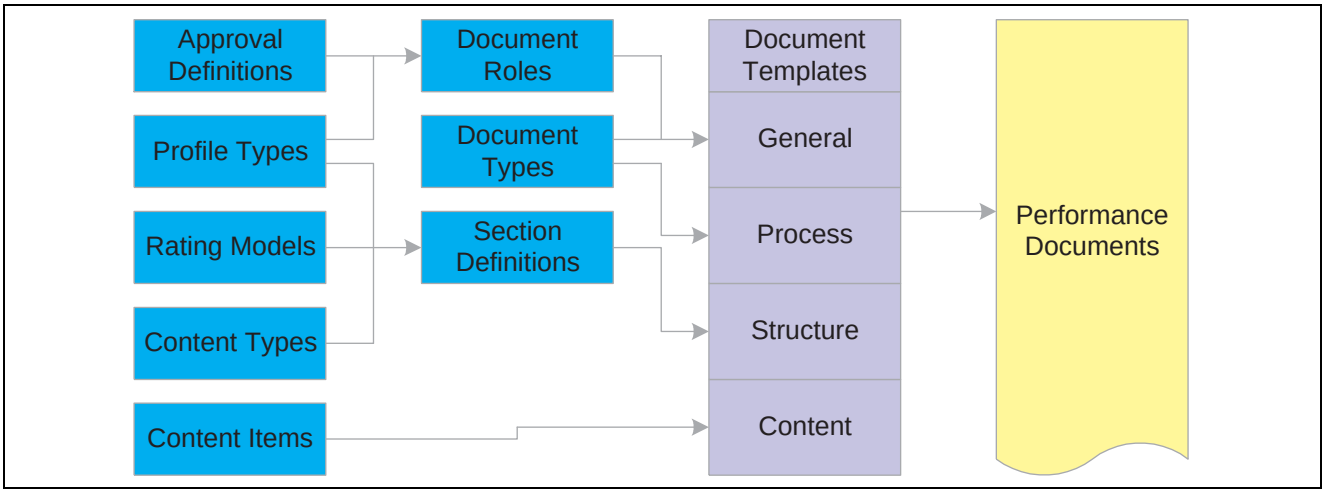
This chapter provides an overview of document templates and discusses how to:

- Define document types.
- Define roles.
- Define sections.
- (JPN) Create review identifiers.
- Define document templates.

Understanding Document Templates

Document templates store information that is used to generate specific document instances for use by participants in the evaluation process. Options on the document template define the roles that participate in the review process and the abilities of each role, the steps in the review process, and the items that are evaluated.

The following diagrams shows the relationship between the core ePerformance tables, document templates, and generated performance documents.



Relationship between ePerformance tables

The decisions you make and the options you select when you define templates influence the way the evaluation process is conducted in an organization. Organizations often define a high-level template and then successively clone and modify this template for the appropriate levels of the organization. For example, an organization might want a set of goals and initiatives for all employees. Each business unit clones this template with the common goals and initiatives and modifies it to add goals and initiatives that apply only to the business unit.

Before defining templates, consider:

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- Which features are appropriate for the types of documents that are used in the organization. For example, some organizations use documents to enhance communication between managers and employees, and do not assign ratings; others assign a single overall rating; and still others rate each individual item (such as goals, responsibilities, or competencies) that is contained in the document.
- Ease of use and reuse when you design document templates. Limiting the number of templates that you create for each document type makes it easier for users to select the correct template when they generate performance documents and simplifies template maintenance.
- Making the basic content in a template as generic as possible so that templates are flexible enough to meet the needs of large groups of employees. You can then use job profiles to include job-specific competencies and responsibilities for all employees in a particular job, job family, position, or salary grade. By doing so, each employee's annual performance document has the same general appearance and instructions, but includes the competencies and responsibilities that are relevant to the particular job.

Defining Document Types

To define document types, use the Document Types (EP_REVIEW_TYPE_TBL) component.

This section provides an overview of document types and discusses how to set up document types.

Understanding Document Types

Document types identify the types of documents that are valid for an organization, such as: Annual, Semi-Annual, Quarterly, Project, and Performance Improvement Plan. They are used to when you create document templates and provide default values for many fields on the template.

Document types also define whether:

- The document is to be used as the official review for integration with Salary Planning.
- Employees, managers, or both can generate documents.
- The document can be cloned.
- The user or the profile type identifies the document template.
- An approval process is used during the review process.

Prerequisite for Setting Up Document Types

Before you create document types and are planning to use profile types as the content source for your performance and development documents, define your profiles in the Manage Profiles business process.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Managing Profiles".

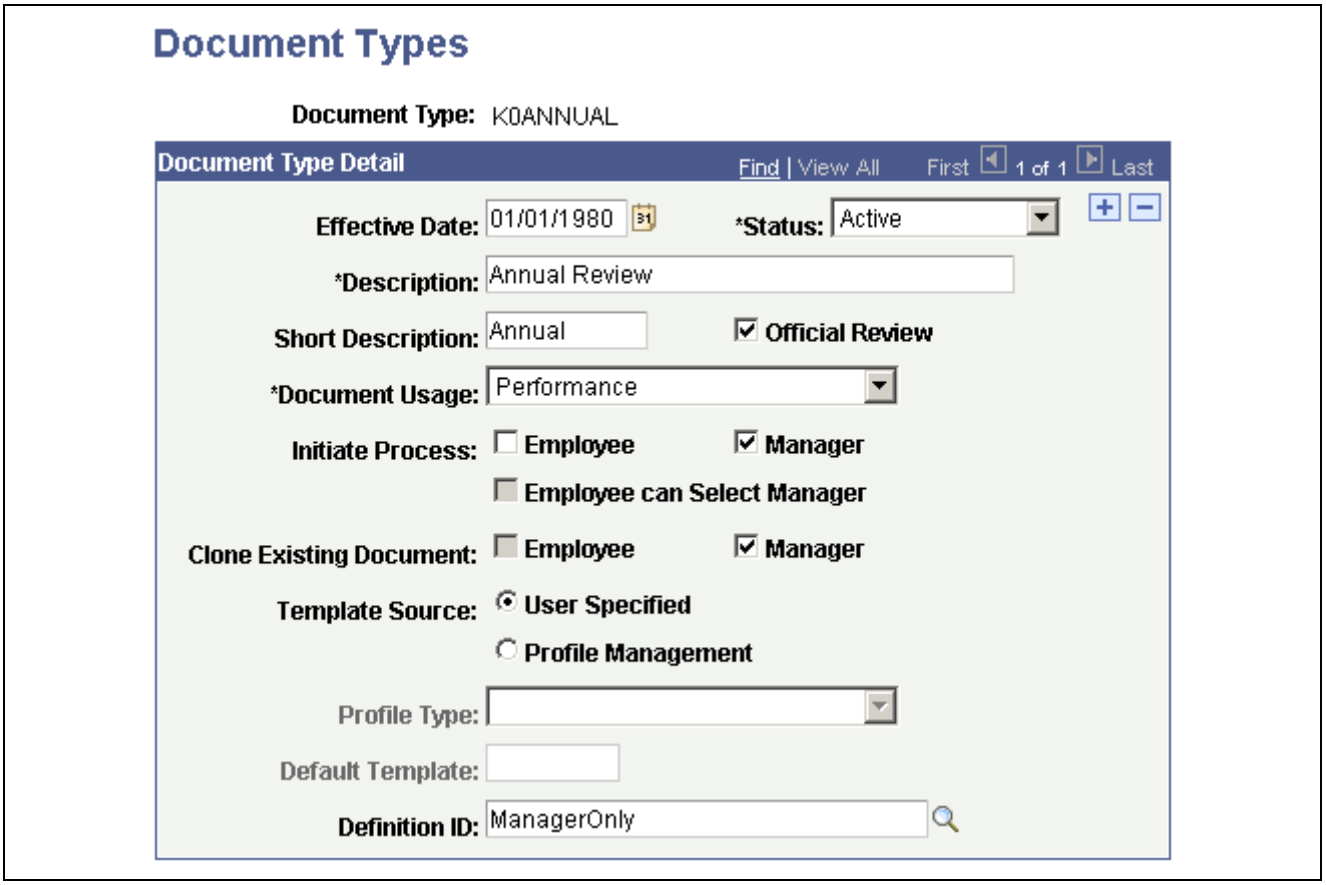
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Page Used to Set Up Document Types

Page Name	Object Name	Navigation	Usage
Document Types	EP_REVIEW_TYPE_TBL	Set Up HRMS, Product Related, ePerformance, Document Structure, Document Types, Document Types	Define document types.

Defining Document Types

Access the Document Types page.



Document Types page

Official Review Select this check box to designate that documents generated for this document type are used by the Salary Planning by Group process to retrieve rating and review points and, by the Salary Increase Matrix page to retrieve ratings.

If an employee has more than one official document, these processes use the results of the document with the latest period ending date.

This selection becomes the default value for the Official Document field on the Template Definition page.

Document Usage Select the process that uses the document type. Valid options are:

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- *Performance*, which indicates that the system uses this document type for performance planning or evaluation.
- *Development*, which indicates that the system uses this document type for employee development.

Performance documents appear on the manager or employee self-service pages under the My Performance Documents menu or on the administrator pages under Workforce Development, Performance Management, Performance Documents.

Development documents appear under the My Development Documents menu on the self-service pages or under the Development Documents menu on the administrator pages.

Initiate Process

Select *Employee*, *Manager*, or both check boxes to indicate which role or roles can initiate the evaluation process. The value that is in this field determines if the manager or employee can select the document type when initiating the evaluation process.

Employee can Select Manager

This check box appears only if you select the Employee check box for the Initiate Process field.

Select this check box to enable an employee to select the person who acts in the manager role during the evaluation process.

Clone Existing Document

Select *Employee*, *Manager*, or both check boxes to indicate which role or roles can clone an existing document to create a new document.

The employee and manager check boxes are only available if you selected the corresponding check box in the Initiate Process field.

See Chapter 5, “Generating Documents,” page 73.

Template Source

Select the option that identifies where the system obtains the document template that is to be used to generate documents. Valid options are:

- User Specified, which indicates that the user initiating the document creation process must identify the template.
- Profile Management, which indicates that the template comes from the Manage Profiles business process. The system identifies the template by using the information entered in the Profile Type field and the employee’s job information.

Profile Type

This field is available if you select the *Profile Management* option in the Template Source field.

Select the profile type that is used by the Create Documents process to identify the document template. The list contains only nonperson profile types that have an ePerformance template included as a related object in the Profile Association Options group box on the Profile Types - Associations page.

Default Template

This field is available if you select theProfile Management option in the Template Source field.

Select the template that is used to generate the documents for this document type when the system cannot identify a template for the given profile type.

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Note. Because document types are defined before templates, return to the Document Type page after you define the default template and enter the value for this field.

Definition ID Select the approval definition for documents of this type. Valid options are:

- *ManagerOnly*

  This is a one-step approval process that routes the transaction to an approving manager.

- *ManagerToAdmin*

  This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance HR Administrator.

- *AdminOnly*

  This is a one-step approval process that routes the transaction to the ePerformance HR Administrator.

The definition ID determines the chain of approvals a document must go through, if any, when a manager clicks the Submit button on an document. The value that you select here becomes the default value for the Definition ID field on the Template Definition page for templates of the document type.

See Also

Chapter 10, "Managing Reviews and Approvals," page 151

Defining Roles

To define roles, use the Document Roles (EP_ROLE_TBL) component.

This section provides an overview and discusses how to set up roles that can provide multi-participant feedback.

Understanding Roles

ePerformance enables you to include feedback from participants other than the employee and employee's manager, for example, peers or customers. To implement multi-participant feedback processes, first define the roles that can participate in the process. After the roles are defined, you can add them to a document template definition that is used in the multi-participant process.

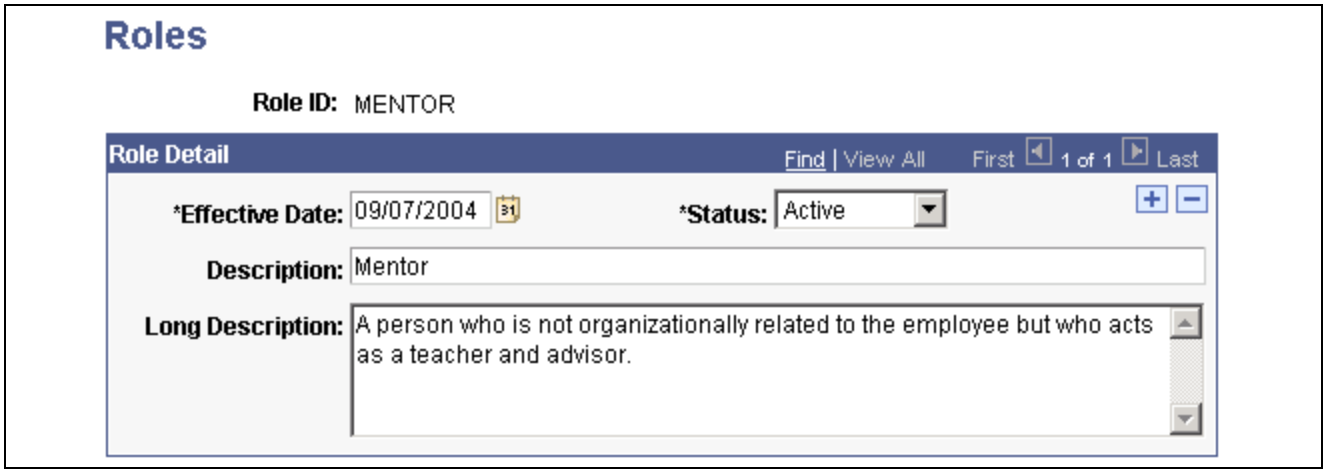
Pages Used to Define Roles

Page Name	Object Name	Navigation	Usage
Roles	EP_ROLE_TBL	Set Up HRMS, Product Related, ePerformance, Document Structure, Document Roles, Roles	Set up roles.

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Setting Up Roles

Access the Roles page.



Roles page

ePerformance delivers the Manager and Employee roles as system data. Other roles that are available as sample data are: Customer, Peer, and Other.

Note. You cannot modify, inactivate, or delete the Manager or Employee roles. They are required data.

Defining Sections

To create document sections, use the Section Definition (EP_SECTION_DEFN) component.

This section provides an overview of document sections and discusses how to define sections.

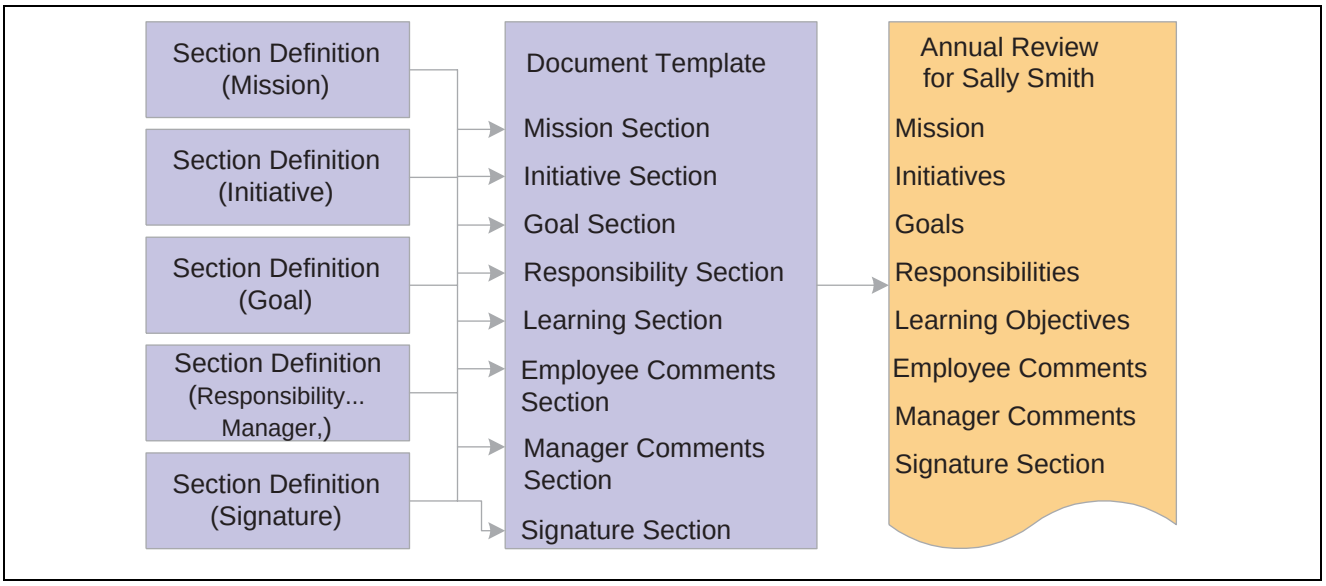
Understanding Sections

Sections are another building block for document templates. They form the structure of a performance or development document. For example, your organization may want its performance evaluations to include:

- The organization's mission statement.
- The department's initiative for meeting the mission statement.
- The employee's goals.
- The employee's competencies, responsibilities, or learning.
- A section for employee's to add comments.
- A section for manager's to add comments.
- A section for signatures.

Each of these are separate section definitions that can be added to the document template. The following diagram illustrates the relationship between sections, templates, and generated documents.

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Section definitions define the structure of document templates

When you define sections, you specify:

- Whether the section is rated or weighted.
- Which calculation method to use to determine employee ratings.
- Which rating model to use to rate employees.
- Any special processing for that section.
- What category of content types are associated with the section.
- What information to include in the document.

ePerformance delivers the following section definitions:

- Competency (competency)
- Employee (employee comments)
- Goals
- Init (initiatives)
- Learning
- Manager (manager comments)
- Mission
- Resp (responsibility)
- Sign (signature)
- Summary (overall summary)

Ratings and Weighting

Some sections you want to rate, such as employee responsibilities or competencies. Others section, such as mission statements, you probably don't want to rate. You may want to weight the sections that are rated higher than others. Weighting a section or item in the section enables you to place more or less importance on the section or item.

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Calculation Methods

If your organization rates employee performance, you can have the system calculate the employee's performance rating or manually enter the ratings. ePerformance delivers three different calculation methods:

- *Average*

  To use this method, the rating models that are associated with the section and its items must define numeric ratings that correspond to the rating descriptions. The system uses the numeric ratings to calculate a weighted average if weights exist; otherwise, it calculates a straight average. It then converts this average back to a performance document rating, again using the rating model.

- *Summation*

  To use this method, the rating models that are associated with the section and its items must define review points. The rating model for the section must also define point ranges (from points and to points). The system converts ratings to review points as defined in the rating model, calculates the total review points, and converts this total into the corresponding review rating for the section by using the point range on the rating model. Weights are ignored. Item ratings are not used in the summation method.

- *Review Band*

  This method is similar to the Summation method, but is only available for the Overall Summary section of a document. To use this method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). During the calculation process, the system computes the total review points across all sections and converts this total into the equivalent rating on the document band.

Special Processing

Special processing determines a sections use and the fields that are enabled in the Section, Items, and Sub-Items group boxes on the Section Definition page. ePerformance provides the following type of special processing.

If Special Processing is	Then the section
Employee Comments	Cannot be rated nor weighted. Cannot have items nor subitems.
Learning	Can be rated and weighted. Cannot have items nor subitems.
Manager Comments	Cannot be rated nor weighted. Cannot have items nor subitems.
None	Can be rated and weighted. Can have items and subitems.
Overall Summary	Can be rated and weighted. Cannot have items nor subitems.
Signatures	Cannot be rated nor weighted. Cannot have items nor subitems.

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Prerequisites for Creating Section Definitions

Before you can create sections, complete the following:

1. Define rating models.
2. Define content types.
3. (Optional) Define profile types.

   When competencies and responsibilities vary between jobs, you can use job profiles to generate the performance criteria associated with a section. This might be easier than creating a separate template for each job. Job profiles can be attached to job codes, job families, salary grades, and positions. That means that anyone associated with the same job code, job family, salary grade, or position will have the same content downloaded into their performance document.

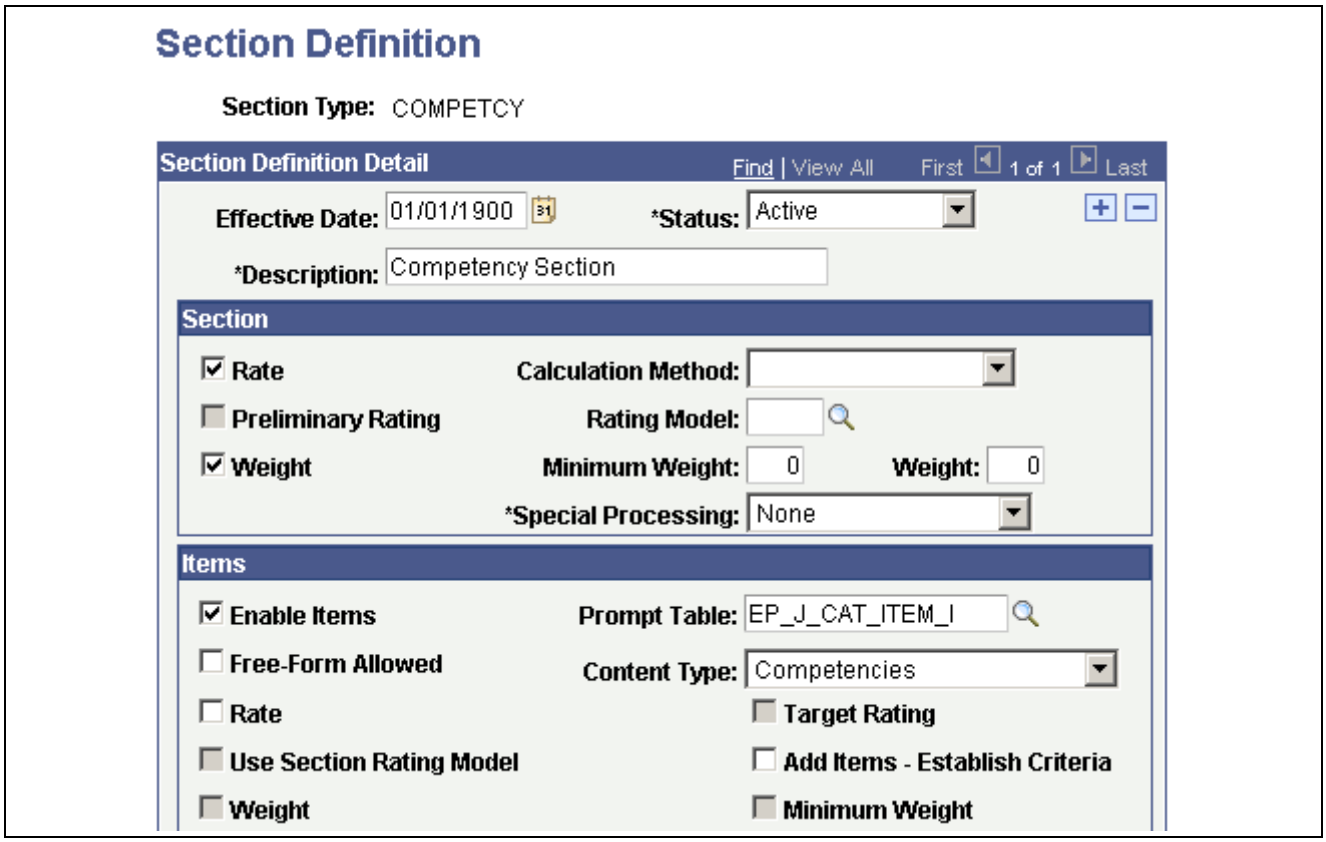
Page Used to Create Section Definitions

Page Name	Object Name	Navigation	Usage
Section Definition	EP_SECTION_DEFN	Set Up HRMS, Product Related, ePerformance, Document Structure, Section Definition, Section Definition	Define sections.

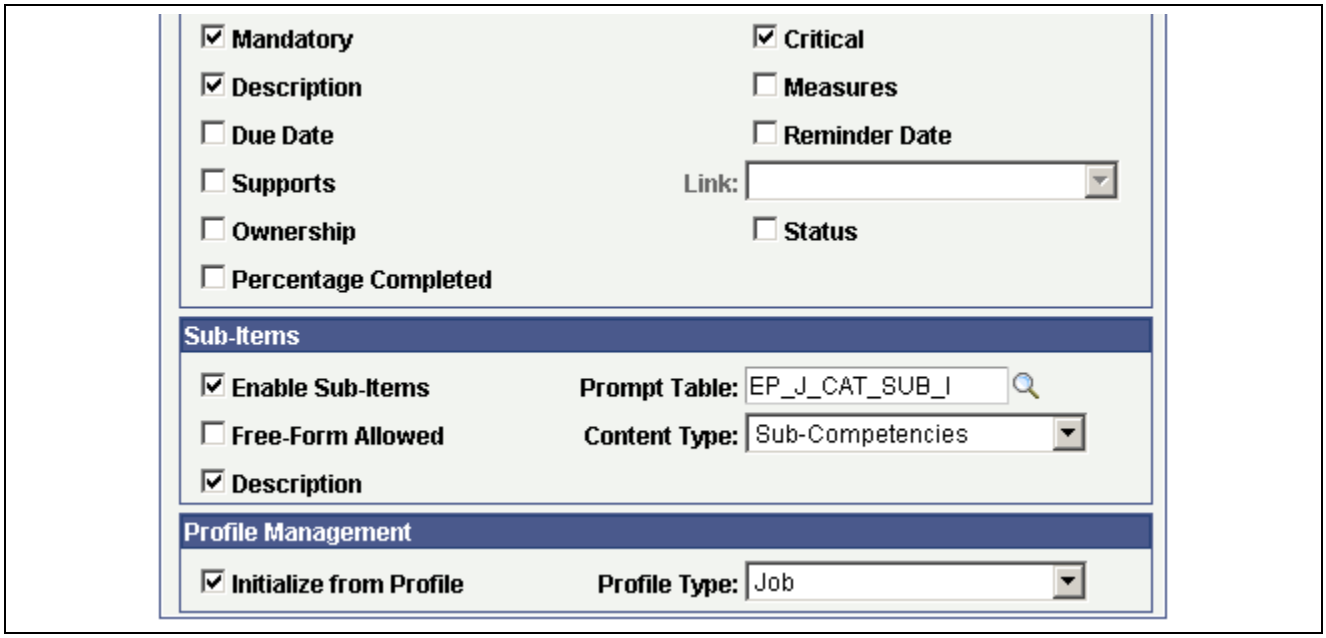
Defining Sections

Access the Section Definition page.

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Section Definition page (1 of 2)



Section Definition page (2 of 2)

Enter the detailed information that is used later to populate the fields on the Template Definition - Structure page for the specified section. The description enter here is used to identify the section you want to add on the Template Definition page.

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Section

Rate

This check box is available if *Learning*, *None*, or *Overall Summary* is selected in the Special Processing field.

Select this check box to enable a rating assignment for the section, either by a system calculation or manually. A Rating field appears in the section summary of a document.

Calculation Method

This field is available if the Rate check box is selected and the Special Processing field is set to *Learning*, *None*, or *Overall Section*.

Select the calculation method used for the section. Valid values are:

- *Average*
- *Summation*
- *Review Band*

Preliminary Rating

This check box is available if the Rate check box is selected and the Special Processing field is set to *Overall Section*.

Select this check box to enable a manager to enter a preliminary rating for the performance document.

Rating Model

This field is available if the Rate check box is selected and the Special Processing field is set to *Learning*, *None*, or *Overall Section*.

Select the default rating model for the section.

Weight

This check box is available if the Rate check box is selected and the Special Processing field is set to *Learning* or *None*.

Select this check box to enable the section to have a weighting relative to the other sections in the document. A Weight Section field appears in the section summary.

You cannot weight sections of a performance document when you select a calculation method of Summation or Review Band for the Overall Summary section and you elect to have the system calculate performance ratings. (You enter calculation instructions through the Template Definition component.)

Minimum Weight

This check box is available if the Weight check box is selected.

Enter the minimum weight for the section. This field is used when ratings are calculated to ensure that the section weight cannot fall below a minimum value.

Weight

This check box is available if the Weight check box is selected.

Enter the default weight for a section.

Special Processing

This field determines the type of information that is entered in this section and how the system processes the information. Select:

- *Employee Comments* if this section is used by employees to enter and edit comments on the manager's performance evaluation when the evaluation status is *Available for Review, Review Held,* or *Acknowledged.*

  This type of special processing allows the employee to enter their comments regarding the manager's assessment of the employees performance on the Manager Evaluation.

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When selected, all fields on this page become unavailable.

- *Learning* if this section is used by employees and managers to add or view learning information from Learning Management. Only the Rate and Weight check boxes are available.
- *Manager Comments* if this section is used by managers to enter comments, in response to the employee's comments, on the performance evaluation when the evaluation status is *In Progress, Available for Review, Review Held,*or *Acknowledged.*

  When selected, all fields on this page become unavailable.
- *None* if no special processing options apply. Most likely, you'll select this option when creating a section for a mission statement, initiatives, goals and objectives, competencies, or responsibilities.
- *Overall Summary* if this section contains the overall rating for the document. A document template can include only one section that is set to *Overall Summary.*

  When selected, all fields on this page except the Rate Section and Summary fields become unavailable.
- *Signatures* if a predefined signature section appears on the printed version of the evaluation.

  This section consists of two signature rows: the first for the employee, the second for the manager. Each row includes a signature line and a date. To change the format of the signature lines in this section, modify the Text Catalog feature.

  When selected, all fields on the page except the Summary field become unavailable.

Note. The Text Catalog entry for defining the signature format is APPR_MAIN1_INST2 for evaluations and APPR_BASE_SEC_DESC for the Establish Criteria document. The section type context key for both equals SIGN.

Items

The fields in this group box are available if the Special Processing field is set to *None*. The fields in this page region determine if the section on the document can contain content items such as mission statements, initiatives, goals or objectives, competencies, responsibilities, or free-form items. A section must contain all items of the same content type. Items are evaluated or tracked depending on the rules that you specify. Typically, Employee Comments, Manager Comments, Overall Summary and Signatures sections do not include content items.

Enable Items This check box is available if the Special Processing field is set to *None*.

Select this check box if the section can contain items. When you select this check box, the other fields in this page region are enabled.

Prompt Table This check box is available if the Enable Items check box is selected and applies for only content items.

Select the name of the table that holds the content items that you want included in the section.

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Free-Form Allowed

This check box is available if the Enable Items check box is selected.

Select to enable users to add free-form items to this section of a document or template. For example, managers might use this feature to add a list of courses that an employee should take. The system assigns a unique identifier to each free-form item that is added. These items are not stored for reuse.

Content Type

This check box is available if the Enable Items check box is selected.

Select the content type from which content items (job attributes) are pulled when defining the criteria used to evaluate employees' performance on the Template Definition - Content page. Valid options are any content types defined in the content catalog in the Manage Profiles business process.

This field cannot be a content type that is defined only as a child of another content type.

Rate

This check box is available if the Enable Items check box is selected.

Select this check box to enable a rating assignment for the section, either by a system calculation or manually. The Rating Model field appears on the Template Definition - Content page and a rating field appears in the section summary on the performance document.

Target Rating

This check box is available if the Rate check box is selected.

Select this check box to indicate that content items can have a target proficiency rating assigned on the Template Definition - Content page. The target proficiency rating displays on the performance document for the content items.

Use Section Rating Model

This check box is available if the Enable Items check box is selected and a rating model is entered in the Rating Model field in the Section group box.

Select this check box to have the rating model for all items and subitems on the document template default to the section rating model.

Add Items - Establish Criteria

This check box is available if the Enable Items check box is selected.

Select this check box to enable a manager, employee, or peer to add items or subitems for the section on the Establish Criteria document.

Note. The specific roles and whether they can add items or subitems to their evaluations are defined in the Section Roles grid when you include this section in a document template.

Weight

This check box is available if the Rate check box is selected.

Select this check box to enable the item in the section to have a weighting relative to the other items in the section. A Weight Section field appears in the section summary.

You cannot weight sections of a performance document when you select a calculation method of Summation or Review Band for the Overall Summary section and you elect to have the system calculate performance ratings. (You enter calculation instructions through the Template Definition component.)

Minimum Weight

Select this check box if items can have a minimum weighting. Minimum weights are entered on the Template Definition - Structure page.

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During the evaluation process, managers can click an update link on the evaluation to edit the minimum weight.

Mandatory This check box is available if the Enable Items check box is selected.

Select this check box if the document author cannot edit or delete items. This applies to all items, regardless of whether they are defined on the template or job profile.

Critical This check box is available if the Enable Items check box is selected.

Select this check box to indicate that items can have a critical indicator.

Description This check box is available if the Enable Items check box is selected.

Select this check box to have the description that is defined for the item appear on the document. For example, if the section pertains to responsibilities and you select this check box, the document includes the description that is defined on the Content Items - Items Detail page.

Measures This check box is available if the Enable Items check box is selected and is designed for use by free-form items.

Select this check box to display the Measurement field on the Template Definition - Content page.

Measurements describe the standards against which performance is compared.

Due Date This check box is available if the Enable Items check box is selected.

Select this check box to have items include a due date on the document. For example, managers might enter a due date by which an employee must become proficient in a certain competency or attain a particular goal. During the evaluation process, managers can update the due date.

Reminder Date This check box is available if the Enable Items check box is selected.

Select this check box if items can contain a reminder date on the document.

During the evaluation process, managers can click an update link on the evaluation to edit the reminder date.

Supports This check box is available if the Enable Items check box is selected.

Select this check box to enable the association of items in this section with items in a different section of the same review. This field works in conjunction with the Link field.

Link This field is available if the Supports check box is selected.

This enables you to indicate that the current section supports another section, similar to cascading objectives. This association displays as informational information on the performance document.

Ownership This check box is available if the Enable Items check box is selected.

Select this check box to have items contain an Owner field that indicates who is responsible for the item: the employee or the manager. The flag is informational only; it does not cause any special processing to occur. During the evaluation process, managers can click an update link on the evaluation to edit the Owner field.

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Status This check box is available if the Enable Items check box is selected.

Select this check box to have items in the section of a document include a field that identifies the status of the item.

Possible statuses are *Complete, In Progress,* and *N/A (Not Applicable)*.

Percentage Complete This check box is available if the Enable Items check box is selected.

Select this check box if items on a document can include a field for entry of the percentage complete. Employees and managers can use this field to indicate progress towards certain goals.

Sub-Items

Fields in this group box are available if the Enable Items check box in the Items group box is selected.

Enable Sub-Items Select this check box to indicate that the section can contain subitems. Although subitems are typically sub-competencies, this is not a requirement. For example, you might create free-form subitems for responsibilities.

Prompt Table Select the name of the table that holds the subitems that are included in the section.

Free-Form Allowed This field is available if the Enable Sub-Items check box is selected.

Select this check box to enable users to add free-form (non-coded) subitems to this section.

Content Type This field is available if the Enable Sub-Items check box is selected.

Select the content type from which content items to be selected. The content types available for selection are those that have been set up as a child of the content type selected in the Content Type field of the Items section.

Description Select this check box to have the description for the subitem appear on the evaluation.

During the evaluation process, managers can click an update link on the evaluation to edit the description for the subitem.

Profile Management

This group box is used to identify whether you want to download criteria from an nonperson profile.

Initialize from Profile This field is available only when the Special Processing field is set to *None*.

Select this check box if you want the competencies or responsibilities that are associated with a profile type automatically loaded from the profile into the template or document.

Profile Type This field is available if you select the Initialize from Profile check box.

Select the profile type. These profile types are defined in the Manage Profiles business process with a Profile equal to *Person*.

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(JPN) Creating Review Identifiers

To create review identifiers, use the Review Definition table JPN (REV_DEF_TBL_JPN) component.

This section provides an overview of review identifiers (IDs) and discusses how to create review definitions.

Understanding Review Identifiers

Review IDs associate document types with setIDs. In some organizations, the document types and the performance periods that one business unit uses can differ from those in another business unit. You also define whether the performance results are considered by the Grade Advance Candidate JPN and by any of the salary increase processes of the Plan Salaries business process for Japan.

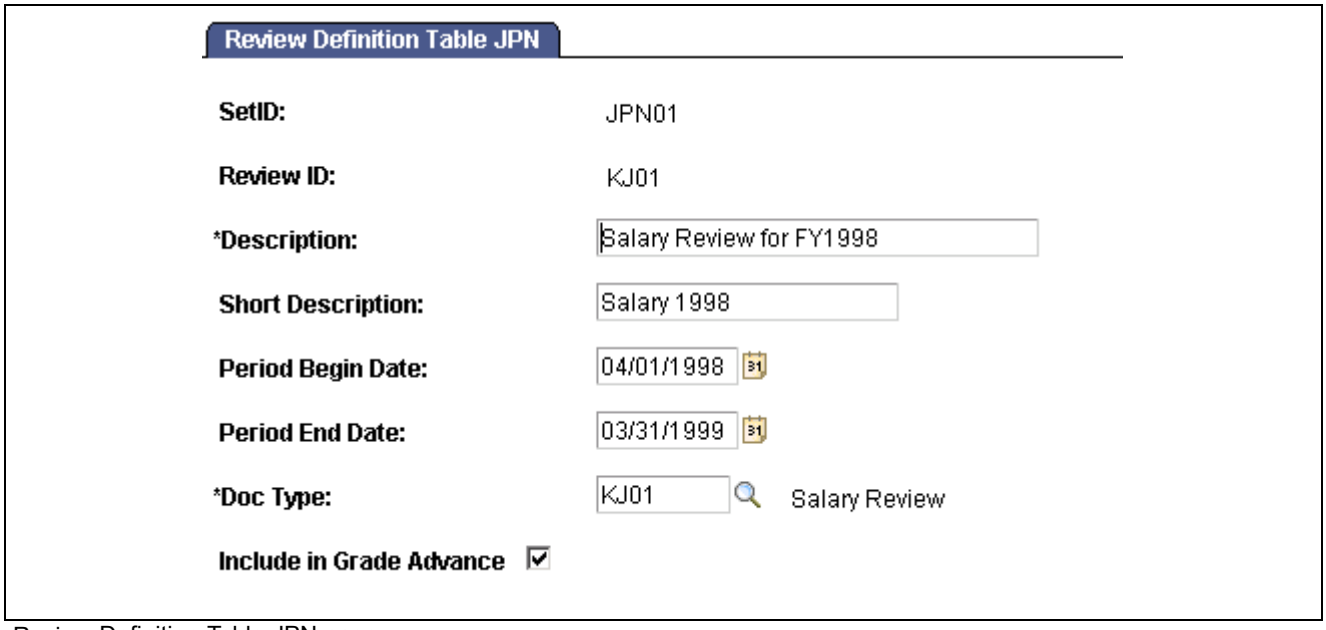
When you create a document template, you can designate that the documents generated from the template are used for official reviews. This is required if you want to use the Manage Base Compensation and Budgeting business process. Pages in this business process locate employee review results by locating the document ID that is linked to the template that was used to create the employee review document.

Page Used to Create Review Identifiers

Page Name	Object Name	Navigation	Usage
Review Definition Table JPN	REV_DEF_TBL_JPN	Set Up HRMS, Product Related, ePerformance, Define Review JPN, Review Definition Table JPN	Define reviews. This includes performance period, document type, and inclusion of the review when determining eligibility for grade advances.

Defining Reviews

Access the Review Definition Table JPN page.



Review Definition Table JPN page

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Period Begin Date and **Period End Date**

Enter the first and last dates of the performance period. This information is informational only.

See Chapter 3, "Setting Up Document Templates," Defining General Template Information, page 40.

Document Type

Select the document type that is valid for the selected setID.

Include in Grade Advance

Select this check box to include this review when you run the JPN Grade Advance Candidate (PER062JP) SQR report.

To run the JPN Grade Advance Candidate report, you define the criteria employees must meet before they are eligible for a grade advancement, including the number of eligibility points they must earn on evaluations. For example, you can have the system take an average or weighted average of the eligibility points for the employee's last three evaluations. When you run the Grade Advance Candidate process, the system looks at the number of eligibility points the employee earned on this and other designated or applicable evaluations. If the eligibility points meet the required threshold, the employee is eligible for a grade advancement.

This field works with the eligibility points that are defined for the rating model that the system references when calculating the performance results (the Overall Summary section of the document).

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Administering Salary Plans, Grades, and Steps," (JPN) Setting Grade Advance Criteria

Creating Document Templates

To create document templates, use the Template Definition (EP_TMPL_DEFN) component.

This section discusses how to:

- Define general template information.
- Define document processes.
- Define document structure.
- Add criteria to sections.
- Load content from profiles.
- Clone templates.

Understanding Document Template Set Up

Document templates are defined using these four pages:

- General.
- Process.
- Structure.

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- Content.

General Page

The General page defines processing options, Establish Criteria and Nominate Participants, and define what roles can be participants in the performance or development process. You can also designate that documents using this template are recognized by the system as the official review.

By selecting Official Review, you are indicating that the overall rating from the manager's document generated with this template is to be used to update salary planning information.

By selecting Establish Criteria, you are activating the step in the business process. Establish Evaluation Criteria appears as the first step to be completed on the Document Details page. The system also creates the Performance Criteria - Draft document, which allows the manager and/or employee to update and possibly add items to the performance criteria document.

By selecting Nominate Participants, you are activating the step in the business process. Nominate Participants, Track Nominations, and Review Participant Evaluations appear as steps on the Document Details page. The system also creates documents for each person that accepts their nomination.

See Chapter 3, "Setting Up Document Templates," Defining General Template Information, page 40.

Process Page

The Process page shows the processes that are required for the document based on the choices you made on the General page. You select the actions that each role or roles can perform for each process, and you specify whether the ratings that are entered by persons having that role are anonymous.

You specify approval rules for the manager's document and overall document processing rules on this page.

See Chapter 3, "Setting Up Document Templates," Defining Document Processes, page 42.

Structure Page

The Structure page defines the sections that are included on documents. You select one or more sections to include in the document. The section definition is copied into the document template, and you can override any of the section settings.

For each section that you include in the document, you can specify how the document roles interact with that section: the actions that they can perform, the content that is visible to them, and the writing tools that they can use to enter ratings and comments.

You can add multiple sections that require ratings. These sections can be any content type defined in the Manage Profile business process: such as goals, objectives, and competencies sections. Sections can also be defined to pull content from nonperson profiles created in the Manage Profile business process.

Each section may have different calculation methods. Because you can add sections that have different calculation methods, the following table illustrates how the calculation method that you select for the overall rating (the Overall Summary section) determines which calculation methods the other sections of the document can use and whether the calculation method permits section weighting:

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Calculation Method for Overall Summary Section	Calculation Methods Allowed for Other Sections	Section Weighting Allowed?	Rating Calculations
Average	Average	Yes	• To determine item ratings, the user enters the item rating. If subitems exist, the system calculates the item rating by taking the average of the subitems. • To determine section ratings, for sections other than Overall Summary, the system looks to see if there are items that are rated. If there are no other rated items, the user enters the section rating. If there are rated items, the system determines if any of the items are weighted. If there are: - Weighted items, the system calculates the rating as a weighted average of all of the item ratings in the section, taking individual item weights into account. Unrated items and items that are not weighted are ignored. - No weighted items, the system calculates the simple average of all rated items. Unrated items are ignored. • To determine overall ratings, the system checks to see if there are other sections that are rated. If there are no other rated sections, the user enters the section rating. If there are rated sections, the determines if the sections are weighted. If there are: - Weighted sections, the system calculates the rating as a weighted average of all of the section ratings in the document, taking individual section weights into account. Unrated items and items that are not weighted are ignored. - No weighted sections, the system calculates the simple average of all rated items. Unrated items are ignored.

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Calculation Method for Overall Summary Section	Calculation Methods Allowed for Other Sections	Section Weighting Allowed?	Rating Calculations
Summation	Average and Summation You must define review points in addition to numeric ratings for these sections. The system converts section ratings to review points to determine the overall rating.	No	• To determine section ratings, for sections other than the Overall Summary section, the system determines the rating and corresponding review points for each item in the section. Only items with review points are considered. It sums the points to determine the total points for the section. • To determine overall ratings, determine the calculation method for the other sections. If the section rating is calculated using the: - Average method, the system converts the section rating to the appropriate number of review points entered for that section, using the rating model associated with the section. - Summation method, the total review points for the section are used as the section points. The points from each section are summed and converted to a document rating using the from and to point range on the rating model that is used for the Overall Summary section.
Review Band	Average and Summation You must define review points in addition to numeric ratings for these sections. The system converts section ratings to review points to determine the overall rating.	No	Only available for Overall Summary sections. To use this method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). The system uses the points in its calculations and: 1. Calculates the overall points by following the same steps as the summation method. 2. Converts the overall points into the appropriate review band according to the rules you define on the Rating Model page.

See Chapter 3, "Setting Up Document Templates," Defining Sections, page 24.

Content Page

The Content page defines the specific job attributes or content items by which an employee is to be measured. Only those sections that were included on the Structure page are available on the Content page.

Criteria on the Content page can come from three sources:

• Content Catalog

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Items and sub-items from the Content Items Detail (JPM_CAT_ITEMS) table.

Note. You can define unique coded categories of performance criteria. To do so, you use Application Designer to create tables that store the items for the new criteria type. The tables that you create are then referenced as prompt tables in document templates and evaluations. Include the following fields in the table that you define: EP_ITEM_ID (key), EP_TITLE, EFFDT (optional key), EFF_STATUS (optional), EP_DESCR254 (optional)

- Free-Form Items

  Free-form items are criteria that are not stored in the database. Free-form items enable you to fine-tune evaluations to an individual employee or a small group of employees. You can add free-form criteria to the templates you use to create performance documents. You can also enable managers, employees, or both to add free-form assessment items after the performance document is generated.

- Download from the nonperson profile.

  Items and sub-items can be added from nonperson profile defined in the Manage Profiles business process. The system uses the specified profile type to identify content and automatically adds it to the Template Definition - Content page.

The criteria defined on the Template Definition - Content page is automatically pulled into the document that is generated using the specified template.

Prerequisites for Creating Document Templates

Before you create templates, complete the following tasks:

- Set up the content catalog.
- (Optional) Define job profiles.
- Set up rating models.
- Define document types.
- Define document roles.
- Define section definitions.
- (JPN) Create Review Identifiers.

Note. You cannot create a template without a document type, and a template must contain at least one section with a manager role selected.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, “Setting Up the Content Catalog”.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, “Managing Profiles”.

See Chapter 3, “Setting Up Document Templates,” Defining Document Types, page 20.

See Chapter 3, “Setting Up Document Templates,” Defining Roles, page 23.

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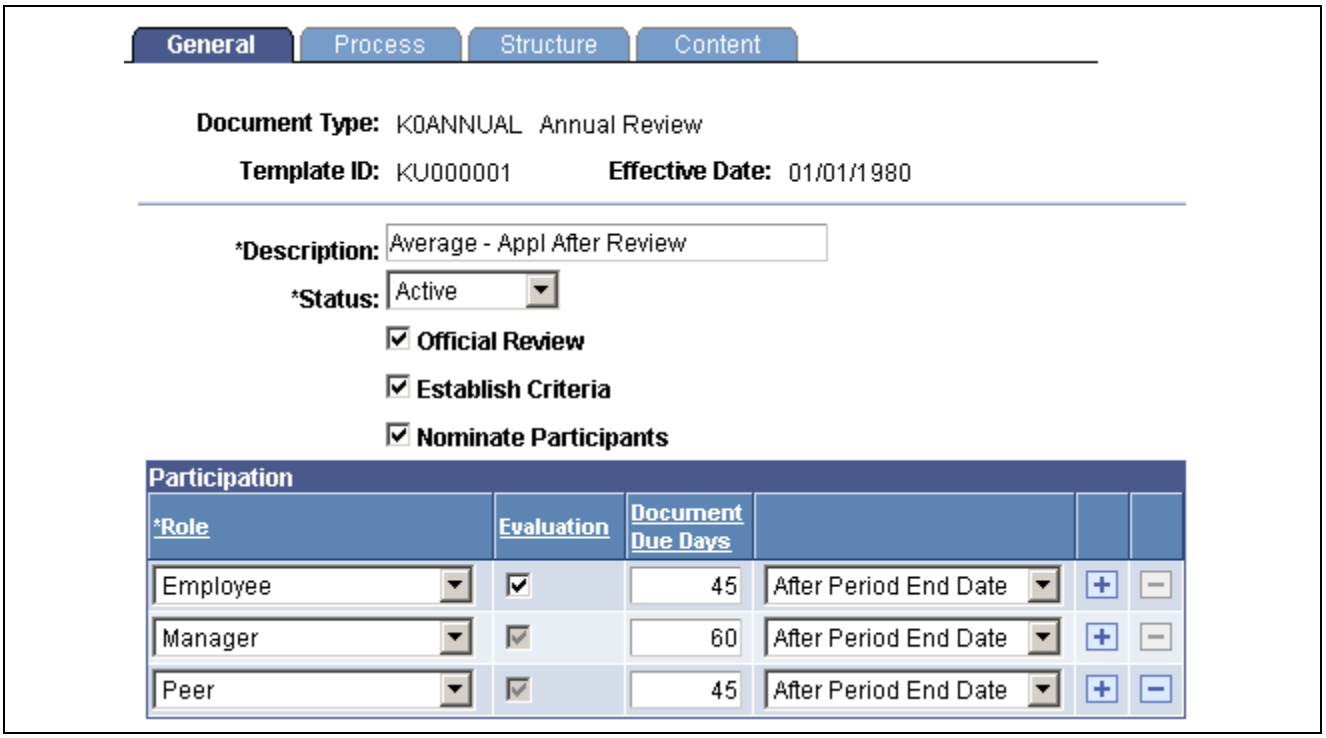
Pages Used to Create Document Templates

Page Name	Object Name	Navigation	Usage
Template Definition - General	EP_TMPL_DEFN1	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, General	Define general template information. The information that you specify on this page controls the sections that are available on other pages of the component.
Template Definition - Process	EP_TMPL_DEFN2	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Process	Define document processes. The information that you specify here determines the functions that employees, managers, and other participants can perform in each step of the review process.
Template Definition - Structure	EP_TMPL_DEFN3	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Structure	Define document structure. Add appropriate sections to the template. Override default section settings and define the way each role interacts with the document section.
Template Definition - Content	EP_TMPL_DEFN4	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Content	Add criteria to sections.
Load Content From Profile	EP_TMPL_DEFN5	Click the Load Content from Profile link on the Template Definition - Content page.	Load content from profiles. Profiles can be used load criteria into sections.
Clone Template Definition	EP_CLONE_TMPL	Set Up HRMS, Product Related, ePerformance, Document Structure, Clone Template Definition	Clone templates.

Defining General Template Information

Access the Template Definition - General page.

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Template Definition - General page

Description Enter a description of the document template.

This description appears as a selection field when users create evaluations from the template; therefore each template within a document type should have a unique description.

Official Review Select this check box to designate that the overall rating from the manager's documents generated with this template is to be used to update salary planning information.

If an employee has more than one official document, these processes use the results of the document with the latest period end date. The default value from the Document Type page appears here, but you can change it.

Establish Criteria Select this check box to enable the Establish Criteria step.

When you select this check box, the Establish Criteria group box appears on the Process page and as a step on the Document Detail page. The default value from the Document Type page appears here, but you can change it.

Nominate Participants Select this check box to enable the Nominate Participants step.

When you select this check box, the Nominate Participants and Review Participant Feedback group boxes appear on the Process page. The default value from the Document Type page appears here, but you can change it.

Participation

Role Select one or more roles that can participate in evaluations that are generated using this document template.

The Manager and Employee roles always appear in this list. You can add additional roles that you defined on the Roles page.

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Evaluation Select this check box to define whether an evaluation is created for the role.

The check box for the manager role is always selected and cannot be altered.

Document Due Days Enter the number of days that the document is due before or after the period end date.

Documents always pertain to a specific period of time, defined by the period begin and period end dates. These dates are established when the document is created.

The document due date appears on the Employee Performance pagelet that managers can use to monitor pending performance documents (if you have PeopleSoft Portal Pack).

The due date is also used to generate the Late Reviews (EP_LATE_APPR) report and to run the Create Summary Data (EP_RPT_SNAP) process. Managers can use the Change Due Dates page to change the due date of the employee's document. HR administrators can use the same page to modify the due date of the manager's document.

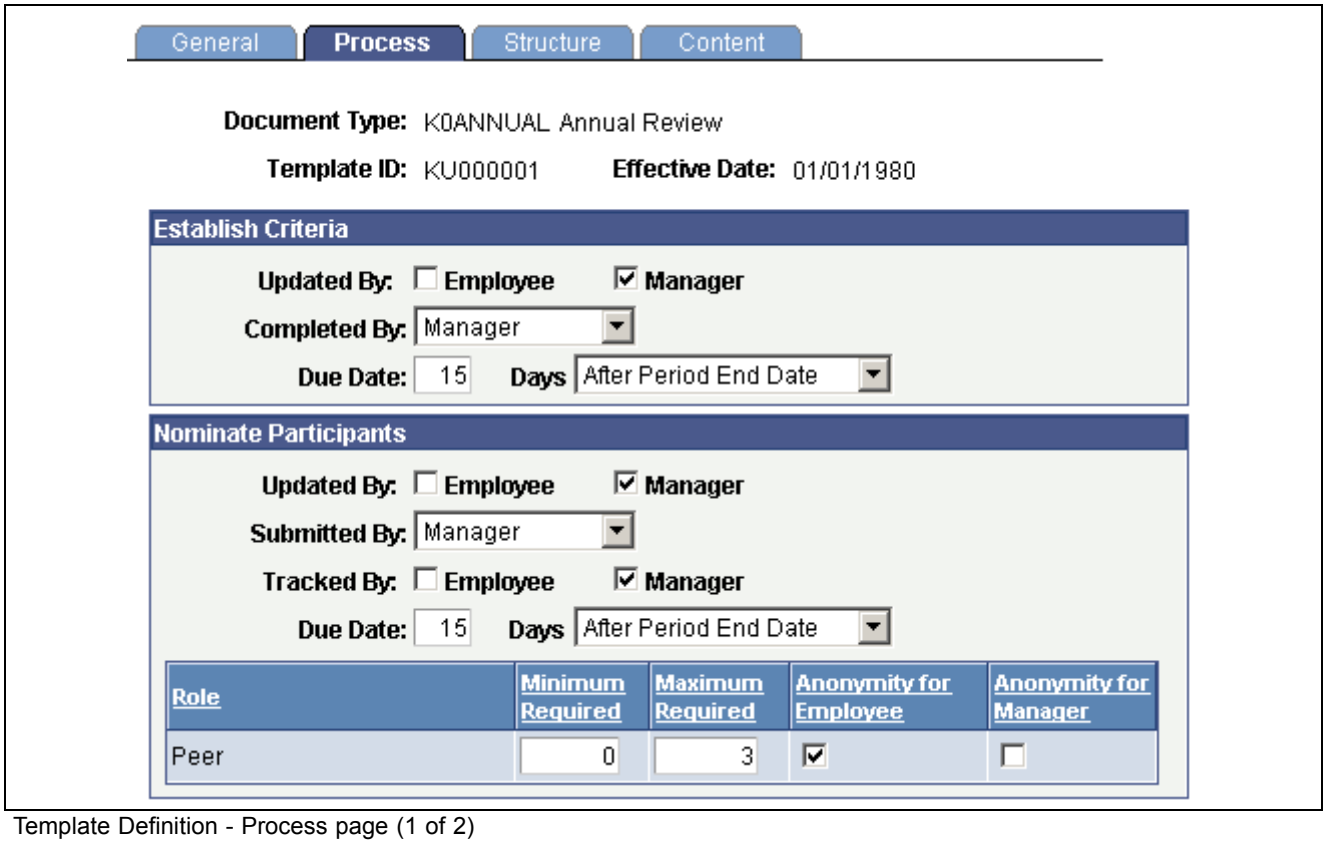
See Also

Chapter 4, "Setting Up Text for Advisor Tools," page 59

Chapter 5, "Generating Documents," Viewing Document Progress Details, page 90

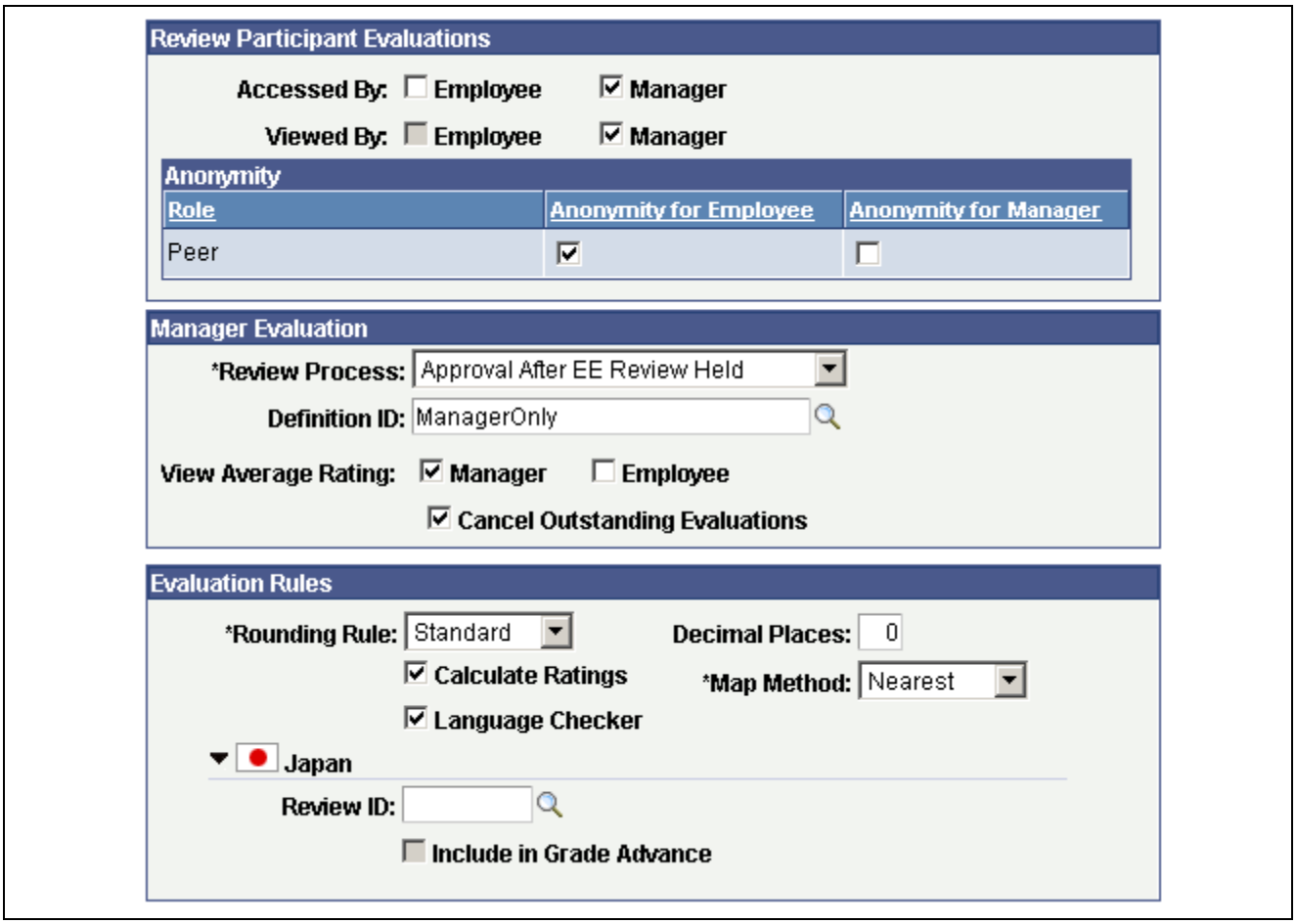
Defining Document Processes

Access the Template Definition - Process page.



Template Definition - Process page (1 of 2)

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Template Definition - Process page (2 of 2)

Establish Criteria

This section is used to set up the rules for the Establish Criteria process. It appears only if the Establish Criteria check box is selected on the General page. The rules defined here determines the information that is displayed on the Document Details page.

Updated By Select either or both the Manager and Employee check box to indicate the roles that can update the criteria on documents.

Completed By Select one role that can complete or finalize the establish criteria document.

Due Date Enter the number of days before or after the period end date when the establish criteria document is due.

Days Select from After Period End Date or Before Period End Date.

Nominate Participants

Use this section to set up the rules for the Nominate Participants process. It appears only if the Nominate Participants check box is selected on the General page. The rules defined here determines the information that is displayed on the Document Details page.

Updated By Select either the Manager check box, the Employee check box, or both to indicate the roles that can nominate participants for a review.

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Submitted By Select the role that can submit the nominations to nominees. You can only select a role that can update participants.

Tracked By Select either the Manager check box, the Employee check box, or both to indicate the roles that can track nominations that are submitted.

If this check box is selected, then the Track Nomination step appears in the Document Details page. This enables the user to view the submitted nominations and track whether or not they have been accepted. If the user has access to this step, then they can also cancel the nominations that have not been accepted.

Due Date Enter the number of days before or after the period end date when the nominations must be completed. This date appears on the Document Details page.

Days Select from After Period End Date or Before Period End Date.

Role

The Role grid contains one entry for each participant role other than the manager and employee who is defined on the General page.

Minimum Req(minimum requirement) Enter the minimum number of participants of this type that are required to participate in a review. For example, if the review requires at least three peers, you must nominate at least three peers and they must accept the nominations before the review can proceed.

Maximum Allowed Enter the maximum number of participants of this type that can participate in a review. For example, if the review maximum for peers is three, you cannot submit nominations to four peers.

Anonymity for Employee Select this check box to indicate that the employee is not able to see the names of the participants for this role when tracking nominees.

Anonymity for Manager Select this check box to indicate that the manager is not able to see the names of the participants for this role when tracking nominees.

Review Participant Evaluations

This page region is used to set up the rules for Review Participant Evaluations step. It appears only if the Nominate Participants check box is selected on the General page.

Accessed By Select either the Manager check box, the Employee check box, or both to indicate the roles that can access participant feedback from the Document Details page.

Viewed By Select the check box next to role that can view completed evaluations from participants. You can only select a role that can access participant feedback.

Role

The Role grid contains one entry for each participant role that is defined on the General page.

Anonymity for Employee Select this check box to indicate that the employee is not able to see the names of the participants for this role when tracking nominees.

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Anonymity for Manager Select this check box to indicate that the manager is not able to see the names of the participants for this role when tracking nominees.

Manager Evaluation

Review Process (Optional) Select the sequence by which the review is completed.

This field identifies the process for reviewing a document with the employee, and when this review takes place relative to a formal approval of the document. It also controls when the Submit, Complete, Available for Review, and Review Held actions are available to the manager.

Options are:

- *Approval After Review Held:* Select if the document approval occurs after the manager reviews the completed document with the employee.
- *Approval Before Review Held:* Select if the approval must occur before the manager reviews the completed document with the employee.
- *Approval No Review Held:* Select if an approval process is required, but the manager does not need to review the document with the employee.
- *No Approval No Review Held:* Select if neither an approval process nor a review of the completed document is required.
- *No Approval Review Held:* Select if the manager reviews the completed document with the employee, but no approval process applies.

See Chapter 10, "Managing Reviews and Approvals," page 151.

Definition ID Select the approval definition that determines the chain of approvals a document must go through when the manager clicks the Submit button on the performance document.

The default value selected on the Document Type page appears here, but you can change it. This field applies only if the Review Process field is set to *Approval After Review Held, Approval Before Review Held,* or *Approval No Review Held.*

Valid options are:

- *ManagerOnly*

  This is a one-step approval process that routes the transaction to an approving manager.

- *ManagerToAdmin*

  This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance HR Administrator.

- *AdminOnly*

  This is a one-step approval process that routes the transaction to the ePerformance HR Administrator.

View Average Rating Select this check box if you want to view a graphical representation of the ratings on the document.

Cancel Outstanding Evaluations Select this check box to automatically cancel evaluations that are not completed and nominations that are not accepted when the manager evaluation

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moves past the *In Progress* status. This option prevents late evaluations from coming in and altering the average ratings.

Evaluation Rules

The fields in this page region define rules for calculating ratings that apply to the document as a whole.

Rounding Rule Specify how the system should round calculated ratings whenever using the Average calculation method. Values are *Down, Standard,* and *Up.* With standard rounding, the system rounds up on 5 and rounds down on 4. For example, 2.5 rounds to 3, while 2.4 rounds to 2. This works in combination with the number of decimal places the system rounds to. For one decimal place, 2.45 rounds to 2.5, while 2.44 rounds to 2.4.

Decimal Places If you select a rounding rule, enter the number of decimal places for rounding. No more than two decimal places are allowed.

Calculate Ratings Select this check box to indicate that the system automatically performs all roll-up calculations to calculate an overall summary rating. This feature is the default, and causes a calculate button to appear on the evaluations. To have evaluators manually enter all ratings, clear this check box.

Map Method If the Calculate Rating check box is selected, select how calculated numeric ratings are mapped to qualitative ratings when there is no exact match after the rounding rule is applied. For example, the calculated rating 2.7 falls between numeric ratings defined on the Rating Model Table page as 1, 2, 3, and 4; the mapping method defines the numeric rating to map to the value 2.7.

Options are *Highest, Lowest,* and *Nearest.*

For example, assume the rating model has the following entries:

A = Superior (numeric rating = 1)

B = Good (numeric rating = 2)

C = Average (numeric rating = 3)

D = Needs improvement (numeric rating = 4)

If the system calculates a rating of 2.7 (between Good and Average, but closer to Average), the mapping method tells the system which entry to pick:

- *Highest* yields the next numerically highest rating—in this case 3, or Average.
- *Lowest* yields the next numerically lowest rating—in this case 2, or Good.
- *Nearest* yields the numerically closest rating—in this case 3, or Average.

  If the calculated rating falls exactly halfway between two ratings in the rating model, the system assigns the numerically higher of the two ratings.

Language Checker Select this check box to enable the use of the Language Checker tool when entering comments. Users can click a button on the document to have the system check for inappropriate language in the comments and results text boxes on the evaluation.

(JPN) Review ID To enable the (JPN) Salary Planning process by review ID, select the ID. You define IDs on the Review Definition Table JPN page. You can only select documents defined for the selected document type.

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(JPN) Include in Grade Advance (applicable for grade advance)	Select this check box if the selected review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is selected automatically if theInclude in Grade Advance check box is selected on the JPN Review Definition Table page.

See Also

Chapter 6, “Modifying Evaluation Criteria,” page 93

Chapter 7, “Nominating and Tracking Multi-Source Participants,” page 105

Chapter 8, “Entering Comments and Ratings on Evaluations,” page 117

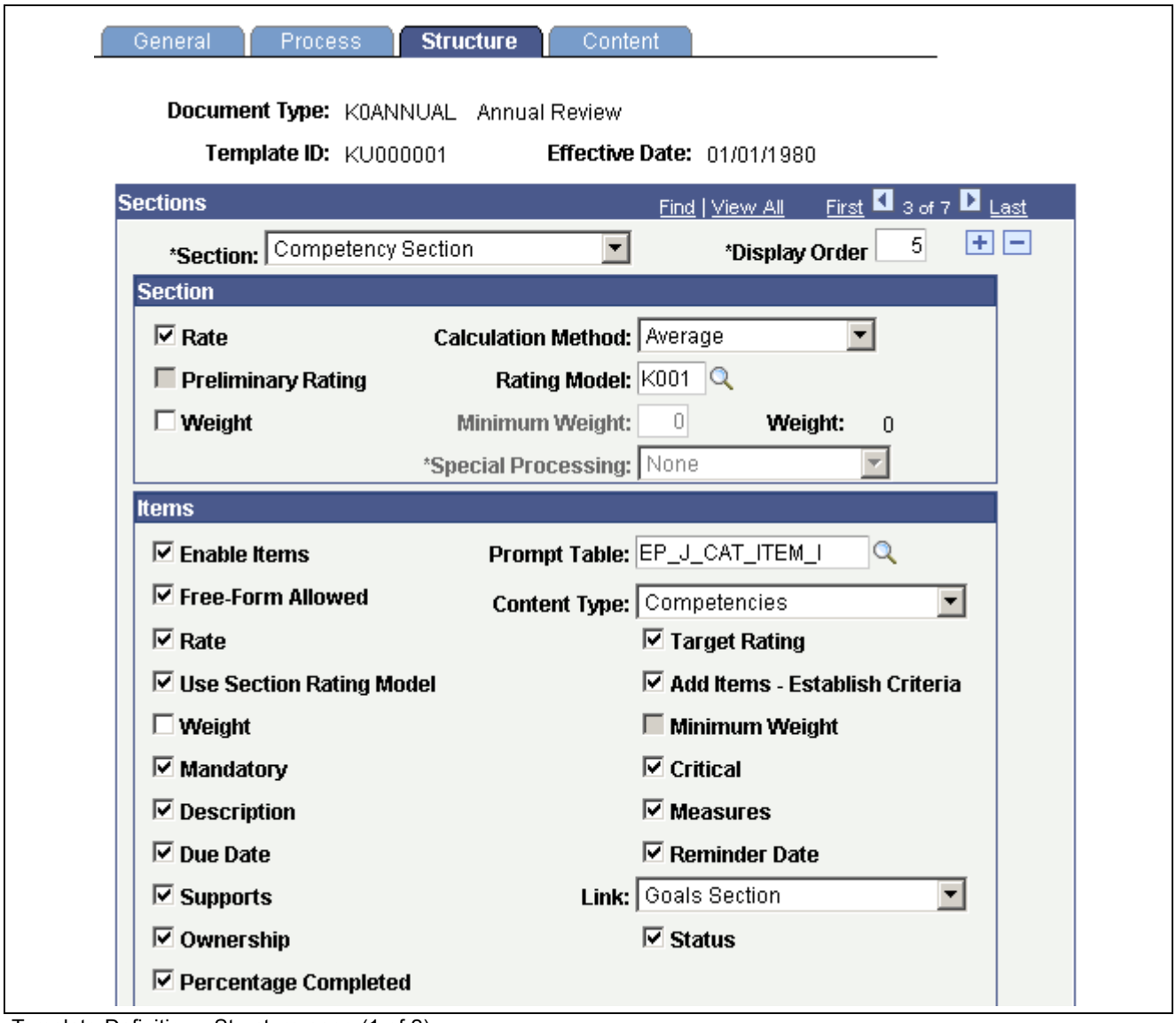
Chapter 9, “Consolidating Feedback from Evaluators,” page 137

Chapter 10, “Managing Reviews and Approvals,” page 151

Adding Sections to Documents

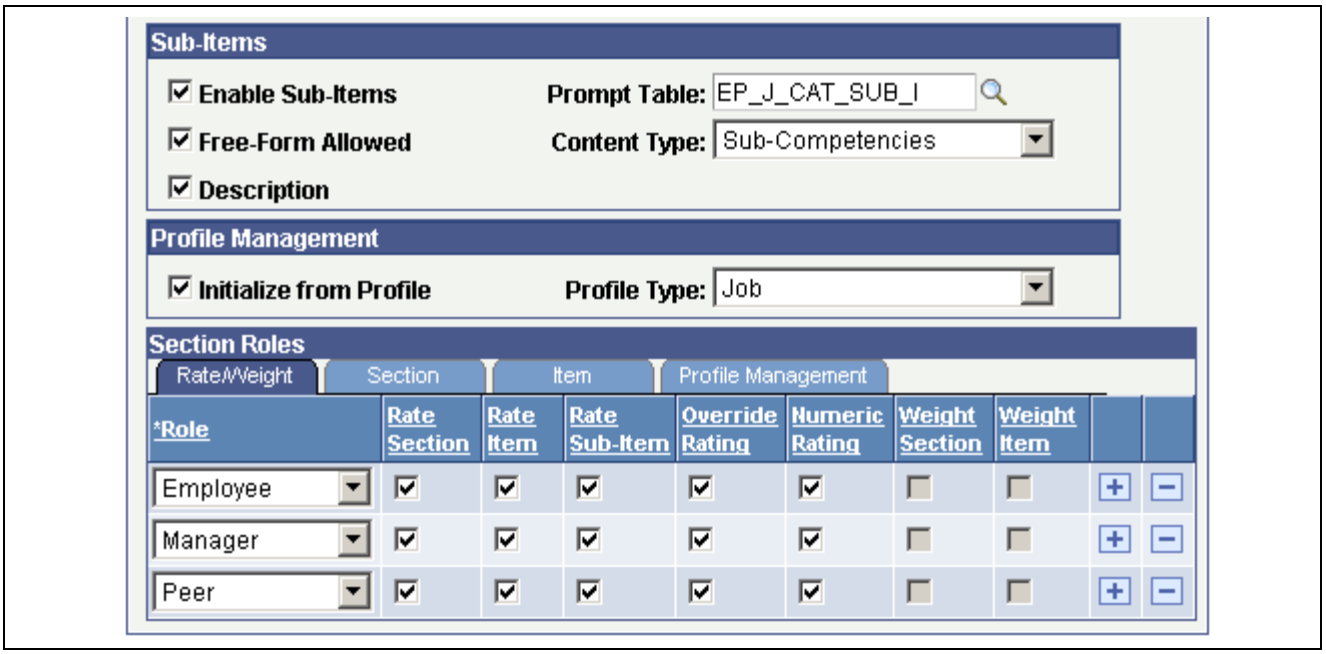
Access the Template Definition - Structure page.

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Template Definition - Structure page (1 of 2)

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Template Definition - Structure page (2 of 2)

Most of the fields on this page are similar to the Section Definition page.

See Chapter 3, "Setting Up Document Templates," Defining Sections, page 24.

Section Select a section to include in the documents that are generated from this template.

The sections available for selection are those that were previously defined using the Section Definition page. When you select a section, the information defined for that section becomes the default information for this section on the Structure page. You can override any default value.

Note. You can include only one Overall Summary section on each template.

Display Order Enter a unique sequence number to specify the relative order in which this section appears in the document. The default value for the first section is 10. The system increments the value for subsequent sections by ten. If, for example, you override a sequence number to 25, the system assigns 35 as the next sequence number.

Note. If you enter sequence numbers out of order, the system automatically reorders them when you exit the Template Definition component and reopen it.

Sections, Section, Items, Sub-Items, and Manage Profiles

The fields that appear in these group boxes default to the values you defined for this section on the Section Definition page. You can override these values.

See Chapter 3, "Setting Up Document Templates," Defining Sections, page 24.

Rate/Weight Tab

Role Select the role for which you are defining rules.

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Rate Section This field is available if Rate is selected for the section.

Select this check box to enable the author to assign a section rating.

Rate Item This field is available if Rate is selected in the Items page region for the section.

Select this check box to enable the author to rate items in this section.

Rate Sub-Item This field is available if Rate is selected in the Items page region for the section.

Select this check box to enable the author to rate subitems in this section.

Override Rating This option is available when the Calculate Ratings check box is selected on the Template Definition page.

Select this check box to have an Override Rating button appear next to the Calculate button on the evaluation. The author can click this button to modify the calculated rating.

Warning! Do not use this feature with the Summation calculation method.

Numeric Rating This option is available if Rate is selected for the section.

Select this check box to have the evaluation display both the rating and the numeric equivalent or points of the rating that you define on the Rating Model Definition page.

Weight Section This option is available if Weight Section is selected for the section.

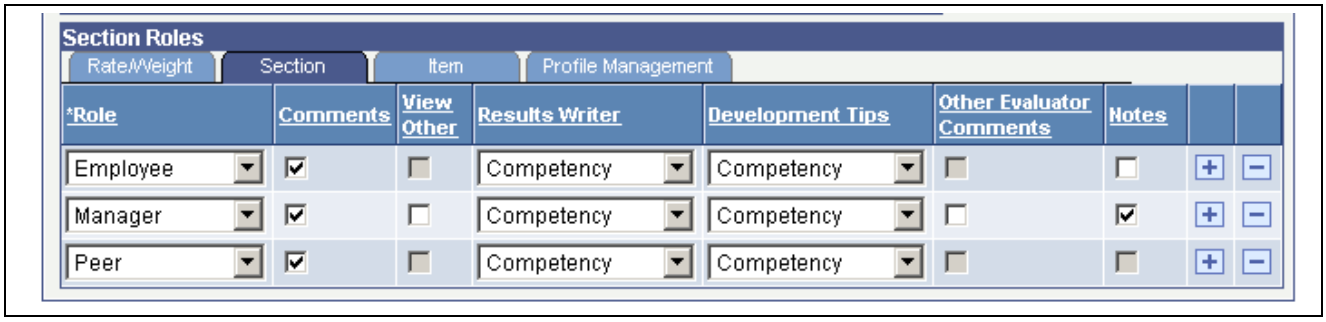
Select this check box to enable the author to assign a section weighting.

Weight Item This option is available if Weight Section is selected for the section.

Select this check box to enable the author to weight items in this section.

Section Tab

Select the Section tab.



Template Definition - Structure page - Section tab

Comments Select this check box to have the section contain an area for users to add a free-form description of the employee's performance on the section. If you do not select this check box for a role, the other selections for the role are not available.

View Other Select this check box to enable the role to view the sections from other completed evaluations that are part of this document. This option is available to managers only.

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Results Writer

This field is available only if the Comments check box is selected for the role

Select an option to have text suggestions from the Results Writer tool appear on the Suggested Results page when the user clicks the Writing Tools link on an evaluation.

Results Writer suggestions are predefined statements that describe the employee's proficiency level for the associated item. The Results Writer tool is designed primarily for competency and sub-competency sections of an evaluation; however, you can enable this feature for other sections of an evaluation as well.

The available options are:

- *Competency*

  Select to list the Results Writer statements that are associated with competencies. You associate statements with competencies on the Competency Proficiencies - Results Writer page.

- *Sub-competency*

  Select to list the Results Writer statements that are associated with sub-competencies. You associate statements with sub-competencies on the Sub-Competency Proficiencies - Results Writer page.

- *Not Used*

Select if you do not want Results Writer suggestions to appear on the Suggested Results page.

Development Tips

This field is available only if the Comments check box is selected for the role

Select an option to have text suggestions from the Development Tips tool appear on the Suggested Results page when the user clicks the Writing Tools link on an evaluation.

Development tips are predefined statements that suggest how employees can improve proficiency at the associated item and are designed primarily for competency and sub-competency sections of a evaluation. However, you can enable this feature for other sections of an evaluation as well.

The available options are:

- *Competency*

  Select to list development tips that are associated with competencies. You associate development tips with competencies on the Competency Proficiencies - Development Tips page.

- *Sub-competency*

  Select to list development tips that are associated with sub-competencies. You associate development tips with competencies on the Sub-Competency - Development Tips page.

- *Not Used*

  Select if you do not want development tips to appear on the Suggested Results page.

Other Evaluator Comments

This field is available only if the Comments check box is selected and the role is manager.

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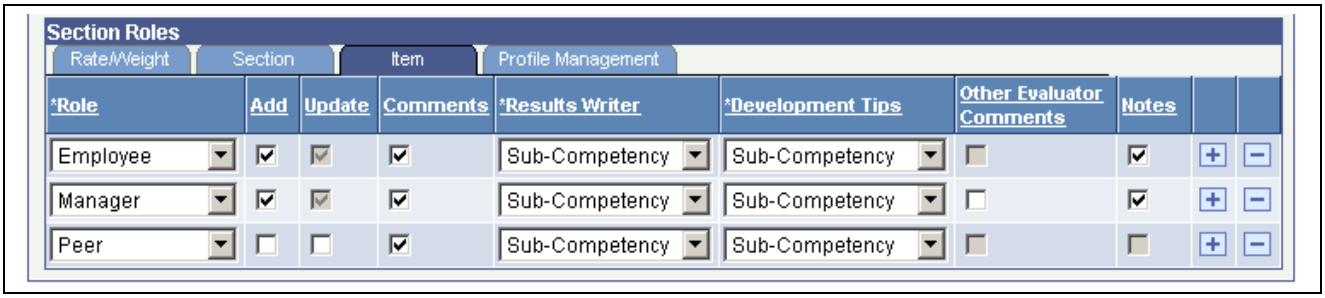
Select this check box to have comments that were entered by other evaluators appear on the Suggested Results page for the role. Only comments from completed evaluations that were entered for the same summary section appear on the list.

Notes This field is available only if the Comments check box is selected for the role.

Select this check box to have performance notes that the employee or manager entered during the Establish Criteria step appear on the Suggested Results page. Only notes that were entered for the same section or item by the same person appear on the list.

Item Tab

Select the Item tab.



Template Definition - Structure page - Item tab

Add Select this check box to enable the role to add items to this section.

Update Select this check box to enable the role to update items in this section on the documents that are generated for the role.

Comments Select this check box to have items in the section contain an area for authors to add a free-form description of the employee's performance on the item. If this check box is selected, the Results Writer, Development Tips, Other Evaluator Comments, and Notes check boxes are enabled for the role. The use of these fields is analogous to the same fields under the Section tab.

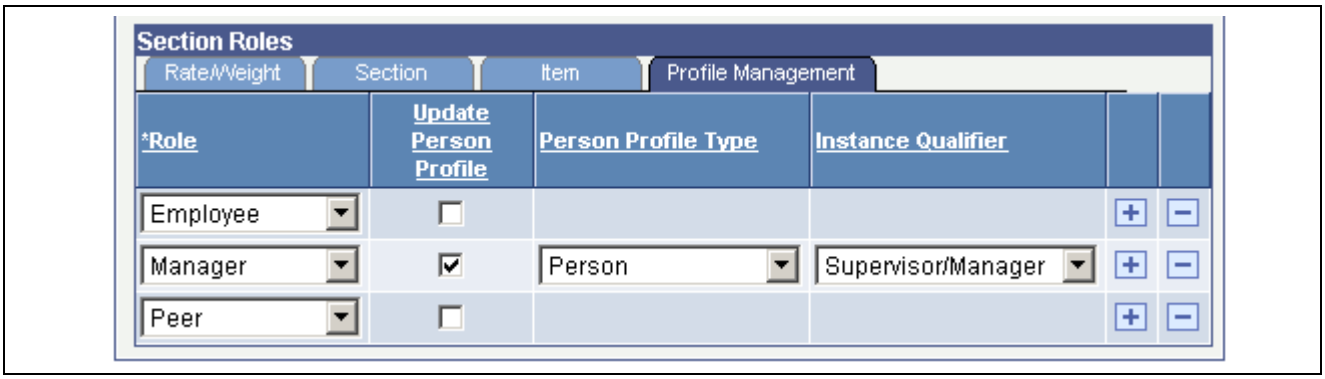
Results Writer Same as Section tab.

Development Tips Same as Section tab.

Profile Management Tab

Select the Profile Management tab.

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Template Definition - Structure page - Profile Management tab

Update Person Profile This field is available if the section items have the Rate check box selected and if a content type is enter in the Content Type field in the Items group box on the Template Definition - Structure page.

Select this check box if you want the system to update the employee's profile in the Manage Profiles business process with this document.

Person Profile Type This field is available if the Update Person Profile check box is selected.

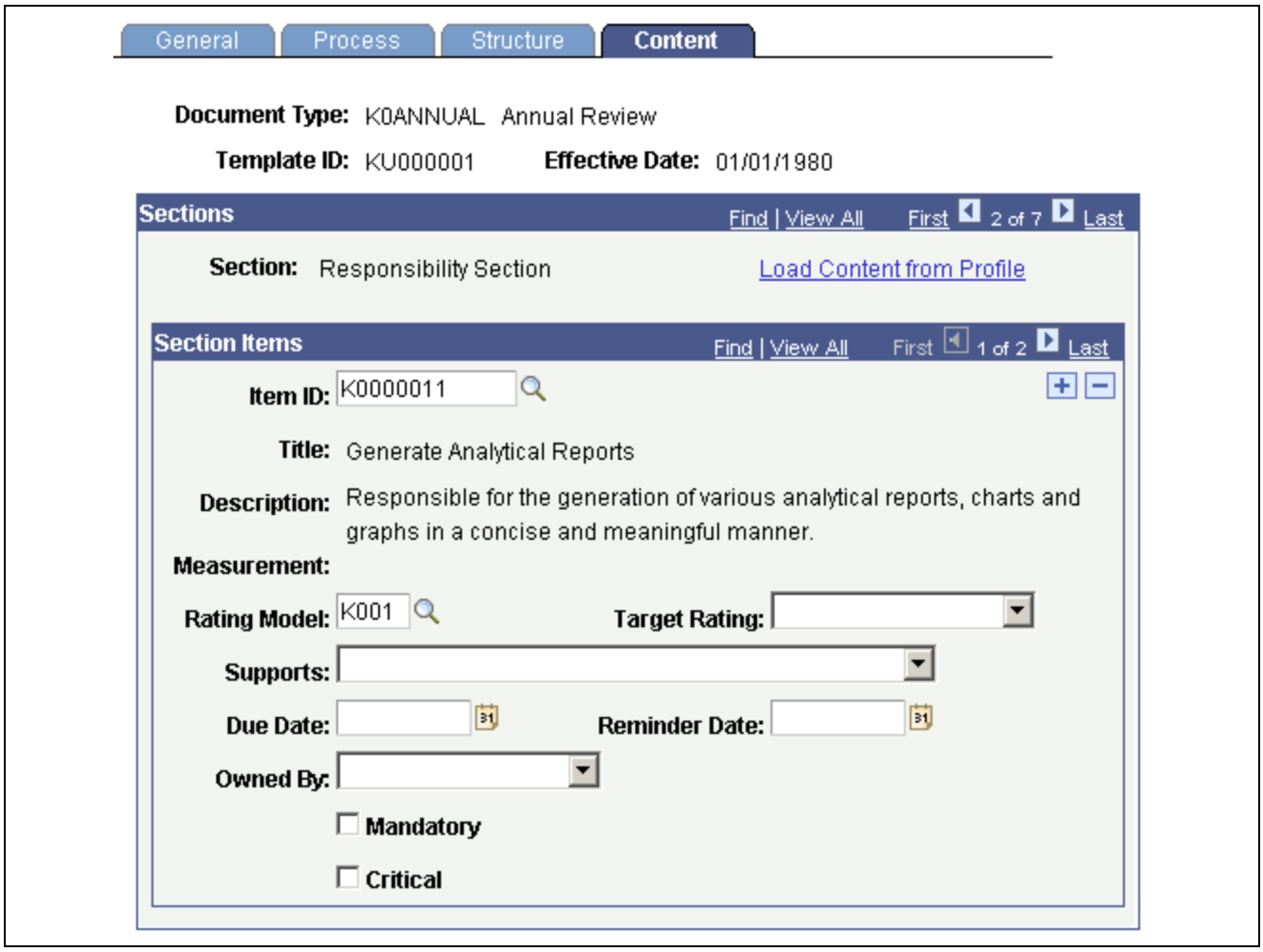
Select the profile type. These profile types are defined in the Manage Profiles business process with an Identity Option equal to *Person*.

Instance Qualifier Select an instance qualifier that distinguishes this evaluation from other evaluations in the Manage Profiles business process. ePerformance delivers an instance qualifier, Evaluation, that allows the evaluations coming from ePerformance to be identified as Supervisor/Manager, Self Evaluation, or Other.

Adding Criteria to Sections

Access the Template Definition - Content page.

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Template Definition - Content page

Only the sections entered on the Template Definition - Structure page are available on this page. To add more sections, go to the Template Definition - Structure page.

Load Content from Profile Click this link to display the Load Content from Profile page.

Section Items

The fields in this group box are available only if you select the Enable Items check box on the Template Definition - Structure page. Items automatically appear here when you click the Load Content from Profile link. You can view, add, edit, or delete items to track or rate on the document.

Add free-form items if the Free-Form Allowed check box for this section is selected on the Template Definition - Structure page.

Item ID Select an item from the Content Item Detail (JPM_CAT_ITEM) table.

You can only select content items that are linked to the content type entered in the Content Type field on the Template Definition - Structure page.

This field does not apply to free-form items.

Title Enter the title for a free-form item.

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	You can only enter titles for free-form items. Otherwise, the system displays the text that was entered in the Description field on the Content Items - Items Details page.
Description	This field is available only if you selected the Description check box in the Items group box on the Template Definition - Structure page. Enter the description for a free-form item that you are adding. You can only enter descriptions for free-form items. Otherwise, the system displays the text that was entered in the ePerformance Description field on the Content Items - Items Details page.
Measurement	This field displays if the Measures check box is selected on the Template Definition - Structure page. Enter text that clearly and objectively describes the standard by which this item is measured. This text appears on the performance or development document.
Rating Model	This field appears if the Rate check box is selected on the Template Definition - Structure page. Select the rating model for this item. If you selected the Use Section Rating Model, check box in the Items group box on the Template Definition - Structure page, the system display the rating model you entered in Rating Model field in the Section group box on the Template Definition - Structure page.
Target Rating	This field appears if the Target Rating check box is selected on the Template Definition - Structure page. Select the rating at which the employee should be performing for this section item.
Weight	This field appears if the Weight check box is selected on the Template Definition - Structure page. Enter the percentage amount that this section contributes to the overall weight.
Minimum Weight	This field appears if the Minimum Weight check box is selected on the Template Definition - Structure page. Enter the minimum percentage amount that you want this item to contribute to overall weight.
Supports	This field appears if you selected the Support check box and selected a section in the Link field on the Template Definition - Structure page. Select one of the section items associated with the linked section.
Due Date	This field appears if the Due Date check box is selected on the Template Definition - Structure page. This can be to track the progress of an item and whether it was completed on time.
Reminder Date	This field appears if the Reminder Date check box is selected on the Template Definition - Structure page. This date is used only for informational purposes.

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Owned By

This field appears if the Ownership check box is selected on the Template Definition - Structure page.

Select whether the *Employee* or *Manager* is responsible for the completion of this item.

Mandatory

This field appears if the Mandatory check box is selected on the Template Definition - Structure page.

Select this check box to prevent anyone from editing or deleting this item on the document.

Note. This selection overrides the value in the Mandatory field on the job profile. If you specify that an item on the job profile is mandatory and do not select this check box, the item is not mandatory on the document.

Critical

This field appears if the Critical check box is selected on the Template Definition - Structure page.

Select this check box to have the word Critical appear in the detail area of the item on the document.

Sub-Items

Use this group box to add subitems for each item. The group box appears only if you select subitems on the Structure page.

Sub-Item ID

To include a subitem from the prompt table (typically, a sub-competency) in this section of the document, select the subitem ID. You can select from the items that belong to the subitems table that is identified in the Prompt Table field on the Template Definition - Structure page.

This field does not apply to free-form items.

Title

Displays the title of the selected subitem. If you're adding a free-form subitem, enter the title here.

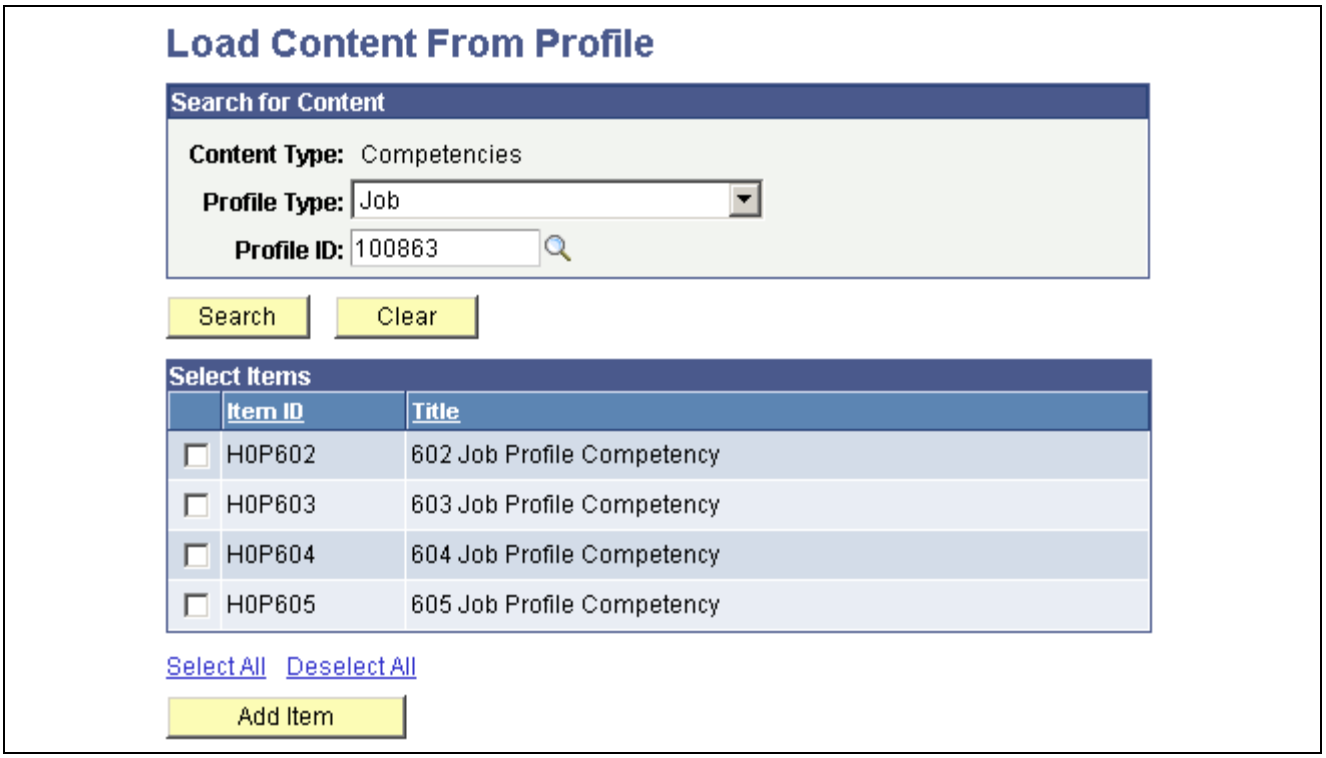
Description

Displays the description of the subitem. This field appears if you selected Descriptions in the subitems group box on the Structure page.

Loading Content from Profiles

Access the Load Content From Profile page.

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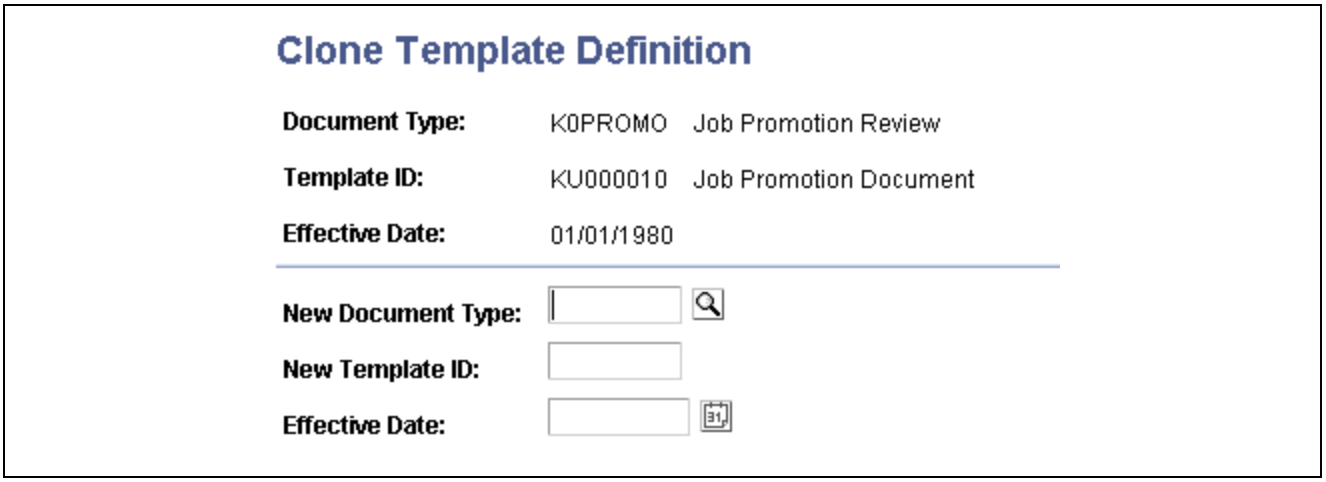
Load Content From Profile page

Enter the search for content criteria and then select the items you want added to the Section Items group box on the Template Definition - Content page.

Note. Remember that these items become part of the template. It is best to only have common items that fit all employees.

Cloning Templates

Access the Clone Template Definition page.



Clone Template Definition page

To clone a template:

1. On the Search page, select the document type-template combination that you want to clone.

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2. Select a document type.
3. Enter up to eight alphanumeric characters for the new template ID.
4. Select the effective date for the new template.
5. Click the Save button.

   The Template Definition component opens so that you can update the new template.

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CHAPTER 4

Setting Up Text for Advisor Tools

This chapter provides an overview of advisor tools and discusses how to:

- Define content for the Language Checker tool.
- Define content for the Results Writer and Development Tips tools.
- Link development tips to competencies and sub-competencies.
- Import third-party content.
- Build Verity search indexes.

Understanding Advisor Tools

This section lists common elements and discusses:

- Template setup for results writer and development tips use.
- Search collections for results writer and development tips.

Common Elements Used in this Chapter

Language Checker

Evaluators use the Language Checker tool during the evaluation process to identify words or phrases in a performance document that an organization deems objectionable and to view suggested alternatives. The system checks all Comments text boxes for inappropriate content.

You can manually define content for the Language Checker tool, or you can import data from a third-party vendor.

Note. To enable the Language Checker tool, select the Language Checker check box on the Template Definition - General page.

Results Writer

Evaluators use the Results Writer tool to select predefined statements that describe an employee's level of proficiency in a particular competency or sub-competency. Managers can use this tool by clicking a Writing Tools link that appears in the comments box at the item or section level on the evaluation. For example:

Bob's initiative is very impressive. He does not wait to be told what to do. His energy sets an example for the rest of the team.

When you define competencies and sub-competencies, you can use the Results Writer page of the Competency and Sub-Competency components to enter the

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statements from which managers can select when they use writing tools. You can also import this content from third-party suppliers.

Development Tips Development tips suggest ways for employees to improve, develop, or use a competency or sub-competency based on their current rating level. If you use ePerformance and have implemented this feature, the system displays the appropriate set of tips when you click the Writing Tool link on an evaluation.

Template Setup for Results Writer and Development Tips Use

You can define text for these tools at either the competency or sub-competency level. You then set up the document template to access this text. The template rules control the level of text, by competency or sub-competency, that the system searches to find text suggestions for a section or item. You must set the template rules to correspond to the level at which the text is defined. For example, if you define text or bring in text from a third party at the sub-competency level, then you must set the Results Writer and Development Tips template switches to *Sub-Competency* for the tool to locate text.

The combination of the level at which text is defined, the level at which the tool is enabled on the document template, and the ratings that the user enters, determine the suggested results that appear when the user clicks the Writing Tools link on an evaluation.

This table shows the results for the possible combinations of link level, text level, and ratings entered.

Writing Tools Link Appears at Level	Text Defined at Level	Ratings Entry Required	What Appears in Suggested Results
Item	Competency	The item is rated. If using subitems (behaviors), the item rating was calculated.	Competency text for the item and rating.
Item	Sub-competency	At least one subitem for the item is rated.	Sub-competency text for the item, subitem, and rating.
Section	Competency	At least one item in the section is rated. If the item has subitems, the item rating was calculated.	Competency text for the item and rating. The Results Writer tool returns one or more entries for every rated item in the section. The Development Tips tool returns one or more entries for every rated item in the section.
Section	Sub-competency	Subitem. At least one subitem for an item in the section is rated.	Sub-competency text for the item, subitem, and rating. The Results Writer tool returns one or more entries for every rated subitem in the section. The Development Tips tool returns one or more entries for every rated subitem in the section.

See Also

Chapter 3, “Setting Up Document Templates,” Creating Document Templates, page 35

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Search Collections for Results Writer and Development Tips

Any time you make an addition or deletion to Results Writer or Development Tips items, you need to rebuild the search index to reflect the new state of the collection of items. The Writing Tools use this search index to locate text when either the Results Writer or Development Tips tool is enabled for a section or item.

See Also

Chapter 9, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 142

Defining Content for the Language Checker Tool

To define content for the Language Checker tool, use the Language Checker Suggestions (EP_CHK_SUG_TBL) and Language Checker Words (EP_CHK_WRD_TBL) components.

This section discusses how to:

- Define objectionable words and phrases.
- Define suggested wording.

See Also

Chapter 9, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 142

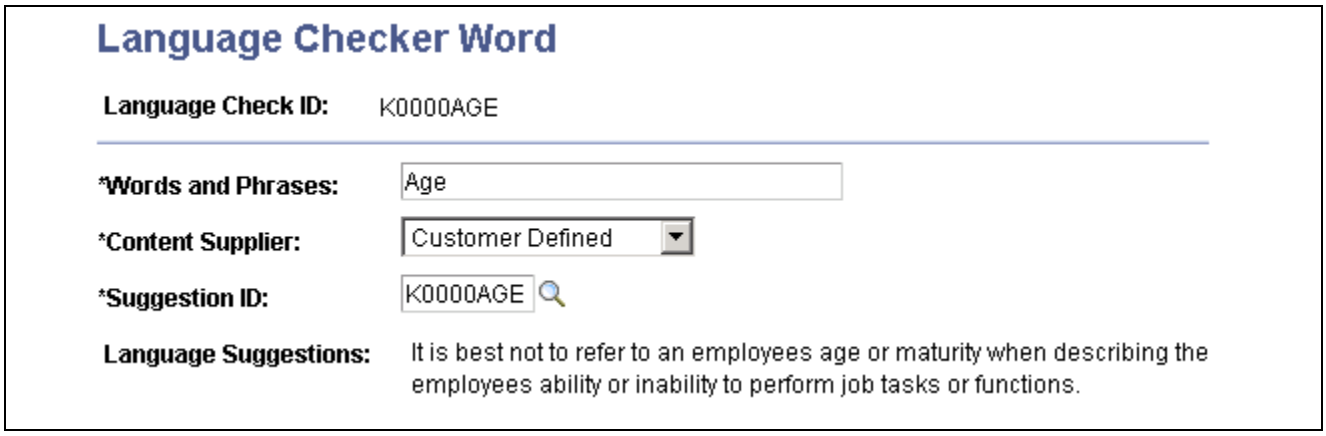
Pages Used to Define Language Checker Content

Page Name	Object Name	Navigation	Usage
Language Checker Word	EP_CHK_WRD_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Language Checker Words, Language Checker Word	Define the objectionable words and phrases, and link them to suggested wordings.
Language Checker Suggestion	EP_CHK_SUG_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Language Checker Suggestions, Language Checker Suggestion	Define suggested wordings.

Defining Objectionable Words and Phrases

Access the Language Checker Word page.

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Language Checker Word page

Words and Phrases Enter the word or phrase that is deemed inappropriate in a performance document. Case is not important—the Language Checker tool is not case-sensitive. When invoked, the Language Checker tool follows these search rules:

- If you enter a single word here, the Language Checker tool searches for whole words that match.
- If you enter multiple words, the Language Checker tool looks for phrases with an exact match.

Content Supplier Select the source of the content. The default value is *Customer Defined.*

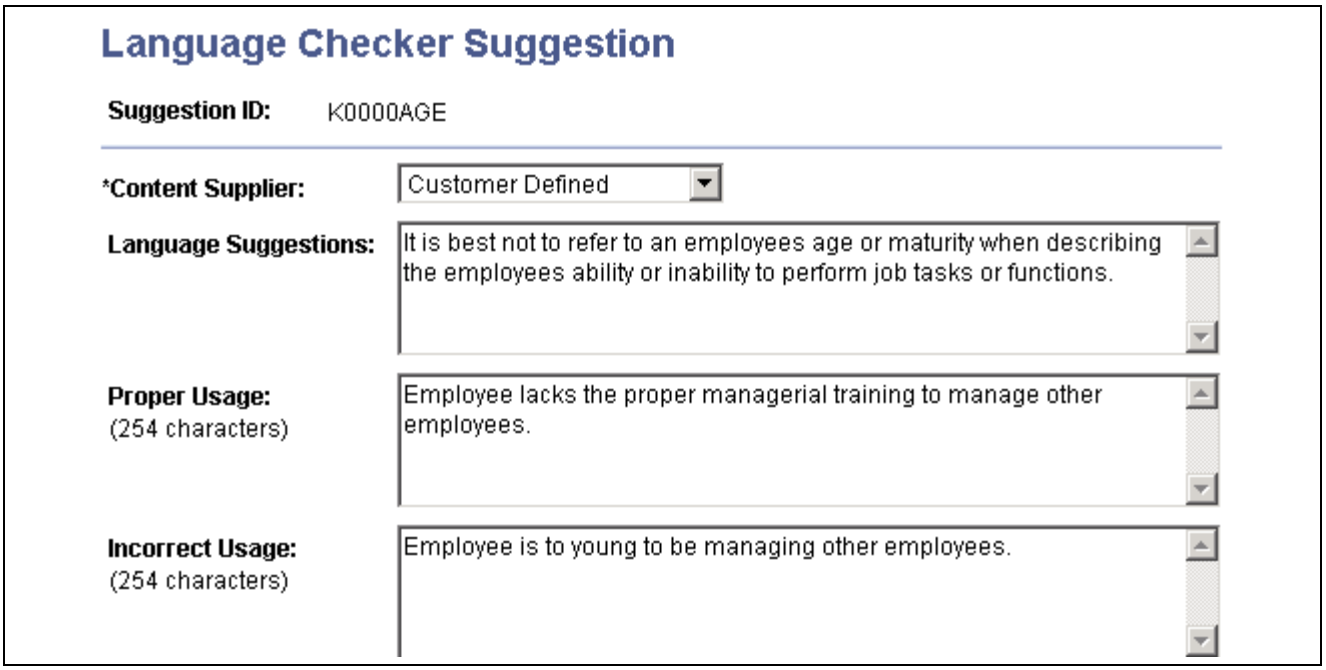
Suggestion ID Enter the ID for the suggested words or phrases that managers can use instead of the words and phrases entered on this page. You define language suggestions and IDs on the Language Checker Suggestion page.

Language Suggestions Displays the language suggestions that are associated with the suggestion ID.

Defining Suggested Wording

Access the Language Checker Suggestion page

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Language Checker Suggestion page

Content Supplier Select the source of the content: *Customer Defined* or the third-party supplier's name.

Language Suggestions Enter language suggestions for words and phrases, or list the reasons why the manager should not use certain words and phrases.

Proper Usage Enter examples of the proper usage of words or phrases.

Incorrect Usage Enter examples of the incorrect usage of words or phrases.

Defining Content for the Development Tips and Results Writer Tools

To define content for the Development Tips and Results Writer Tools, use the Define Development Tips (EP_DEV_TIP_TBL_EP) and Results Writer (EP_COMP_WRT_TBL) components.

This section lists prerequisites and discusses how to:

- Define development tips.
- Define Results Writer text for competencies and sub-competencies.

See Also

Chapter 9, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 142

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

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Prerequisites

Text entries for the Results Writer and Development Tips tools are related to competencies and their proficiency level, and sub-competencies and their proficiency level. You must set up this information before defining text for these tools.

- Rating models.
- Competencies and sub-competencies.
- Competency and sub-competency proficiency levels.

If multiple business units and setIDs are implemented in PeopleSoft Enterprise Human Resources, the information that you use and create is determined by how the business unit and setID functionality is set up for the user ID.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables".

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog".

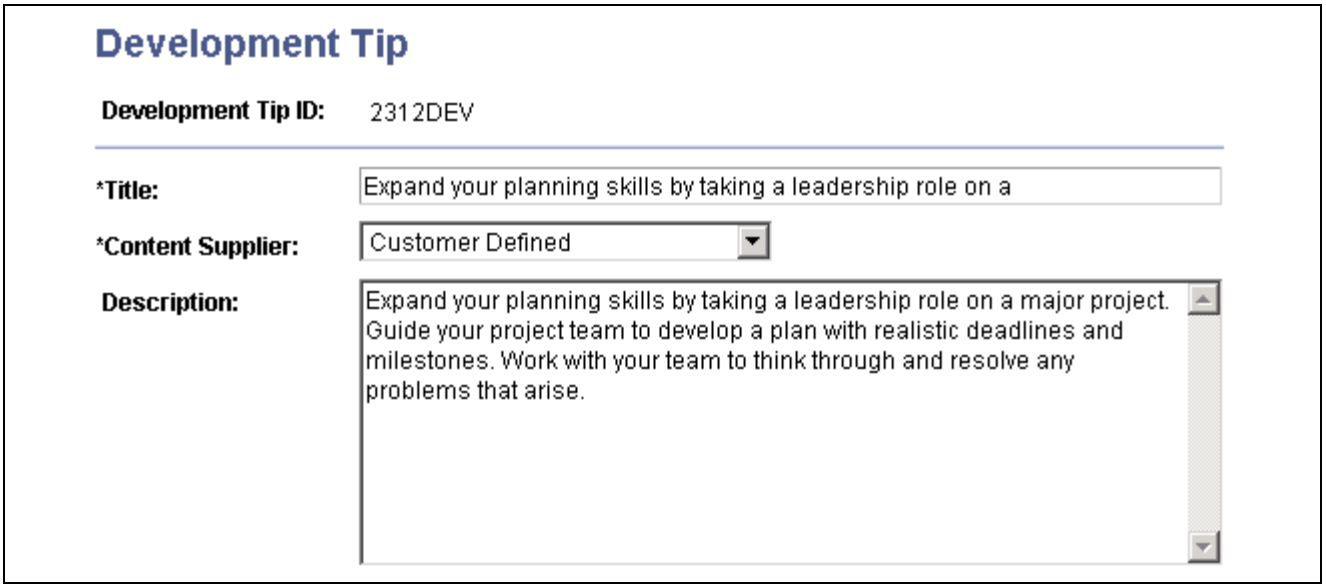
Pages Used to Define Content for the Development Tips and Results Writer Tools

Page Name	Object Name	Navigation	Usage
Development Tip	EP_DEV_TIP_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Define Development Tips, Development Tip	Define development tips. Also display and modify development tips imported from third-party suppliers.
Results Writer - Competency	EP_COMP_WRT_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Results Writer, Results Writer - Competency	Define Results Writer statements for each level of proficiency associated with a competency.
Results Writer - Sub-Competencies	EP_SUB_WRT_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Results Writer, Results Writer - Sub-Competencies	Define Results Writer statements for each level of proficiency associated with a sub-competency. **Note.** The Results Writer - Sub-Competencies page is similar in appearance and use to the Results Writer - Competency page and is not documented separately. See Chapter 4, "Setting Up Text for Advisor Tools," Defining Results Writer Text for Competencies, page 65.

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Defining Development Tips

Access the Development Tip page.

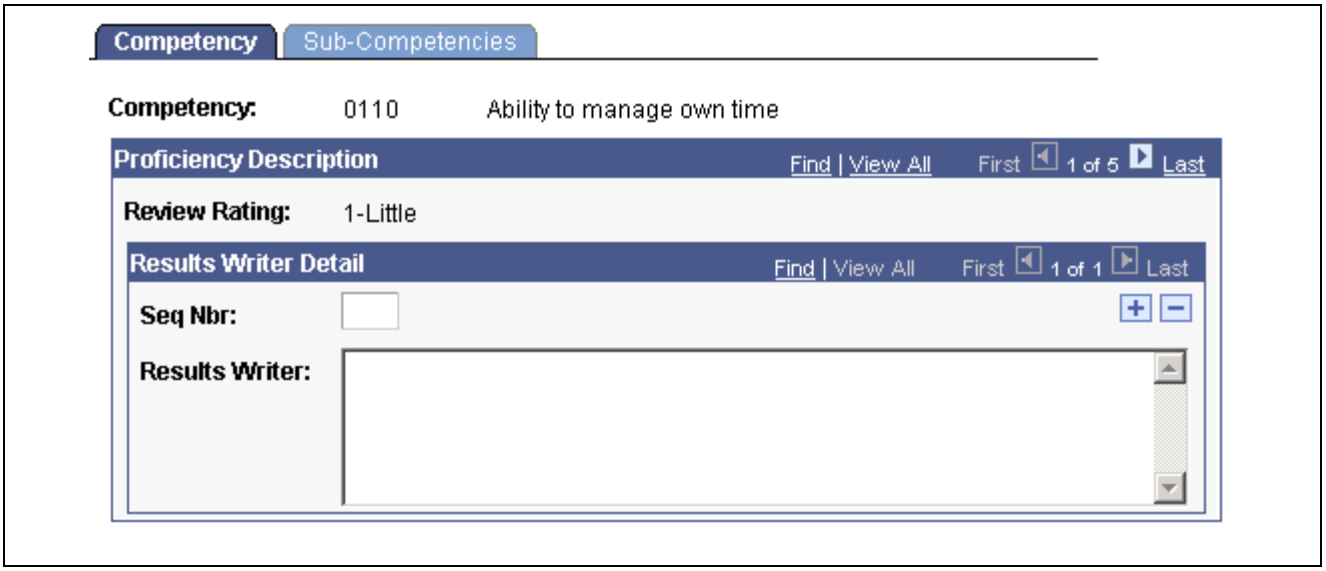


Development Tip page

Content Supplier Select the content supplier for the development tip. Select a third-party supplier from the available options, or select *Customer Defined* to enter development tips.

Defining Results Writer Text for Competencies

Access the Link Development Tips - Competency page.



Results Writer - Competency page

Review ratings describe an employee's level of proficiency for a competency. For each review rating that is associated with the competency, you can define the suggested text that managers can use when they invoke the Results Writer tool. You can create one or more text entries for each rating.

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Note. When you access the Sub-Competencies page, the first sub-competency that is associated with the competency appears. You must page forward or use the View All link to access other sub-competencies.

Seq Nbr (Sequence Number) Enter a number that determines the order in which managers see the statements when they use the Results Writer tool for this competency.

Results Writer Enter one or more sentences to describe the selected proficiency level.

You can insert the following characters to personalize the text based on the employee's name and gender.

- %1 = Employee's First Name
- %2 = He or She
- %3 = His or Her
- %4 = Him or Her
- %5 = Himself or Herself

Linking Development Tips to Competencies and Sub-Competencies

To link development tips to competencies and sub-competencies, use the Link Development Tips (EP_COMP_DEV_TBL) component.

This section discusses how to link development tips to competencies and sub-competencies.

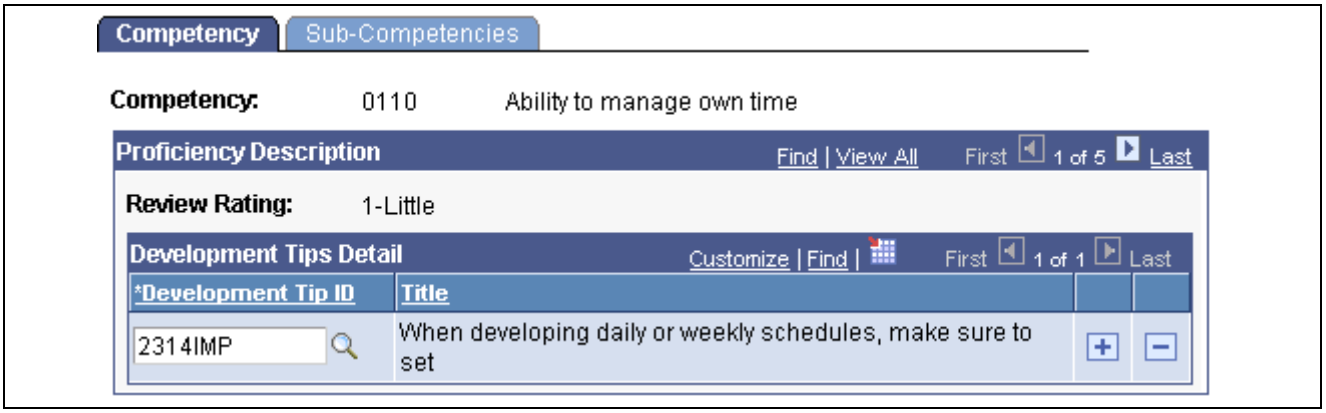
Pages Used to Link Development Tips to Competencies and Sub-Competencies

Page Name	Object Name	Navigation	Usage
Link Development Tips - Competency	EP_COMP_DEV_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Link Development Tips, Competency	Links one or more developments tips to a competency.
Link Development Tips - Sub-Competencies	EP_SUB_DEV_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Link Development Tips, Sub-Competencies	Links one or more developments tips to a sub-competency. **Note.** The Link Development Tips - Sub-Competencies page acts in a similar fashion to the Link Development Tips - Competency page and is not documented separately.

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Linking Development Tips to Competencies

Access the Link Development Tips - Competency page.



Link Development Tips - Competency page

Review ratings describe an employee's level of proficiency for a competency. For each review rating that is associated with the competency, you can define the suggested text that managers can use when they invoke the Development Tips tool. You can create one or more text entries for each rating.

Development Tip ID Select a development tip from the list of available tips that were created using the Development Tips page. The development tip links to the competency that you selected to access this page.

Note. When you access the Sub-Competencies page, the first sub-competency that is associated with the competency appears. You must page forward or use the View All link to access other sub-competencies.

Importing Third-Party Content

This section provides an overview of importing third-party content for the Language Checker tool and lists the pages used to import data.

See Also

PeopleSoft 9.0 Enterprise Components PeopleBook

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Understanding Third-Party Data Import

PeopleSoft has established partnerships with several third-party providers that supply content for defining competencies and proficiency levels. Some content providers also provide content for the Development Tips and Language Checker tools that are delivered with ePerformance. You can import third-party data into the system, enter free-form content, or use a combination of both.

ePerformance uses PeopleTools Integration Broker to receive vendor-supplied data in the form of comma-delimited flat files. The flat files are imported into ePerformance using the Inbound File Publish Application Engine (EOP_PUBLISHF) process. You do not need to develop an interface to load third-party content into ePerformance.

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Preparing to Import Data

To prepare to import data, activate inbound file rules for the file you are importing on the Inbound File page. You also use this page to associate messages with files and optionally change the default directory for incoming files from *c:\temp* to a directory that you choose.

This table lists the identifiers for the inbound file rules.

File Identifier	Description
EP_CHK_SUG	Language Checker suggestions
EP_CHK_WRD	Language Checker words and phrases
EP_COMPETENCY	Competencies
EP_ COMP_DEV	Development tips for competencies
EP_COMP_PROF	Proficiency statements for competencies
EP_DEV_TIP	Development tips
EP_RATING_MDL	Rating models
EP_REVW_RATING	Levels of ratings for rating models
EP_SUB_COMP	Sub-competencies
EP_SUB_DEV	Development tips for sub-competencies
EP_SUB_PROF	Proficiency statements for sub-competencies
EP_SUB_WRT	Results Writer statements for sub-competencies

Importing Data

To import data:

1. Make sure that each channel is running (not paused).

   Channels are delivered paused.

   Follow the procedure for configuring a message channel.

   See *PeopleTools PeopleBook: PeopleSoft Integration Broker*
2. Ensure that each message, its Peoplecode subscription, and its Integration Broker transaction are active.
3. Open PeopleSoft Process Scheduler.

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The application server must have publish and subscribe running.

See *PeopleTools PeopleBook: PeopleSoft Server Tools*

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

   The publish process converts the flat file to a message.

   a. Select Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish.

   b. Create a run control and initiate the process.

      Follow the procedure for using the inbound file pages for processing files.

      See *PeopleSoft 9.0 Enterprise Components PeopleBook*

5. Confirm that the process is complete through the Process Monitor page.
6. Confirm that the subscription occurred.

   a. Access the Monitor Message component by selecting PeopleTools, Integration Broker, Monitor, Monitor Message.

   b. Select the local node in the Publish Node field and *Subscription Contract* in the Queue Type field.

      Look for a subscription contract for the message just processed.

Pages Used to Import Data

Page Name	Object Name	Navigation	Usage
File Inbound	EO_FILE_INBOUND	Enterprise Components, Integration Definitions, Inbound File Rule, File Inbound	Select the file that you are importing into the Advisor tools.
Inbound File Publish - Inbound File	EO_FILETOMSG	Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish, Inbound File	Initiate a background process to populate entries from third-party providers.
Process List	PMN_PRCSLIST	Click the Process Monitor link on the File Inbound page.	View the status of background processes that you initiate.

Building Verity Search Indexes

This section provides an overview of search indexes and lists the pages used to build Verity search indexes.

Search Indexes

When you either add or remove Results Writer or Development Tips text items, you must rebuild the Verity search index to accurately reference these items in the database. If you do not rebuild the index, the system user will not see the added content when using the writing tools.

These are the search indexes to rebuild for each item that you change:

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Search Index	Content Type
EP_COMP_DEV_VW	Development tips for competencies.
EP_COMP_WRT_TBL	Results writer for competencies.
EP_DEV_TIP_TBL	Development tips that are not linked to competencies or sub-competencies.
EP_SUB_DEV_VW	Development tips for sub-competencies.
EP_SUB_WRT_TBL	Results writer for sub-competencies.
EP_CMP_DEV_LANG	Development tips for competencies: related language.
EP_COMPWRT_LANG	Results writer for competencies: related language.
EP_DEV_TIP_LANG	Development tips that are not linked to competencies or sub-competencies: related language.
EP_SUBWRT_LANG	Development tips for sub-competencies: related language.
EP_SUB_DEV_LANG	Results writer for sub-competencies: related language.

These Search Index definitions are predefined in the system. You must manually rebuild them any time you make a change to Results Writer or Development Tips content, including when you load content from a third-party provider, such as Lominger. The search indexes are built using PeopleTools pages.

Note. If you don't use languages other than English, you do not need to build the indexes whose object name ends in _LANG

See Also

Chapter 9, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 142

Enterprise PeopleTools PeopleBook: System and Server Administration

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Page Used to Build Search Indexes

Page Name	Object Name	Navigation	Usage
Design a Search Index	SID_RGW	PeopleTools, Search Engine, Record-Based Indexes, Design a Search Index	Build a search index after you have changed any entries for development tips or results writer text.
Search Index Admin	SIA_ADMINISTER	PeopleTools, Search Engine, Administration, Search Index Admin PeopleTools, Search Engine, Administration, Search Index Admin	Select search indexes for deletion, modification, or scheduling builds.
Edit Properties	SIA_IDXPROP_SEC	Click the Edit Properties link on a listed index on the Search Index Admin page.	Enter languages for which to build a related language search index.

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CHAPTER 5

Generating Documents

This chapter provides an overview of document generation and discusses how to:

- Generate documents as an administrator.
- Generate documents as a manager.
- Generate documents as an employee.
- Access documents.

Note. The process for generating performance and development documents is the same. The examples in this chapter refer to performance documents, but apply equally to development documents.

Understanding Document Generation

This section discusses:

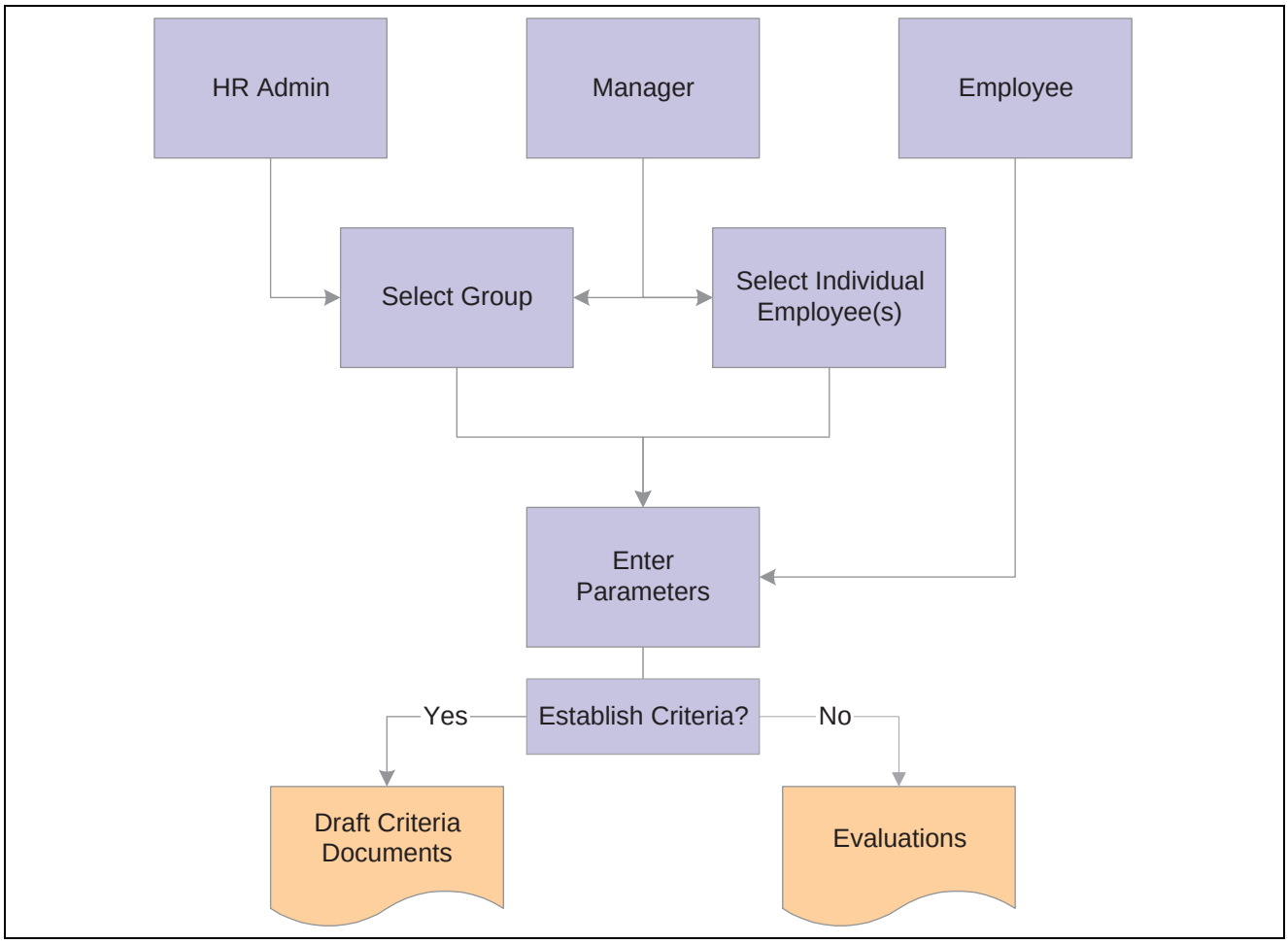
- Document generation process.
- Document cloning
- Document content.
- Initializing from profiles.

Document Generation Processes

Document generation initiates the evaluation process. The process for generating a document varies, depending on the role that is generating the document, and culminates in the creation of a criteria document for each participant identified in the Section Roles group box on the Template Definition - Structure page.

The following diagram shows the document generation process:

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Document generation processes

Each of the three roles that can generate documents does so in slightly different ways:

- HR Administrators schedule a background process and select one or more employee groups.
- Managers can select one employee group that reports to them and select one or more employees from the group, or just select one or more employees that reports to them.
- Employees can only generate documents for themselves.

After the individuals are identified, the process initiator must select the parameters for the document. These include the document type, document template, and evaluation period that is covered. The language code might be required, depending on the installation settings. For employee-initiated documents, if the employee has more than one job, the job title is required. The employee might also need to select a manager/mentor for the evaluation, if specified for the document type.

Once the parameters have been entered, the system checks the rules associated with the document type and the document template:

- Can the employee select their manager?
- Can the document be created by cloning another document?
- Is the document template to be entered by the user or determined by the system?
- Is Establish Criteria enabled?
- Is Nominate Participants enabled?

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Based on the rules established by the document type and document template, the system creates an internal baseline document and populates the Document Details page with the appropriate steps associated with the evaluation process.

Cloning Documents

To facilitate document creation, ePerformance enables managers and employees to clone an existing document. This can be helpful when documents are extensively modified or the same changes apply to multiple employees.

To activate the cloning feature, select the Manager, Employee, or both check boxes on the Document Type page. This causes the Clone from Document field to display on the Create Performance Document and Create Development Document pages.

When managers clone a document, they select one of their direct reports' document to use as the source. When employees clone a document, they select one of their own documents to use as the source. The system uses the structure of the document, not the rating information, as the basis for the new document.

Document Content

The critieria or content items included in a document are determined by the associated template. New items and free-form items can be added to the Criteria document, if the *Add* check box is selected for the user role in the Item tab on the Template Definition - Structure page. Free-form items also require the selection of the *Free-Form Allowed* check box.

Initializing From Profiles

When you generate documents and Initialize from Profile is selected on the Template Definition - Structure page, the system checks to see if there are items to add to the document based on the nonperson profiles associated to the employees job information.

If Initialize from Profile is selected, the system:

1. Identifies the profile type entered in the Profile Type field in the Profile Management group box on the Template Definition - Structure page
2. Identifies all Profile IDs associated with the profile type.
3. Identifies all the profile identity options and keys associated with the Profile IDs
4. Orders those profile-identity options according to the sequence defined on the Profile Identity Options - Configuration page.
5. Identify the employee job information record.
6. Looks at the first profile identity option in the sequenced list and see if there is data for that item in the employee's job information record that matches the key.
    a. If there is a match, add the associated content items from the profile ID to the document.
    b. If there is no match, check next profile identity option in the sequenced list.
    c. If it is the end of sequenced list, stop

Prerequisites for Generating Documents

Before generating documents, you must:

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1. Define templates.
2. Identify the template source on the Document Type page.
3. Define group IDs.

   To generate documents for a group of employees, HR administrators or managers must specify the ID of the group that contains to the employees they want to process.
4. Connect employees to managers in PeopleSoft Enterprise Human Resources.
5. Set up notifications on the General Settings page.

See Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 35.

See Chapter 3, "Setting Up Document Templates," Defining Document Types, page 20.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions," Setting Up Group Definitions.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce".

See Chapter 2, "Setting Up ePerformance," page 7.

Generating Documents as an Administrator

This section discusses how to:

- Generate documents.
- View document creation results.

Understanding Administrator Document Generation

HR administrators schedule a background process and select one or more employee groups for which to generate documents.

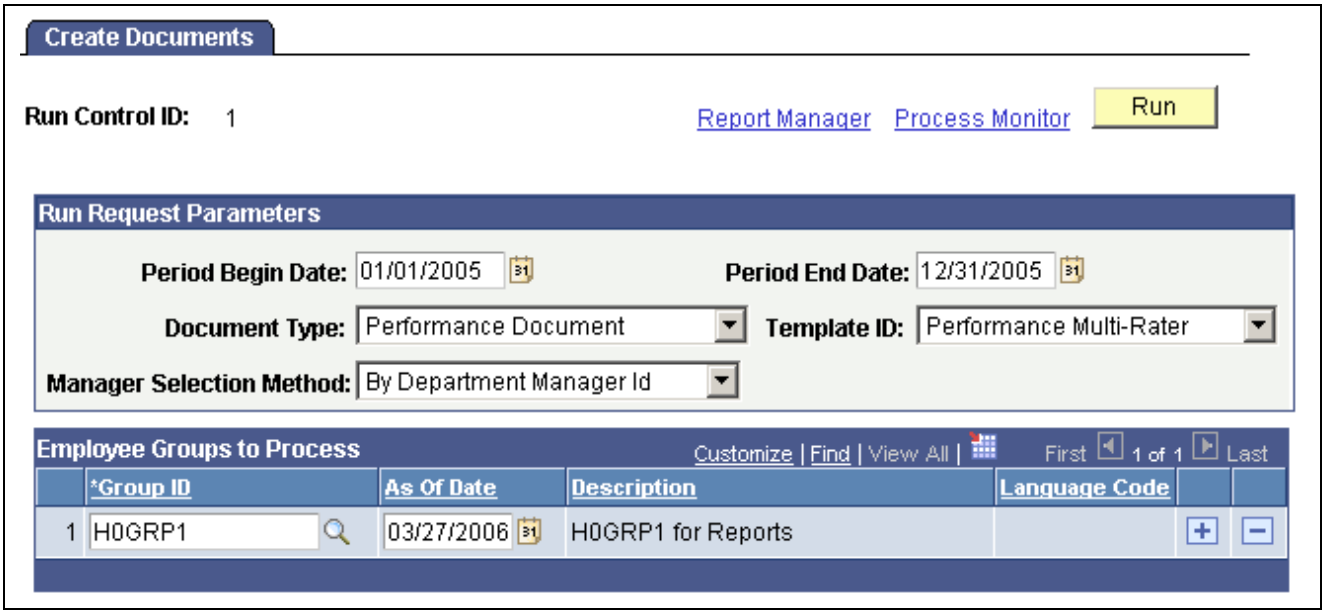
Pages Used to Generate Documents as an Administrator

Page Name	Object Name	Navigation	Usage
Create Documents	RUNCTL_EPMGRDOC	Workforce Development, Performance Management, Performance Documents, Create Documents Workforce Development, Performance Management, DevelopmentDocuments, Create Documents	Schedule a background process to generate documents for all of the employees in selected groups. Persons with the HR Administrator role can access this page.
View Document Creation Results	RUNCTL_EPMGRDC_INQ	Workforce Development, Performance Management, View Document Creation Results	View documents that were created by the background process.

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Generating Documents

Access the Create Documents page.



Create Documents page

Run Request Parameters

Period Begin Date and **Period End Date**
Enter the beginning and ending date of the period of time that the document covers.

Document Type
Enter a document type such as *Quarterly, Semi-Annual,* or *Yearly.* You define document types using the Document Type component.

Template ID
Select the template ID to generate the documents. This field is available if the template source on the Document Types page is *User Defined* for this document type.

Manager Selection Method
Specify a method for selecting manager IDs. When you launch the mass document creation process, the system determines the manager of each employee it processes using data defined in Human Resources. It needs this information to route email messages to managers informing them that review forms are available, and to associate a manager ID with each document, so that the manager can act as the author of the manager document and the owner of the evaluation process.

Values are:

- *By Department Manager Id:* The system retrieves a manager based on the department of the employee, using the Manager ID field on the Department Profile page.
- *By Group Id:* The system retrieves the manager from the Manager ID field on the Group Profile page.
- *By Reports To Position:*The system retrieves the manager of the employee's position that is specified inn the Position Data component.

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- *By Supervisor Id:*The system retrieves the manager based on the Supervisor ID field on the Job Data - Job Information page.
- *By Part Posn Mgmt Dept Mgr Id:* The system searches for a Reports To relationship between managers and employees, and then uses the *By Department Manager Id* selection method if a Reports To ID is not found.
- *By Part Posn Mgmt Supervisor Id:*The system searches for a Reports To relationship between managers and employees, and then uses the *By Supervisor Id* selection method if a Reports To ID is not found.

Employee Groups to Process

Group ID Specify the employee groups for which you want to generate documents.

As of Date Enter the date as of which you want to generate the group that is used in the document creation process. The current system date is the default.

Note. The mass creation process always regenerates the selected groups before it creates employee documents.

Lang Cd (language code) Select a language code to generate documents in a different language than the base language of the database. This field is available only when the Allow Review Language Override check box is selected on the ePerformance Installation table.

See Also

Chapter 2, "Setting Up ePerformance," Defining System Settings, page 7

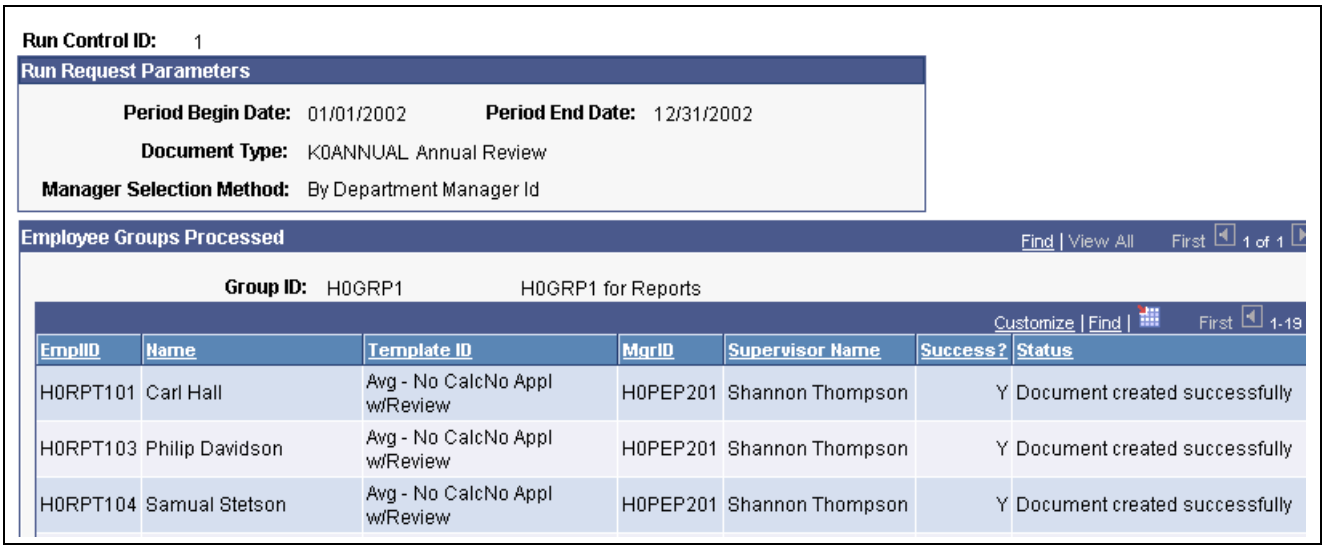
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Understanding Position Management"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

Viewing Document Creation Results

Access the View Document Creation Results page.

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Run Control ID: 1

Run Request Parameters

Period Begin Date: 01/01/2002 Period End Date: 12/31/2002

Document Type: K0ANNUAL Annual Review

Manager Selection Method: By Department Manager Id

Employee Groups Processed — Find | View All — First 1 of 1

Group ID: H0GRP1 H0GRP1 for Reports

Customize | Find | First 1-19

EmplID	Name	Template ID	MgrID	Supervisor Name	Success?	Status
H0RPT101	Carl Hall	Avg - No CalcNo Appl w/Review	H0PEP201	Shannon Thompson	Y	Document created successfully
H0RPT103	Philip Davidson	Avg - No CalcNo Appl w/Review	H0PEP201	Shannon Thompson	Y	Document created successfully
H0RPT104	Samual Stetson	Avg - No CalcNo Appl w/Review	H0PEP201	Shannon Thompson	Y	Document created successfully

View Document Creation Results page

This page presents results from the selected run of the Create Summary Data process.

Success? Displays a *Y* (Yes) if the employee document was created successfully. Otherwise displays an *N* (No).

Status Displays the status of the document. Values include: *In Progress, Available for Review, Review Held, Complete,* or *Cancelled.*

Generating Documents as a Manager

This section provides an overview of document generation for direct reports and discusses how to generate documents.

Understanding Document Generation

In the manager role, you can generate documents for direct reports by either:

- Selecting a group and then selecting one or more employees within the group.
- Selecting one or more employees directly.

Regardless of which option you choose, you first need to select the *As of* date for determining which employees report to you. You then select the employees for whom you want to generate documents. Finally, you select the document template from which to generate the individual documents and enter the dates of the evaluation period that is covered.

You can generate either performance or development documents. The process is identical, except for the page names and the navigation path by which you access the document generation pages.

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Pages Used to Generate Documents

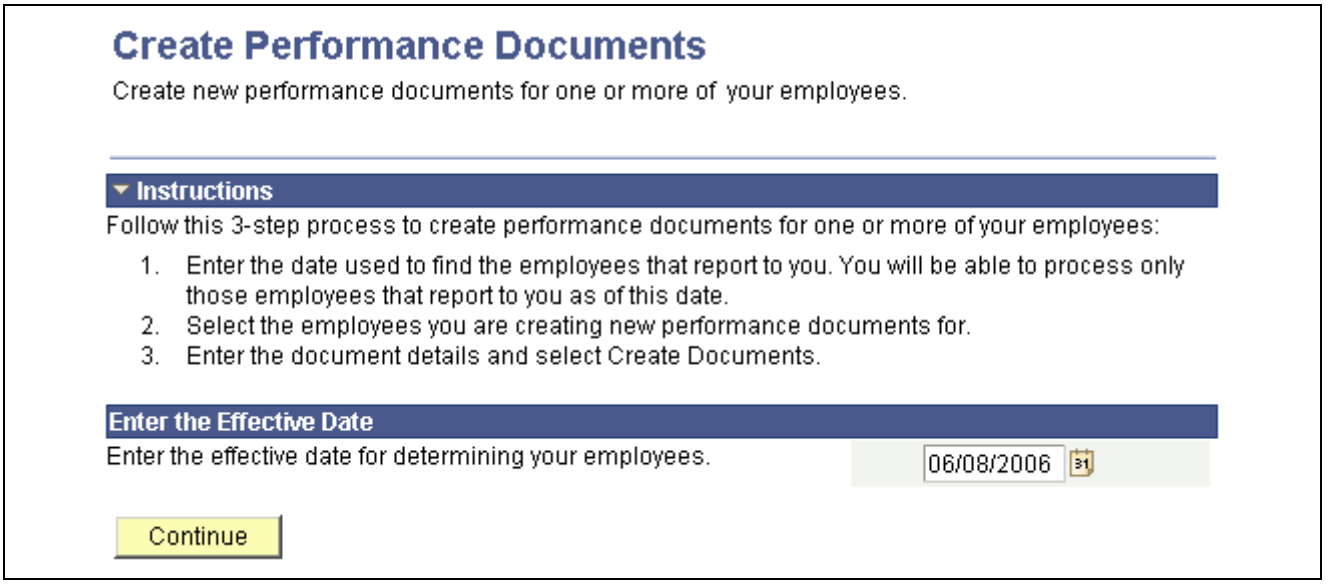
Page Name	Object Name	Navigation	Usage
Create Performance Documents, Create Development Documents	HR_DR_ADDL_INFO	Access this page through different paths to create performance documents or development documents. • Manager Self-Service, Performance Management, Performance Documents, Create Documents, Create Performance Documents • Manager Self-Service, Performance Management, Performance Documents, Create Documents by Group, Create Performance Documents • Manager Self-Service, Performance Management, Development Documents, Create Documents, Create Development Documents • Manager Self-Service, Performance Management, Development Documents, Create Documents by Group, Create Development Documents	Enter the effective date for determining your employees. This is the first page in a series of pages that guide you through the generating documents.
Create Performance Documents, Create Development Documents	HR_DR_SELECT_GROUP	Click the Continue button on the either the Create Performance Documents or Create Development Documents pages.	This page appears only if you selected the Create Document by Group in the left-hand navigation path. Select the group ID of the of employees for whom you want to create documents.
Create Performance Documents, Create Development Documents	HR_DR_SELECT_EMPS	Click the Continue button on either the Create Performance Documents or Create Development Documents page.	Select employees for whom you want to create documents.
Create Performance Documents, Create Development Documents	EP_CREATEAPPR_MGR	Select one or more employees and click the Continue button on either the Create Performance Documents or Create Development Documents page.	Select the document template and dates.

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Page Name	Object Name	Navigation	Usage
Create Performance Documents - Results, Create Development Documents - Results	EP_CREATE_RESULTS	• Click the Create Documents button on the Create Performance Documents page. • Click the Create Documents button on the Create Development Documents page.	View the status of document creation for the employees that you selected.

Entering the Effective Date

Access the Create <document type> Documents page.



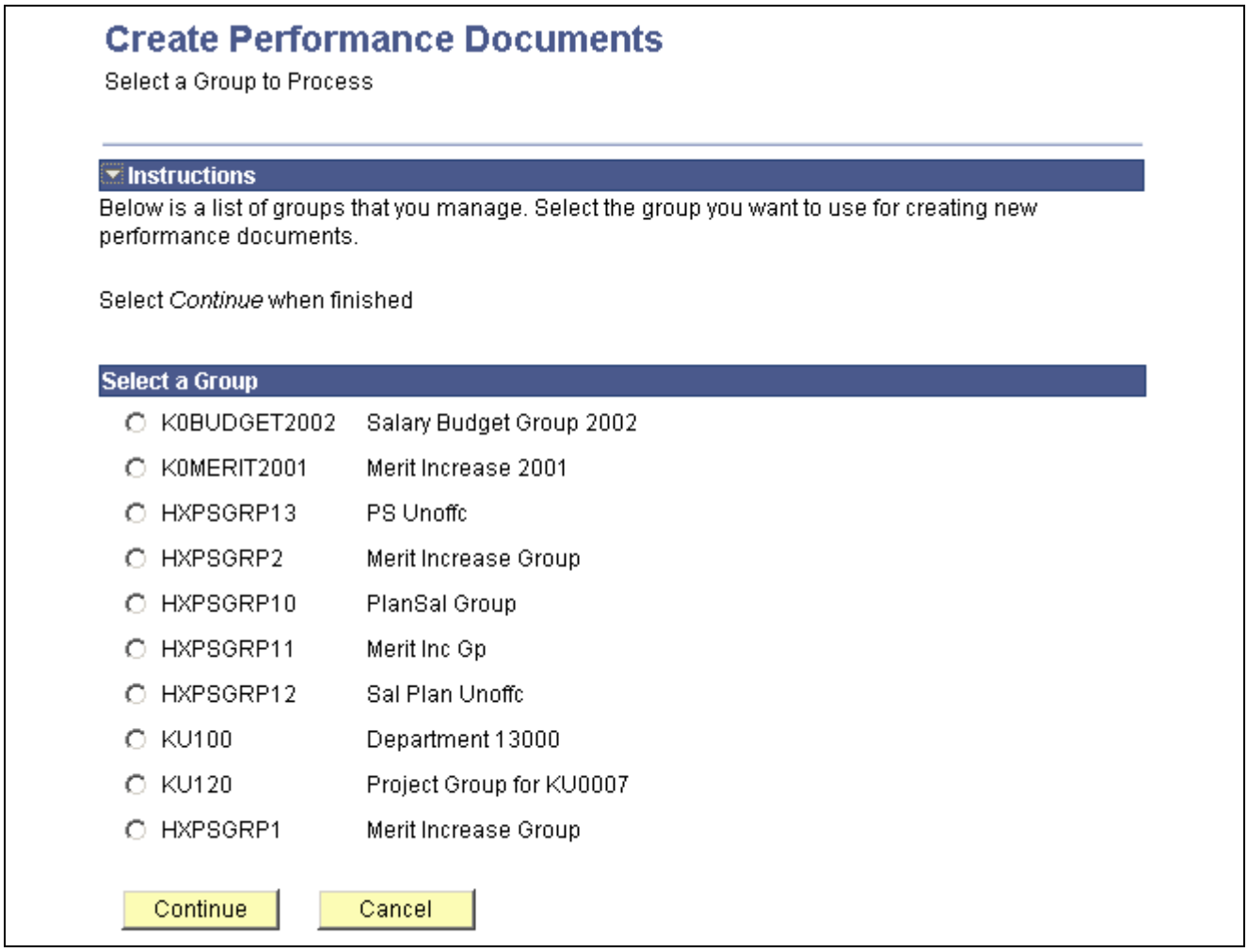
Create <document type> Documents page

Enter the effective date and click the Continue button.

Selecting Groups

If you are creating documents according to group, access the Create <document type> Documents page.

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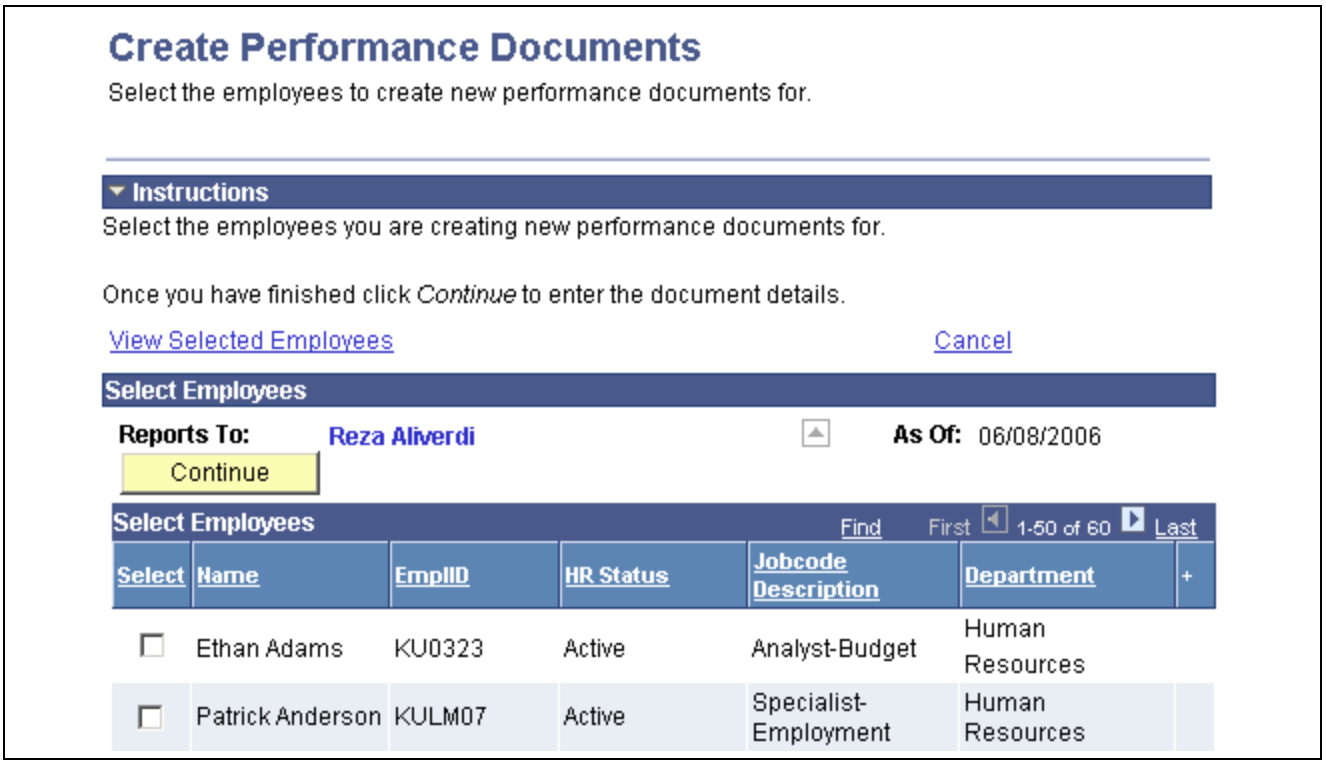
Create <document type> Documents page

Select one or more groups and click the Continue button.

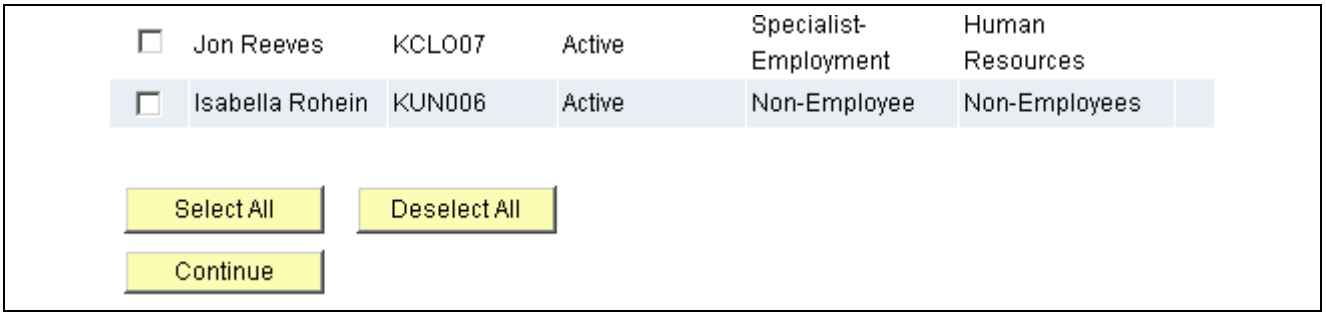
Selecting Employees

Access the Create <document type> Documents page.

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Create <document type> Documents page (1 of 2)



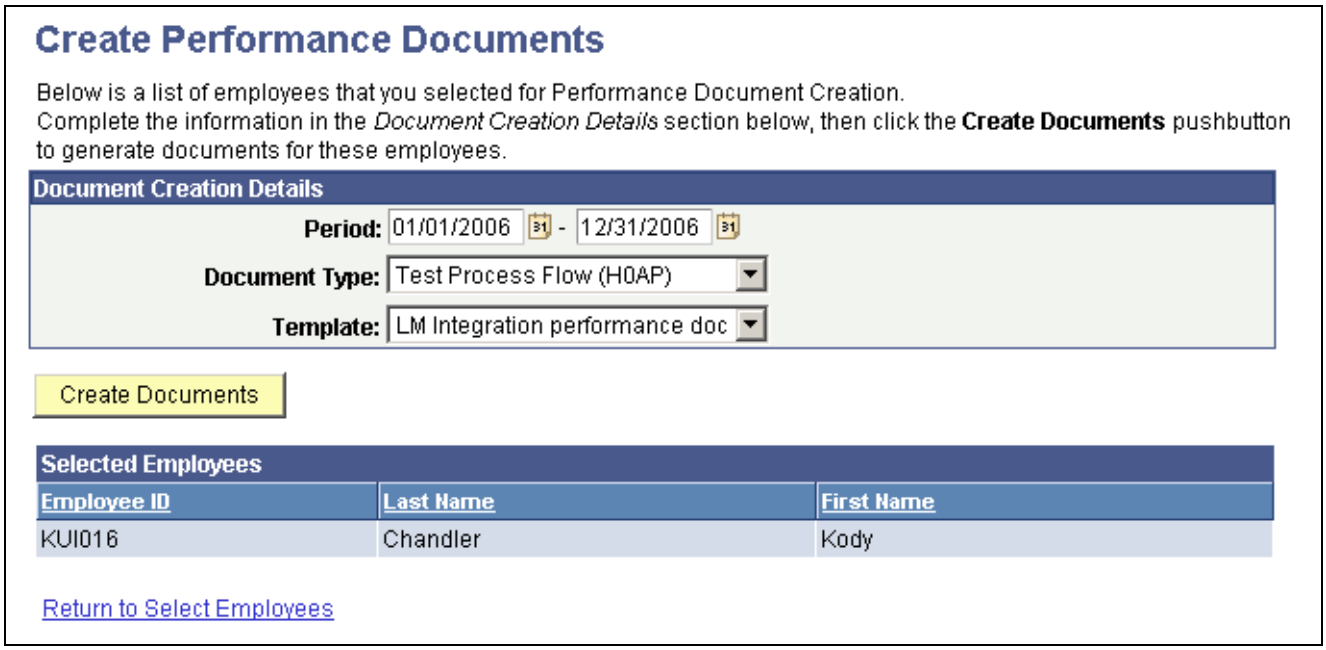
Create <document type> Documents page (2 of 2)

Select one or more employees and click the Continue button.

Defining Document Generation Parameters

Access the Create <document type> Documents page.

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Create <document type> Documents page

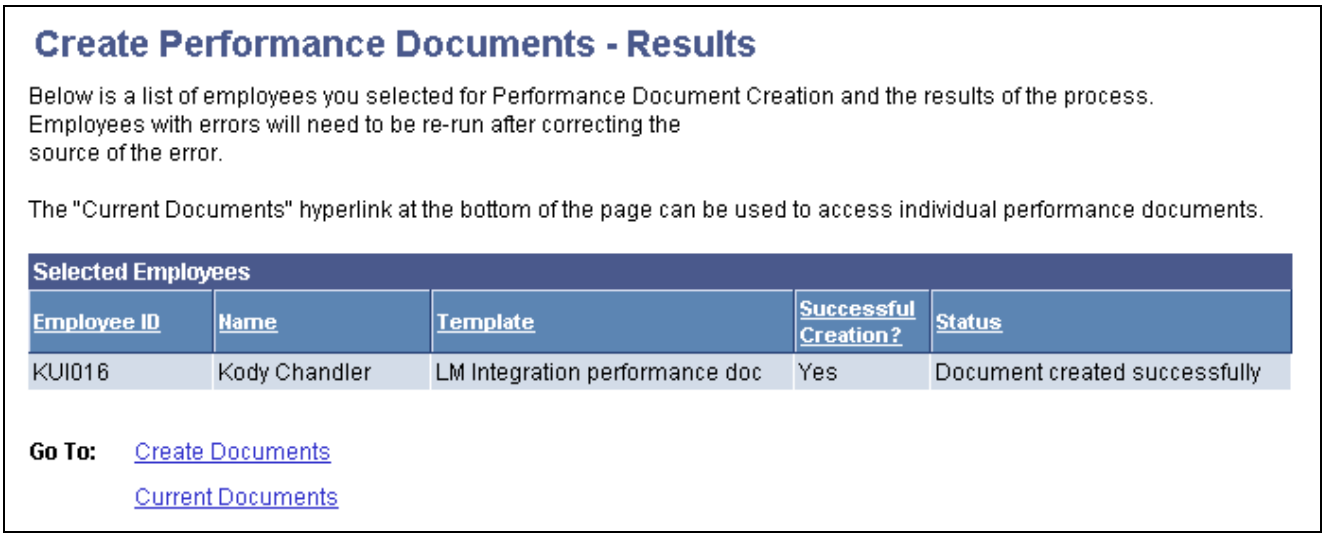
To enter the parameters:

1. Enter the time period for the document.
2. Enter the document type.
3. If Clone Existing Document is selected on the Document Types page, select whether the document is to be created for an existing document. If you select *Yes* in the Create from Prior Document, then select the document to clone.
4. If Clone Existing Document is not selected on the Document Types page or *No* is selected in the Create from Prior Document, select the template from which the documents will be created.
5. Click the Create Documents button.

Reviewing Document Creation Results

Access the Create <document type> Documents - Results page.

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Create <document type> Documents - Results page

The Selected Employees group box displays the results of the document creation process.

Generating Documents as an Employee

This section discusses how to generate development documents.

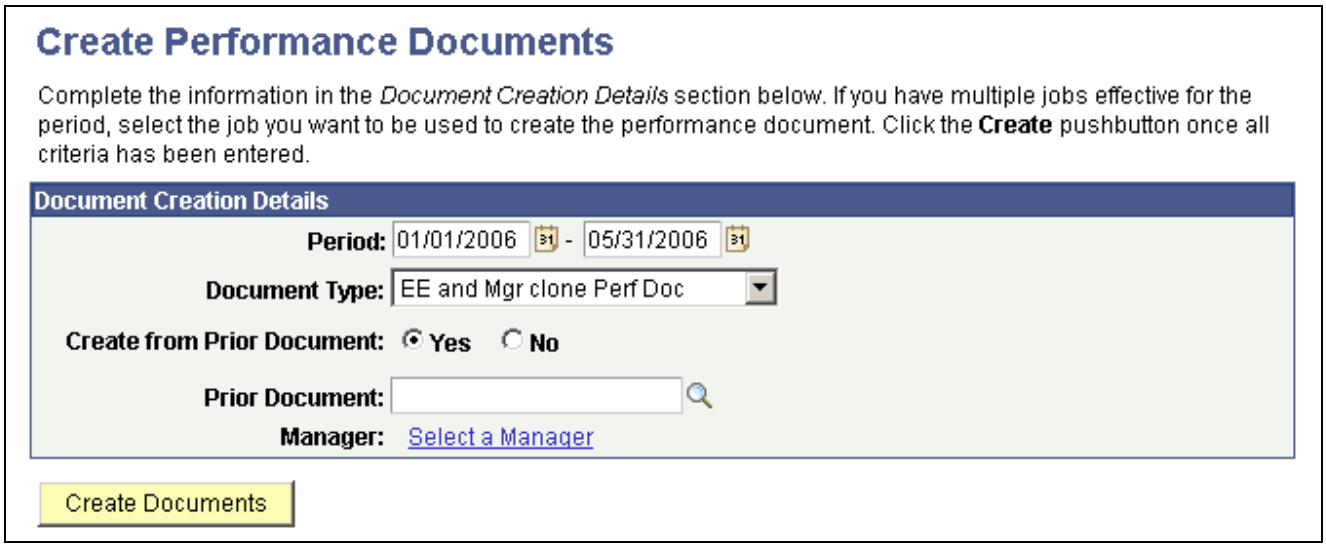
Pages Used to Generate Documents as an Employee

Page Name	Object Name	Navigation	Usage
Create Performance Documents, Create Development Documents	EP_CREATEAPPR_EE	• Self Service, Performance Management, My Performance Documents, Create Documents, Create Performance Documents • Self Service, Performance Management, My Development Documents, Create Documents, Create Development Documents	Enter parameters for generating documents as an employee.
Person Search - Simple	HR_PSS_SEARCH	Click the Select a Manager link on the Create Performance Documents page or the Create Development Documents page.	Select the person who will function in the manager role for this document.

Entering Document Parameters

Access the Create Development Documents or the Create Performance Documents page.

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Create <document type> Documents page

Period Enter the beginning and ending dates of the evaluation period.

Document Type Select the type of document to generate. Valid document types are defined on the Document Types page.

Create from Prior Document This field displays if the Employee check box is selected for the Clone Process field on the Document Types page.

Select Yes if you want to clone an existing document. Select No if you do not want to clone an existing document.

Template Select the document template from which to generate the documents. Document templates are created in the Document Template component.

Select a Manager This field displays if the Employee can Select Manager check box is selected on the Document Types page.

Click to access the Person Search page where you can search for and select the person who will act in the manager role for this evaluation.

Select Job This field appears only if the employee has multiple jobs.

Select the job for which the document is generated.

Create Documents Click this button to create the document. After you create the document, the Document Details page for the document you created appears.

Accessing Documents

This section provides an overview of document statuses and discusses how to:

- Select documents.
- View document process, status, and actions.

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Understanding Process Statuses

Each process step has several statuses. These statuses control the actions that are available to employees or managers when they access the document. This table shows how the process statuses are set when the document is first generated:

Step	Status	Condition	Effect on Evaluation Process
Establish Criteria	Not Started (*NS*)	The Establish Criteria check box is selected on the document template.	The Establish Criteria step appears on the Document Progress grid with a status of *Not Started* and a due date as specified in the document template.
	Not Applicable *(NA)*	The Establish Criteria check box is not selected on the document template.	The Establish Criteria step does not appear on the Document Progress grid.
Nominate Participants	Not Started (*NS*)	The Nominate Participants check box is selected on the document template.	The Nominate Participants step appears on the Document Progress grid with a status of *Not Started* and a due date as specified in the document template.
	Not Applicable *(NA)*	The Nominate Participants check box is not selected on the document template.	The Nominate Participants step does not appear on the Document Progress grid.
Employee Self Evaluation	Not Started (*NS*)	The Document check box is selected for the Employee role.	The Complete Self Evaluation step appears on the Document Progress grid with a status of *Not Started* and a due date as specified in the document template.
	Not Applicable *(NA)*	The Document check box is not selected for the Employee role.	The Complete Self Evaluation step does not appear on the Document Progress grid.
Manager Evaluation	Not Started (*NS*)	The Manager document is required in all cases; therefore, the status for this step is set to *NS*.	The Review Final Document step appears on the Document Progress grid with a status of *Not Started* and a due date as specified in the document template.
Employee Self Evaluation	Not Started (*NS*)	The Document check box is selected for the Employee role.	The Complete Self Evaluation step appears on the Document Progress grid with a status of *Not Started* and a due date as specified in the document template.
	Not Applicable *(NA)*	The Document check box is not selected for the Employee role.	The Complete Self Evaluation step does not appear on the Document Progress grid.

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Step	Status	Condition	Effect on Evaluation Process
Track Nomination	Not Started*NS*		The Track Nominations step appears on the Document Progress grid with a status of Not Started and a due date as specified in the document template.
	Not Applicable *(NA)*	The Track By check box is not selected on the Template Definition – Process Page for the Manager, Employee or both roles. (If the check box is not selected for the role then that step will not be displayed to that role user.)	The Track Nominations step does not appear on the Document Progress grid.
Review Participants Evaluations	Not Started*NS*		The Review Participant Evaluations step appears on the Document Progress grid with a status of Not Started and a due date as specified in the document template.
	Not Applicable *(NA)*	The Accessed By check box is not selected on the Template Definition – Process page for the Manager, Employee or both roles. (If the check box is not selected for the role then that step will not be displayed to that role user.)	The Review Participant Evaluations step does not appear on the Document Progress grid.

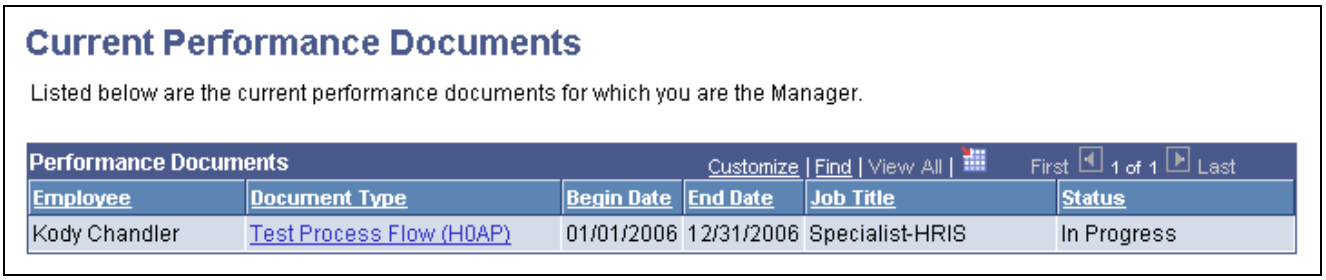
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Pages Used to Access Documents

Page Name	Object Name	Navigation	Usage
Current Performance Documents, Current Development Documents	EP_APPR_SELECT	• Manager Self-Service, Performance Management, Performance Documents, Current Documents • Self-Service, Performance Management, My Performance Documents, Current Documents • Manager Self-Service, Performance Management, Development Documents, Current Documents • Self-Service, Performance Management, Development Documents, Current Documents	Select performance or development documents to view or edit.
Current Performance Documents - Document Details, Current Development Documents - Document Details	EP_APPR_DETAIL	Click a document on the Current Performance Documents or Current Development Documents page.	View document process, status, and actions.

Selecting Documents

Access the Current Performance Documents or Current Development documents page.



Current Performance Documents page

Performance Documents

The information that appears on this grid depends on the path with which you access the page.

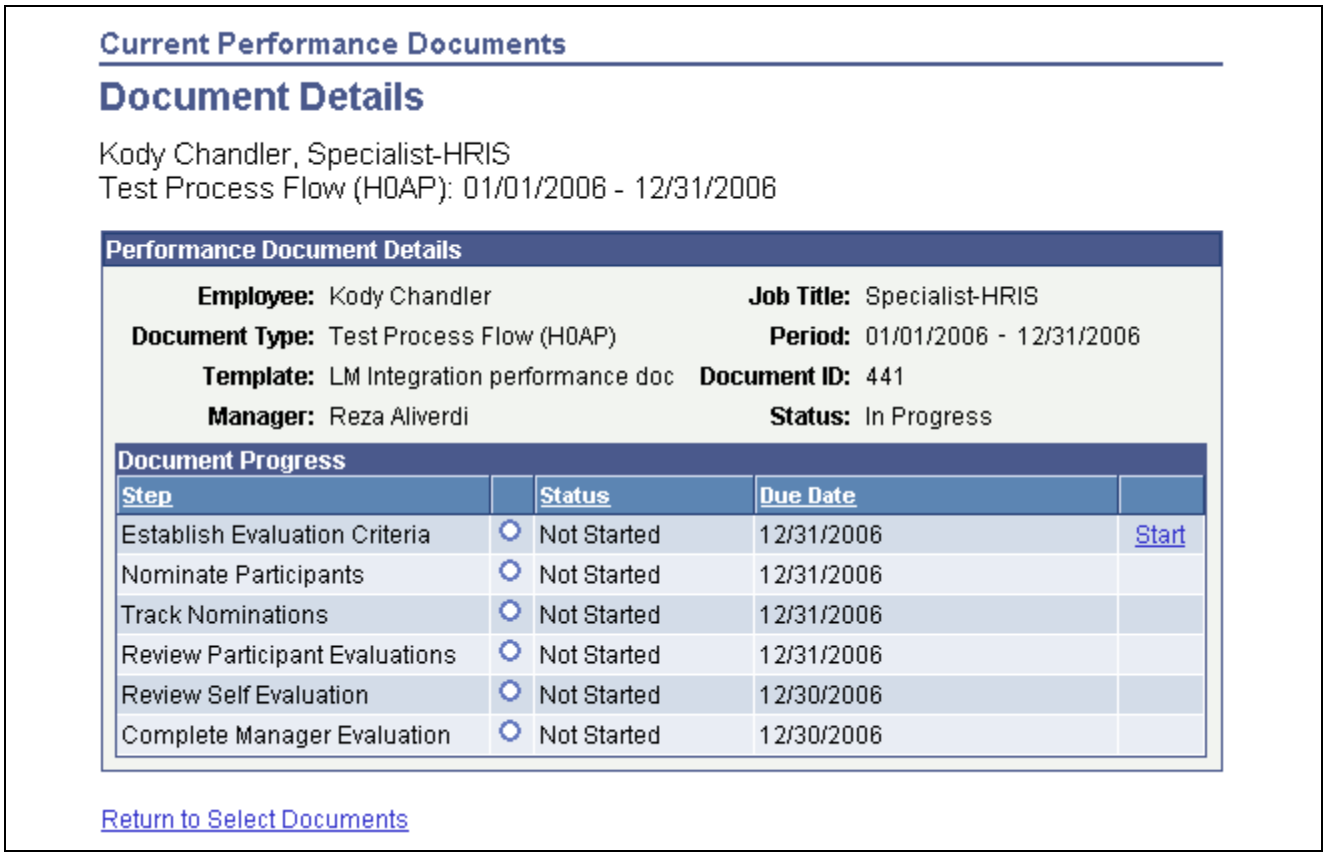
If you access this page through the Manager Self Service menu, the grid lists all documents with statuses that are not *Complete* or *Canceled* for which you are the manager. *Complete* documents are listed on the Historical Documents page.

If you access this page through the employee Self Service menu, the only documents that appear are current documents for which you are the employee. The name column does not appear, but an additional column on the grid lists the person who is the manager for the document.

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Viewing Document Progress Details

Access the Document Details page.



Document Details page

Document Progress

The information that appears on this page is controlled by a combination of the document template, the role that accesses the page, and the status of each step.

- Establish Criteria.

  Appears in the Document Progress grid only if the Establish Criteria check box is selected on the Template Definition - General page.

  This table shows the possible actions for the Establish Criteria step and the conditions under which each step is enabled. You perform the document template setup on the Establish Criteria region of the Template Definition - Process page.

Action	Step Status	Document Template Setup
Start	*Not Started*	The Updated By check box is selected for the role.
Edit	*In Progress*	The Updated By check box is selected for the role.
Complete	*In Progress*	The role is selected in Completed By field.
View Criteria	*Complete*	This link appears to all roles that are defined on the document template.

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- Nominate Participants.

  Appears in the Document Progress grid only if the Nominate Participants check box is selected on the Template Definition - General page and the Nominate Participants check box is selected for that role on the Template Definition - Process page.

  This table shows the possible actions for the Nominate Participants step and the conditions under which each step is enabled. You perform the document template setup on the Nominate Participants region of the Template Definition - Process page.

Action	Step Status	Establish Criteria Step Status	Document Template Setup
Start	*Not Started*	*Not Applicable* *In Progress* *Complete*	The Updated By check box is selected for the role.
Edit	*In Progress*	*Not Applicable* *In Progress* *Complete*	The Updated By check box is selected for the role.
Submit	*In Progress*	*Not Applicable* *Complete*	The role is selected in Submitted By field.
View	*Complete*	*Not Applicable* *In Progress* *Complete*	This link appears to all roles that are defined on the document template.

- Track Nominations.

  Appears in the Document Progress grid only if the Nominate Participants check box is selected on the Template Definition - General page.

Action	Nominate Participants Step Status	Document Template Setup
Edit	*In Progress*	The Tracked By check box is selected for the role.
View	*Complete*	N/A

- Review Participant Evaluations.

  This step appears in the Document Progress grid only if the Nominate Participants check box is selected on the Template Definition - General page. The only action available for this step is *View*. Only the employee or manager role can view participant evaluations, depending on the settings in the Review Participant Evaluations page region on the Template Definition - Process page.

  If the Accessed By check box is selected for the role, the role can view a list of participants and their evaluation status. If the Viewed By check box is also selected for the role, an active link to the document is available to view the document itself.

- Complete Self Evaluation or Review Employee Evaluation.

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Appears in the Document Progress grid if you select the Document check box for the *Employee* role on the Document Template - General Information page. The step is labeled differently depending on the status of the step and the review process selected.

Action	Step Status	Role
Start	*Not Started*	*Employee*
Edit	*In Progress*	*Employee*
View	*Complete*	*Employee* *Manager*

- Complete Manager Evaluation.

  This step always appears in the Document Progress grid because a manager evaluation is always required. The step is labeled differently depending on the status of the step and the review process selected.

  The actions for this step are Start, Edit, and View. Depending on the review option that is selected, the Mark Available, Review Held, Acknowledge, Submit, and Complete might also appear.

Action	Step Status	Role
Start	*Not Started*	*Manager*
Edit	*In Progress*	*Manager*
View	*Complete*	*Employee* *Manager*

  Additional actions for the manager evaluation are available if the document template specifies a review process that requires review or approval. These are *Mark Available*, *Review Held*, *Acknowledge*, *Submit*, and *Complete.*

Note. For the purpose of publishing performance results, the definition of *complete* depends on the performance process that you select on the Template Definition page when creating templates. Documents that require approval are considered complete when the approval status is *Approved* and the document status is *Complete*. Reviews that do not require approval are considered complete when the document status is *Complete.*

See Chapter 10, “Managing Reviews and Approvals,” page 151.

See Also

Chapter 3, “Setting Up Document Templates,” page 19

Chapter 7, “Nominating and Tracking Multi-Source Participants,” page 105

Chapter 6, “Modifying Evaluation Criteria,” page 93

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CHAPTER 6

Modifying Evaluation Criteria

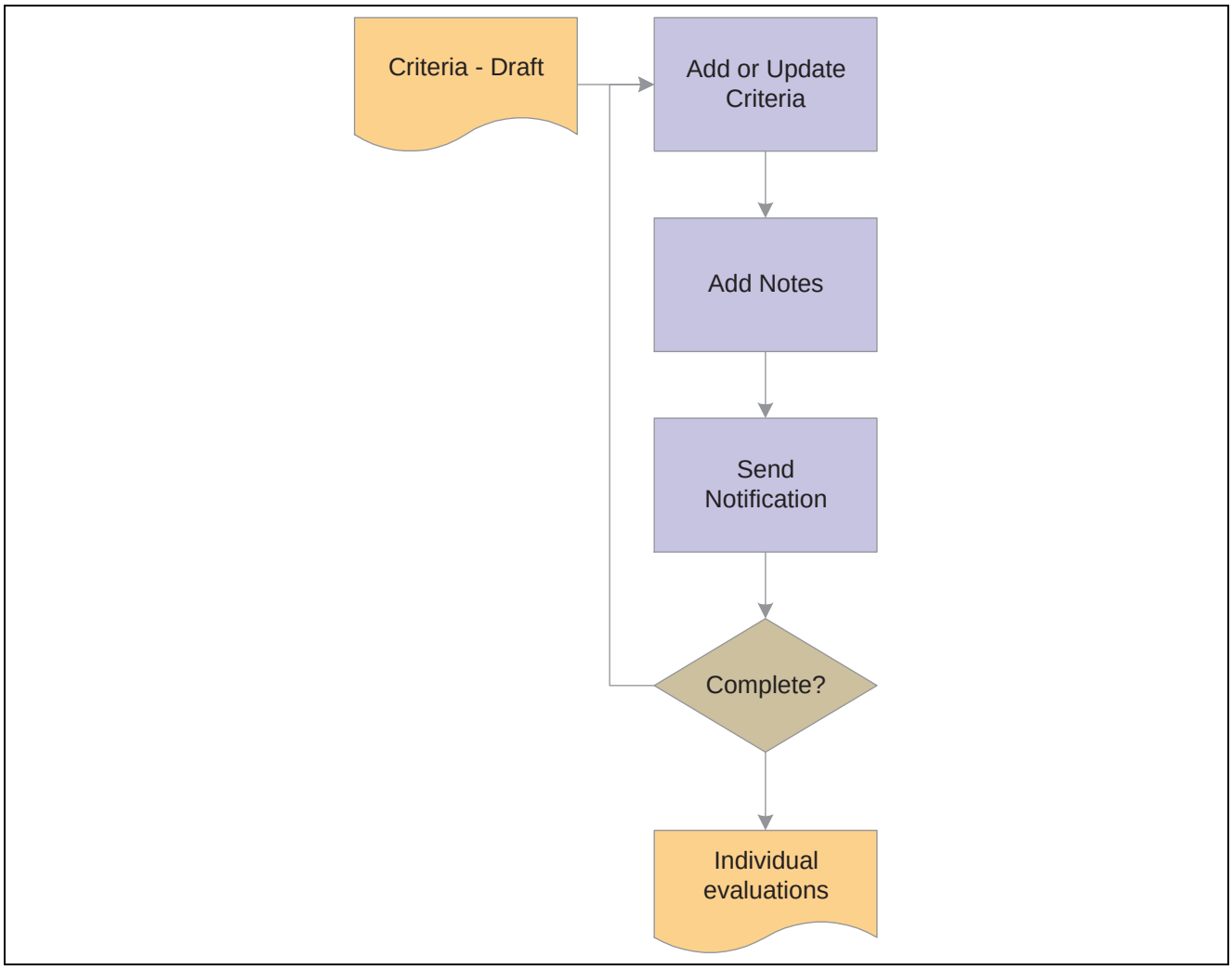
This chapter provides an overview of evaluation criteria modification and discusses how to modify evaluation criteria.

Understanding Evaluation Criteria Modification

The draft criteria document that is generated from the document template contains the evaluation criteria and the item wording that are specified on the document template. The Establish Criteria step enables a manager, an employee, or both to tailor the document template's evaluation criteria for the employee prior to generating evaluations for the employee.

This diagram shows the process for modifying evaluation criteria during the Establish Criteria step:

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Establish criteria processes

Depending on the role's capabilities as defined on the document template, evaluators can make these modifications to the criteria document:

- Add items such as goals, responsibilities, competencies, or user defined content items to a section.

  You can add free-form items or select predefined (coded) items from a prompt table. You can also add free form subitems or select predefined subitems for items that are already in the Establish Criteria document.

- Add learning items to a learning section.

  If a learning section is added to the template, the system select all learning in the Learning Management system for the employee that meets the following criteria with a type equal to Activity, Program, or Supplemental

  - Learning type equals Activity, Program, or Supplemental.
  - Status equals Planned, Enrolled, In Progress, or Completed.
  - Status date falls within the evaluation begin and end dates.

  Only the administrator, manager, and employee can view this section. Links within the section will open the Learning Management system a separate window where the user can search for learning or review detailed information about the learning in which the employee is enrolled. The Search for Link is not available for documents with a status equal to complete.

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- Delete criteria.

  You cannot delete criteria if they are identified as mandatory on the template.

- Update criteria.

  The criteria details that you can edit during the Establish Criteria step depend on whether or not the items are defined as mandatory and whether or not the items are coded, as shown in the table below:

If the item is	Editable Fields for Coded Items	Editable fields for Not Coded (Free From) Items
Mandatory	Status Percent Complete Target Rating	Status Percent Complete Target Rating
Not Mandatory	Supports Critical Ownership Due Date Reminder Date Status Percent Complete Target Rating	Title Description Measurement Supports Critical Ownership Due Date Reminder Date Status Percent Complete Target Rating

When you are satisfied with the document criteria, the designated completer completes the document. You can generate individual evaluations, by role, from a completed criteria document. You can also reopen the document for further modification

Either a manager or an employee can add performance notes during the Establish Criteria step. These notes are linked to the section and item to which they apply. Later in the process, the person that entered a note can access the note to review it, update it, or include it in their section or item comments.

See Also

Chapter 3, “Setting Up Document Templates,” page 19

Chapter 8, “Entering Comments and Ratings on Evaluations,” Entering Performance Notes, page 121

Prerequisites

Before you modify evaluation criteria, complete the following tasks:

1. Activate the establish criteria process.

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Select the Establish Criteria check box on the Template Definition - General page.

2. Define the rules for the establish criteria process.

   Complete the fields in the Establish Criteria group box on the Template Definition - Process page.

3. Activate the ability to add items to the <document type> Criteria - Draft document.

   Select the Add Items - Establish Criteria check box on the Template Definition - Structure page.

4. Activate the ability to add items to the <document type> Criteria - Draft document for each specific role.

   Select the Add check box in the Item tab on the Template Definition - Structure page.

Modifying Evaluation Criteria

This section discusses how to modify evaluation criteria.

Note. The navigation paths and page documentation in this section refers to modifying the Competencies section of an evaluation document. All sections on a document work similarly and use the same page formats. For example, if a document has both a Goals and a Competencies section, the Add Goal page and the Add Competency page function in the same way.

Pages Used to Modify Evaluation Criteria

Page Name	Object Name	Navigation	Usage
Current Documents	EP_APPR_SELECT	• Manager Self Service, Performance Management, Performance Documents, Current Documents • Self Service, Performance Management, My Performance Documents, Current Documents • Manager Self Service, Performance Management, Development Documents, Current Documents • Self Service, Performance Management, My Development Documents, Current Documents	Select the document for which you want to modify evaluation criteria.
Document Details	EP_APPR_DETAIL	Select a document on the Current Documents page.	View the status of the evaluation document and select actions to perform.
<document type> Criteria - Draft	EP_APPR_BASE1	Click the Edit link in the Establish Criteria row on the Document Details page.	Modify performance or development criteria.

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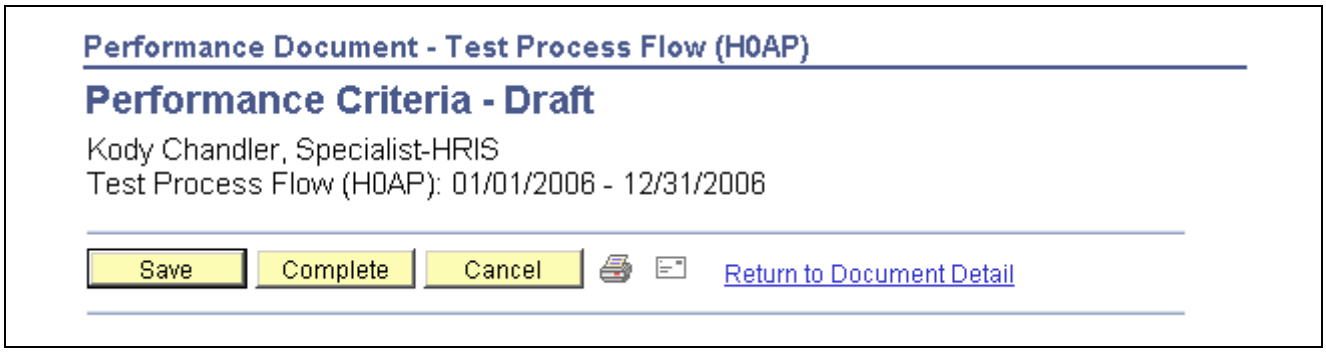
Page Name	Object Name	Navigation	Usage
Add a <section name>	EP_APPR_EDIT3	Select the Add <section name> link for any item that is listed on the Performance Criteria - Draft or Development Criteria - Draft pages	Select whether you want to add a free-form or a predefined competency to the evaluation criteria specified on the document template.
Add a <section name>	EP_APPR_EDIT4	Select Add your own <section name> on the Add a <section> page.	Search for a predefined competency to add to the evaluation criteria specified on the document template.
Add a <section name>,	EP_APPR_EDIT5	• Select Add your own <section name> on the Add a <section name> page. • Click the Edit Details link on the Performance Criteria - Draft or Development Criteria - Draft pages.	Add a free-form item to the evaluation criteria specified on the document template or modify a competency.
Add a <section name> Behavior	EP_APPR_EDIT6	Select the Add Behavior link for any item that is listed on the Performance Criteria - Draft or Development Criteria - Draft pages.	Select whether you want to add a free-form or a predefined sub-competency to the evaluation criteria specified on the document template.
Add a <section name> Behavior	EP_APPR_EDIT7	Select Add your own behavior on the Add a <section name> Behavior page.	Search for a predefined behavior to add to the sub-item specified on the document template.
Add a <section name> Behavior, <section name> Detail	EP_APPR_EDIT8	• Select Add your own <section name> on the Add a <section name> Behavior page. • Click the Edit Details link on the Performance Criteria - Draft or Development Criteria - Draft pages.	Add a free-form sub-item to the evaluation criteria specified on the document template or modify a competency.
Delete Confirmation	EO_DEL_CONFIRM	• Click the Delete <section name> link on the Performance Criteria - Draft or Development Criteria pages. • Click the  button next to a behavior for a <section name> on the Performance Criteria - Draft or Development Criteria - Draft pages.	Confirm that you intend to delete an item or behavior.

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Page Name	Object Name	Navigation	Usage
Complete/Reopen Confirmation	EP_APPR_MAIN2	Click the Complete or the Reopen button on the Performance Criteria - Draft page.	Confirm that you intend to complete or reopen the document.
Performance Notes	HR_NP_NOTE_SRCH	Click the Add Notes link in the Details group box for any item on the Performance Criteria - Draft page. Click the Add Notes link in the Details group box for any item on the Development Criteria - Draft page.	Search for performance notes. See Chapter 8, "Entering Comments and Ratings on Evaluations," Entering Performance Notes, page 121.
Performance Notes - New Note	HR_NP_NOTE	Click the Add a New Note button on the Performance Notes page.	Add a new performance note to the section.

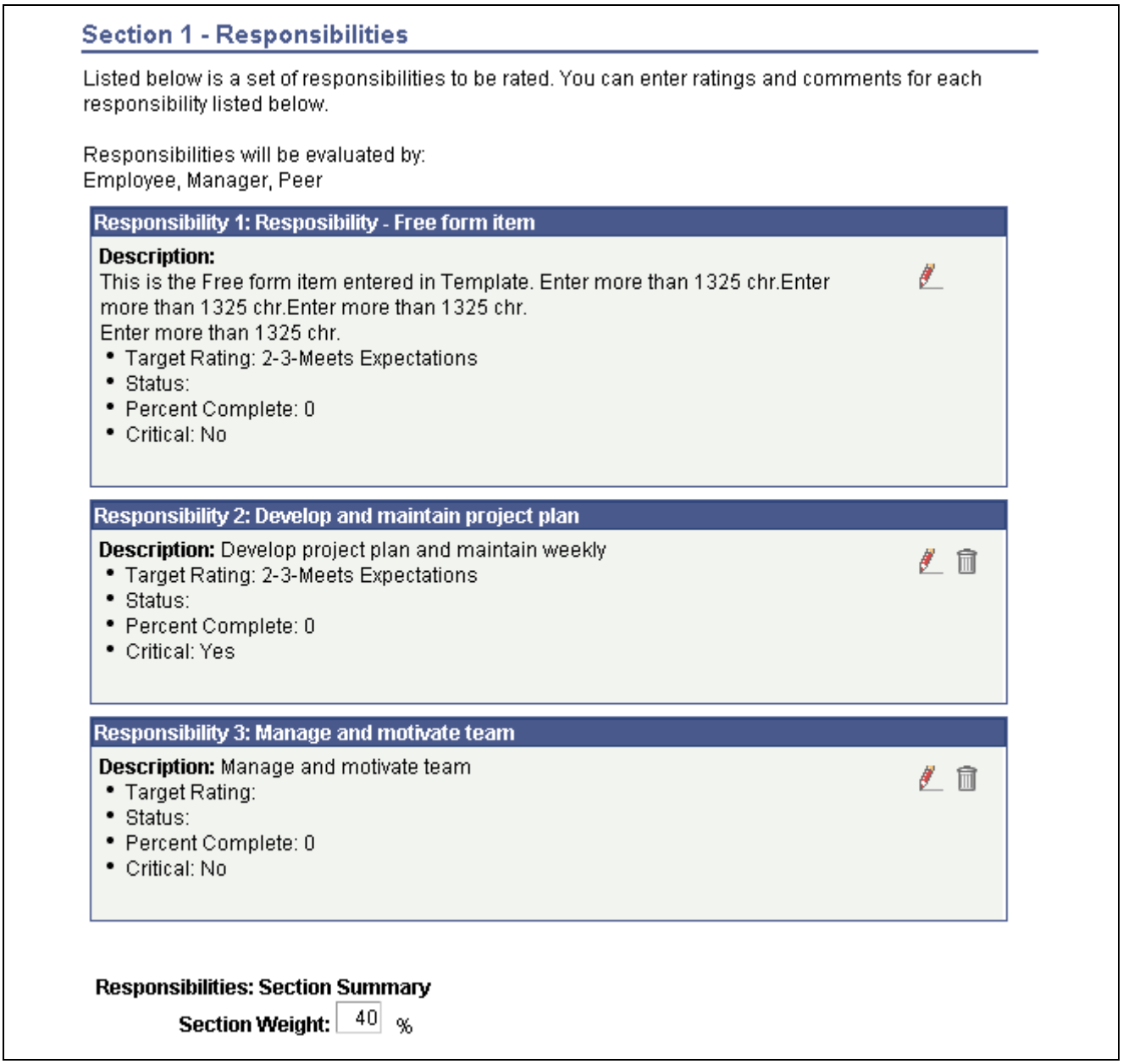
Modifying Evaluation Criteria

Access the Performance Criteria - Draft page.



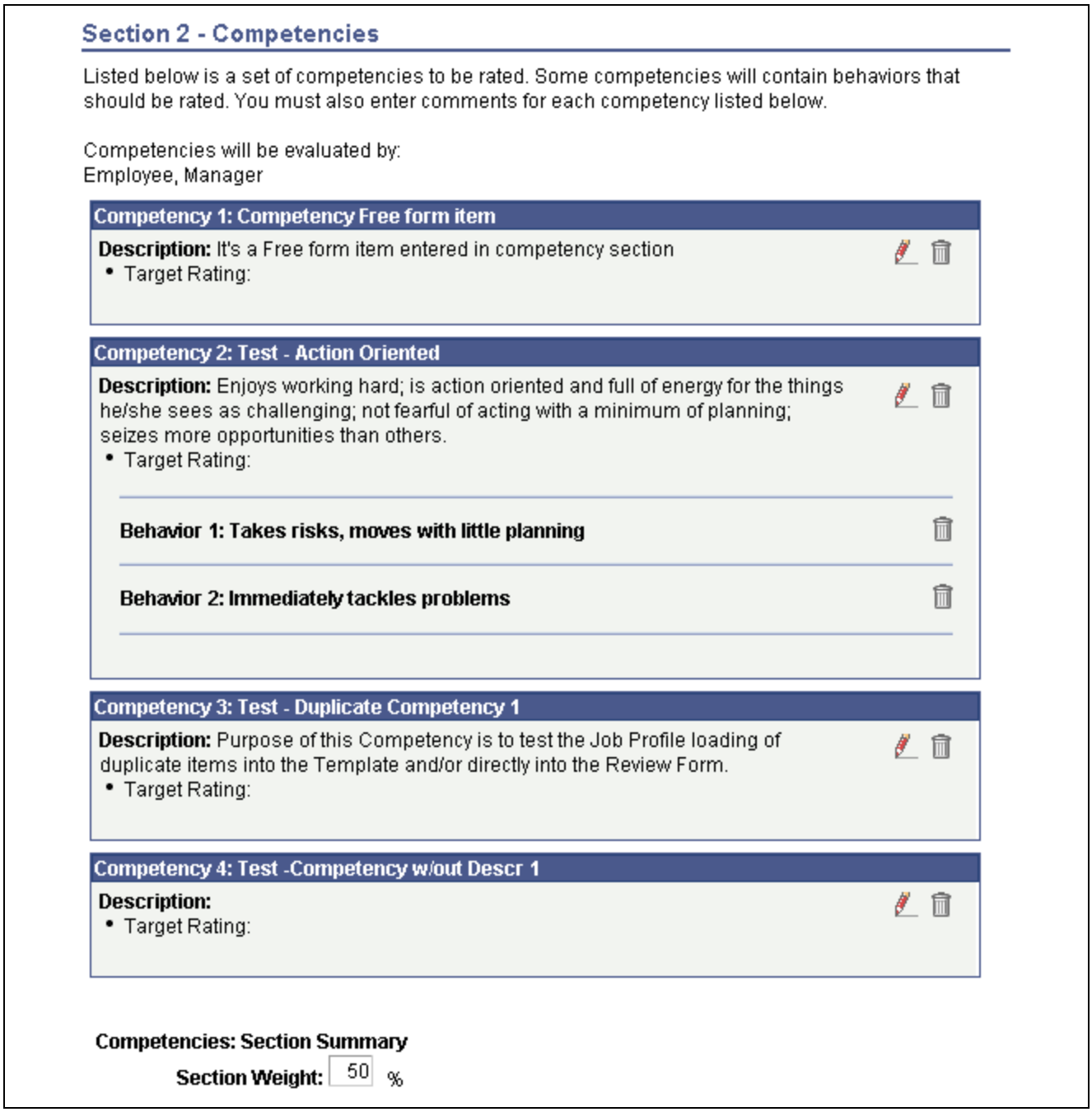
<document type> Criteria - Draft page (1 of 4)

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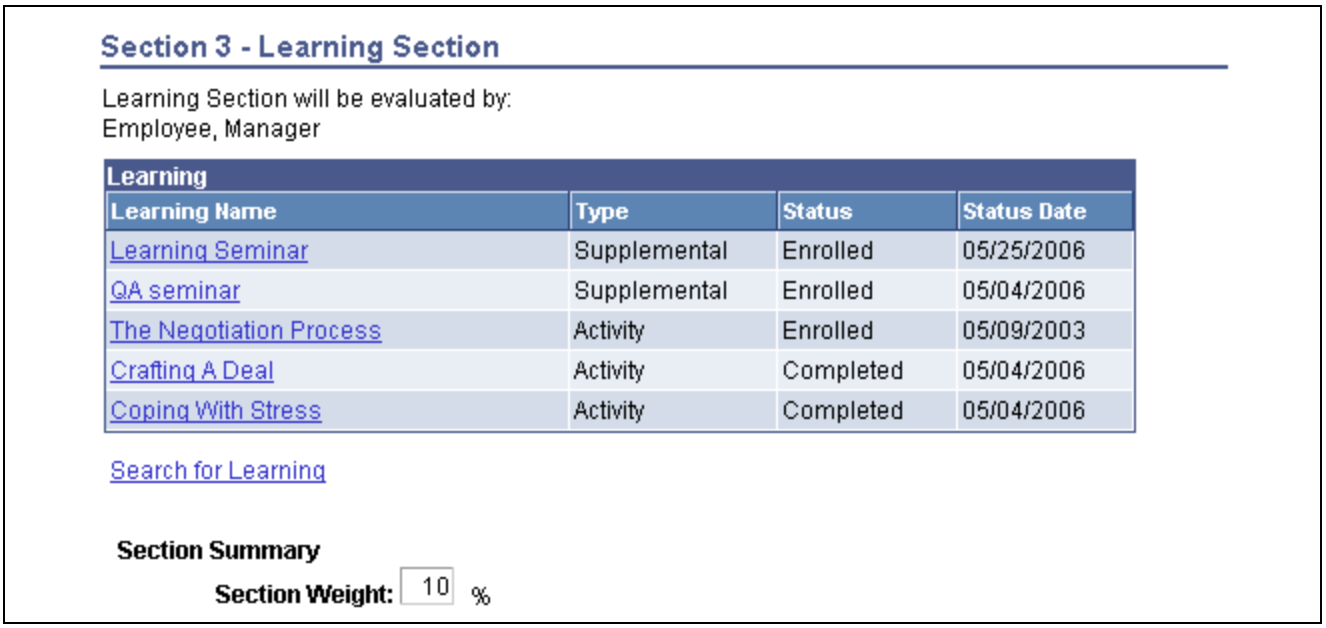
<document type> Criteria - Draft page (2 of 4)

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<document type> Criteria - Draft page (3 of 4)

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<document type> Criteria - Draft page (4 of 4)

Note. This is an example of the Performance Criteria - Draft document, the field definitions that follow also apply to the Development Criteria - Draft document. The contents that appear on the page are determined by the template associated with the document.

Save Saves the Performance or Document Criteria - Draft document.

Complete Click this button to complete the Evaluation Criteria step. This button is only enabled if you are signed in as the role that can complete this step.

After you complete the Establish Criteria step, you can view the draft criteria document. When you view a completed criteria document, the Complete button changes to Reopen.

Cancel Click this button to cancel the changes and return to the Document Details page.

Reopen This button displays if you have completed the establish criteria process.

Click this button to reopen a criteria document that you previously completed.

Note. After a role evaluation is created or a pending nomination is accepted, you cannot reopen the criteria document. This button no longer appears on the document, unless all pending nominations have been canceled and all evaluations have been deleted.

(View Printable Evaluation) Click this icon to display a printable version of the Establish Criteria - Draft document.

(Notify) Click this icon to display the Send Notification page.

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Section # - <section name>

This section describes the roles that are allowed to evaluate the section. Roles are assigned to a section on the Template Definition - Structure page - Rate/Weight tab.

Item # - <item name>

This section describes the parameters that were defined in the Items and Sub-Items group boxes on the Template Definition - Structure page - Rate/Weight tab. You can add or delete items from the sections in the document.

 (Performance Note)

This icon is available if the Notes check box is selected on the Template Definition - Structure page - Section tab.

Click the Performance Note icon to display the Performance Notes page.

You can access this note later on when you enter comments or rate the item on the evaluation.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the HR Notepad.

 (Edit Details)

This icon displays if the update field is selected on the Item tab of the Template Definition - Structure page: Item tab.

Click the Edit Details icon to display the <section name> Details page.

 (Delete)

The Delete icon is available if the if the Establish Criteria step is enabled and the item is not defined as Mandatory on the document template.

Click the Delete icon to remove the item for the page.

Add <Sub-Item Name>

This link is available if the document template specifies that the section contains subitems and the Add check box is selected in the Section Roles: Items grid.

Click this link to access the Add a <subitem> page.

The Add a <subitem> page has one of three formats, depending on how you set up the document template for the section subitem:

- If you selected Free-Form Allowed and selected a Prompt Table on the document template, the page enables you to select whether you want to add a predefined behavior or add a free-form subitem.
- If you selected Free-Form Allowed but did not select a Prompt Table on the document template, the page enables you to add a free-form subitem.
- If you selected a Prompt Table but did not select Free-Form Allowed on the document template, the page enables you to select whether you want to add a predefined subitem.

Add <section name>

The Add link is available if the Add Items - Establish Criteria check box is selected for the section and the Add check box is selected for the role in the Section Roles: Item grid on the document template.

Click this link to access the Add a <section name> page. This page has one of three formats, depending on how you set up the document template for the section item:

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- If you selected Free-Form Allowed and selected a Prompt Table on the document template, the page enables you to select whether you want to add a predefined competency or add a free-form competency.
- If you selected Free-Form Allowed but did not select a Prompt Table on the document template, the page enables you to add a free-form competency.
- If you selected a Prompt Table but did not select Free-Form Allowedon the document template, the page enables you to select whether you want to add a predefined competency.

Section # - Learning

Use this section to review, add, or delete learning for the employee. This section is available from both the Current and Historical documents pages.

Learning Name Click this link to display the <learning name> Description page in the Learning Management database.

Search for Learning Click this link to display the Search Catalog page in the Learning Management database.

See Also

Chapter 3, “Setting Up Document Templates,” Creating Document Templates, page 35

Chapter 3, “Setting Up Document Templates,” Adding Criteria to Sections, page 53

Chapter 9, “Consolidating Feedback from Evaluators,” Working with Writing Tools, page 142

PeopleSoft Enterprise Learning Management 9.0 PeopleBook, “Using the Learning Catalog”

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CHAPTER 7

Nominating and Tracking Multi-Source Participants

This chapter provides an overview of the nomination and tracking process and discusses how to:

- Manage nominations.
- Manage evaluation requests.
- Monitor participant evaluations.

Understanding the Nomination and Tracking Processes

This section lists prerequisites and provides an overview of the nomination and tracking process.

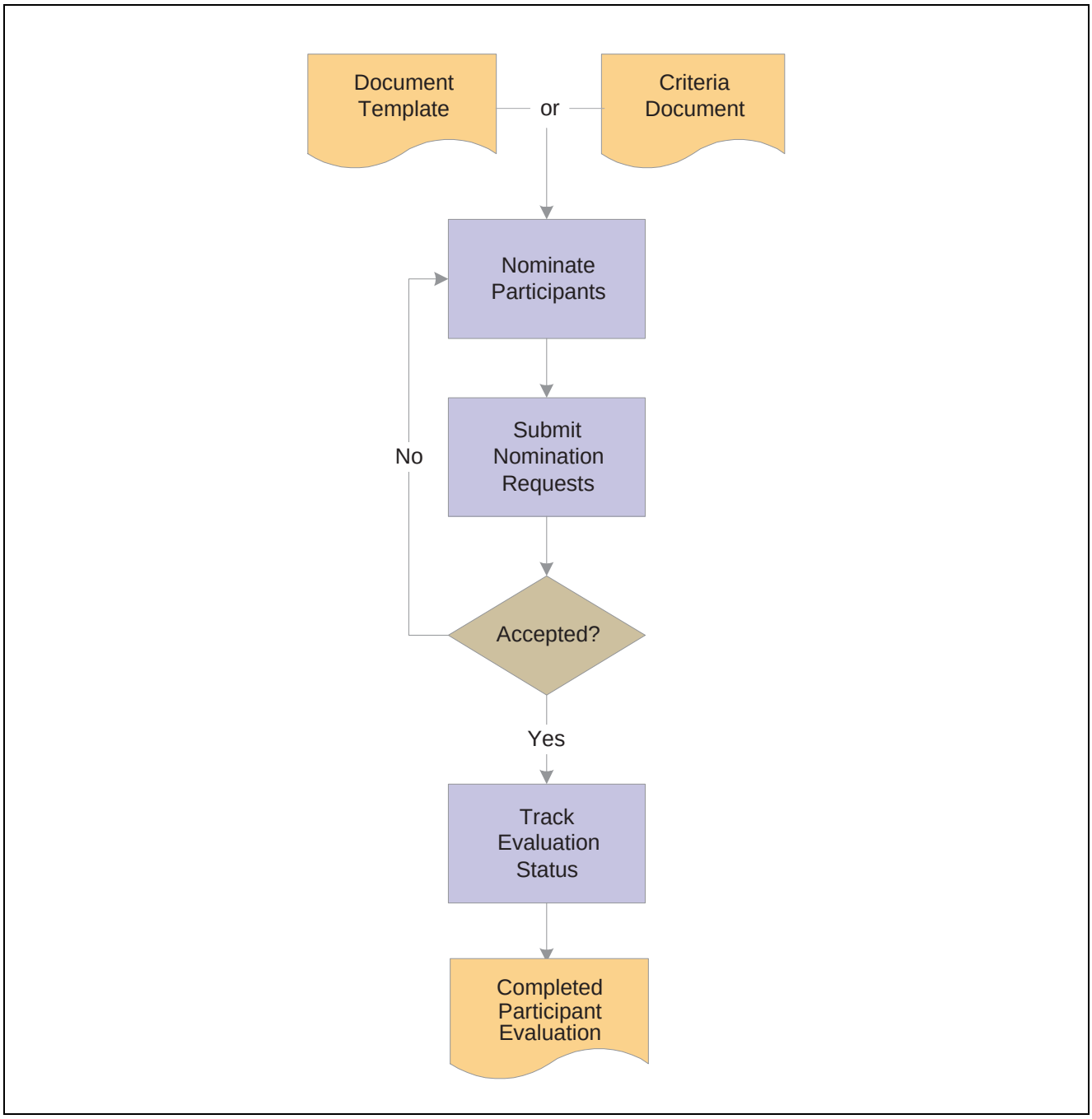
Nomination and Tracking Process Overview

The multi-participant process enables individuals other than the manager and employee to provide direct feedback into an employee's performance or development document. Additional roles might include peers, mentors, customers, and other managers.

You select the roles and specify the capabilities of each role on the document template. The options that you select on the document template also control how the manager and employee interact with the process.

This diagram shows the steps of the multi-participant process:

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Multi-participant process

The multi-participant process can begin any time after the criteria document is created.

Note. If the Establish Criteria step is enabled on the document template, you cannot start the Nominate Participants step you complete that step, because nominees must be able to view the evaluation criteria before deciding whether to accept or decline a nomination.

The actions that managers and employees can perform relative to multiple participants are defined on the Template Definition-Process page in the Nominate Participants and Review Participant Evaluations page regions. These actions include:

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- Nominate participants.

  Although both the manager and employee can nominate participants if the Updated By check box is selected for their role, only the role that is selected in the Submitted By field can approve and submit the nominations.

- Track the status of nominations and cancel nominations.

  A tracker might cancel a nomination if it is pending for too long. The tracker has the ability to resubmit cancelled nominations.

- Review participant evaluations.

  This step consists of two functions: tracking participant evaluations and accessing the content of participant evaluations. The ability to perform the two functions is set separately on the Process page of the document template.

  If the Accessed By check box is selected for the role, the role can view a list of participants and their evaluation status. If the Viewed By check box is also selected for the role, an active link to the participant evaluation is available to open and view the evaluation itself.

Note. A user that can open evaluations can also change the due date of the evaluation or send it back for rework. Both of these actions trigger notifications to the participant.

Optional features of the nomination process that are controlled on the document template include the ability to:

- Establish a minimum and maximum number of participants.
- Designate that nominee information is anonymous in the tracking nominations feature.
- Designate that feedback from a participant role is anonymous for either the manager and/or employee.

Nominations

Nominations are not submitted to nominees until the minimum number of participants are nominated and the Establish Criteria step, if applicable, is complete. After a nomination is submitted, it has the status of *Pending*.

Nominees can view their evaluation requests and accept or decline nominations. When a nominee accepts a nomination, the nomination status changes to *Accepted,* and the system generates an evaluation for the nominee.

Multi-Participant Evaluations

A nominee who accepts a nomination becomes a *participant*. An evaluation, with the specific content and capabilities that are defined for the role on the document template, is created for each participant at the time they accept the nomination.

See Also

Chapter 7, “Nominating and Tracking Multi-Source Participants,” Managing Evaluation Requests, page 111

Chapter 7, “Nominating and Tracking Multi-Source Participants,” Monitoring and Viewing Participant Evaluations, page 113

Chapter 8, “Entering Comments and Ratings on Evaluations,” page 117

Prerequisites

Before nominating people other than the manager and employee to participate in a performance or development review, you must:

1. Define any multi-participant roles that will be used in the process.

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2. Define a document template that is set up for multiple participants.
3. Generate documents from the template.
4. Begin or complete the Establish Criteria step.

See Also

Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 35

Managing Nominations

This section discusses how to:

- Nominate participants
- Track nomination status

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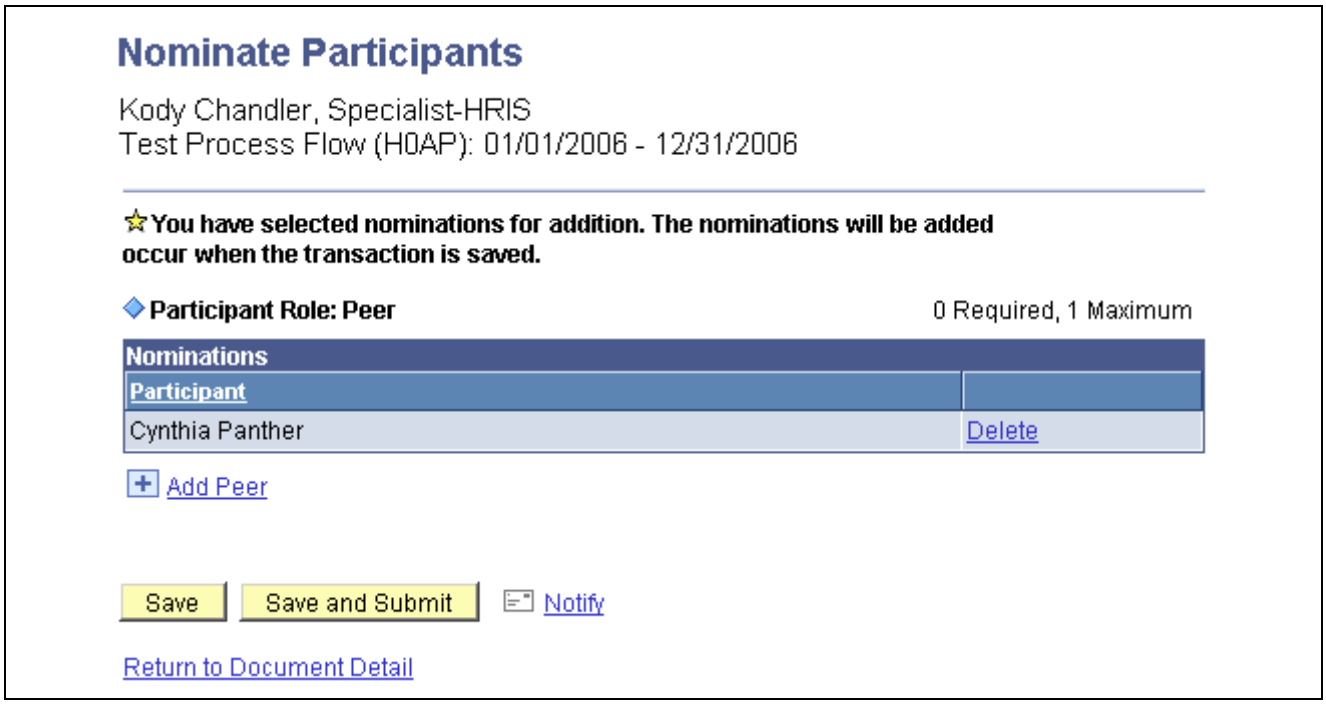
Pages Used to Nominate Participants

Page Name	Object Name	Navigation	Usage
Current <document type> Documents,	EP_APPR_SELECT	• Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents • Self Service, Performance Management, My Performance Documents, Current Documents, Current Performance Documents • Manager Self Service, Performance Management, Development Documents, Current Documents, Current Development Documents • Self Service, Performance Management, My Performance Documents, Current Documents, Current Development Documents	Select an employee evaluation.
Document Details	EP_APPR_DETAIL	Click a document link on the Current Performance Documents or Current Development Documents page.	View the status of document processes and access detail pages for document steps.
Nominate Participants	EP_APPR_NOM_BUILD	Click the Start link or the Edit link for the Nominate Participants step on the Document Details page.	Nominate participants for multi-source evaluations. On this page, you can view the number of participants that are required for each role, view a list of the nominees you selected, and submit evaluation requests to nominees.
Person Search - Simple	HR_PSS_SEARCH	Click the Add <Role> link on the Nominate Participants page.	Search for prospective participants to add to the nomination list.
Track Nominations	EP_APPR_NOM_TRACK	Click the Start link or the Edit link for the Track Nominations step on the Document Details page.	Track the status of nominations that you submitted.

Nominating Participants

Access the Nominate Participants page.

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Nominate Participants page

Delete Click this link to delete a participant from the nomination list. This link is available only when the nominations is not yet submitted to the participant.

Add <role> Click this link to access the Person Search - Simple page and search for persons to nominate in the role that is listed. One Add <Role> link appears for each participant role that is defined on the document template.

For example, the Add Peer link appears if the peer role is defined on the document template

Save Click this button to save the participant list.

Save and Submit Click this button to save the participant list and submit the nominations to the nominees. This button only appears if the role you signed in with is enabled to submit nominations on the document template and the Establish Criteria step is complete. Submitted nominations appear on the nominee's My Evaluation Requests page.

Participant Role Summary

A summary of the nomination status for each participant role appears preceding the participant list for the role. This summary lists the remaining required and maximum nominations that you must submit and have accepted before the Nominate Participants step is complete.

For example, a document template specifies:

Role	Required	Maximum
Other	0	3
Peer	1	3

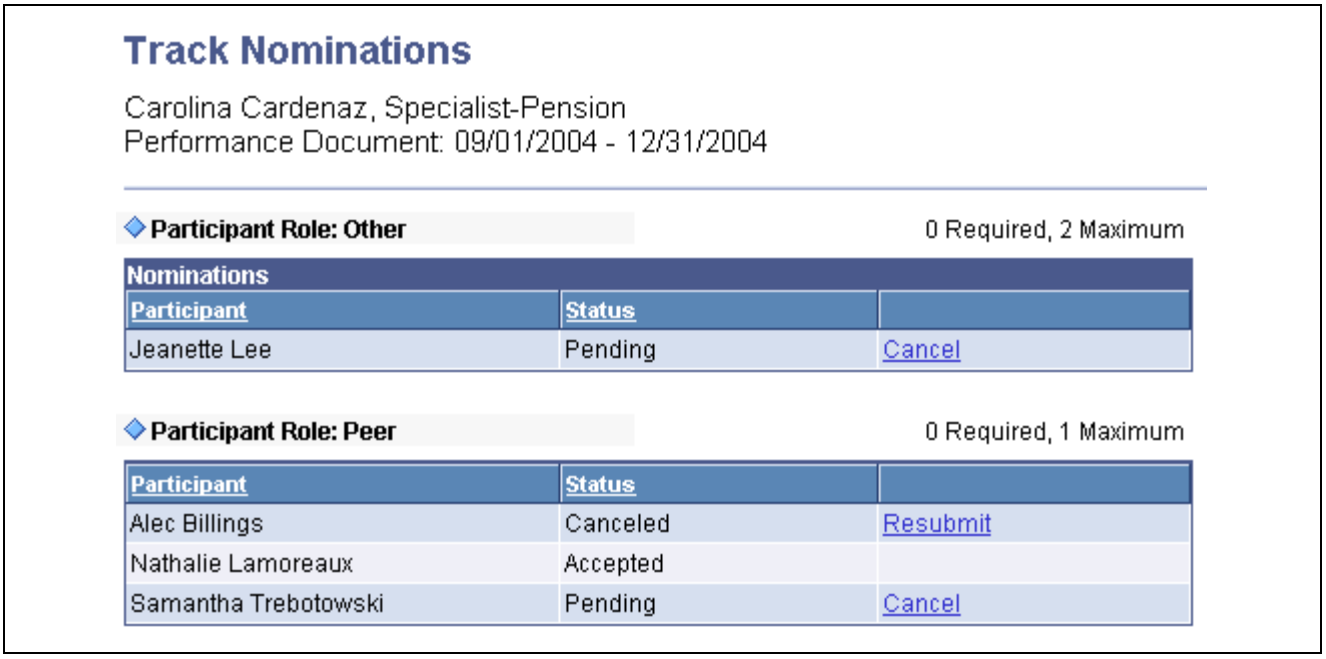
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One nomination for the Other role and 3 nominations for the Peer role are submitted. One peer nomination is accepted and one is declined. The role summary appears like this:

Role	Required	Maximum
Other	0	2
Peer	0	1

Tracking Nomination Status

Access the Track Nomination Status page.



Track Nominations page

Nominations

Use this scroll area to view the status of each individual nominee, by role. If the Anonymity check box is selected for a role, the nominee is identified by role and a number, otherwise the nominee's name appears in the list.

Cancel Click this link to cancel a nomination request.

Resubmit Click this link to resubmit a nomination request. This link appears for nominations that you previously cancelled.

Decline Click this link to view the nominee's comments on why they declined. This link appears if the nominee declined the evaluation request.

Managing Evaluation Requests

This section discusses how to:

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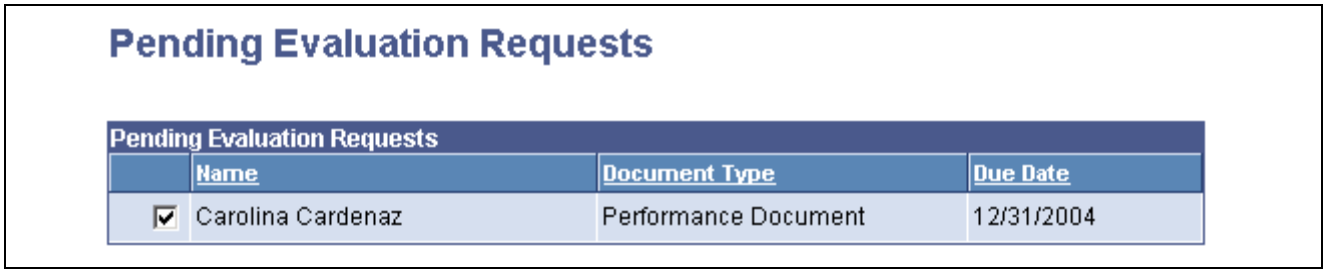
- Accept or decline nominations.
- Complete multi-participant documents.

Pages Used to Manage Evaluation Requests

Page Name	Object Name	Navigation	Usage
Pending Evaluation Requests	EP_NOM_PENDING_OTH	Self-Service, Performance Management, Other's Performance Documents, Pending Evaluation Requests Self-Service, Performance Management, Other's Development Documents, Pending Evaluation Requests	Respond to requests to provide performance or developmental evaluations for others.
Decline Evaluation Request Nomination	EP_DECLINE_CONFIRM	Click the Decline button on the Pending Evaluation Requests page.	Enter reasons for declining a nomination.
My Current Evaluations for Others	EP_APPR_OTH_SELECT	• Select one or more evaluations and click the Accept button on the Pending Evaluation Requests page. • Self-Service, Performance Management, Other's Performance Documents, Current Evaluations, My Current Evaluations for Others • Self-Service, Performance Management, Other's Development Documents, Current Evaluations, My Current Evaluations for Others	View a list of the evaluations that you are performing for employees who are not in a reporting relationship to you.

Accepting or Declining Nominations

Access the Pending Evaluation Requests page.



Pending Evaluation Requests

Accept Click this button to accept the evaluation requests that you select.

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This action changes the nomination status to *Accepted*, creates the evaluation document, adds it to the Other's Performance Documents - Current Documents list, and transfers the user to this navigation. A notification is also sent to the nominator.

Decline Click this button to decline the evaluation requests that you select.

This action brings up the Decline Evaluation Request Confirmation page, on which you enter a reason for declining the nomination. The system changes the nomination status to *Declined* and sends a notification to the nominator.

Accessing Multi-Participant Evaluations

Access the Other's Performance Documents - Current Documents page.



Other's Performance Documents - Current Documents page

If you access this page after accepting one or more evaluations, the message that appears below the page title is *You have successfully accepted the selected evaluations.*

Click a Document Type link to access the evaluation.

Monitoring and Viewing Participant Evaluations

This section discusses how to monitor participant evaluation status and view the content of participant evaluations.

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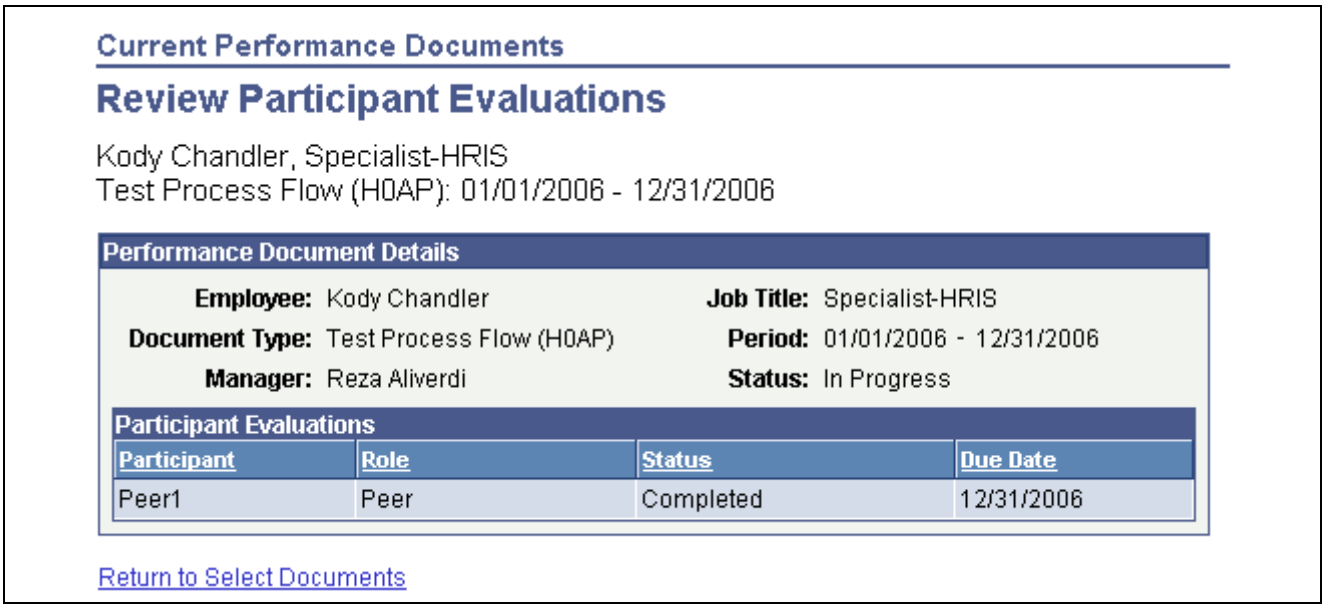
Page Used to Monitor and View Participant Evaluations

Page Name	Object Name	Navigation	Usage
Review Participant Evaluations	EP_APPR_PARTIC	• Manager Self Service, Performance Management, Performance Documents, Current Documents Select a document on the Current Documents page. Click the View link on the Review Participant Evaluations step. • Self Service, Performance Management, My Performance Documents, Current Documents Select a document on the Current Documents page. Click the View link on the Review Participant Evaluations step. • Manager Self Service, Performance Management, Development Documents, Current Documents Select a document on the Current Documents page. Click the View link on the Review Participant Evaluations step. • Self Service, Performance Management, My Development Documents, Current Documents Select a document on the Current Documents page. Click the View link on the Review Participant Evaluations step.	Track the status of multi-participant evaluations and view the content of participant evaluations.

Reviewing Participant Evaluations

Access the Review Participant Evaluations page.

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Review Participant Evaluations page

This page is only visible to roles that are enabled to review participant feedback on the document template.

Participant Click a link for a listed participant to open their document for viewing.

Note. The example page shot is from the manager's pages and the Anonymity for Manager check box is selected on the document template, therefore the participants are listed by role: Peer1, Peer2, and so forth. If the Anonymity for Manager check box is clear, the participant names are visible.

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CHAPTER 8

Entering Comments and Ratings on Evaluations

This chapter provides an overview of evaluation data entry and discusses how to:

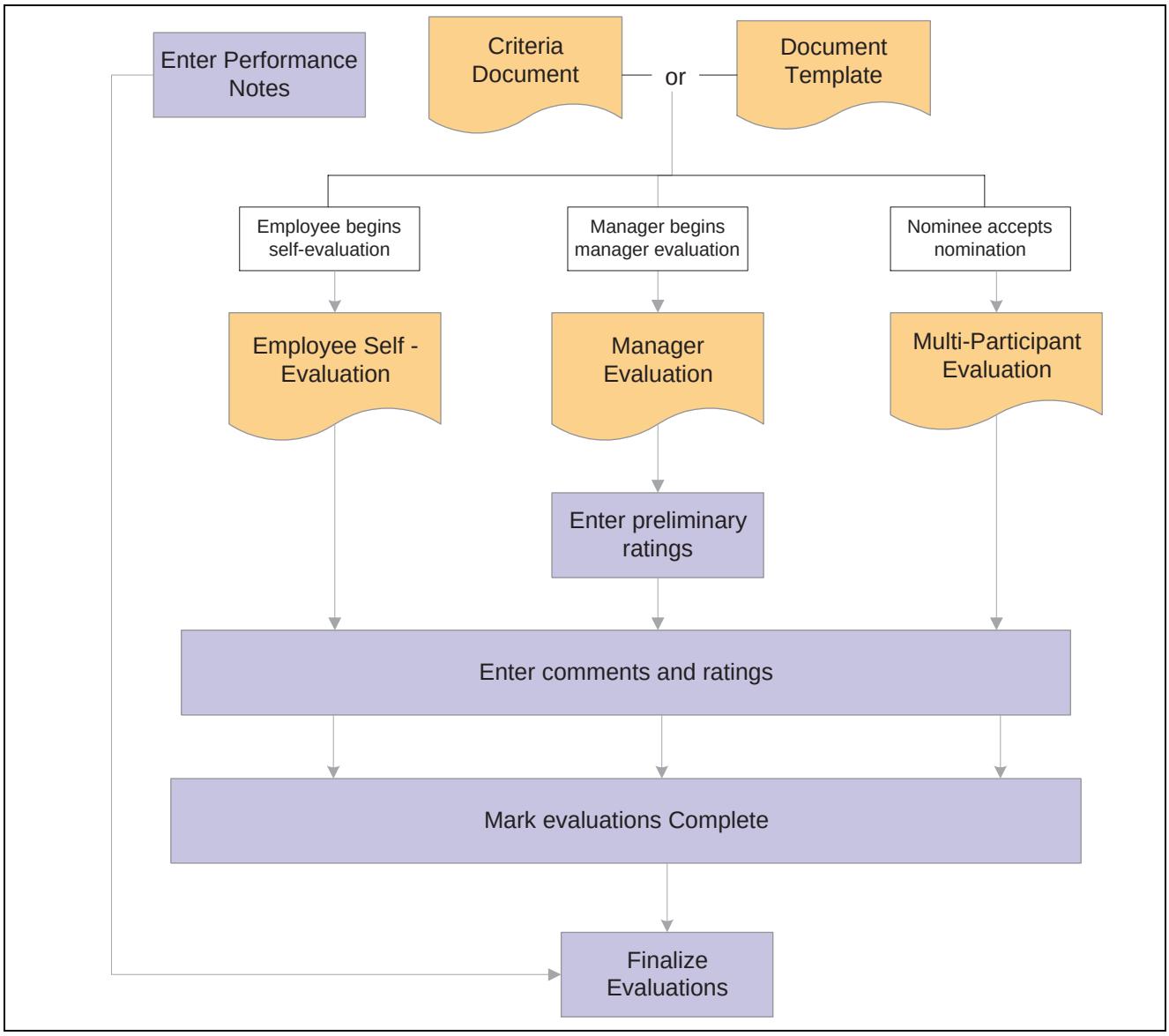
- Record preliminary ratings.
- Record performance notes.
- Update evaluations.

Understanding Evaluation Data Entry

ePerformance is designed to support the complete performance and development process from planning to evaluation. An enterprise can implement the complete process or just portions of it. This chapter focuses on the part of the process where participants evaluate the employee's performance or development needs against the evaluation criteria.

This diagram shows the flow of the evaluation data entry process, assuming that you implement all options:

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Evaluation data entry process

Preliminary Ratings

The capability to enter preliminary ratings for employees is available to managers only. These ratings are entered before the official rating data is entered in the manager's evaluation, and they are not entered on the evaluation—they are entered on the Preliminary Ratings page. This enables the manager to enter preliminary ratings at any time after the document is created, including during the Establish Criteria and Nomination steps.

Only documents that are *In Progress* appear on the Preliminary Ratings page.

Preliminary ratings are used to generate the Ratings Distribution Summary report, which enables managers and HR administrators to compare preliminary ratings with desired and actual rating distributions. Employees cannot see preliminary ratings.

To enable the entry of preliminary ratings, select the Preliminary Rating check box for the Overall Summary section on the document template.

See Chapter 8, "Entering Comments and Ratings on Evaluations," Recording Preliminary Ratings, page 120.

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Performance Notes

Managers and employees can record notes about an employee's performance and accomplishments in two ways:

- During the Establish Criteria step.

  The Add Note link appears on a section or item during the Establish Criteria process if enabled on the document template. Notes that are added during this step are directly linked to the section and item to which they apply.

- At any time, by navigating to the Performance Notes page.

  Employees can create records of events, activities, and accomplishments that they can later use to complete their performance evaluations. Similarly, managers can record details of an employee's performance for use when they complete the employee's evaluation. These notes are dated, and are available only to the author of a note. In other words, the manager cannot see notes that the employee enters and vice versa.

Note. There is not a separate page for development notes. The Performance Notes page is used to record any comment, and these notes are available for inclusion in either performance or development documents. The Performance Notes page is located under the Performance Management menu item and do not fall under the Performance Documents or Development Documents submenus.

See Chapter 8, "Entering Comments and Ratings on Evaluations," Entering Performance Notes, page 121.

Ratings and Comments

The performance document template setup enables you to configure evaluations for each role (employee, manager, and multi-participant) to include only sections, items, and features that are appropriate for the role to evaluate. For example, on a project review, you might include the Goals, Initiatives, Competencies, and Overall Summary sections on the manager and employee evaluations and enable them to enter ratings and comments on all sections. However, you might include only the Competencies and Overall Summary sections on multi-participant evaluations.

To evaluate an employee's performance, participants can enter and update ratings and comments as permitted by the template at any time during the performance period. This evaluation information is visible to employees and managers only after the evaluations are completed.

Note. A manager can include comments that other evaluators entered on a section or item only if the manager also has comments enables for the same section and item.

See Chapter 8, "Entering Comments and Ratings on Evaluations," Updating Evaluations, page 123.

Advisor Tools

Depending on the capabilities granted to the participant's role on the document template, any evaluation participant might have access to the Development Tips or Results Writer tools. These tools provide suggestions for incorporating into comments. Actual usage of these tools most often occurs when the manager role consolidates feedback and finalizes evaluations.

See Chapter 9, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 142.

Finalization Activities

After evaluations are complete, the manager consolidates feedback and ratings into the manager evaluation. The manager conducts a review with the employee (if a review process is required) and submits the evaluation for approval (if an approval process is required).

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See Chapter 10, "Managing Reviews and Approvals," page 151.

See Also

Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 35

Chapter 6, "Modifying Evaluation Criteria," page 93

Recording Preliminary Ratings

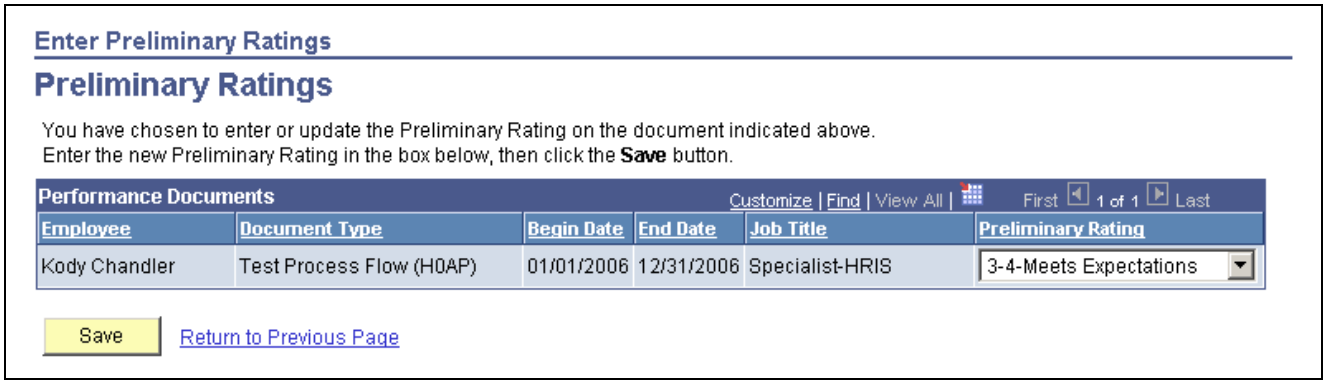
This section provides and overview of preliminary ratings and discusses how to enter preliminary ratings.

Page Used to Record Preliminary Ratings

Page Name	Object Name	Navigation	Usage
Enter Preliminary Ratings	EP_APPR_SELECT	Manager Self Service, ePerformance, Performance Documents, Administrative Tasks, Enter Preliminary Ratings, Enter Preliminary Ratings	Select one or more employees for whom to enter preliminary ratings.
Preliminary Ratings	EP_APPR_PRELIM	Click the Continue button on the Enter Preliminary Ratings page.	Enter preliminary ratings for selected employees.

Entering Preliminary Ratings

Access the Preliminary Ratings page.



Preliminary Ratings page.

Preliminary Rating Enter a preliminary rating. The list of ratings from which you select is defined by the rating model that is associated with the Overall Summary section of the document.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog," Defining Rating Models

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Entering Performance Notes

This section lists pages used to enter performance notes.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with Common Components," Configuring the HR Notepad

Pages Used to Enter Performance Notes

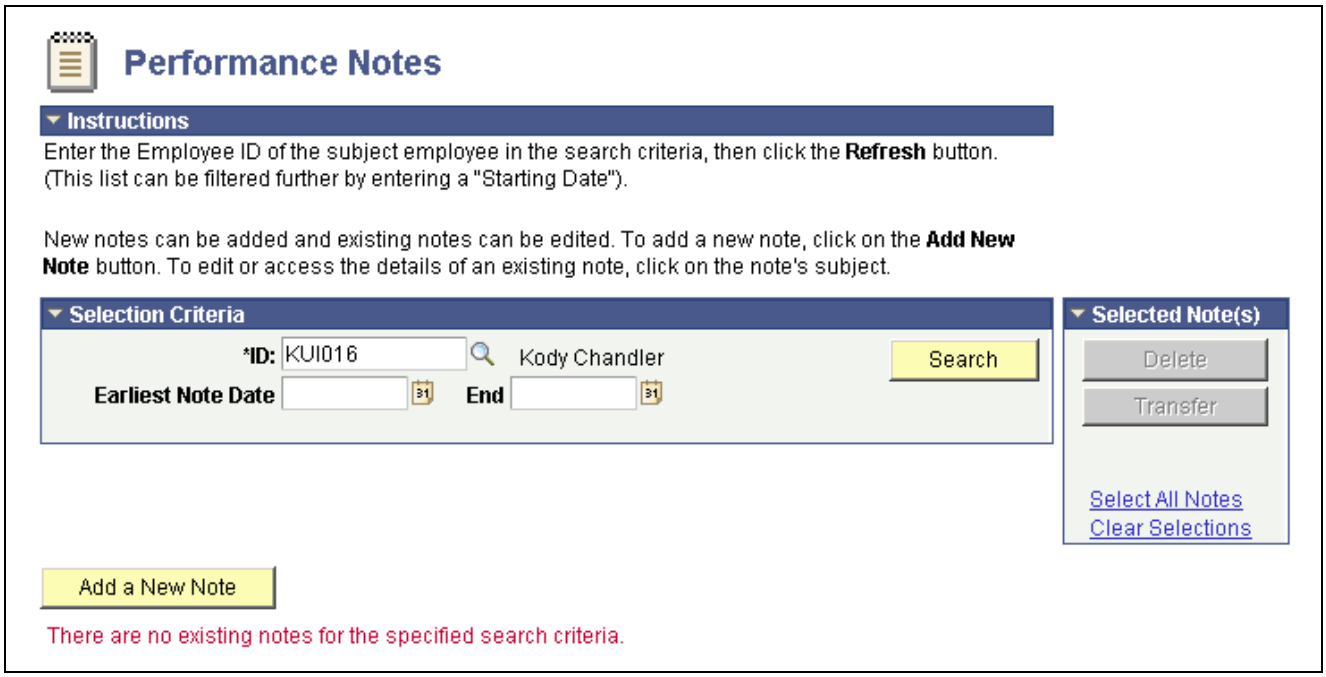
Page Name	Object Name	Navigation	Usage
Performance Notes	HR_NP_NOTE_SRCH	• Manager Self Service, Performance Management, Maintain Performance Notes, Performance Notes • Self-Service, Performance Management, Performance Notes, Performance Notes	Search for and enter performance notes.
Performance Notes - New Note, Performance Notes - Selected Note	HR_NP_NOTE	Click the Add a New Note button on the Performance Notes or the My Performance Notes page.	Enter a new performance note. You can also view and modify an existing performance note on this page.
Performance Notes - Confirm Delete	HR_NP_MESSAGE	Click the Delete button on the Performance Notes or the My Performance Notes page.	Confirm a delete of a performance note.
Person Search - Simple	HR_PSS_SEARCH	Click the Transfer button on the Performance Notes or the My Performance Notes page.	Search for and select a recipient manager for a performance note transfer.

Accessing Notes

Access the My Performance Notes page or the Performance Notes page.

Note. These two pages work similarly, except that the My Performance Notes page enables employees to search for and enter notes on their own performance and the Performance Notes page enables managers to search for and enter notes on other employees.

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Performance Notes page

Selection Criteria

To add or view performance notes for a specific employee, enter an ID and, optionally, an Earliest Note Date and End date. If you do not specify dates, all notes for the employee regardless of date entered appear in the Existing Performance Notes for this Employee grid

---

Note. The ID field appears only on the manager version of this page, since employees can only view their own notes.

Search	Click to view a list of performance notes that meet the search criteria.
Add New Note	Click to access the Performance Notes Detail page, where you can create a new note.

Existing Performance Notes for this Employee

This section lists all the performance notes that meet the search criteria. Click the note link to view and modify the details of the note, or select one or more notes to delete or transfer.

Selected Note(s)

Select one or more listed notes and click the Delete button to remove them from the system or the Transfer button to transfer them to another manager.

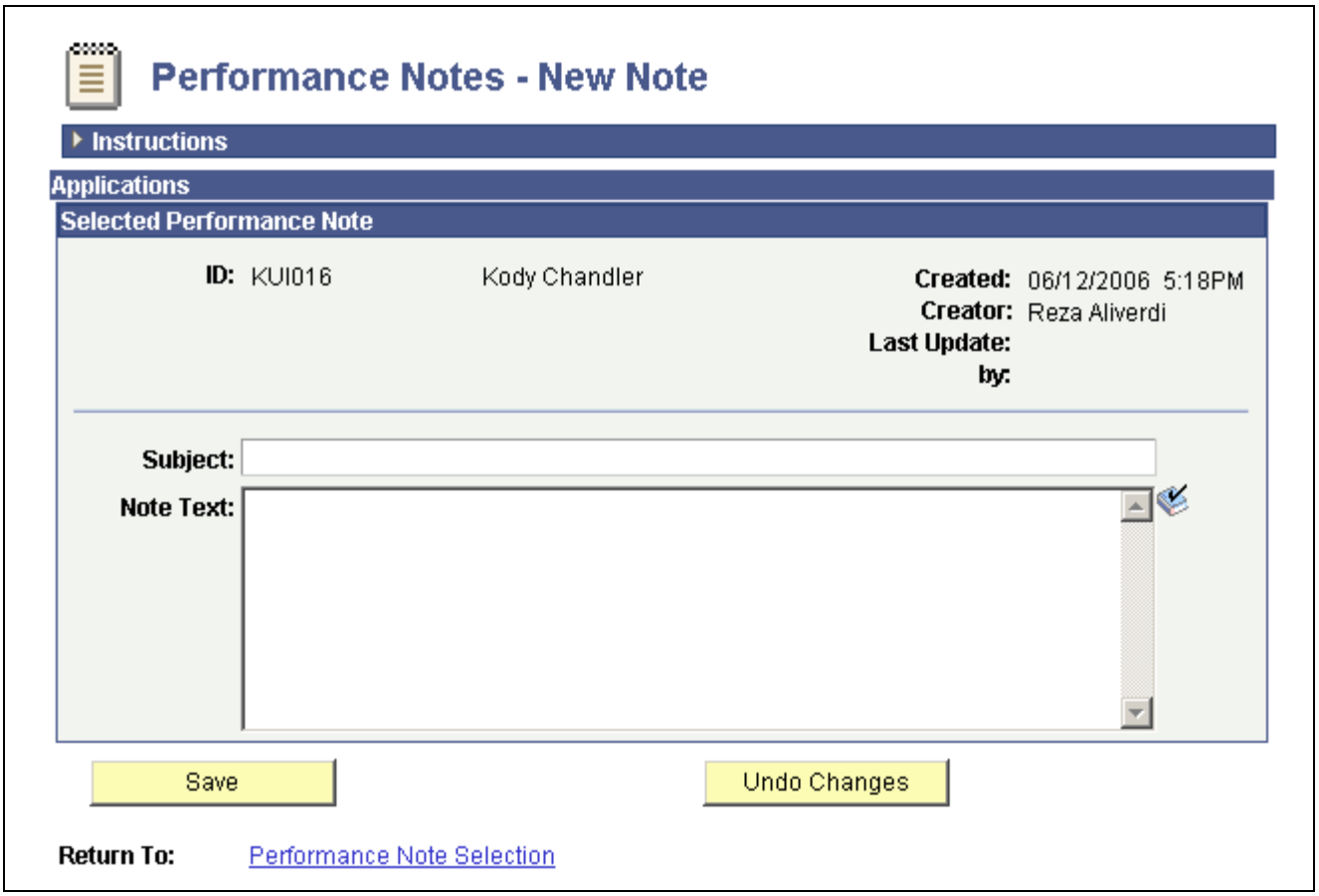
Entering Performance Notes

Access the Performance Notes - New Note page.

Note. If you are viewing an existing note, the page title changes to Performance Notes - Selected Note, as shown below

---

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Performance Notes - New Note page

Subject Enter the note subject in the Comments text box, or enter a new note.

The note date for new notes is the current date and you cannot change the date.

Updating Evaluations

This section lists prerequisites and discusses how to enter and maintain evaluation data.

Note. In this section, a page or field title with a word in brackets indicates that the page takes its name from the context in which it appears.

Prerequisites

Before entering evaluation data as a manager or employee, you must complete the Establish Criteria step, if it is specified on the document template. To enter evaluation data as another participant, you must have received and accepted a nomination to participate in the evaluation.

See Also

Chapter 6, "Modifying Evaluation Criteria," page 93

Chapter 7, "Nominating and Tracking Multi-Source Participants," page 105

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Pages Used to Update Evaluations

Note. The availability and order of these pages depends on the template being used and the role of the participant.

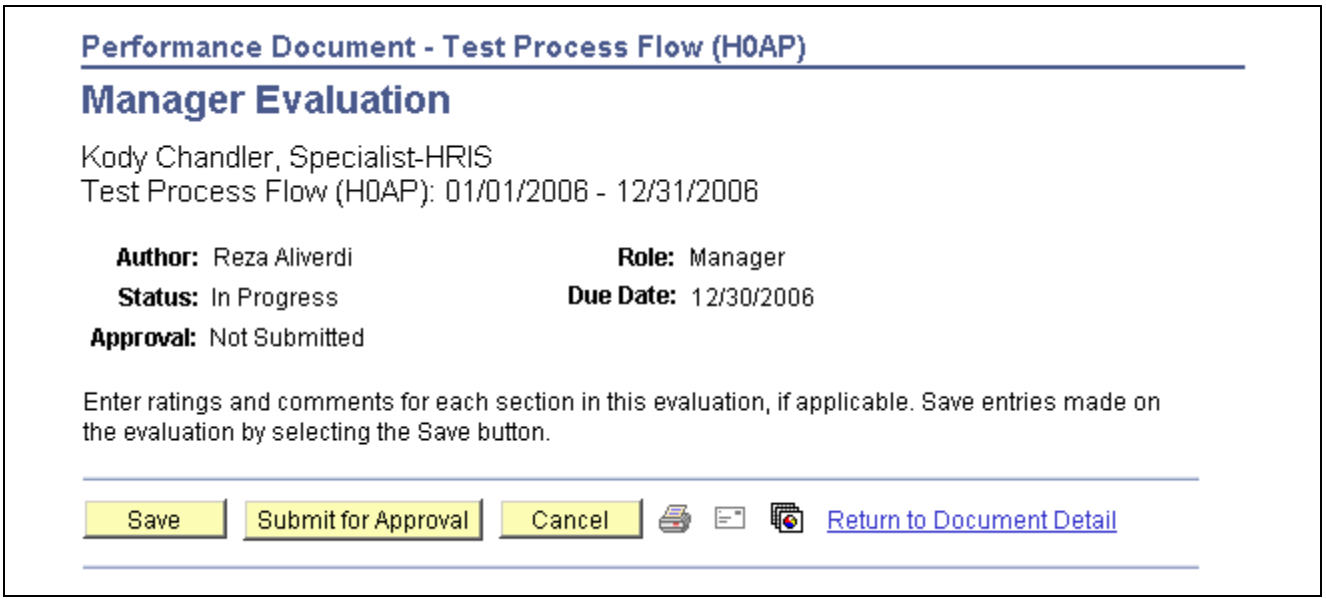
Page Name	Object Name	Navigation	Usage
<role> Evaluation	EP_APPR_MAIN1	• Manager Self Service, Performance Management, Performance Documents, Current Documents • Self Service, Performance Management, My Performance Documents, Current Documents • Self Service, Performance Management, Other's Performance Documents, Current Documents On the Current Documents page, click the link in the Document Type column for a listed document. On the Document Details page, click the Start link or the Edit link, whichever appears, for the appropriate role Evaluation step.	Enter and maintain evaluation data, pursuant to the participant role.
Edit Details Icon	EP_APPR_M_EDIT5	Click the Edit Detail icon on any Details box on an evaluation.	Update item details such as title, description, due date, owner, supports, status, reminder date, percent complete, and flags indicating critical items.
View Other Authors Selection	EP_APPR_SEC_ROLES1	Click the View Other Authors link on the <role> Evaluation page.	Select other evaluation authors to view the comments that they entered.
Add <item>	EP_APPR_EDIT3	Click the Add <item> link on the <role> Evaluation page.	Add an item to the section. You can add either a coded or a free-form item.
Add a <section name>	EP_APPR_EDIT4	Click the Add link on the <role> Evaluation page.	Add an item to the section.
Add a <section name> Behavior	EP_APPR_EDIT7	Click the Add Behavior link that appears for a competency item.	Select a behavior to add to the competency or enter a free-form behavior.
Edit <section name> Behavior	EP_APPR_EDIT8	Click a listed behavior link for a competency.	Modify the behavior description for a competency.

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Entering and Maintaining Evaluation Data

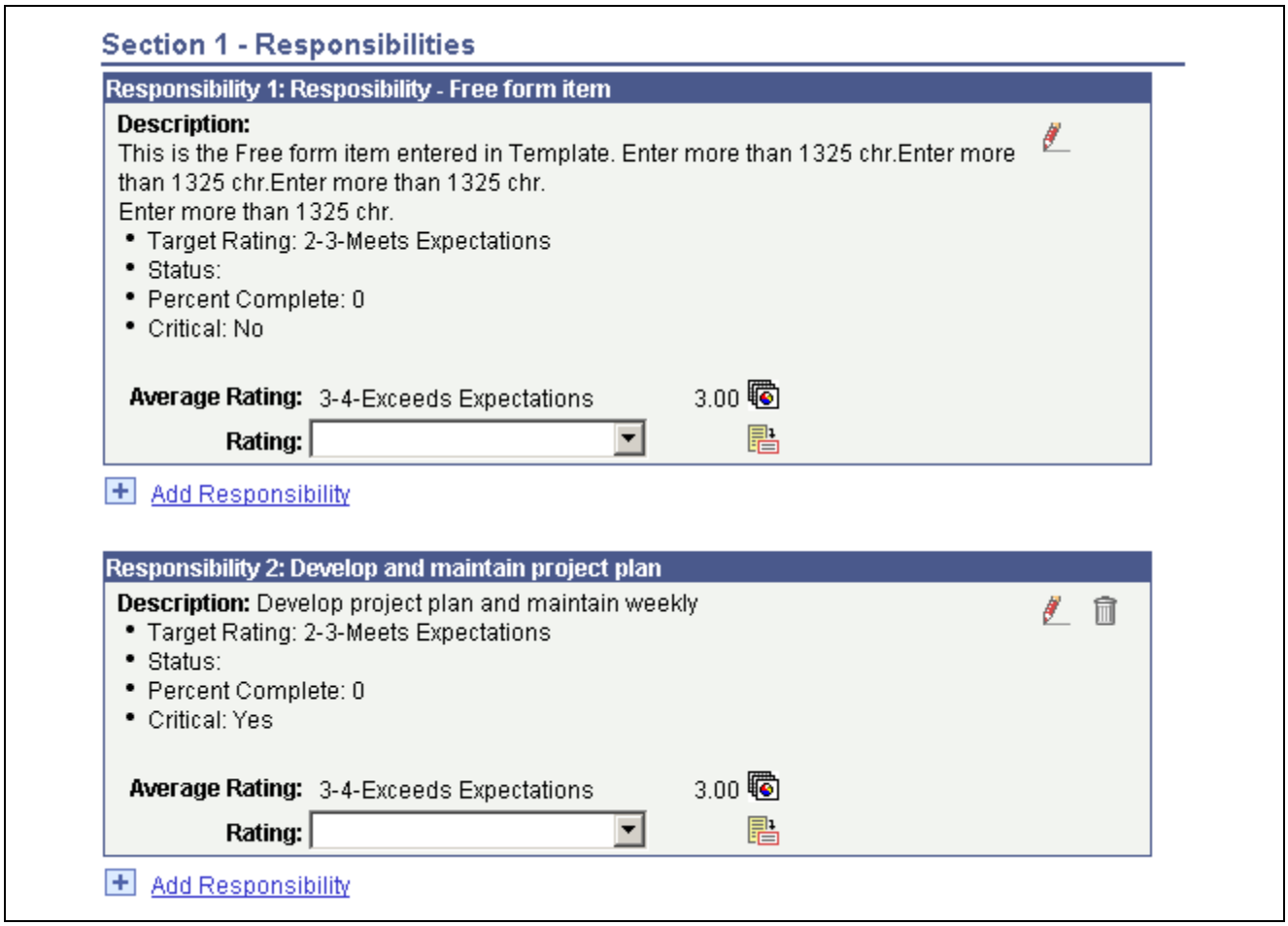
Access the Manager Evaluation, Employee Evaluation, or Peer Evaluation page.

Note. The example shown is from a manager's evaluation.

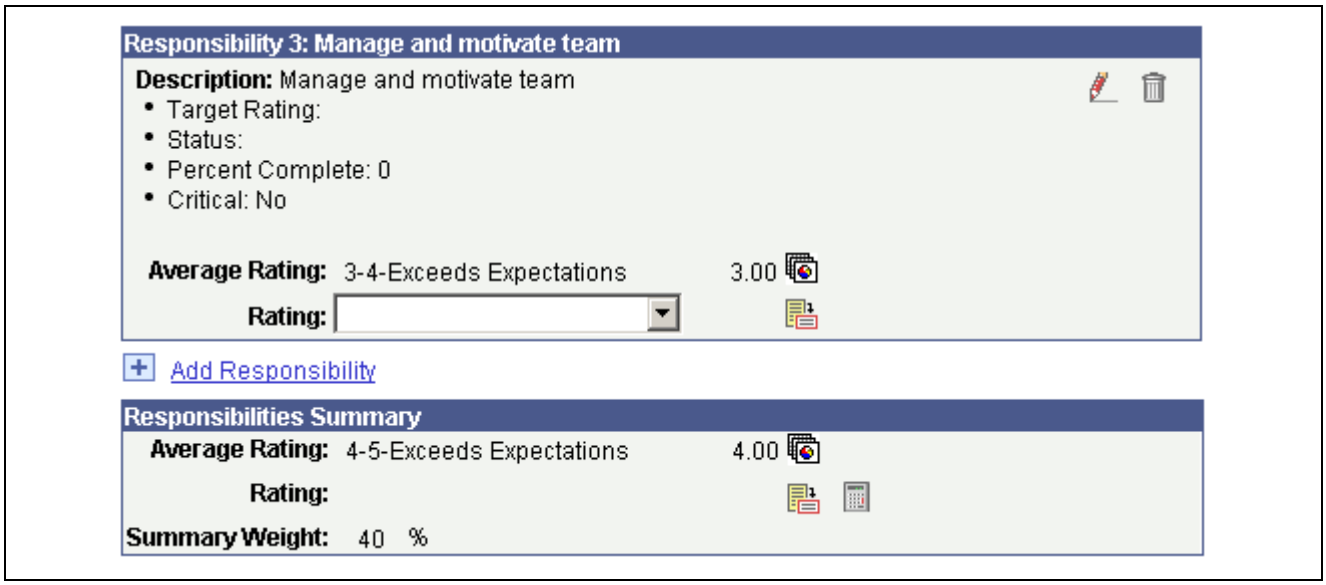


Manager Evaluation page (1 of 7)

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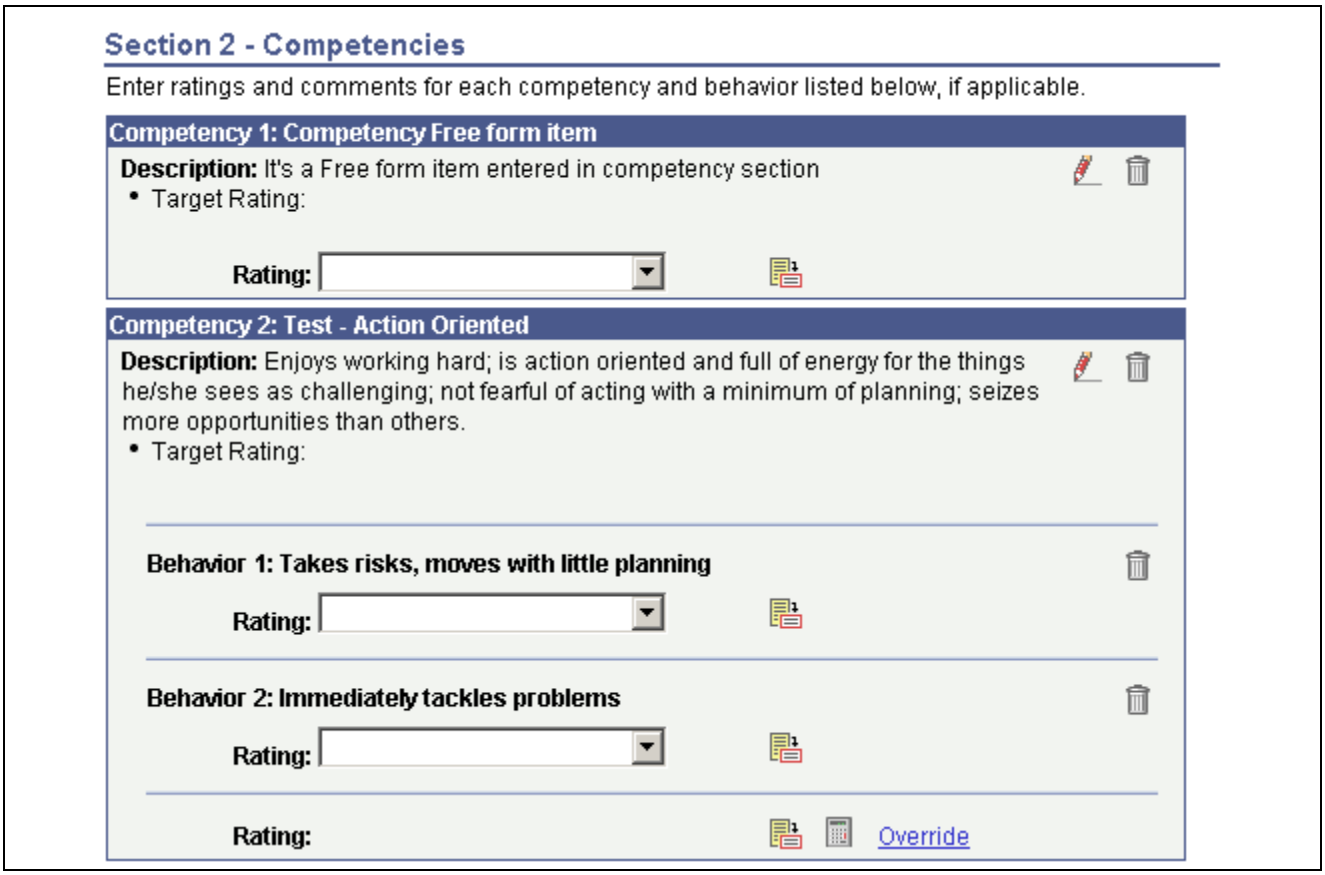


Manager Evaluation page (2 of 7)



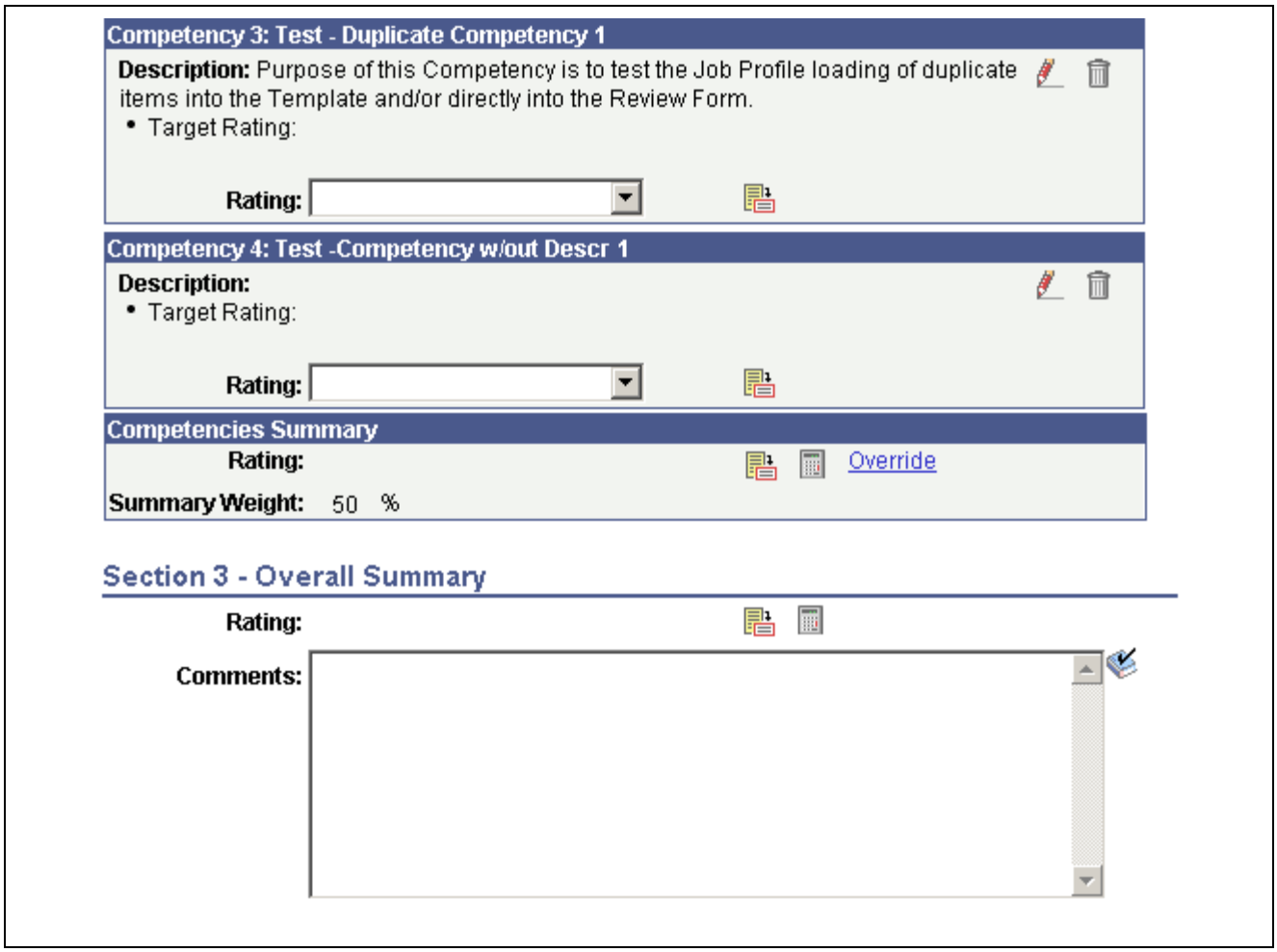
Manager Evaluation page (3 of 7)

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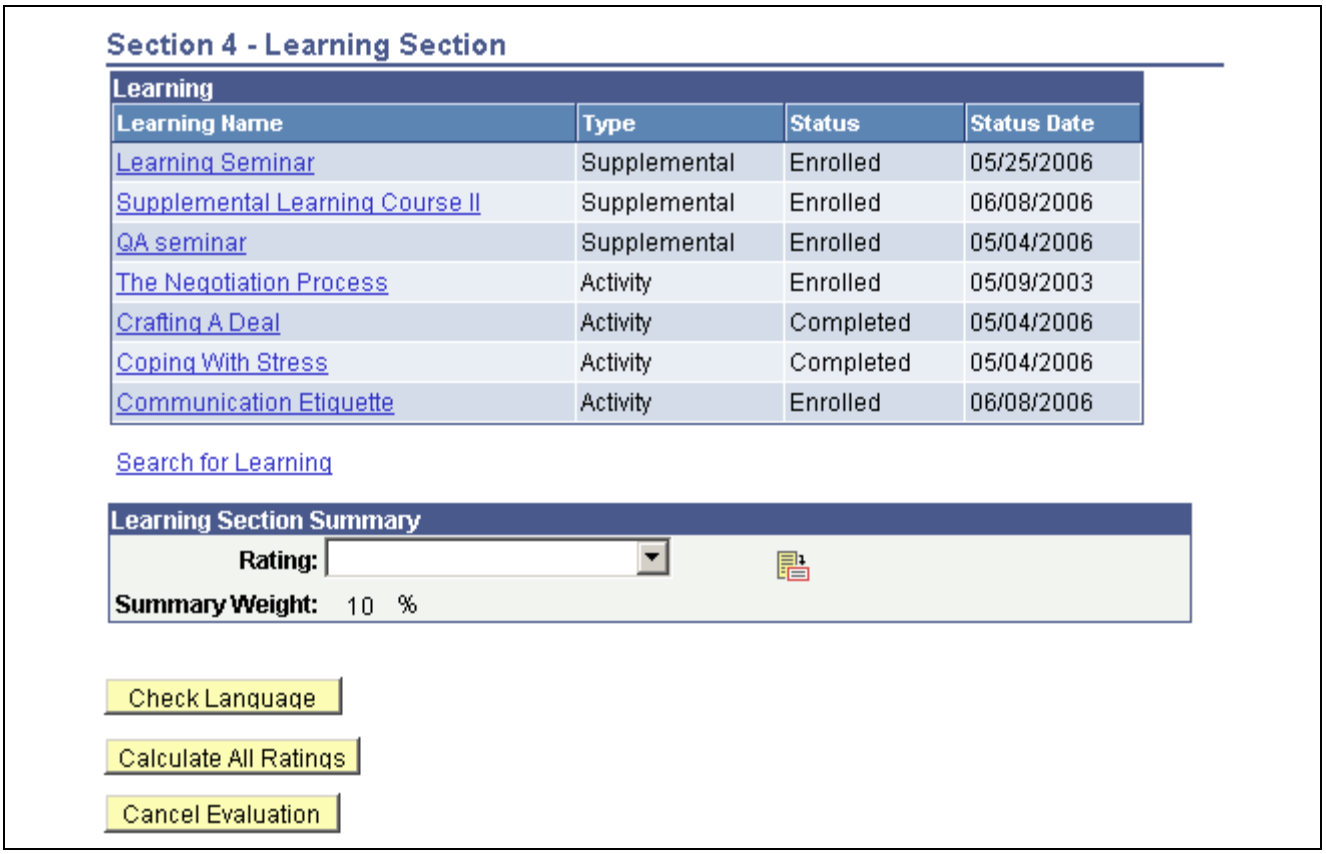
Manager Evaluation page (4 of 7)

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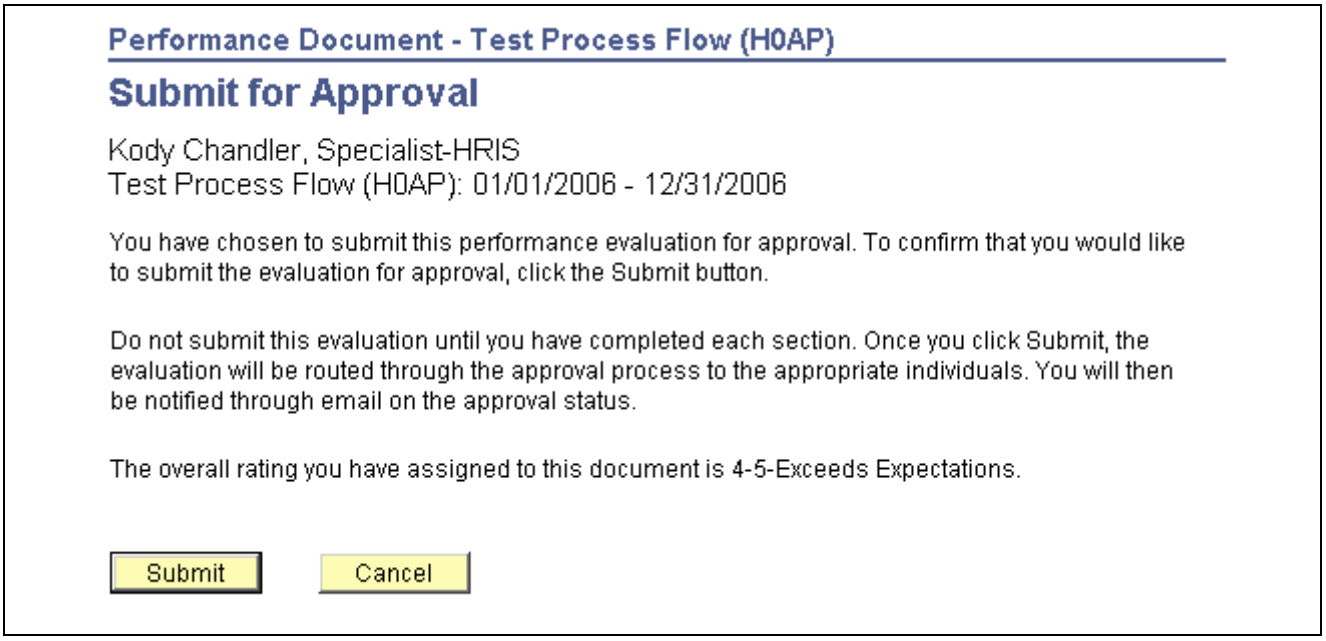


Manager Evaluation page (5 of 7)

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Manager Evaluation page (6 of 7)



Manager Evaluation page (7 of 7)

Evaluations are divided into sections, with each section containing a different type of content. Sections contain the items and subitems against which an employee's performance is evaluated and can include mission statement, goals and objectives, responsibilities, competencies, learning, employee comments, manager comments, an overall summary, signature lines, or organization-specific sections that you define.

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Each *role* evaluation contains header information that identifies the role and the person who is evaluated. The header information also contains instructional text that changes depending on the role. The instructional text is system data that is supplied with ePerformance, but you can modify this text by using the Text Catalog.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with Common Components".

Save This button displays on an evaluation when the evaluation status is *In Progress*.

Click to save the evaluation and return to it later. The system calculates, according to template rules, all ratings were entered prior to saving the review to the database.

Submit for Approval This button displays if the review process that is selected in the Manager Evaluation region of document template's Process page specifies that an approval is required.

Click to submit the evaluation to the designated approver according to the approval rules.

Available for Review This button is available when the review process selected in the Manager Evaluation group box of the document template's Process page specifies that an employee review is required and you have entered all required information

Click to submit the document for review by the employee, according to the review and approval rules.

Cancel Click to cancel the changes you have made to the evaluation.

 **View Printable Evaluation** Click this icon to view a printable version of the performance document. Use the browser's Print command to print a hard copy of the document.

 **Notify** Click this icon to enter and address an ad-hoc notification message.

 **View Graphical Ratings Report** Click to display the Graphical Ratings Report page.

Section # – <section name>

The information that displays in a section depends on the type of section, special processing associated with the section, and the parameters selected on the Template Definition - Structure page.

The Manager Comments, Employee Comments, and the Overall Summary sections are delivered predefined.

See Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 35.

Description The Description label displays if the Description check box is selected on the Template Definition - Structure page. Content for the Description label displays if data is entered in the JPM_TEXT1325_1 field on the Content Items - Items Detail page.

 (edit details) The Edit Details icon displays on the evaluation if the Update check box is selected for the role in the Section Roles grid, Item tab for the section.

Click to edit the detail information for the item.

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See Chapter 8, "Entering Comments and Ratings on Evaluations," Updating Section Item Details, page 134.

 (delete)

Delete is available if the Mandatory check box is not selected on the Template Definition - Content page.

Click to delete the content item.

Note. This overrides the value in the Mandatory field on the job profile. If you specify that an item on the job profile is mandatory and do not select this check box, the item is not mandatory on the document.

Measurement

The Measurement label displays if the Measures check box is selected on the Template Definition - Structure page. Content for the Measurement label displays if data is entered in the JPM_TEXT1325_2 field on the Content Items - Items Detail page.

Measurement describes the criteria for measuring an employee's success at meeting this content item.

For example, if the goal is to reduce customer complaints by 5 percent, the measurement might be: "Based on the number of complaints received by Customer Support through December 31, as compared to complaints made in the previous year." You can change the information for free-form items, as needed.

Supports <item>

The Supports <item> label displays if the Supports check box is selected on the Template Definition - Structure page. Content for the Supports <item> label displays if a section is selected in the Link field on the Template Definition - Structure page and a content item is selected for the Supports field on the Template Definition - Content page.

This field is used to link goals to initiatives, or competencies to responsibilities, initiatives or goals

Ownership

The Ownership label displays if the Ownership check box is selected on the Template Definition - Structure page. Content for the Ownership label displays if *Employee* or *Manager* is selected in the Owned By field on the Template Definition - Content page.

Reminder Date

The Reminder Date label displays if the Reminder Date check box is selected on the Template Definition - Structure page. Content for the Reminder Date label displays if a date is entered in the Reminder Date field on the Template Definition - Content page.

Due Date

The Due Date label displays if the Due Date check box is selected on the Template Definition - Structure page. Content for the Due Date label displays if a date is entered in the Reminder Date field on the Template Definition - Content page.

Target Rating

The Target Rating label displays if the Target Rating check box is selected on the Template Definition - Structure page. Content for the Target Rating label displays if a target rating is selected in the Target Rating field on the Template Definition - Content page.

Status

The Status label displays if the Status check box is selected on the Template Definition - Structure page.

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Percent Complete

The Percent Complete label displays if the Percentage Completed check box is selected on the Template Definition - Structure page.

Critical

The Critical label displays if the Critical check box is selected on the Template Definition - Structure page. *Yes* or *No* displays as the content for the Critical label if it is defined on the Template Definition - Content page.

Average Rating

The Average Rating label displays if the View Average Rating check box is selected on the Template Definition - Process page.


<view graphical rating)

The View Graphical Rating icon displays if the View Average Rating check box is selected on the Template Definition - Process page.

Click to display the Average Ratings page.


(rating explanation)

Click to display a page that provides an explanation of the rating.

From this page you can select the rating that best describes the employee's proficiency. The system displays either the description entered on the Rating Explanation page or the proficiency description entered on the Content Item page. If the system finds there is a rating explanation and a proficiency description, the proficiency description has precedence over the rating explanation.

Rating

This field displays if the Rate check box is selected for the section and the applicable Rate Section, Rate Item, or Rate subitem check box is selected in the Section Roles grid, Rate/Weight tab.

View or enter ratings. The action that is permitted depends on the level (subitem, item, section) where the field occurs if calculation is enabled in the document template, and the user actions that the template definition permits.

For example, at the overall summary and section summary levels, the rating field is read-only unless the role has permission to override system-calculated ratings or calculate field was not enabled on the document template.


(calculate ratings)

This icon is available in the <content item> Summary group box and Overall Summary section.

Click to calculate ratings.

Override

Click to override a system-calculated rating or remove an existing override.

The button appears at the following levels on the performance review page, depending on the template definition:

- At the item level within a section, to override the system-calculated average of individual subitem ratings.
- At the section summary level to override the system-calculated average of individual item ratings.
- At the overall performance review summary level, to override the system-calculated average of individual section ratings.

Note. An override that you enter remains in place until you remove it. To have the system recalculate the rating, remove the override.

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Weight

The Weight field displays if the Weight check box is selected for the section and the applicable Weight Section or Weight Item check box is selected in the Section Roles grid, Rate/Weight tab.

Enter the weight of an item relative to the other items in the same section or relative to other sections in the evaluation.

Note. The sum of the weights for all items in a section or all sections in a document, must equal 100 percent in the manager's document.

Comments

The Comments field displays if the Comments check box is selected in the Section Roles grid, Section tab or Item tab.

Enter free-form text to describe an employee performance relative to the corresponding item or section. The comments section always has access to a spell checker and optionally has access to writing tools. This field can appear at the item level or the section summary level.

View Other Authors

This link appears if the View Other check box is selected Section Roles grid, Section tab.

Click this link to view the evaluation data that other roles entered on this section for the employee.

 (spell check comments)

Click to check the spelling of the text entered in the Comments field..

Writing Tools

This link displays if the Comments check box and at least one writing tool are selected for the role in the Section Roles grid, Section or Item tab.

Click this link to access the Suggested Results page. The Suggested Results page displays a list of text entries that can include Performance Notes, Other Evaluator Comments, Results Writer, and Development Tips statements, and enables you to choose one or more entries for inclusion in the Comments section.

The Writing Tools link appears for a role if the role is enabled on the document template to view Results Writer and Development Tips suggestions for the section or item. Any performance notes that the employee or manager recorded from within the Establish Criteria about the employee also appear in this list, but are restricted to the document role. Employees do not see notes that the manager has recorded about them and managers do not see employee notes. The manager can also view comments from other evaluators for the item or section they are evaluating if it was enabled on the document template.

Learning Name

This link appears only in Learning sections.

Click this link to display the <learning name> Description page in the Learning Management database.

Add Behavior

Add Behavior displays if Subitems are enabled on the Template Definition - Structure page.

Add <content item>

Add <content item> displays if the Add check box is selected on the Section Roles grid, Item tab.

Search for Learning

This link appears only in Learning sections.

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Click this link to display the Search Catalog page in the Learning Management database.

Check Language

This button is available if the Language Checker button is selected on the Template Definition - General page.

Select to run the Language Checker tool.

The Language Checker tool enables you to check a performance review for inappropriate language that is used in the manager's document. When inappropriate words are identified, the Language Checker tool suggests alternative words or phases that are more acceptable from an organization's perspective.

Calculate All Ratings

This button display if the section has the Rate check box selected on the Template Definition - Structure page and ratings have been entered for sections, items, or subitems.

Click to calculate all of the item and section ratings, as well as the overall rating that appears on the performance document. Ratings are not calculated for items, sections, or summaries that are overridden.

Cancel Evaluation

Click to move the current evaluation from a status of *In Progress* to a status of *Cancelled.*

If the template was setup to update Profile Management and a manager cancels the evaluation, then all evaluations, employees and peers, that might have already been sent to the Manage Profiles business process will be deleted.

If the employee cancels the his or her evaluation, then only his or her evaluation is deleted the Manage Profiles business process.

Review Held

This button displays if the review process specifies that an employee review is required and the employee has reviewed the manager's finalized evaluation.

Click to record the fact that a review of the evaluation was held.

Reopen

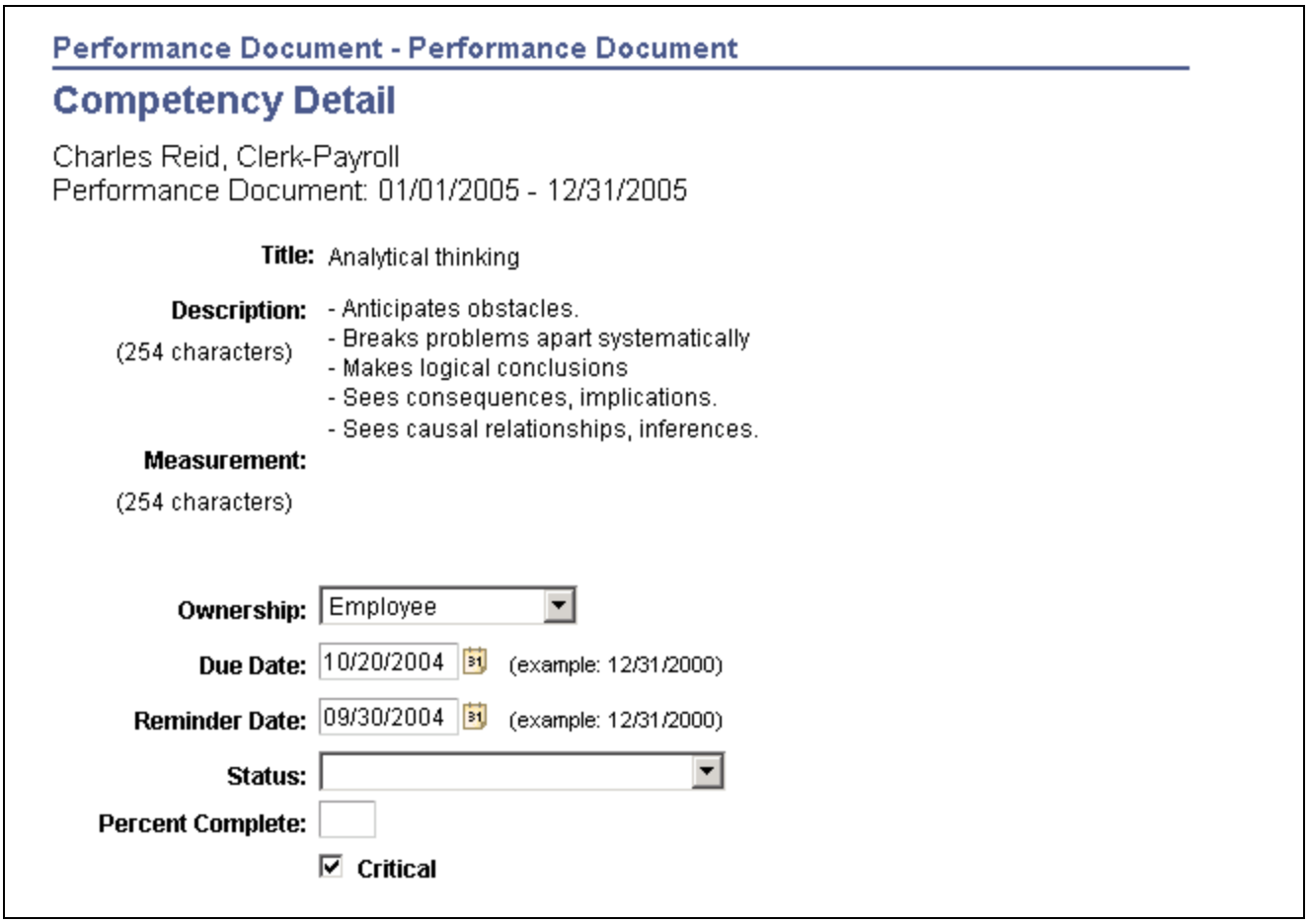
This button appears for managers and administrators when the evaluation is in the *Complete* status.

Click to change the status to *In Progress*.

Updating Section Item Details

Access the <Section> Detail page.

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Competency Detail page

Use this page to change the evaluation details for the item. You can configure the document template to enable an evaluator to change the value of any field except the Title, Description, or Measurement. The evaluator can modify these fields only if the item is not coded (stored in a system table).

The value that initially appears for a detail field is set on the Content page of the document template.

Minimum Weight If you're permitted to change the weight of the item or section, you cannot enter a value that's below the minimum weight that appears here.

Due Date Enter the date when a particular goal should be completed.

Reminder Date Enter a date for informational purposes.

Status Identify the status of the item. Possible values are *Complete, In Progress, N/A* (not applicable).

Percent Complete Enter the completion percentage for an item that appears on the performance document.

Add - Target Rating Enter or view the target ratings.

This field defines the level of proficiency or rating that the employee should achieve by the end of the performance period.

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CHAPTER 9

Consolidating Feedback from Evaluators

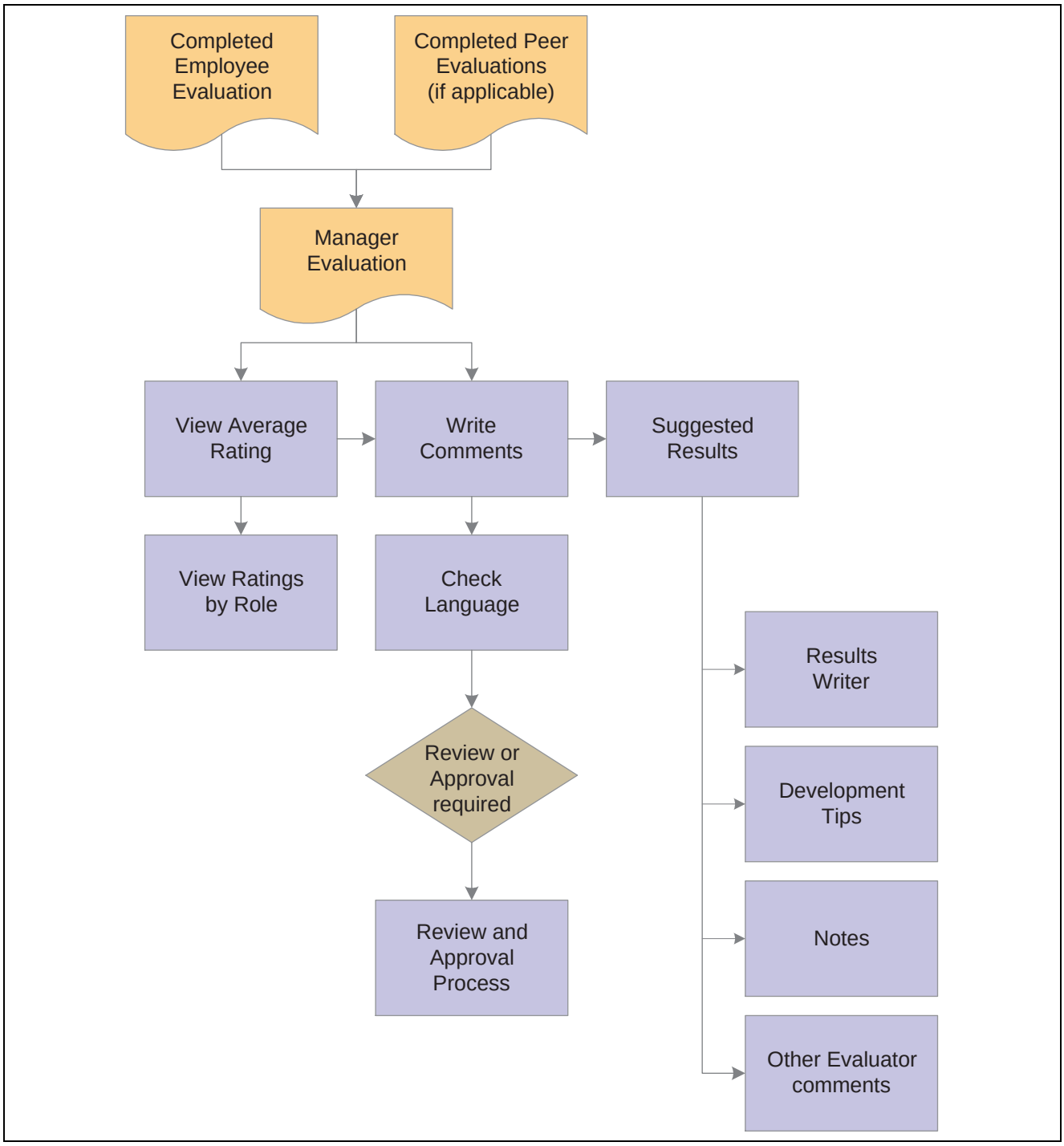
This chapter provides an overview of consolidating feedback and discusses how to:

- View calculated ratings.
- Work with writing tools.

Understanding Consolidating Feedback

This diagram shows the high-level process for consolidating feedback:

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Consolidate feedback process

Although managers can rate items, add comments to their evaluations, and record notes at any time during the evaluation cycle, they must perform additional steps to finalize and complete evaluations. These steps include writing final evaluation comments and conducting reviews and approvals, if required.

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Ratings

Ratings are entered at either the section, item, or subitem level, as defined on the document template. If the document is set up to automatically calculate ratings, ratings from lower levels are averaged and rolled up to the higher levels. The manager rating (calculated or manually entered) on the manager's evaluation is used by the writing tools to select appropriate text.

View Other Authors

Managers can use this tool to view comments and ratings from evaluators in other roles. This tool is read-only. Other evaluators' ratings and comments appear only if the evaluation status is *Complete.*

To enable this functionality, select the View Other check box for the role and section in the Section Roles grid on the Structure page of the document template.

Writing Tools

The Writing Tools link accesses the Suggested Results page, which contains text suggestions that assist evaluators in writing comments. These suggestions can come from any of several different sources, provided that as they are enabled for the section or item on the document template.

The Suggested Results page presents the text items that are most directly related to the section and item. You can also select a tool from the available options in the Find Additional Content field to use an advanced search for text that is not directly related to the section, item, and rating from which you accessed the writing tools. This enables you to search for text suggestions from any text source that is defined on the document template for the section or item.

These are the possible sources for text suggestions:

- Results Writer

  Results writer statements are predefined statements that describe an employee's proficiency for a given competency or sub-competency. These statements appear on the Suggested Results page for competency sections only, but you can locate results statements for other sections by using the advanced search.

  For example, to find statements for a goal that you know is related to the "Communications Skills" competency, you can use the advanced search. You can then incorporate the suggestions that apply to the goal into the comments for the goal.

  You must rate a section or item before suggested results appear.

- Development Tips

  Development Tips consist of predefined statements that provide tips on how employees can develop their proficiency. Development tips are related to competencies and sub-competencies, but can apply to other evaluation criteria as well.

  You must rate a section or item before development tips appear.

- Comments

  A manager can view comments that evaluators in other roles entered for the same section and item. Comments from another evaluator appear only if the role's evaluation status is *Complete.*

  - If you access the Suggested Results page from an item, all comments from complete evaluations for the item appear.
  - If you access the Suggested Results page from a section, only the comments from complete evaluations for the section appear. Comments do not appear at the item level.

- Performance Notes

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The performance notes that were entered during the Establish Criteria for the section are available on the Suggested Results page, and are available only to the person who entered the note.

Note. Employees and managers can also enter notes that are not directly tied to an evaluation. You can search for these notes using advanced search capabilities.

Language Checker Tool

The Language Checker tool alerts managers to inappropriate language that appears in a manager's evaluation and suggests alternative language. It is enabled on the document template for an evaluation as a whole and is not turned off or on at the section or item level.

Reviews and Approvals

Employee reviews and management approvals are not required in all cases. If they are required, the manager's evaluation is the one that is reviewed and approved, and the status of this document reflects the review and approval status.

See Also

Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 35

Chapter 4, "Setting Up Text for Advisor Tools," page 59

Chapter 8, "Entering Comments and Ratings on Evaluations," page 117

Chapter 10, "Managing Reviews and Approvals," page 151

Viewing Evaluation Ratings

This section discusses how to view evaluation ratings.

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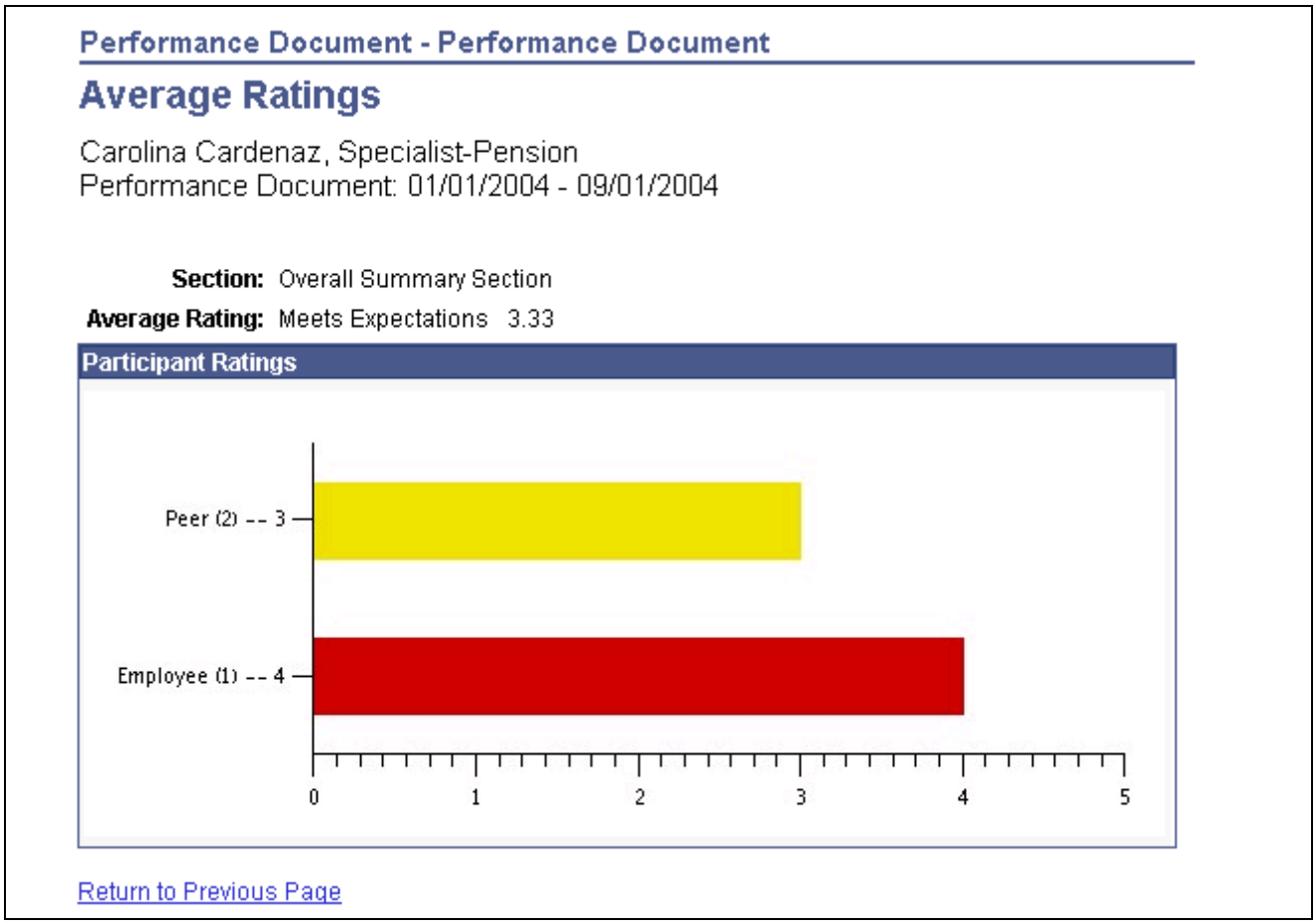
Pages Used to View Evaluation Ratings

Page Name	Object Name	Navigation	Usage
Document Detail	EP_APPR_DETAIL	Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents Click a document link.	View a summary of the document's progress and access the manager evaluation.
Manager Evaluation	EP_APPR_MAIN1	Click the Start link or the Edit link on the Manager Evaluation row on the Document Details page.	View section and item ratings.
Average Ratings	EP_AVG_CHART	Click the Details link next to the Average Rating on any section or item on the evaluation page.	View evaluation ratings by role.
Graphical Ratings Report	EP_360_REPORT	Click the View Graphical Ratings Report link on the evaluation page.	View a summary report that contains the average ratings chart from every section and item on the evaluation.

Viewing Evaluation Ratings

Access the Average Ratings page.

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Average Ratings page

This chart lists the average ratings, by role, from all participants that rated a section, item, or subitem. Summary ratings are rolled up from lower-level ratings. The number in parentheses next to the role lists how many participants in that role are included in the average.

This page is available only from the Manager evaluation, and only if the role has the View Average Ratings check box selected on the Template Definition - Process page.

Note. A summary report containing all the Average Ratings page for an evaluation is available. To view it, click the View Graphical Ratings Report link at the end of the evaluation.

Working with Writing Tools

This section discusses how to:

- Incorporate text suggestions into comments.
- Search for competency and sub-competency performance descriptions.
- Search for development tips.
- Search for performance notes.
- Search for other evaluators' comments.
- List other authors who have entered comments.

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- Check language for appropriateness.

Note. All roles can access the writing tools, The navigation paths given here apply to the manager self-service pages because the manager's evaluation is the most common use of these tools. However, these tools are also available from other roles' evaluations if they are enabled for the role on the document template.

See Also

Chapter 4, "Setting Up Text for Advisor Tools," page 59

Pages Used to Work with Writing Tools

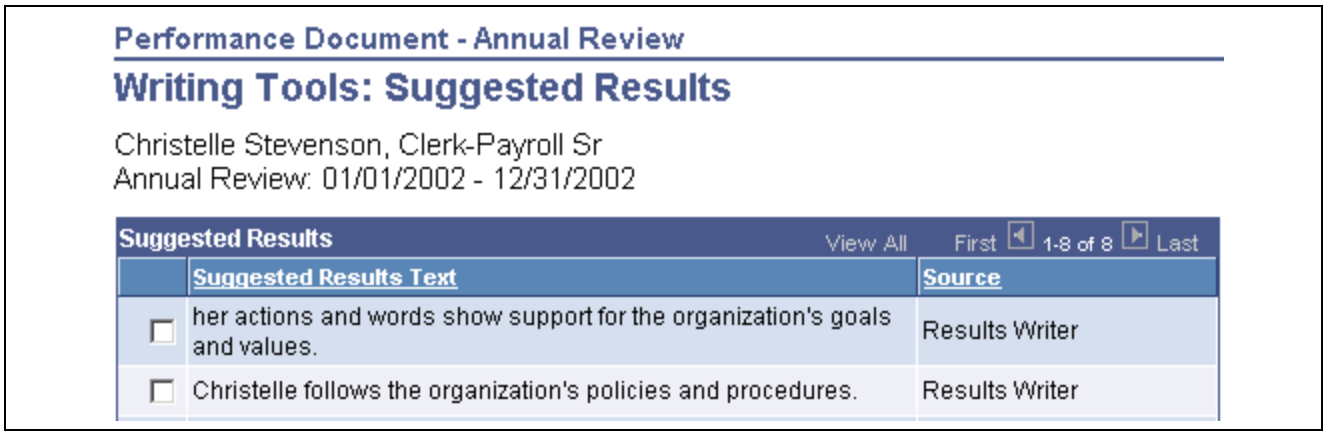
Page Name	Object Name	Navigation	Usage
Writing Tools: Suggested Results	EP_SUGGEST_RESULTS	• Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents, Manager Evaluation Click a document link. Click the Start link or the Edit link on the Manager Evaluation step. Click the Writing Tools link in any section or subsection where it appears. • Manager Self Service, Performance Management, Development Documents, Current Documents, Current Development Documents, Manager Evaluation Click a document link. Click the Start link or the Edit link on the Manager Evaluation step. Click the Writing Tools link in any section or subsection where it appears.	Incorporate text suggestions into comments.
Find Results Writer Suggestions	EP_ADV_RESULT_WRT	Select Results Writer from the available options in the Find Additional Content field on the Writing Tools: Suggested Results page.	Search for competency and sub-competency performance descriptions for a section or item.

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Page Name	Object Name	Navigation	Usage
Find Development Tips	EP_DEV_TIPS	Select Development Tips from the available options in the Find Additional Content field on the Writing Tools: Suggested Results page.	Search for development tips for a section or item.
Find Performance Notes	EP_PERF_NOTEPAD	Select Performance Notes from the available options in the Find Additional Content field on the Writing Tools: Suggested Results page.	Search for performance notes that you previously entered.
Find Other Evaluation Comments	EP_OTHER_COMMENTS	Select *Other Comments* from the available options in the Find Additional Content field on the Writing Tools: Suggested Results page.	Search for other evaluators' comments that were entered for the employee.
Other Authors Selection	EP_APPR_SEC_ROLES1	Click the View Other Authors link for a section on the Manager Evaluation page.	View a list of others who evaluated the section or item. You can select an author to view the particular comments that they entered.
Check Language	EP_LANG_CHECK_SEC	Click the Check Language button at the bottom of the manager's performance document.	Check for inappropriate language within a review and review suggested alternatives.

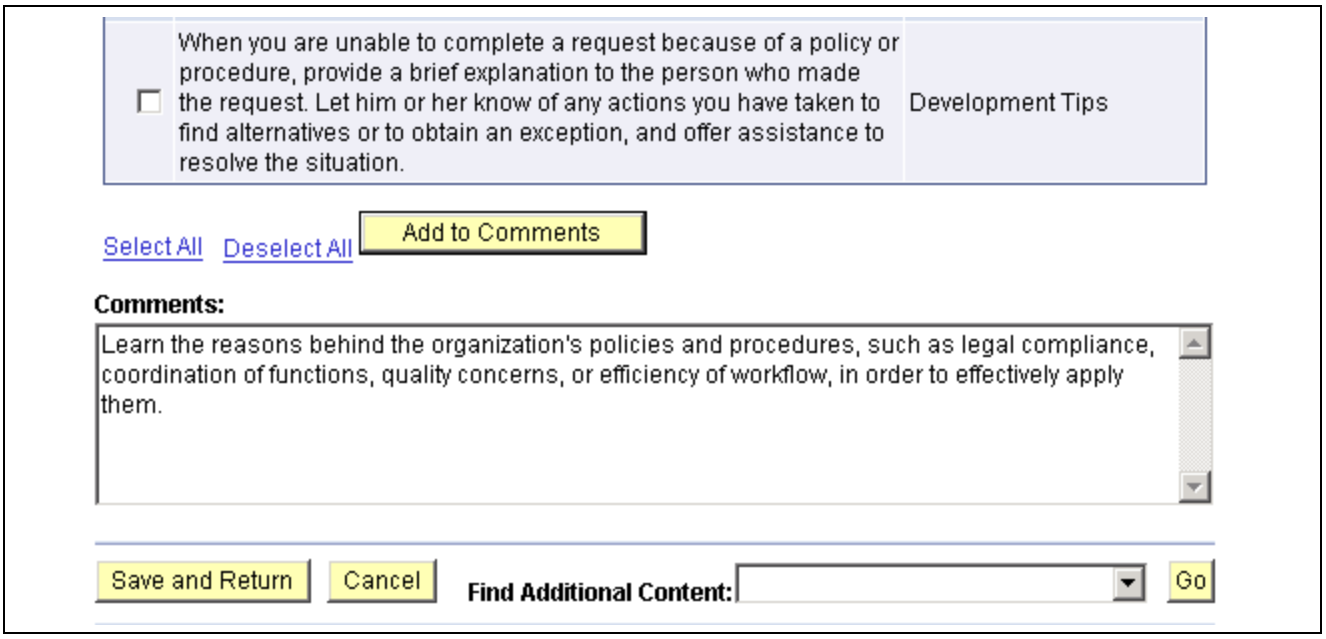
Incorporating Writing Tools Suggestions into Comments

Access the Writing Tools: Suggested Results page.



Writing Tools: Suggested Results page (1 of 2)

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Writing Tools: Suggested Results page (2 of 2)

Comments Use this field to incorporate text from any of the writing tools that are available to you. You can modify the text after you incorporate it.

Add to Comments Click this button to incorporate suggested text into the Comments field.

Find Additional Content Select the writing tool you want to use to find additional suggestions for the comment. This field enables you to find other text items to incorporate into the comments box, in the case that you don't find suitable text in the Suggested Results list. Only tools that are enabled for the role on the document template appear.

Suggested Results

This grid can contain any or all of these items:

- Results Writer text.
- Development tips.
- Notes.
- Comments from other evaluators.

You can select one or more comments and click the Add to Comments link to add them to the comments for this section. Comments are added without line breaks — you must manually insert line breaks to start each comment on a new line.

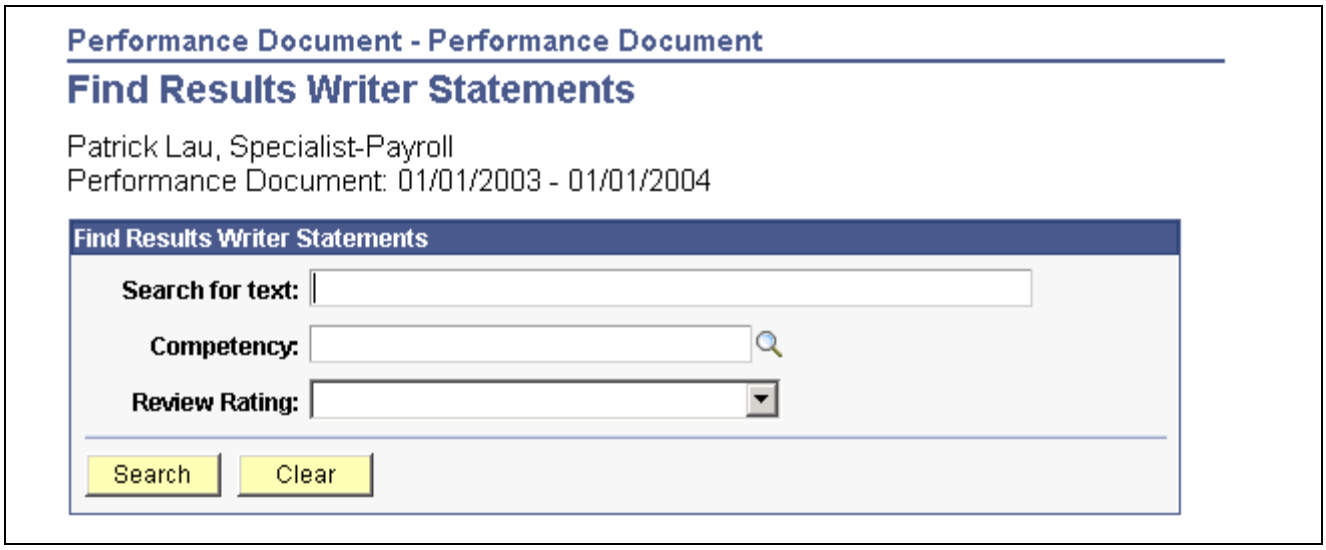
See Also

Chapter 4, "Setting Up Text for Advisor Tools," Template Setup for Results Writer and Development Tips Use, page 60

Searching for Results Writer Statements

Access the Find Results Writer Suggestions page.

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Find Results Writer Statements page

Search for text Enter a keyword to limit the suggestions returned. You can search for text independently without entering competency, sub-competency, or rating.

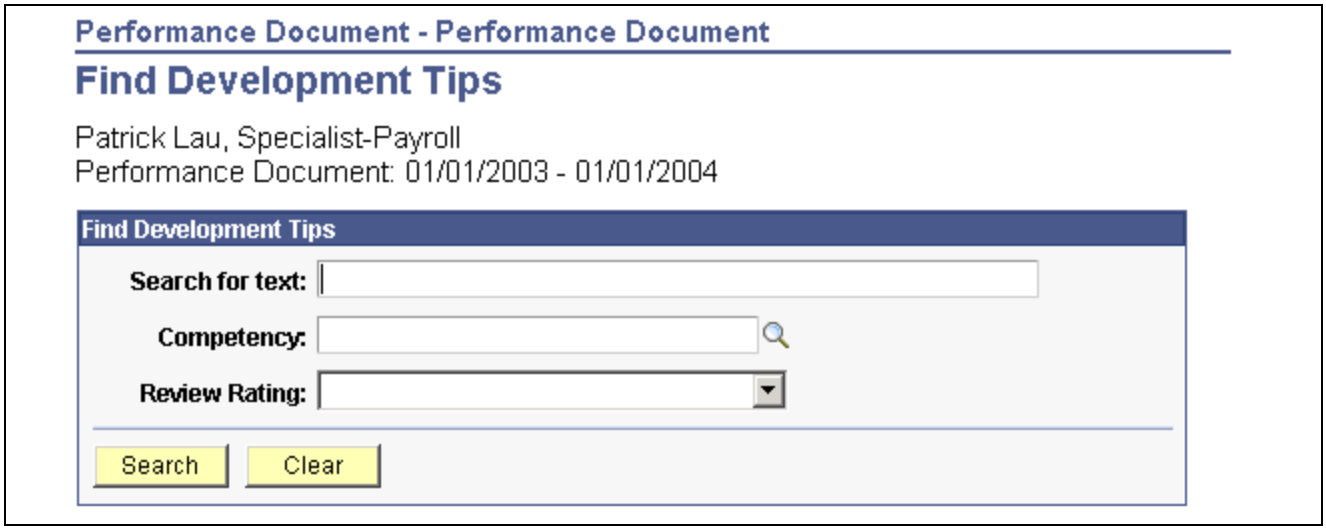
Competency Select the competency for which to search. If you search by competency, you can further refine the search by entering a sub-competency or a review rating.

Sub-Competency Select the sub-competency for which to search. This field appears only if you select a competency that has sub-competencies and if the document template is set up to search sub-competency data for the section.

Review Rating Select the review rating for which to return text suggestions that are linked to competencies or sub-competencies. You must enter a competency or sub-competency before you can enter a rating.

Searching for Development Tips

Access the Find Development Tips page.



Find Development Tips page

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Search for text Enter a keyword to limit the suggestions returned. You can search for text independently without entering competency, sub-competency, or rating.

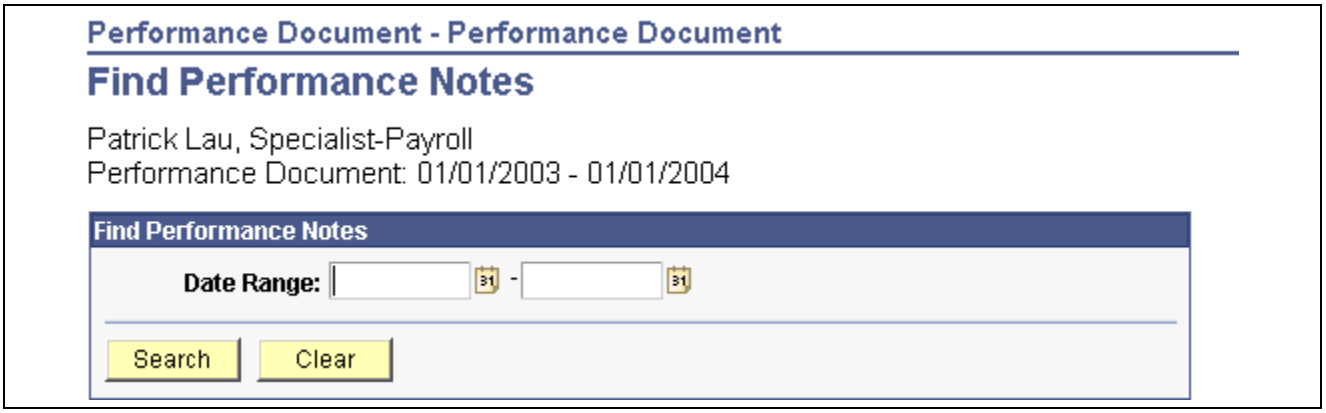
Competency Select the competency for which to search. If you search by competency, you can further refine the search by entering a sub-competency or a review rating.

Sub-Competency Select the sub-competency for which to search. This field appears only if you select a competency that has sub-competencies and if the document template is set up to search sub-competency data for the section.

Review Rating Select the review rating for which to return text suggestions that are linked to competencies or sub-competencies. You must enter a competency or sub-competency before you can enter a rating.

Searching for Performance Notes

Access the Find Performance Notes page.



Find Performance Notes page

Use this page to search performance notes that you recorded. You can only search for those notes that you entered — employees cannot retrieve notes that their manager entered about them, and managers cannot retrieve notes that their employees entered.

Performance notes that are recorded as part of the Establish Criteria step are stored with the particular section and item to which they pertain, and appear on the Suggested Results page.

Date Range Enter a date range to limit the search for performance notes. All notes that you entered within the date range appear in the Results grid.

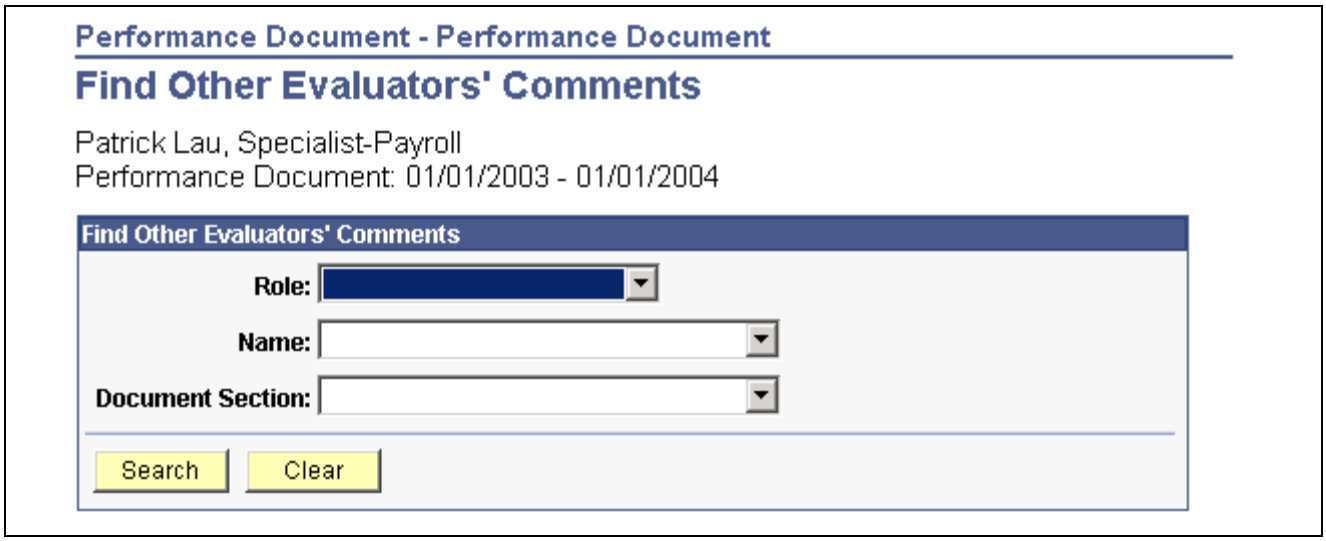
See Also

Chapter 8, “Entering Comments and Ratings on Evaluations,” Accessing Notes, page 121

Searching for Other Evaluators’ Comments

Access the Find Other Evaluation Comments page.

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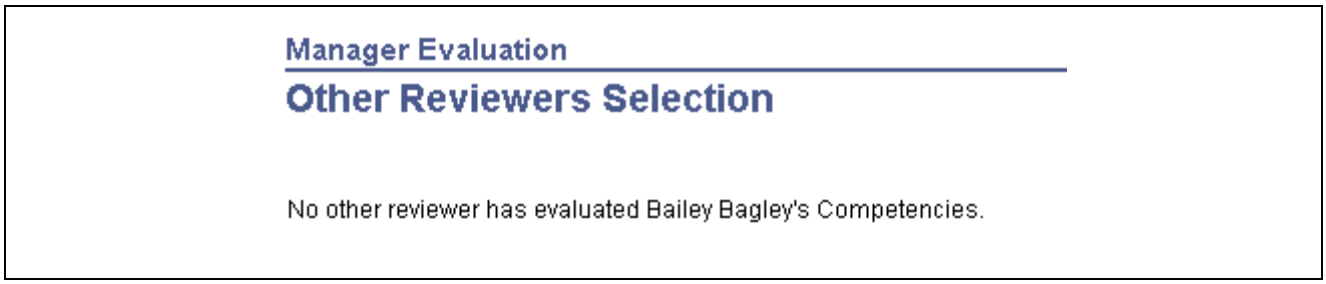
Find Other Evaluation Comments page

Use this page to search for comments that were entered by evaluators who are not the manager or employee.

Role	Select the evaluator role. Only roles that are defined on the document template appear.
Name	Select the person whose comments you want to see. You must first select the role before you can select a name.
Document Section	Select a document section to view comments that were made for that section by any evaluator in any role.

Viewing Other Authors

Access the Other Reviewers Selection page.



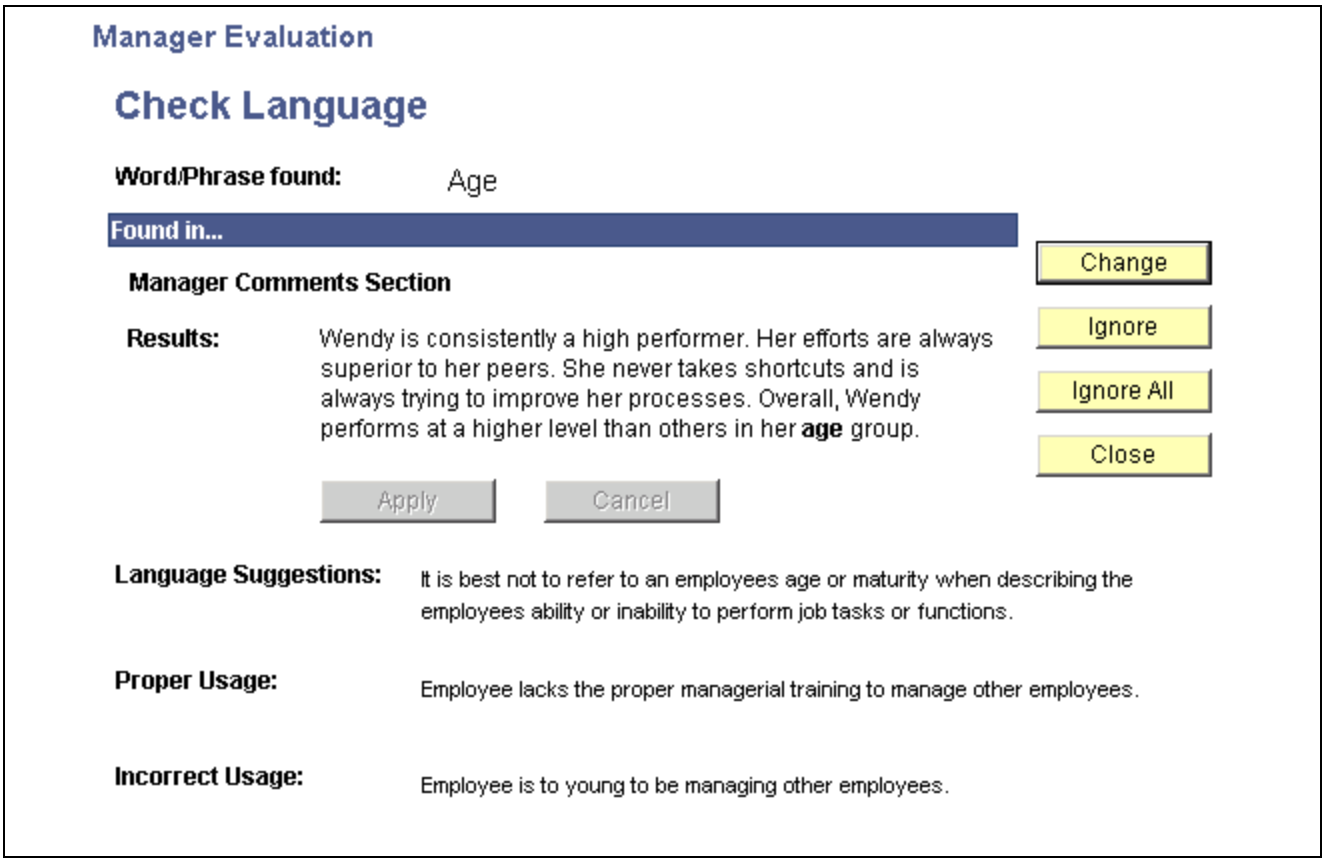
Other Reviewers Selection page

Use this page to list of other reviewers who have entered comments on the section or items within the section. You can select a reviewer and drill down to view the specific evaluation comments. You access this page through the View Other Authors link at the section level. It is available if the View Other check box is selected for the role on the Template Definition - Structure page, Section Roles grid, Section tab.

Checking Language for Appropriateness

Access the Check Language page.

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Check Language page

The word or phrase that's deemed inappropriate appears at the top of the page. The sentence in which it is used is shown below it.

Check Language Click the Check Language button to check all comments fields for inappropriate language. The resultant page lists any objectionable words or phrases, and suggests possible alternatives.

Note. If the Language Checker feature is enabled on the document template, the Check Language button appears at the bottom of the manager's document.

Change Click this button to edit the sentence.

Ignore Click this button to view the next sentence.

Apply Click this button to save the change and continue checking. This button is enabled after you change a sentence.

Note. If you find more than one objectionable word or phrase in the document, each appears in succession. You can edit the field where the text is found.

See Also

Chapter 4, "Setting Up Text for Advisor Tools," page 59

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CHAPTER 10

Managing Reviews and Approvals

This chapter provides an overview of review and approval processes and discusses how to:

- Conduct reviews.
- Approve documents.
- Resolve approval transactions in error.
- Delegate approvals.

Understanding Review and Approval Processes

This section lists prerequisites and discusses:

- Review and approval process options.
- Document statuses during review and approval.
- Initiation and completion of the approval process.
- User actions during the approval process.

Prerequisite

You must enable the review and approval notifications on the General Settings page for ePerformance for this process to work correctly.

Note. The Alternate Role User feature is not available in ePerformance.

Review and Approval Process Options

When you set up the document template, you select a review and approval process option and designate the roles that need to approve the document. The approval process controls when documents require approval and whether or not an employee review is required.

Review and approval processes are designed to:

- Notify employees and managers of status changes when a review is required.
- Automatically route documents from one designated approver to another in the approval chain, and notify each approver by email when it is his or her turn to approve a document.
- Manage workflow; that is, the order in which the review and approval steps are performed.

The review and approval process options are:

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- *Approval Before EE Review Held*

  The document is approved before the manager discusses it with the employee.

- *Approval After EE Review Held*

  The approval process is initiated after the manager has reviewed the document with the employee and the employee or the manager acknowledges the document.

- *Approval, No EE Review Held*

  The manager does not need to review the document with the employee, but approval is required.

- *No Approval, EE Review Held*

  The manager must review the document with the employee, but the document does not need approval.

- *No Approval, No EE Review Held*

  The manager does not review the document with the employee, and the document does not need approval.

Approval Process Participants

The persons that must approve a document are determined by the approval rule set option that you select when creating the document template definition. You can have documents approved by:

- The manager's manager and the ePerformance human resources (HR) administrator.
- The ePerformance HR administrator only.

See Also

Chapter 2, "Setting Up ePerformance," page 7

Chapter 3, "Setting Up Document Templates," Defining Document Processes, page 42

Document Statuses during Review and Approval

Employee reviews and management approvals are not required in all cases. If they are required, the manager's evaluation is the one that is reviewed and approved, and the status of this document reflects the review and approval status.

The manager's evaluation is the final document in the performance process and becomes the document used to communicate the employee's performance. A manager can consolidate other evaluator comments and ratings into the final document by using writing tools and average ratings. In addition, the manager document is the one that other applications such as Salary Planning and Competency Management use for official purposes. Therefore, it is the document that goes through the approval process.

Status codes provide a way of identifying the stages that an document moves through during the review and approval process cycle. Status codes also control when users can view or edit document data, what actions they can perform, and what page controls are available to them.

The statuses through which consolidated documents must pass and the sequence of these statuses are determined by the approval process option that is defined on the template. These statuses are:

- *In Progress*

  This is the status of an evaluation when it is first created. While the status is *In Progress*, the employee and manager can modify all sections of their respective evaluations that the template definition permits. The evaluations stay in this status until the manager finishes the document and clicks one of the *Available for Review, Complete,* or *Submit for Approval* buttons. The exact buttons that appear depend on the setup and approval process that is required.

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- *Available for Review*

  A manager can mark an evaluation as *Available for Review* only when the current status of the evaluation is *In Progress* and one of the following two conditions are met:

  - The review process is either *Approval Required After Review Held* or *No Approval - Review Held*.
  - The review process is *Approval Required Before Review Held* and the approval status is set to *Approved.*

    To change the status of an evaluation to *Available for Review*, the manager must click the Available for Review button. This enables the employee to view the consolidated document and add comments to the Employee Comments section. While the document is in *Available for Review* status, the manager can only edit the Manager Comments section.

    While the consolidated document is available for review, the Review Held button appears on the document. This button enables the manager to change the status of the document to *Review Held* and indicates that the manager has met with the employee to review the consolidated document.

- *Review Held*

  This status indicates that the manager has discussed the consolidated document with the employee. While a document has the status of *Review Held*, the employee and the manager have read-only access to the document, except to enter or edit the Manager Comments or Employee Comments sections of a document, if these sections exist.

- *Acknowledged*

  This status indicates that the employee or the manager has acknowledged the document. When this status is in effect, the Employee Comments and Manager Comments sections both managers and employees have read-only access to the document. When a document is in this status, only the HR administrator can change the status back to *In Progress.*

- *Complete*

  This status indicates that the evaluation process is finished. No further changes to the document are permitted. With this status, employees and managers have read-only access to the document and are unable to edit or modify the content. The manager, however, can click the Rework button on an employee or other participant evaluation to return the document to the employee for revision. When the manager returns a document, the system changes the document back to *In Progress* and makes the Complete button available again.

  The employee clicks the Complete button to change the status of the document back from *In Progress* to *Complete*. This button becomes available when the document is first created or sent back for revision.

  Note. Only the manager has the ability to send the document back for revision when the status of the consolidated document is *In Progress.*

- *Cancelled*

  This status indicates that the document and all its associated evaluations is cancelled. Managers can cancel documents on the Manager Evaluation page until the time that the document status is *Acknowledged* or *Complete*. HR administrators can cancel documents at any time using their own Cancel Document page.

Note. The *Available for Review*, *Review Held*, and *Acknowledged* statuses never apply when the approval process option is set to *No Approval - No Review Held* or *Approval No Review Held.* In these cases, employees can only view the manager's document when the status is *Complete*.

Review Processes

Review process options, document statuses, and approval status values control:

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- The page elements that are available.
- The different levels of access that managers, employees, and HR administrators have to the document.
- The actions that managers, employees, and HR administrators can perform at different points in the review and approval cycle.

Note. Other evaluation participants are not affected by review and approval processes.

The tables in this section illustrate how document status and approval status work together to control user actions on the manager document for each approval process option.

Note. The buttons that are listed in these tables are hidden until they are valid for use.

Approval Before Review Held

This table describes the *Approval Before Review Held* process actions and statuses.

Action	Document Status	Approval Status
1. Manager completes edits to the document.	In Progress	*Not Submitted*
2. Manager submits the document for approval.	In Progress	*Submitted*
3. All persons in the approval chain approve the document.	In Progress	*Approved*
4. Manager marks the document as available for review.	Available for Review	*Approved*
5. Manager discusses document with employee and marks the document as review held.	Review Held	*Approved*
6. Employee or manager acknowledges that the review occurred.	Acknowledged	*Approved*
7. Manager marks the review as completed.	Complete	*Approved*

Note. If approval is denied in step three, the document status remains *In Progress* and the approval status changes to *Denied*.

Approval After Review Held

This table describes the *Approval After Review Held* process actions and statuses.

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Action	Document Status	Approval Status
1. Manager completes edits to the document.	In Progress	Not Submitted
2. Manager clicks the Available for Review button.	Available for Review	Not Submitted
3. Manager discusses document with employee and clicks the Review Held button.	Review Held	Not Submitted
4. Employee or manager clicks the Acknowledge button to acknowledge the document.	Acknowledged	Not Submitted
5. Manager clicks the Submit for Approval button	Acknowledged	Submitted
6. All persons in the approval chain approve the document.	Acknowledged	Approved
7. Manager clicks the Complete button to complete the document.	Complete	Approved

Note. If approval is denied in step six, the document status changes to *In Progress* and the approval status changes to *Denied*.

Approval No Review Held

This table describes the *Approval No Review Held* process actions and statuses.

Action	Document Status	Approval Status
1. Manager completes edits to the document.	In Progress	Open
2. Manager clicks the Submit for Approval button to initiate the approval process.	In Progress	Submitted
3. All persons in the approval chain approve the document.	In Progress	Approved
4. Manager clicks the Complete button to complete the document.	Complete	Approved

Note. If approval is denied in step three, the document status changes to*In Progress* and the approval status changes to *Denied*.

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No Approval No Review Held

This table describes the *No Approval No Review Held* process actions and statuses.

Action	Document Status	Approval Status
1. Manager completes edits to the document.	In Progress	Approval Not Required
2. Manager clicks the Complete button to complete the document.	Complete	Approval Not Required

No Approval Review Held

This table describes the *No Approval Review Held* process actions and statuses.

Action	Document Status	Approval Status
1. Manager completes edits to the document.	In Progress	Approval Not Required
2. Manager clicks the Available for Review button.	Available for Review	Approval Not Required
3. Manager discusses review with employee and clicks the Review Held button.	Review Held	Approval Not Required
4. Employee or manager clicks the Acknowledge button to acknowledge the document.	Acknowledged	Approval Not Required
5. Manager clicks the Complete button to complete the document.	Complete	Approval Not Required

Conducting Reviews

This section lists the pages used to conduct reviews.

See Also

Chapter 8, “Entering Comments and Ratings on Evaluations,” page 117

Chapter 9, “Consolidating Feedback from Evaluators,” page 137

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Pages Used to Conduct Reviews

Page Name	Object Name	Navigation	Usage
Available for Review	EP_APPR_MAIN2	• Manager Self Service, Performance Management, Performance Documents, Current Documents Click a document link to open the Document Details page. Click the Available for Review link on the Manager Evaluation step to open the Manager Evaluation page. Click the Available for Review button on the Manager Evaluation page. • Manager Self Service, Performance Management, Development Documents, Current Documents Click a document link to open the Document Details page. Click the Available for Review link on the Manager Evaluation step to open the Manager Evaluation page. Click the Available for Review button on the Manager Evaluation page.	Confirm that you want to change the document status to *Available for Review*.

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Page Name	Object Name	Navigation	Usage
Reopen Evaluation	EP_APPR_MAIN2	• Manager Self Service, Performance Management, Performance Documents, Current Documents Click a document link to open the Document Details page. Click the Reopen link on the Manager Evaluation step to open the Manager Evaluation page. Click the Reopen button on the Manager Evaluation page. • Manager Self Service, Performance Management, Development Documents, Current Documents Click a document link to open the Document Details page. Click the Reopen link on the Manager Evaluation step to open the Manager Evaluation page. Click the Reopen button on the Manager Evaluation page.	Confirm that you want to reopen a document that you previously marked as *Available for Review.*

Approving Documents

This section discusses how to approve documents.

See Also

Chapter 12, “Using Inquiry Pages,” Viewing Approval Status, page 178

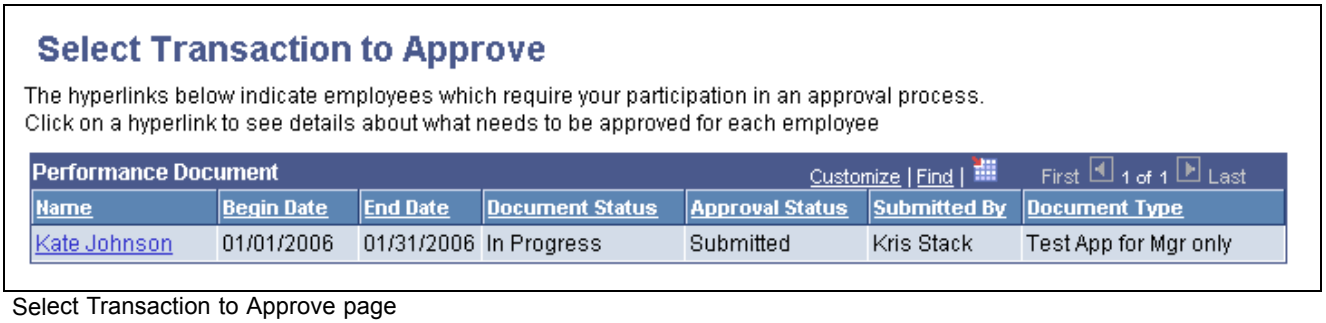
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Pages Used to Approve Documents

Page Name	Object Name	Navigation	Usage
Select Transaction to Approve	SS_LIST	Manager Self-Service, Performance Management, Approve Documents, Select Transaction to Approve	Select the employees for whom you want to grant or deny approval of a document.
View Approval Status Summary	SS_LIST	Manager Self-Service, Performance Management, View Approval Status, View Approval Status Summary	View a list of employees and their approval status.
Approve Transaction, View Approval Status Detail, Approval Request - Confirmation,	EP_APPRAISAL_MGR	Select a document on the Select Transaction to Approve page.	Approve or deny approval of a document.
Approve Performance Documents, Administer Request - Confirmation,	EP_APPRAISAL_ADM	Workforce Development, Performance Management, Administer Documents, Approve Documents, Approve Performance Documents Click the link for a listed document.	Approve or deny approval of a document.
Process Comments	SS_PROC_CMNTS_SEC	Click the Comments link on the Approve Performance Documents page.	View comments that other approvers enter.
Save Confirmation,	EO_SAVE_CONFIRM	Click Save after approving or denying approval for a document on the Approve Performance Documents page.	Confirm that you intended to approve or deny approval of the document and save the action.

Selecting Documents to Approve

Access the Select Transaction to Approve page.



Select Transaction to Approve page

This page enables you to view the documents that you need to approve. It is identical to the View Approval Status Summary page except the Select Transaction to Approve page lists only documents that you have not yet approved, while the View Approval Status Summary page lists all documents where you are an approver or an originator.

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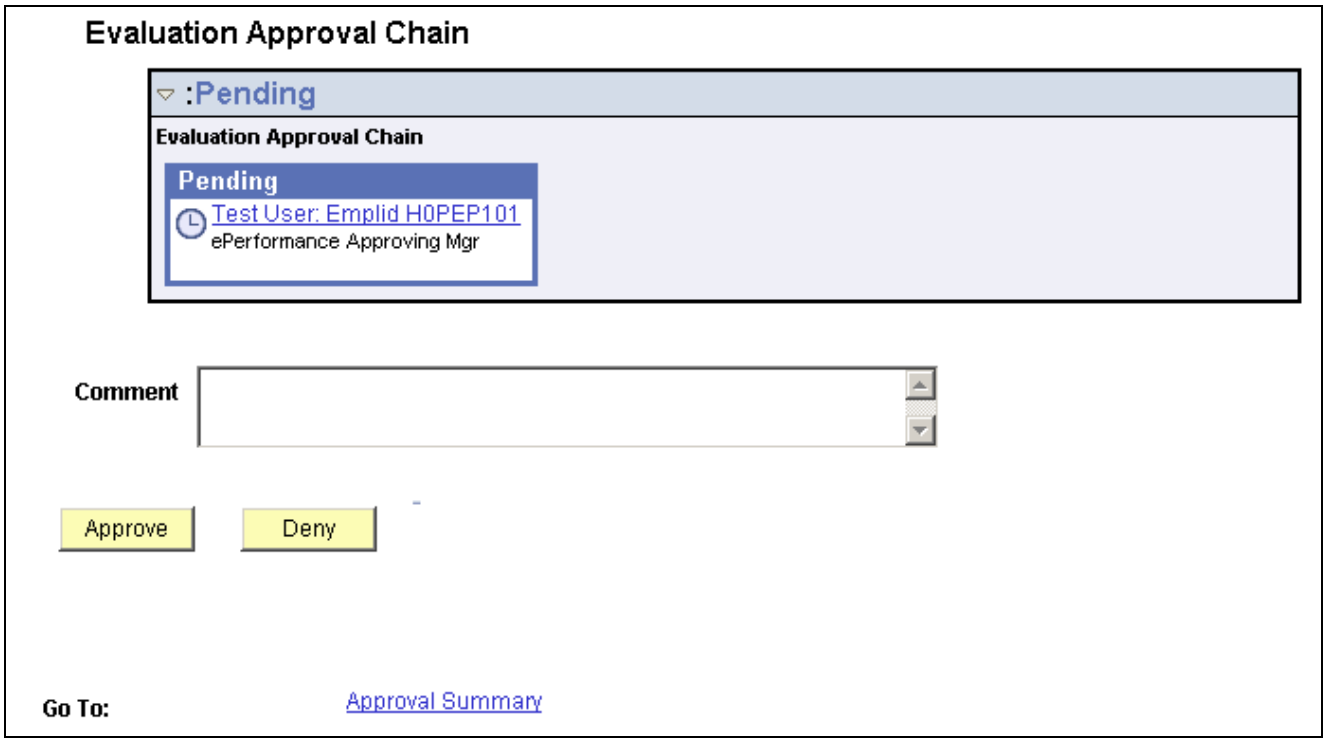
Approving a Document

Access the Approve Transaction or the Approve Performance Documents page.

Note. These two pages are identical in use, except that the Approve Transaction page is used by managers and the Approve Performance Documents page is used by HR Administrators.



Approve Transaction page (1 of 2)



Approve Transaction page (2 of 2)

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Performance Document Details	Click this link to display the Manager Evaluation page in display-only mode. This page contains the consolidated evaluations and comments from all participants.
Process Detail	This group box displays detailed information about the approval process.
Evaluation Approval Chain	This group box displays the approvers in the approval process and their status. Click the name link to open a new browser window containing detailed information about the approver.
Comment	Use this text box to explain the reason for approving the document, or denying approval.
Approve	Click this button to approve the transaction.
Deny	Click this button to deny the transaction.

Resolving Approval Transactions in Error

If an error occurs and the system is not able to route the transaction to its intended approver, the system automatically routes the transaction to the administrator, as defined on the approval process definition. The administrator can then review the transaction using the Monitor Approvals (PTAF_ADMIN_MON) component to approve, deny, or reassign the transaction to the appropriate approver

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Administering Approvals.

Delegating Approvals

Approvers can delegate the approval of a performance or development document to another peer or subordinate.

To delegate the approval transaction:

1. An administrator must activate the EP_APPRAISAL transaction on the Configure Delegation Transaction page.
2. The manager must assign a proxy using the Manage Delegation page.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Working with Self-Service Delegation.

Updating Person Profiles

This section provides an overview the update person profile process.

Understanding the Update Person Profile Process

When the document is complete, the employee's person profile can be updated with the information from the performance or development document. To update the employee's person profile:

1. The system checks that the Update Person Profile check box is selected on the Template Definition - Structure page - Profile Management tab for the role.

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2. If the Update Person Profile check box is selected, then the system identifies the profiles types that need to be updated for the employee. If a profile does not exist, the system create one for the employee.
3. The system copies all items for each section into the employee's profile.

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CHAPTER 11

Performing Administrative Tasks

This chapter presents an overview of administrative tasks and discusses how to:

- Perform administrative tasks.
- Manage document processes.

Understanding Administrative Tasks

You can perform certain administrative tasks outside of the evaluation cycle. Typically, administrators perform these tasks for documents that belong to one or more groups of employees that do not report to them, while managers work only with documents for employees or groups that report directly to them.

Transfer

You might transfer a document from one manager to another if an employee is reassigned or if a reorganization occurs. Administrators can transfer any document that is in any status. Managers can transfer only documents that they currently own with a status of *In Progress*, *Available for Review*, *Review Held*, *or Acknowledged*.

When a document is transferred, the system automatically notifies the new manager that he or she is responsible for completing the evaluation process that is in progress for that employee.

Status Change

The status of individual evaluations that are part of a document changes when employees and managers perform tasks such as opening or completing the evaluation or managers mark an evaluation as *Available for Review*, *Review Held*, or *Acknowledged*. The manager can also change the status of an employee evaluation by clicking the Reopen button on the Employee Evaluation page. This changes the status of the employee evaluation back to *In Progress*. The Reopen button is available to the manager and ePerformance Administrator (ePerformance Admin) for evaluations when they are not the owner (the manager can't reopen their own evaluation) and the evaluation status is *Complete* or *Cancelled* and the overall document status is *In Progress*. Once the manager moves their document status past *In Progress*, they can not reopen the employee evaluation.

However, additional situations might occur where managers or ePerformance administrators need to change the statuses of documents as a whole. Document statuses are changed using pages that are found on the Administrative Tasks menu. Document statuses can only be changed to *In Progress*.

Managers can change documents to *In Progress* from any of these statuses:

- *Available for Review*
- *Review Held*
- *Acknowledged*

ePerformance Admins can change document statuses to *In Progress* from any of the above statuses plus:

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- *Complete*
- *Cancelled*

If a document is changed from *Complete* or *Cancelled* to *In Progress* status, the document is removed from all approval queues and becomes inaccessible to the employee. If the status is changed from *Complete* to *In Progress*, the following steps on the Document Details page also change to *In Progress*: Nominate Participants; Track Nominations; and Review Participant Evaluations.

Any competency ratings that were pushed from the completed evaluation to competency management are rolled back. Managers must then move the document back through the entire sequence of statuses until they can once again mark it as complete.

Cancel

ePerformance enables managers and ePerformance administrators to cancel a document. Managers can only cancel documents with a status of *In Progress*. ePerformance administrators can cancel any document that is not already cancelled.

After you cancel a document, it becomes inactive. Canceling a document does not remove it from the system — it only marks it as cancelled and the document appears in the Historical Documents page instead of Current Documents

If the system is to update Manage Profiles, the system deletes all documents that have been completed and updated to the Manage Profiles business process.

Delete

Because cancelled documents are not physically deleted from the system, ePerformance provides a delete function that enables you to remove documents and all their associated evaluations completely from the system.

Preliminary Ratings

Managers can enter preliminary ratings for employees and update these ratings at any time that a document's status is *In Progress*. Preliminary ratings use the rating model that is defined for the Overall Summary section and are used to generate the View Ratings Summary (EP_DISTRIB_SUM) report, which you use to analyze whether ratings are distributed in the expected manner. Employees cannot view preliminary ratings.

Managing Administrative Tasks

This section lists the pages used to manage administrative tasks and discusses how to:

- Transfer documents.
- Reset document status.
- Cancel documents.
- Delete documents.
- View documents.

  This task is a manager function and is only available from the manager self-service pages.

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Pages Used to Manage Administrative Tasks

Page Name	Object Name	Navigation	Usage
Transfer Document	EP_APPR_SELECT	• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Transfer Document • Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Transfer Document • Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Transfer Document • Workforce Development, Performance Management, Development Documents, Administrative Tasks, Transfer Document	Select documents for transfer from one manager to another.
Confirm Transfer	EP_APPR_XFER	Select one or more documents and click the Continue button on the Transfer Document page.	Confirm the transfer of documents between managers.
Reset Document Status	EP_APPR_SELECT	• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Reset Document Status • Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Reset Document Status • Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Reset Document Status • Workforce Development, Performance Management, Development Documents, Administrative Tasks, Reset Document Status	Select documents for status change.
Confirm Status Reset	EP_APPR_STATUS	Select one or more documents and click the Continue button on the Reset Document Status page.	Confirm an document status change.

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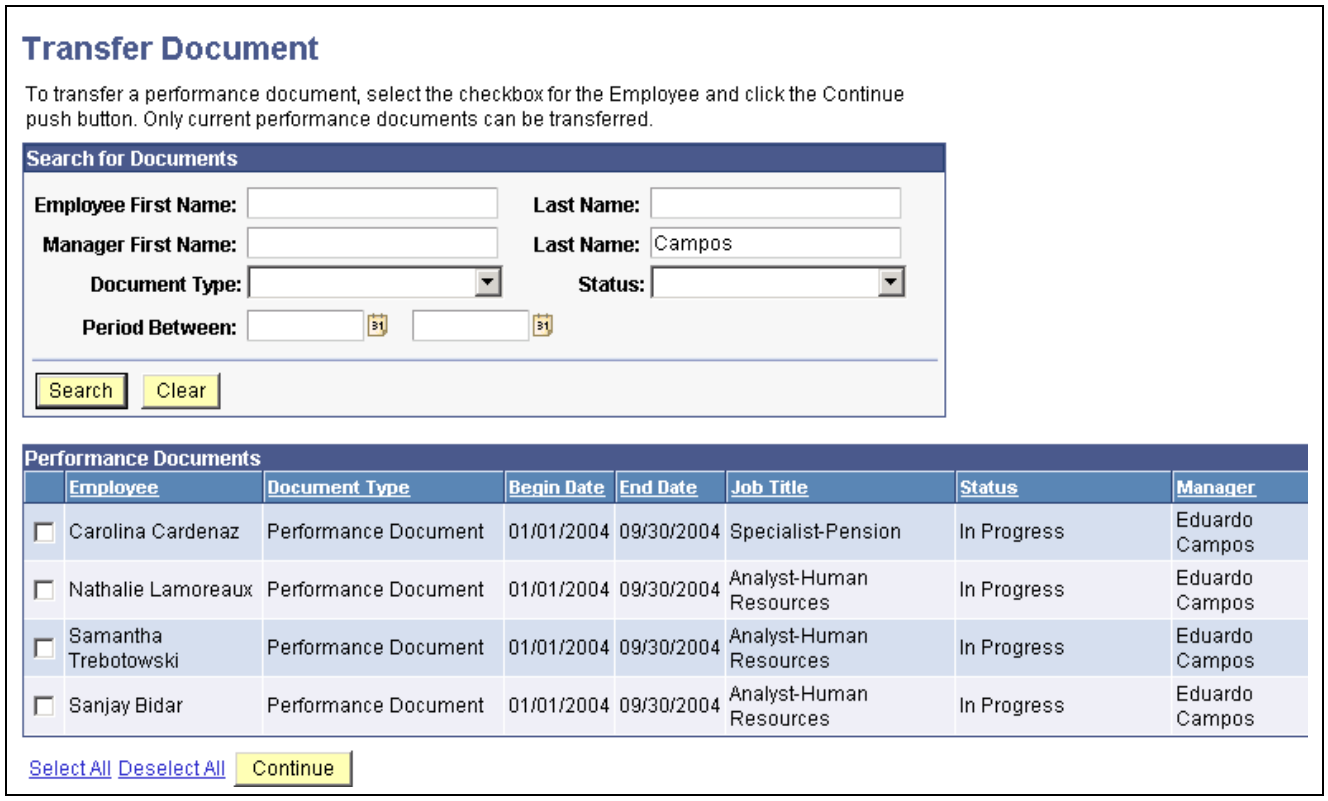
Page Name	Object Name	Navigation	Usage
Cancel Document	EP_APPR_SELECT	• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Cancel Document • Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Cancel Document • Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Cancel Document • Workforce Development, Performance Management, Development Documents, Administrative Tasks, Cancel Document	Cancel an document.
Confirm Cancellation	EP_APPR_CANCEL	Select one or more documents and click the Continue button on the Cancel Document page.	Confirm an document cancellation.
Delete Document	EP_APPR_SELECT	• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Delete Document • Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Delete Document • Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Delete Document • Workforce Development, Performance Management, Development Documents, Administrative Tasks, Delete Document	Delete documents that you previously cancelled.
Confirm Delete	EP_APPR_DELETE	Select one or more documents and click the Continue button on the Delete Document page.	Confirm an document deletion.

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Page Name	Object Name	Navigation	Usage
Enter Preliminary Ratings	EP_APPR_SELECT	Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Enter Preliminary Ratings	Select one or more employees for whom to enter preliminary ratings.
Preliminary Ratings	EP_APPR_PRELIM	Select one or more documents and click the Continue button on the Enter Preliminary Ratings page.	Enter preliminary ratings for selected employees.
Enter Preliminary Ratings - Save Confirmation	EO_SAVE_CONFIRM	Click the Save button on the Preliminary Ratings page.	Confirm that you want to save the preliminary ratings that you entered.
View Performance Document	EP_APPR_SELECT	Manager Self-Service, Performance Management, Administer Documents, View Performance Documents	View documents.

Transferring Documents

Access the Transfer Document page.



Transfer Document page

The ePerformance Admin view, shown above, enables you to select and transfer any documents with a status of *In Progress*, regardless of the manager. You can narrow the search by entering one or more of the search fields. If you click Search without entering criteria, all employee evaluations in the organization appear.

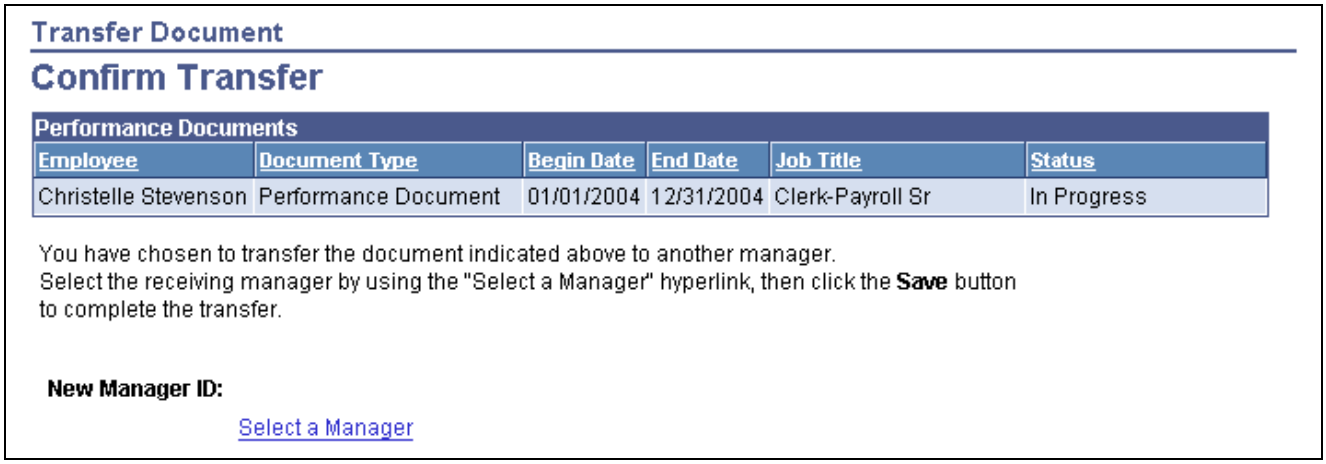
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The manager's view is limited to documents that the manager owns. The manager cannot search for documents.

After selecting one or more documents, click Continue. The Confirm Transfer page appears.

Confirming Transfers

Access the Confirm Transfer page.

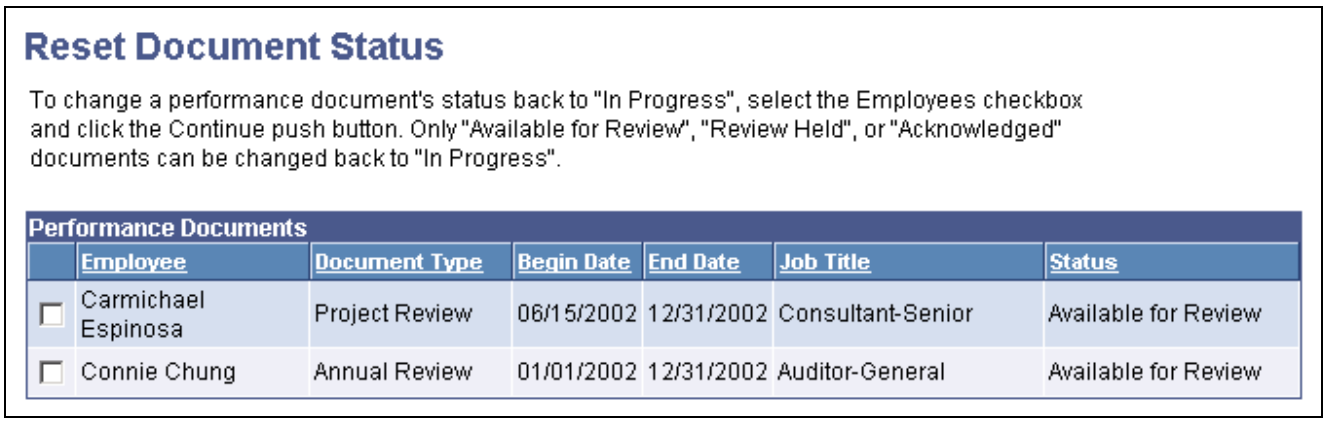


Confirm Transfer

Select a Manager Click this link to select the manager to receive the transfers.

Resetting Document Status

Access the Reset Document Status page.



Reset Document Status page

The manager's view of this page is shown above. All documents in *Available for Review*, *Review Held*, or *Acknowledged* status appear in the list.

The ePerformance administrator view contains search fields to narrow the list by manager first or last name, employee first or last name, Document Type, Status, or Period Between.

To change the document status, select one or more documents and click the Continue button. A confirmation page appears on which you can either confirm the status change or return without changing status.

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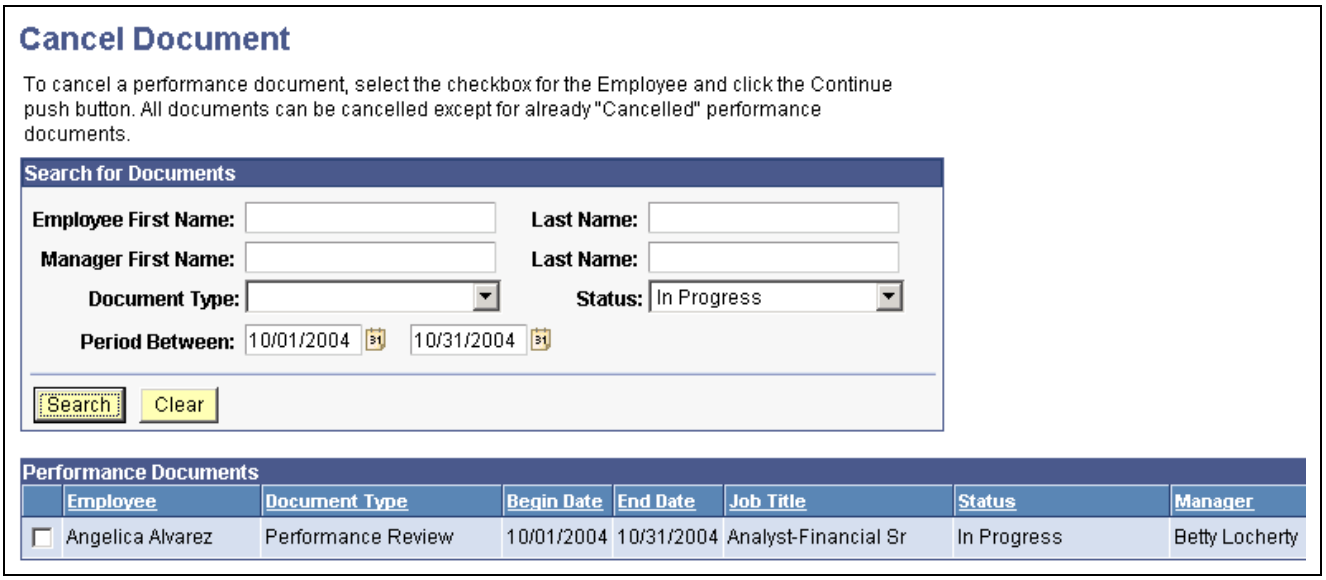
Note. The Reset Document Status page only changes the status of the overall document and the manager evaluation. The manager or HR Administrator must reset the status of individual evaluations within each evaluation.

See Also

Chapter 11, "Performing Administrative Tasks," Managing Document Processes, page 170

Cancelling Documents

Access the Cancel Document page.



Cancel Document page

Search for Documents

ePerformance administrator use this group box to search for non-cancelled documents, regardless of the manager. If you click Search without entering criteria, all employee evaluations in the organization appear.

Manager's use this group box to search for documents they own and where the status is *In Progress*.

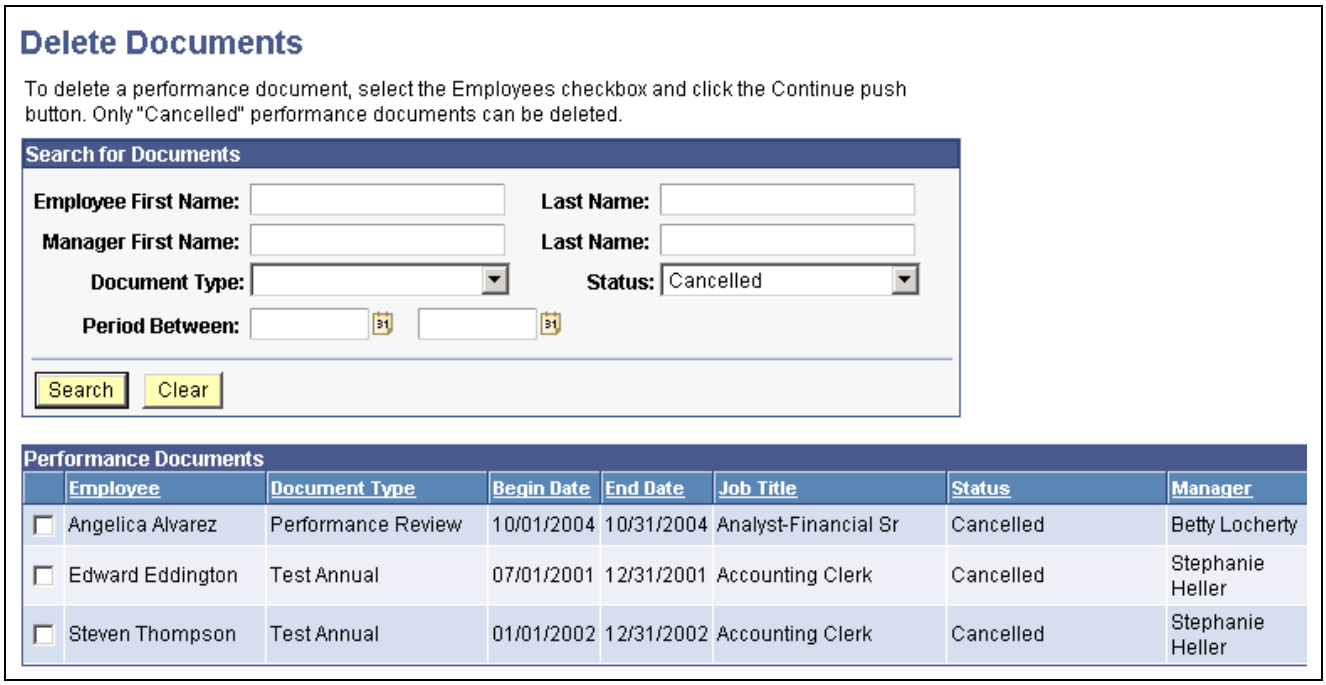
Performance Documents

This group box displays the results of the search. The administrator or manage can select one or more documents. A confirmation page displays after notify the user the cancellation was completed.

Deleting Documents

Access the Delete Documents page.

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Delete Documents page

The ePerformance administrator view, shown above, enables you to delete any documents that are *Cancelled.*You can narrow the search by entering one or more of the search fields. If you click Search without entering criteria, all employee evaluations with a *Cancelled* status appear.

The manager's view displays cancelled documents that the manager owns and does not enable the manager to enter search fields.

After selecting one or more documents, click Continue. The Confirm Delete page appears.

Entering Preliminary Ratings

Access the Preliminary Ratings page.

See Chapter 8, "Entering Comments and Ratings on Evaluations," Recording Preliminary Ratings, page 120.

Managing Document Processes

This section presents an overview of document process management and lists the pages used to manage document processes.

Understanding Document Process Management

If you have the ePerformance administrator role, you can view any document in any status for groups that you manage, and perform certain tasks that change the document status or due date. This is a "safety valve" in case the employee or manager are unable to complete the tasks. Follow these steps:

1. Enter selection criteria and select the document that you want to view from the results list to open the Document Details page for the document.
2. Click the View link next to a step to see the details of that step.

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You can view details of a step only after the step is started.

3. Perform various tasks on the Establish Criteria document (criteria document) or role evaluations.

   The tasks that are available to you depend on the status of the criteria document or role evaluation. These are:

   - Change the due date.
   - Reopen criteria document or evaluation.
   - Cancel criteria document or evaluation.

The procedures for selecting documents, viewing document details, and performing tasks as an administrator are the same as the procedures for any other role.

See Also

Chapter 5, "Generating Documents," Accessing Documents, page 86

Chapter 6, "Modifying Evaluation Criteria," Modifying Evaluation Criteria, page 96

Pages Used to Manage Document Processes

Page Name	Object Name	Navigation	Usage
View Performance Documents, View Development Documents	EP_APPR_SELECT	• Workforce Development, Performance Management, Performance Documents, View Documents, View Performance Documents • Workforce Development, Performance Management, DevelopmentDocuments, View Documents, Development Documents	Search for and view a list of documents that meet the search criteria
View Performance Documents - Document Details, View Development Documents - Document Details	EP_APPR_DETAIL	Click a document type link on the View Performance Documents page	View the details of the selected document.

Generating Reports

This chapter provides an overview of reports in ePerformance and discusses how to generate reports.

Understanding Reports in ePerformance

These are the reports that ePerformance provides to assist human resources (HR) administrators in tracking late or missing documents:

- Missing Documents

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This report lists documents that were not created for a group of employees that you select by group ID, document type, and date range. Knowing whether documents are missing is important if the HR department has defined desired rating distribution percentages, as the results of the distribution report are not reliable unless everyone in the group has a document and receives a rating during the period.

- Late Documents

  Use this report to generate a list of late documents, by document type, for a group of employees. If the current date is greater than the due date and the status of the manager evaluation is not yet complete, the document is reported as late. This report ignores documents that are canceled.

Prerequisites for Generating Reports

Before running any reports, you must first ensure that the groups of employees for which to run the reports are established. This is essential because the reports run against groups of employees.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

Appendix C, "ePerformance Reports," page 203

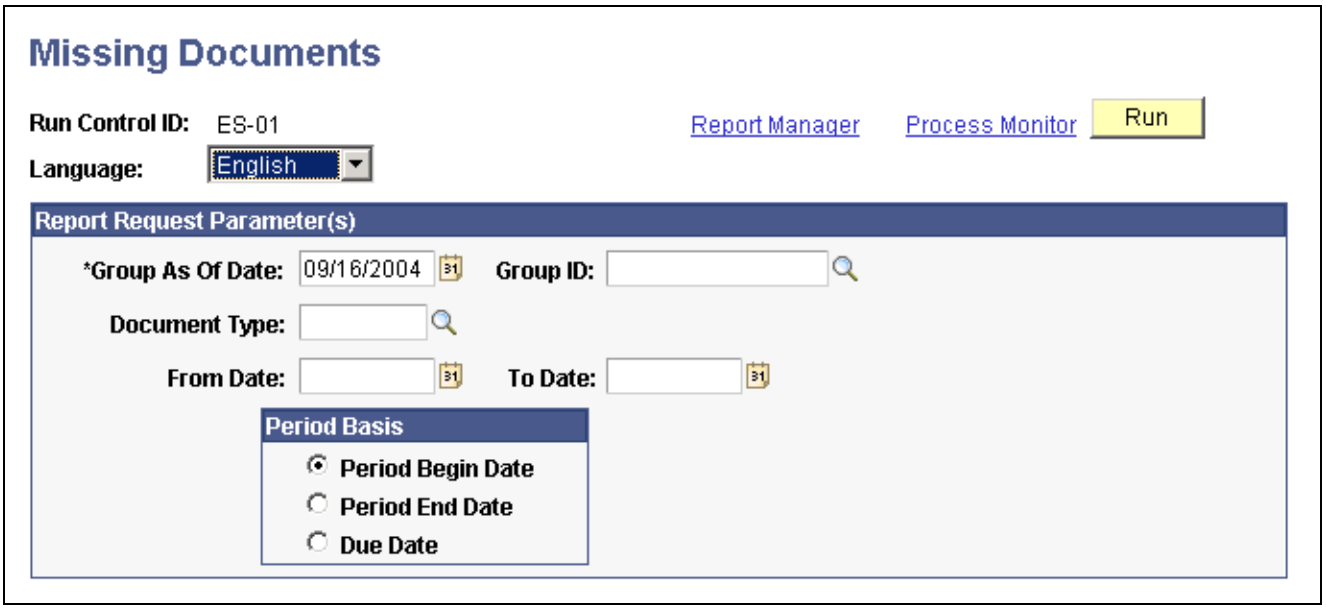
Pages Used to Generate Reports

Page Name	Object Name	Navigation	Usage
Missing Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Missing Documents Report, Missing Documents	Generate missing documents reports
Late Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Late Documents Report, Late Documents	Generate late document reports

Generating Missing Documents Reports

Access the Missing Documents page.

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Missing Documents page

Group ID Identify the group of employees to include in the report.

Group As Of Date Enter a group as of date.

The report generates a list of missing documents for employees belonging to the group that is defined in the Group ID field as of the date specified.

Document Type Select a document type, such as quarterly, annual, or yearly. You define document types on the Document Types page.

Period Basis The period basis determines which of the dates on the manager evaluation the system uses when selecting missing documents to publish in the report. Options are:

- Period Begin Date

  Select this option to look for employees who do not have a document of the specified type with a period begin date falling within the range that you entered in the From Date and To Date fields.

- Period End Date

  Select this option to look for employees who do not have a document of the specified type with a period end date falling within the range entered in the From Date and To Date fields.

- Period Due Date

  Select this option to look for employees who do not have a document of the specified type with a due date falling within the range entered in the From Date and To Date fields.

From and **To Date** The from and to dates establish a date range that the system uses in conjunction with the period basis to select documents to include in the report. For example, if you define a from and to date range of January 1, 2001 to December 31, 2001, and the period basis is *Period End Date,* the report only selects documents whose period end date falls between those dates.

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Generating Late Documents Reports

Access the Late Documents page.



Late Documents page

Language Select the language in which you want to generate the report.

Group ID Enter the group ID of the employees for whom you want to generate the report.

Group As Of Date Select the as of date. The report generates a list of late documents for employees belonging to the group that is defined in the Group ID field as of the date specified.

Document Type Select a document type, such as quarterly, annual, or project review. You define document types on the Document Types page.

See Also

Chapter 12, “Using Inquiry Pages,” page 175

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CHAPTER 12

Using Inquiry Pages

This chapter provides an overview of inquiry pages and discusses how to:

- View historical documents.
- View documents for indirect reports.
- View approval status.
- Set up parameters for inquiry pages.
- View rating summaries.
- View document status summaries.
- View detailed calculations of performance results.

Understanding Inquiry Pages

Managers, employees, and human resources (HR) administrators can access different inquiry pages that enable them to view data of interest to their role.

Manager and Employee Pages

Managers and employees can view lists of their completed documents for both performance and development evaluations and can drill down to detail documents.

Additionally, managers can view the approval status of documents for their direct reports and access documents for their indirect reports in view-only mode.

Note. If PeopleSoft Portal Pack is installed, managers can use the Employee Performance pagelet to view the status of the documents for which they are responsible.

Administrator Pages

The following inquiry pages are designed specifically for HR administrators:

- Rating Distribution Summary page.

  Contains preliminary, actual, and desired rating distributions for a group of employees, defined by group ID, in the form of a bar chart. Administrators use this page to determine whether ratings are distributed in the expected manner, and to plan how to bring actual ratings in line with desired ratings.

- Status Summary page.

  Contains a pie chart that summarizes the status of documents for a group of employees.

- Debug/Trace Results page.

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Lists the detailed calculations that are associated with a particular document. An HR administrator can use this information to debug suspected problems with rating calculations.

Note. Producing this page can have a significant impact on system performance.

Viewing Historical Documents

This section discusses how to access historical documents.

Page Used to View Historical Documents

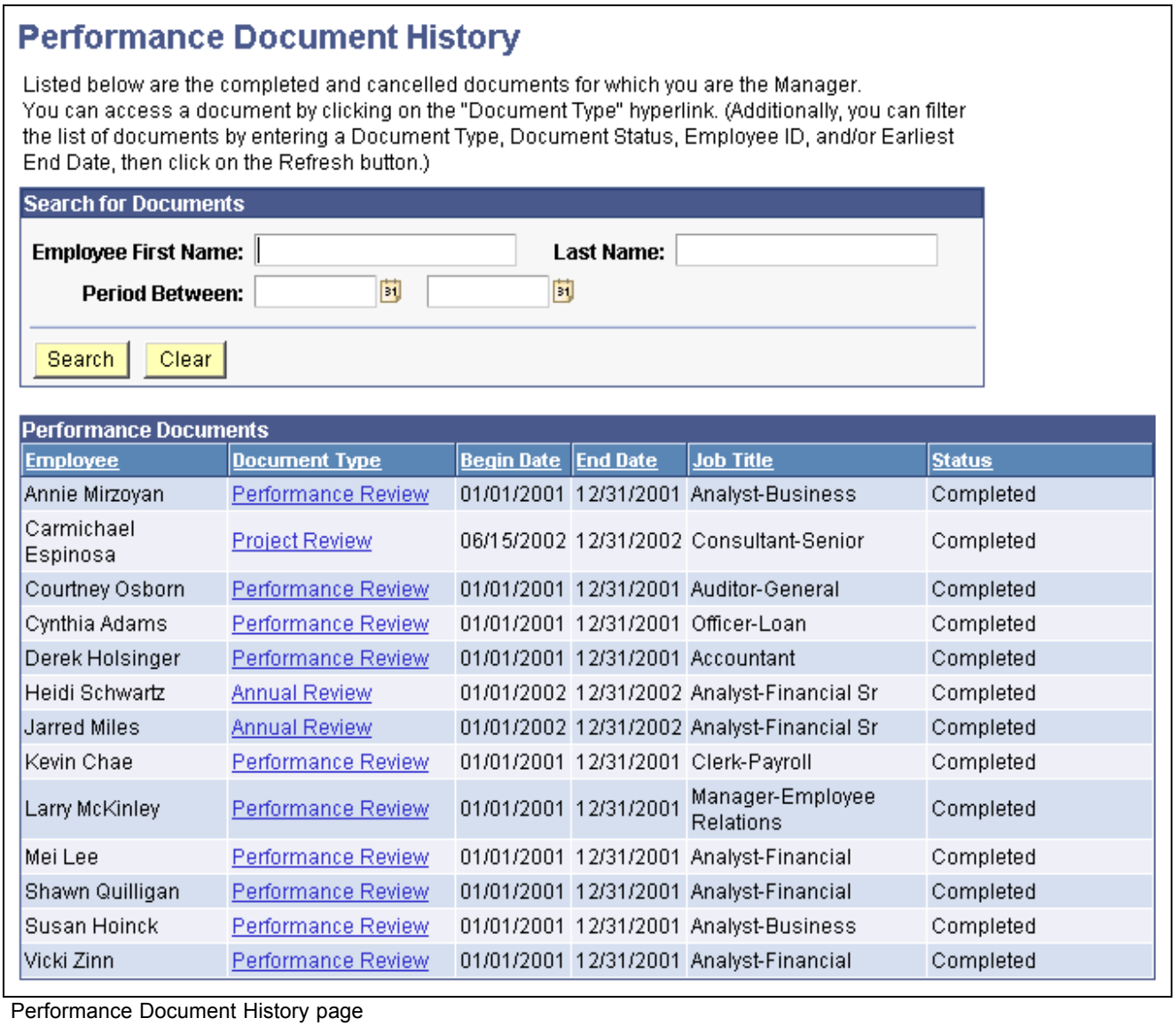
Page Name	Object Name	Navigation	Usage
Performance Document History	EP_APPR_SELECT	• Manager Self Service, Performance Management, Performance Documents, Historical Documents, Performance Document History • Self Service, Performance Management, My Performance Documents, Historical Documents, Performance Document History	Access completed documents for employees that you manage or for yourself.
Development Document History	EP_APPR_SELECT	• Manager Self Service, Performance Management, Development Documents, Historical Documents, Development Document History • Self Service, Performance Management, My Development Documents, Historical Documents, Development Document History	Access completed documents for employees that you manage or for yourself.
My Historical Evaluations for Others	EP_APPR_OTH_SELECT	• Self Service, Performance Management, Other's Performance Documents, Historical Evaluations, My Historical Evaluations for Others • Self Service, Performance Management, Other's Development Documents, Historical Evaluations, My Historical Evaluations for Others	Access completed documents for multi-participant evaluations in which you participated.

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Accessing Completed Documents

Access the Performance Document History, Development Document History, or My Historical Evaluations for Others page.

Note. These pages are all similar in appearance and usage; only the Performance Document History page is detailed here.



Performance Document History

Listed below are the completed and cancelled documents for which you are the Manager.
You can access a document by clicking on the "Document Type" hyperlink. (Additionally, you can filter the list of documents by entering a Document Type, Document Status, Employee ID, and/or Earliest End Date, then click on the Refresh button.)

Search for Documents

Employee First Name: **Last Name:**

Period Between:

Search Clear

Performance Documents

Employee	Document Type	Begin Date	End Date	Job Title	Status
Annie Mirzoyan	Performance Review	01/01/2001	12/31/2001	Analyst-Business	Completed
Carmichael Espinosa	Project Review	06/15/2002	12/31/2002	Consultant-Senior	Completed
Courtney Osborn	Performance Review	01/01/2001	12/31/2001	Auditor-General	Completed
Cynthia Adams	Performance Review	01/01/2001	12/31/2001	Officer-Loan	Completed
Derek Holsinger	Performance Review	01/01/2001	12/31/2001	Accountant	Completed
Heidi Schwartz	Annual Review	01/01/2002	12/31/2002	Analyst-Financial Sr	Completed
Jarred Miles	Annual Review	01/01/2002	12/31/2002	Analyst-Financial Sr	Completed
Kevin Chae	Performance Review	01/01/2001	12/31/2001	Clerk-Payroll	Completed
Larry McKinley	Performance Review	01/01/2001	12/31/2001	Manager-Employee Relations	Completed
Mei Lee	Performance Review	01/01/2001	12/31/2001	Analyst-Financial	Completed
Shawn Quilligan	Performance Review	01/01/2001	12/31/2001	Analyst-Financial	Completed
Susan Hoinck	Performance Review	01/01/2001	12/31/2001	Analyst-Business	Completed
Vicki Zinn	Performance Review	01/01/2001	12/31/2001	Analyst-Financial	Completed

Performance Document History page

Search for Documents

Enter search criteria to limit which documents appear in the list.

Note. This page region appears only if you access the page from Manager Self-Service.

Employee First Name and **Last Name** — Enter the first and last names of the employee whose documents you want to access.

Period Between — Enter a date range for which you want to view documents.

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Performance Documents

Completed documents that meet the selection criteria appear in this list. The information that appears—Employee Name, Document Type, Begin and End dates, and Job Title—assists you to identify the specific document you want to view. You can click the link under the Document Type column to open the document for viewing.

Viewing Documents for Indirect Reports

This section lists the pages used to view documents for indirect reports.

Note. You can view documents of any status.

See Also

Chapter 5, "Generating Documents," Accessing Documents, page 86

Pages Used to View Documents for Indirect Reports

Page Name	Object Name	Navigation	Usage
Document Details	EP_APPR_DETAIL	Manager Self Service, Performance Management, Performance Documents, View-Only Documents, View-Only Documents Select the effective date for determining employees and click Continue. Select an employee and click Continue. Select a document type.	View the document steps and statuses for the selected document. From this page, you can click the View link wherever it appears to view details of the step.

Viewing Approval Status

This section lists the pages used to view approval status.

See Also

Chapter 10, "Managing Reviews and Approvals," Approving Documents, page 158

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Pages Used to View Approval Status

Page Name	Object Name	Navigation	Usage
View Approval Status Summary	SS_LIST	Manager Self Service, Performance Management, View Approval Status, View Approval Status Summary	View a list of all documents for which you are a participant in the approval process.
View Approval Status Detail	EP_APPRAISAL_MGR	Select the Performance Document link on the View Approval Status Summary page.	View approval status of a single document.

Defining Data for Inquiry Pages

This section lists prerequisites and discusses how to:

- Define the desired rating distribution.
- Define the data collection for inquiries.

Prerequisites

Before you run inquiries to produce reports and graphs, you must:

- Define rating distribution parameters.

  Before defining the parameters for the desired rating distribution, define the group for which to produce a ratings distribution report.

  Note. To obtain meaningful rating distribution information, you should use the same rating model and calculation method for all group members. Additionally, an employee should belong to only one group for which you define and evaluate a document result distribution. Therefore, it's important that you carefully define rating distribution groups and use the Group Member Overlap (GBP001) report to identify members with membership in more than one group.

- Run the Create Summary Data (EP_RPT_SNAP) process to build a collection of data for input to various inquiries and reports.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

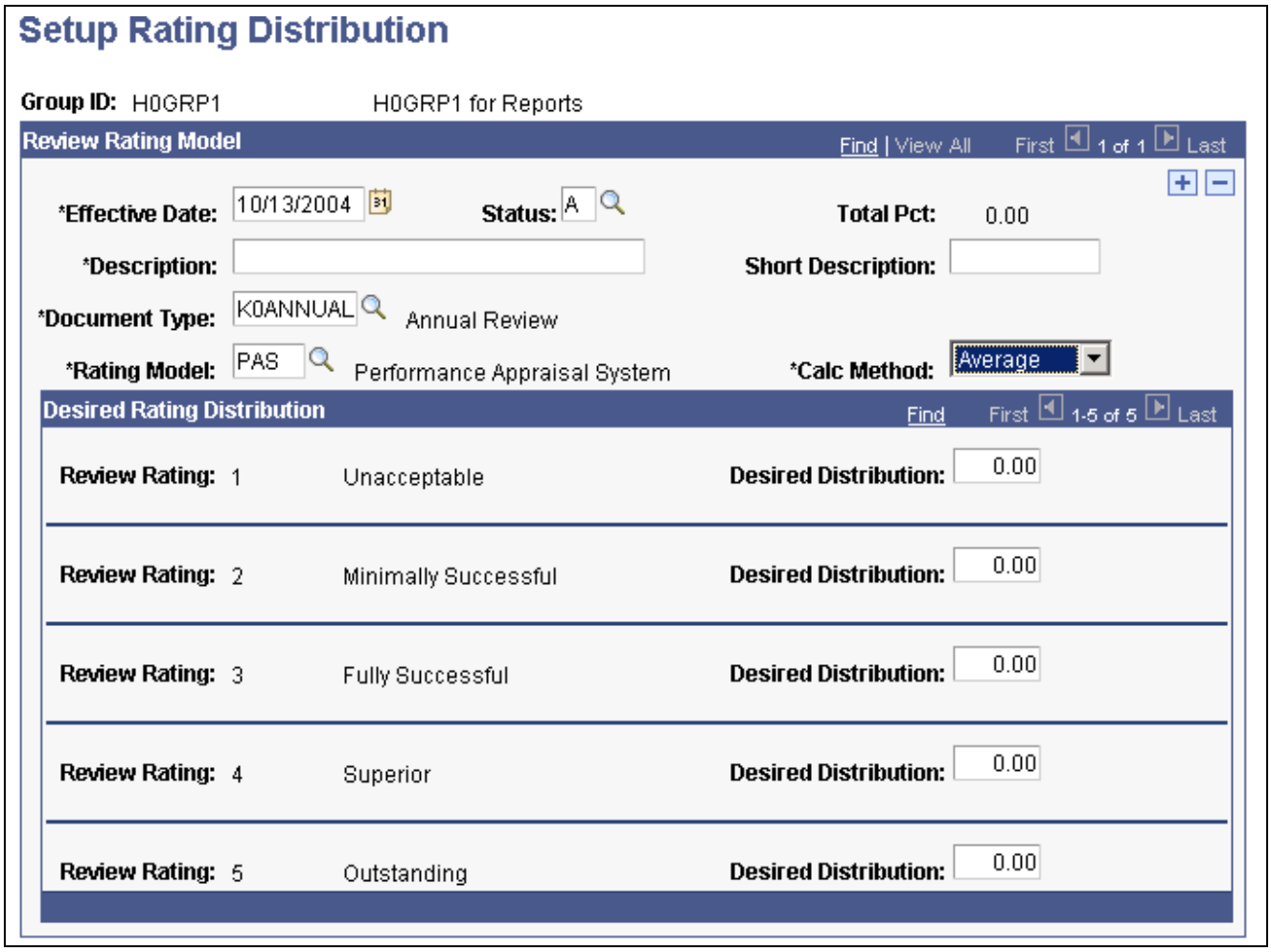
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Pages Used to Define Data for Inquiry Pages

Page Name	Object Name	Navigation	Usage
Setup Rating Distribution	EP_DESIRED_DIST	Workforce Development, Performance Management, Reports, Setup Rating Distribution, Setup Rating Distribution	Define the parameters for generating the Rating Distribution Summary report for a selected group of employees.
Create Summary Data	RUNCTL_EP_RPT_SNAP	Workforce Development, Performance Management, Reports, Create Summary Data	Define the data collection that contains the documents against which inquiries are run. This is a prerequisite for using the Rating Distribution Summary and Status Summary inquiry pages.

Defining the Desired Rating Distribution

Access the Setup Rating Distribution page.



Desired Rating Distribution Table page

The group for which you define the desired distribution parameters appears at the top of the page.

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Review Rating Model

For the report to be meaningful, all group members for which you are defining parameters should share the same rating model and calculation method that you select in the following fields.

Document Type Select the type of document for the desired distribution.

Rating Model Select the rating model for the desired distribution.

Calc Method (Calculation Method) Select the calculation method for the desired distribution. Options are: *Average, Revw Band* (review band), or *Sum* (summation).

Desired Rating Distribution

The desired rating distribution defines, for a given group of employees, the desired percentage of documents that should fall into each rating category or point spread. The selected calculation method determines which fields appear in this group box:

Review Rating If the calculation method is average or review band, this field displays the document's qualitative ratings from the rating model table.

Description If the calculation method is average or review band, the description of the qualitative rating appears here from the rating model table.

From Points and **To Points** These fields appear if the calculation method is summation. Enter the beginning point value and ending point value for the desired distribution. Enter point ranges sequentially; do not leave gaps or enter overlapping point ranges.

Desired Distribution If the calculation method is summation, enter the percentage of employees that should receive the number of points that are defined by the From Points and To Points fields.

If the calculation method is average or review band, enter the percentage of employees that should receive the rating that is specified in the Document Rating field.

Distribution percentages must add up to 100.

Examples

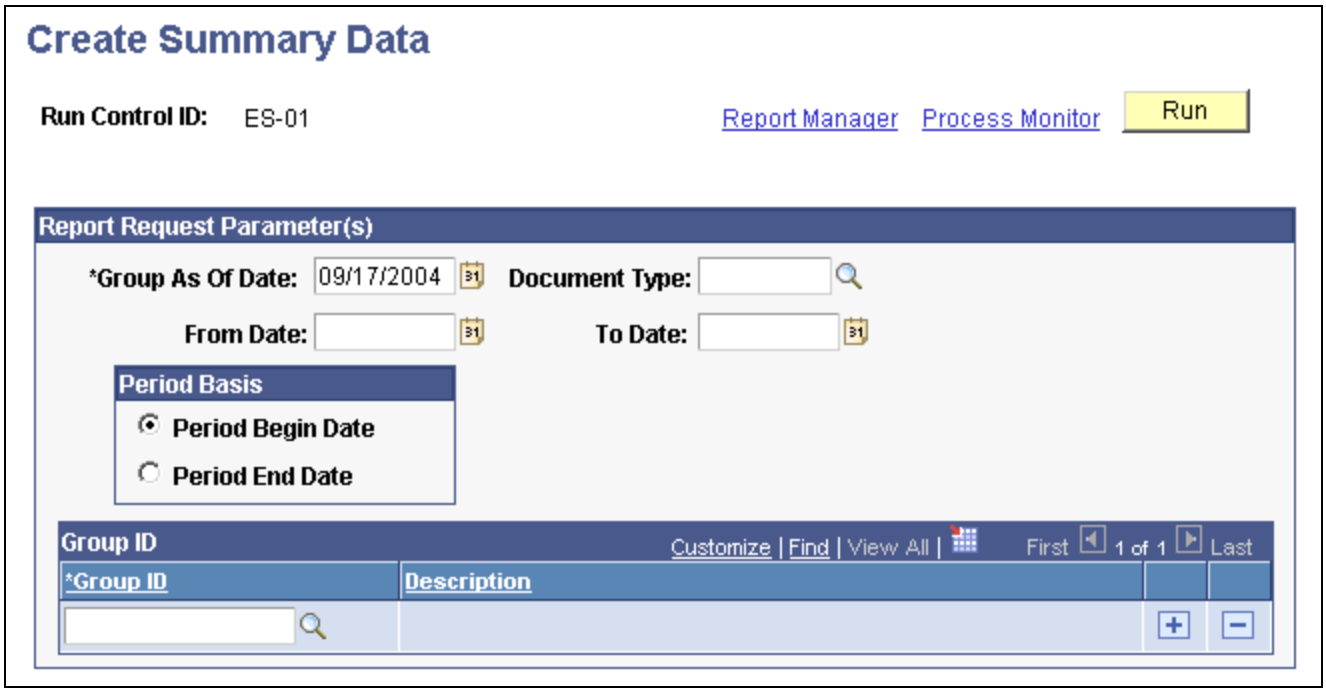
The following examples illustrate how the Desired Distribution field works with the From Points, To Points, and Review Rating fields:

- For five percent of the group members to receive a rating of 10 to 20 points, enter 10 in the From Points field, 20 in the To Points field, and 5 in the Desired Distribution field.
- For five percent of the group members to receive a review rating of O (outstanding), enter five percent in the Desired Distribution field that corresponds to the O rating.

Defining the Data Collection for Inquiries

Access the Create Summary Data page.

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Create Summary Data page

The Create Summary Data process builds the data collection that is used in the rating distribution and status inquiry pages. You must specify at least a Group ID and a Group As Of Date to run this process; other parameters are available to further refine the data collection.

Group As of Date The system summarizes data for employees belonging to the group defined in the Group ID field as of the date specified.

From Date and **To Date** Enter the dates that define a date range for selecting documents to include in the report. These fields work in conjunction with the period basis selection.

Document Type Select a document type, such as quarterly, annual, or yearly. If you leave this field empty, the system selects all document types.

Group ID Enter the Group ID that is associated with the employees for whom you want to generate the inquiry data. (Group IDs are defined as part of the Group Build process in PeopleSoft Enterprise Human Resources.)

Note. When generating data for the status inquiry pages, PeopleSoft recommends that group members share the same approval process option.

Period Basis

Period Begin Date Select to have the system retrieve data for documents that have a period begin date that falls between the dates that you enter in the From Date and To Date fields. The period begin date represents the first day of the period and is associated with a document when the document is first created.

Period End Date Select to have the system retrieve data from documents that have a period end date that falls between the dates that you enter in the From Date and To Date field. The period end date represents the last day of the period and is associated with a document when the document is first created.

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Viewing Ratings Summaries

This section lists prerequisites and discusses how to:

- View rating distribution summaries.
- View rating distribution details.

lUnderstanding Ratings Distributions

The ratings distribution summary report is the most reliable if the documents for everyone in the ratings distribution group are no longer in the *In Progress* status, and that an overall summary rating was entered or calculated on all documents. Additionally, because the rating distribution reports include preliminary ratings, you should ensure that all preliminary ratings are entered.

Prerequisites

Before you can view a rating distribution summary you must:

- Define the desired rating distribution on the Setup Rating Distribution page.
- Build the data collection from which the rating distribution is generated on the Create Summary Data page.

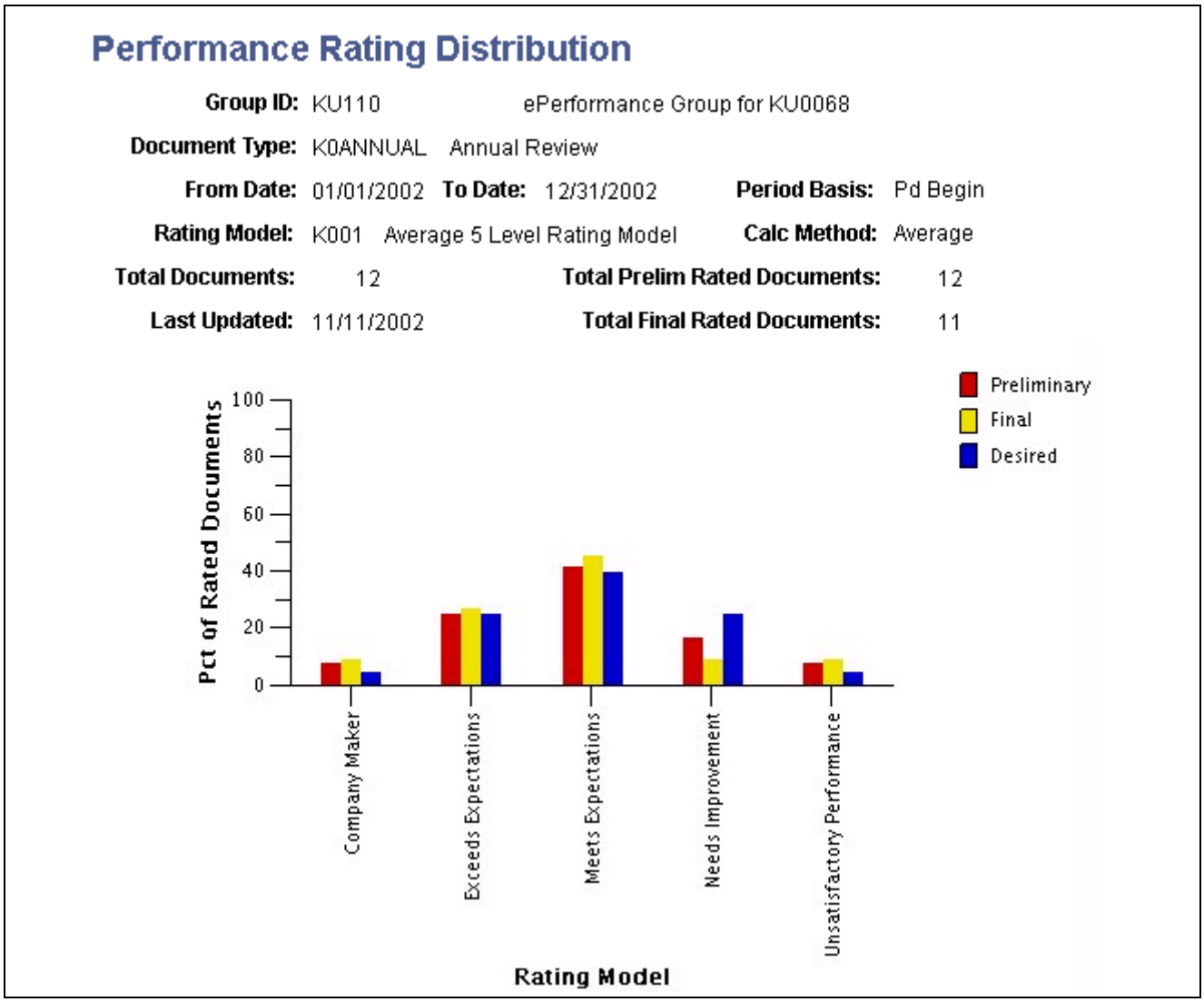
Pages Used to View Ratings Summaries

Page Name	Object Name	Navigation	Usage
Performance Rating Distribution	EP_DISTRIB_SUM	Workforce Development, Performance Management, Administer Documents, Reports, View Rating Summary	View the preliminary, actual, and desired rating distributions for a group of employees and document type.
Rating Distribution Detail	EP_DISTRIB_DTL	Click a bar on the Rating Distribution Summary report.	View details for employees that fall into the selected rating category or point spread on the rating distribution bar chart.

Viewing Rating Distribution Summaries

Access the Performance Rating Distribution page.

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Performance Rating Distribution page

Group ID The group ID for the employees whose rating results appear on the page.

Last Updated The date on which the document rating distribution data that appears on the page was last calculated.

Note. To calculate the data, you must run the Create Summary Data process.

Total Prelim Rated Documents (Total Preliminary Rated Documents) The total number of documents for which preliminary ratings were defined.

Total Final Rated Documents The total number of documents with final rating results.

Rating Model The rating model that is used to quantify and evaluate employee performance.

Calc Method (Calculation Method) The method that is used to calculate ratings. Values are: *Summary, Average,* and *Review Band.*

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Note. The document template defines the calculation method.

Bar Chart Data

The information that the bar chart represents depends on the method that is used to calculate the overall ratings:

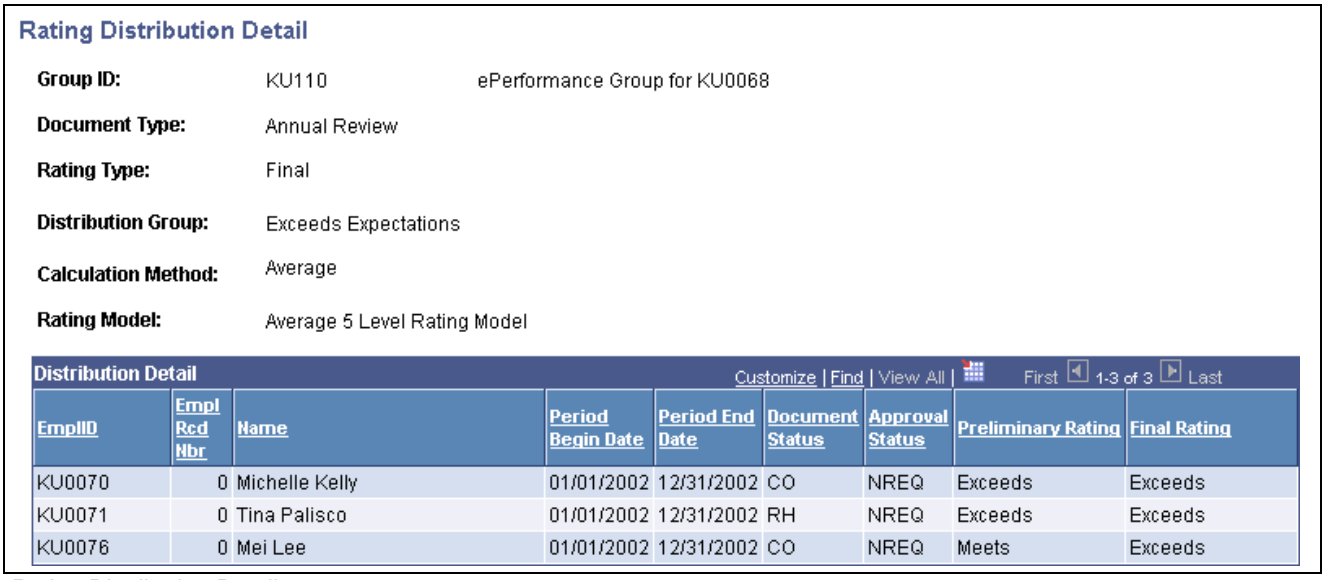
- If the calculation method is *Average* or *Review Band*:
  - The vertical axis shows the percentage of completed documents.
  - The horizontal axis shows qualitative rating categories, for example: *Company Maker* or *Exceeds Expectations.*
- If the calculation method is *Summation*:
  - The vertical axis shows the percentage of documents that fall into each point range that is defined on the Desired Rating Distribution page.
  - The horizontal axis shows each from and to point range that is defined on the Desired Rating Distribution page.

For both calculation methods, the bar chart compares preliminary, actual, and desired results. Preliminary results come from the Preliminary Ratings page; actual ratings come from the Manager Evaluation page; desired results come from the Desired Rating Distribution Table page.

Click a preliminary or actual bar to access the Rating Distribution Details page, where you can see detailed information for the selected rating category or point spread.

Viewing Rating Distribution Details

Access the Rating Distribution Detail page.



Rating Distribution Detail

Group ID: KU110 ePerformance Group for KU0068

Document Type: Annual Review

Rating Type: Final

Distribution Group: Exceeds Expectations

Calculation Method: Average

Rating Model: Average 5 Level Rating Model

Distribution Detail — Customize | Find | View All | First 1-3 of 3 Last

EmplID	Empl Rcd Nbr	Name	Period Begin Date	Period End Date	Document Status	Approval Status	Preliminary Rating	Final Rating
KU0070	0	Michelle Kelly	01/01/2002	12/31/2002	CO	NREQ	Exceeds	Exceeds
KU0071	0	Tina Palisco	01/01/2002	12/31/2002	RH	NREQ	Exceeds	Exceeds
KU0076	0	Mei Lee	01/01/2002	12/31/2002	CO	NREQ	Meets	Exceeds

Rating Distribution Details page

This page lists detailed information for the employees within the rating category or point spread that you selected on the Rating Distribution Summary page.

Approval Status The code for the approval status:

- *NREQ:* Not required

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- *OPEN:* Not submitted
- *SUBM:* Submitted
- *APRV:* Approved
- *DENY*: Denied

Calculation Method The calculation method that is used to calculate the overall ratings. Values are *A* (average), *R* (review band), and *S* (summation).

Viewing Document Status Summaries

This section provides an overview of status inquiry page access, lists a prerequisite, and discusses how to:

- View the document status summary.
- View document status details.

Understanding Status Inquiry Page Access

For the status inquiry pages, group members should share the same approval process option. The approval process option determines when, and if, documents approval is required. It also determines which statuses documents must pass through before they reach the *Complete* status.

To access the Status Inquiry pages, enter either a group ID or a document type to select the employees whose document statuses you want to view. All members of the group should have the same document type. If more than one document template was used to generate the documents, and the review process options differ (for example, some documents hold a review and others do not), then it is possible that not every document that is selected for the report will go through the same set of statuses.

The inquiry pages always represent the correct percentage of documents in each status; however, if more than one review process option is represented, the pages might not give you a complete picture of the statuses through which documents must pass.

Prerequisite

Before you can use inquiry pages to view the status of documents, use the Create Summary Data page to create a snapshot of the data to be used by the inquiry page.

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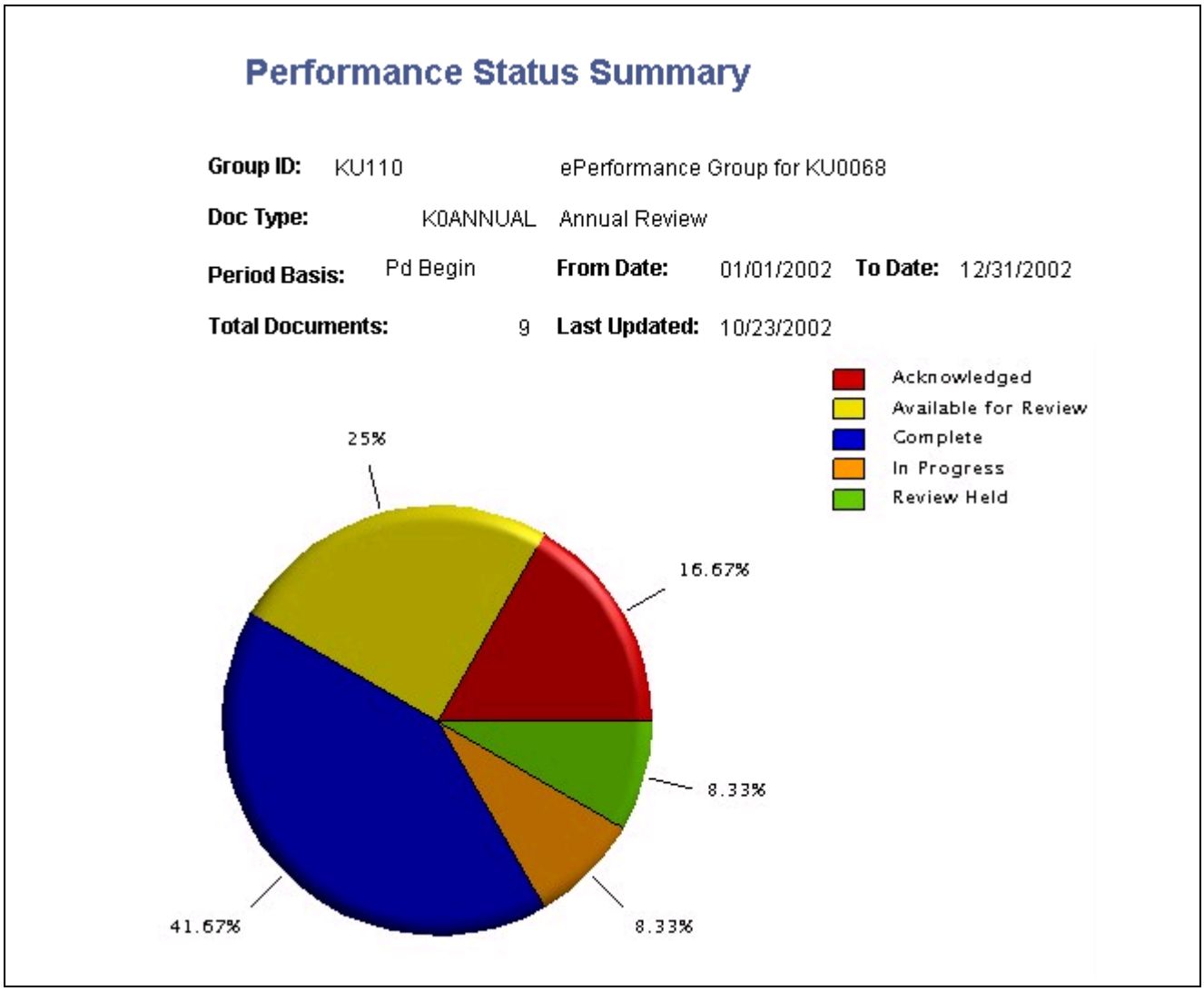
Pages Used to View Document Status Summaries

Page Name	Object Name	Navigation	Usage
View Status Summary	EP_STATUS_SUM	Workforce Development, Performance Management, Administer Documents, Reports, View Status Summary, View Status Summary	View a pie chart that shows the percentage of documents in each document status. Each wedge represents a document status.
Document Status Detail	EP_STATUS_DTL	Click a wedge in the pie chart on the View Status Summary page.	View the list of employees that comprise the document status selected on the Document Status Summary page. Also see status details for each employee.

Viewing the Document Status Summary

Access the Performance Status Summary page.

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Performance Status Summary page

Total Documents Displays the total number of documents for which summary results are available.

Last Updated Displays the date when the document status summary data that appears on the page was last calculated.

Note. To calculate the displayed data you must run the Create Summary Data process.

Pie Chart Data

For the selected group and document type, the pie chart displays the percentage of documents that are currently associated with each document status.

Click a wedge to access the Document Status Detail page, where you can see the list of employees with documents in the selected status.

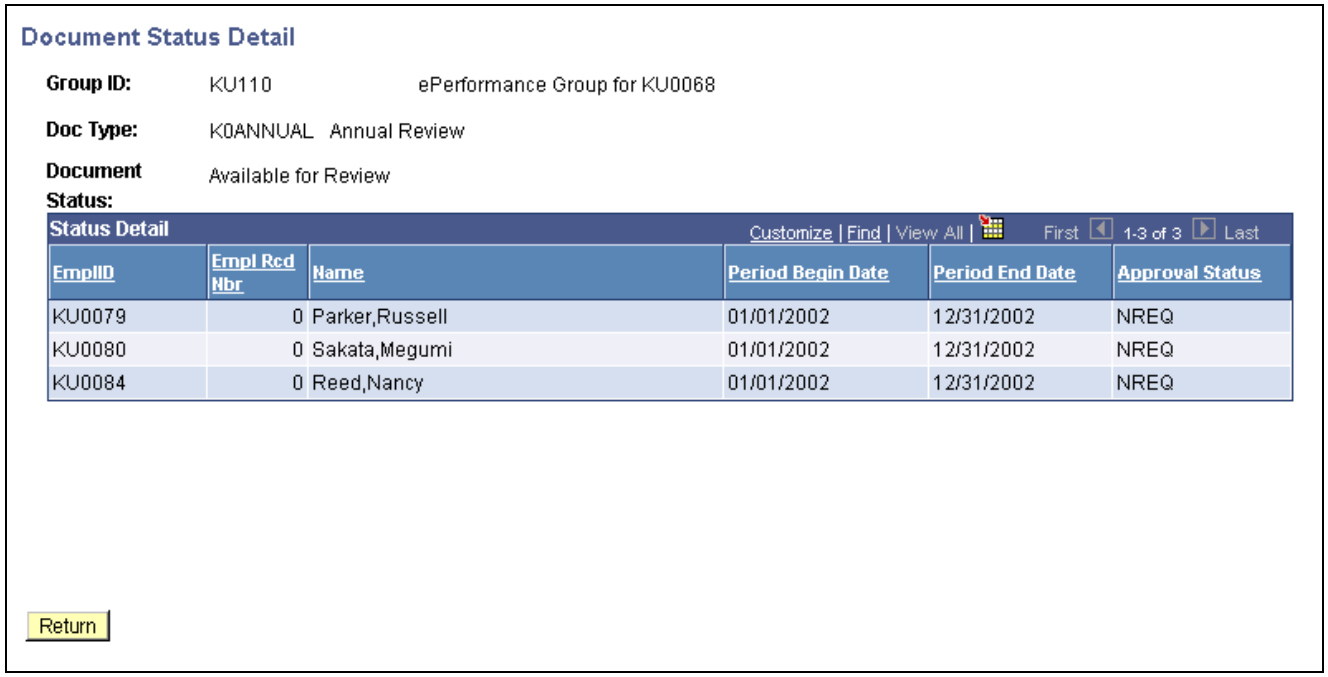
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See Also

Chapter 10, "Managing Reviews and Approvals," Document Statuses during Review and Approval, page 152

Viewing Document Status Details

Access the Document Status Detail page.



Document Status Detail page

Viewing Detailed Calculations of Performance Results

This section provides an overview of debug/trace logs, lists a prerequisite, and discusses how to view the debug/trace log.

Understanding Debug/Trace Logs

You can view a log of the steps that the system takes to calculate the results of a selected document. This feature can be helpful when you're trying to debug setup problems that are not easily identified by looking at the results of a document calculation.

The system generates a debug/trace log for a document when the user clicks a calculate button on the Maintain Documents page.

When a user first enters the Evaluation page, the system deletes any existing debug/trace information for the subdocument and begins a new trace. The document does not need to be saved to record the debug/trace results; clicking a calculate button automatically saves the results to the log.

Review the results of the debug/trace process after results are calculated and before accessing the Evaluation page for the same subdocument, since accessing the page again deletes the debug/trace data just created.

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Prerequisite

To have the system log calculation entries, the Debug Rating Calculation, you must select the check box on the General Settings page.

Warning! Enabling this feature can have a significant impact on system performance. We recommend that you use the feature only when you are testing and debugging the ePerformance setup.

See Also

Chapter 2, "Setting Up ePerformance," Defining System Settings, page 7

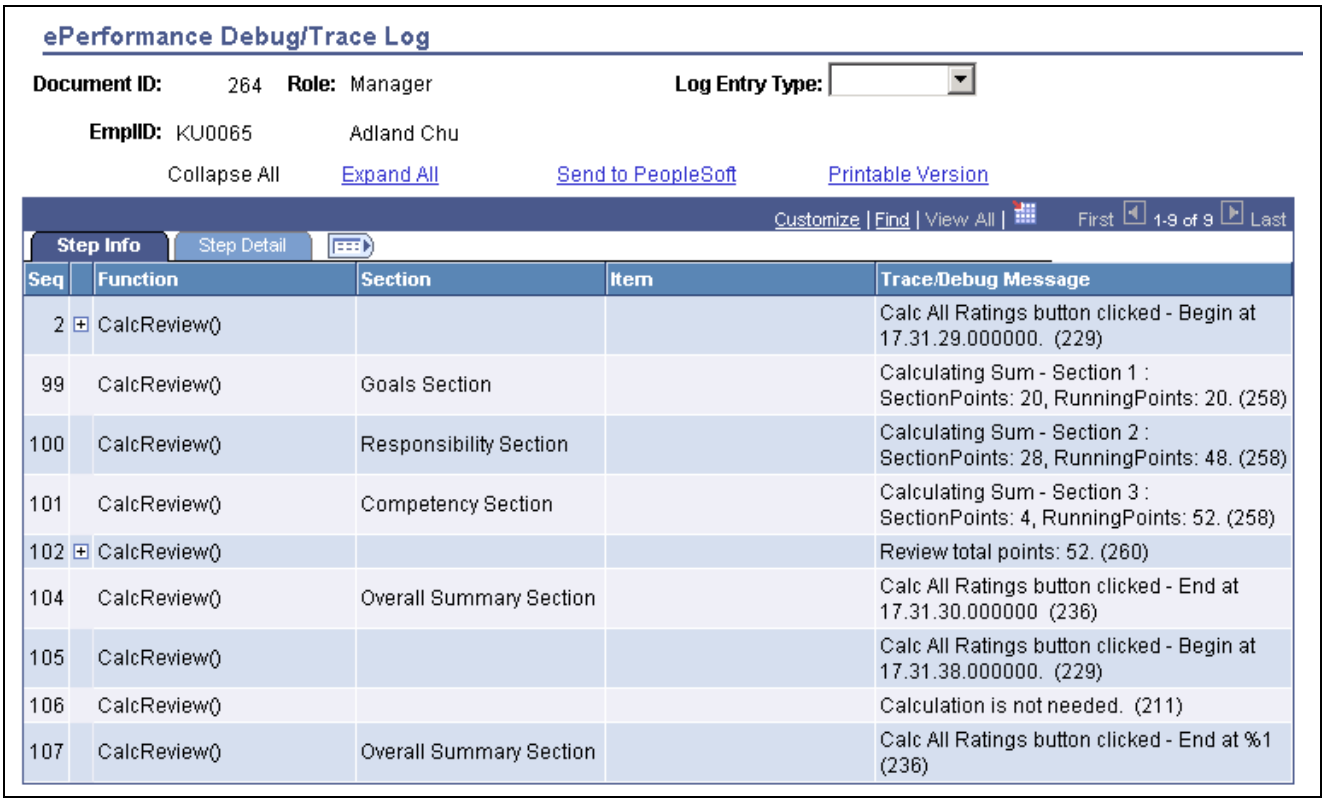
Pages Used to View the Debug/Trace Log

Page Name	Object Name	Navigation	Usage
ePerformance Debug/Trace Log	EP_DEBUG	Workforce Development, Performance Management, Calculation Debug/Trace Results, ePerformance Debug/Trace Log	View the detailed calculations for a document so that you can debug or trace the calculation.
ePerformance Debug/Trace Log (printable version)	EP_DEBUG_PRNT	Click the Printable Version link on the ePerformance Debug/Trace Log.	Display all calculation information on a single page for convenient printing.

Viewing the Debug/Trace Log

Access the ePerformance Debug/Trace Log page.

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Seq	Function	Section	Item	Trace/Debug Message
2	CalcReview()			Calc All Ratings button clicked - Begin at 17.31.29.000000. (229)
99	CalcReview()	Goals Section		Calculating Sum - Section 1 : SectionPoints: 20, RunningPoints: 20. (258)
100	CalcReview()	Responsibility Section		Calculating Sum - Section 2 : SectionPoints: 28, RunningPoints: 48. (258)
101	CalcReview()	Competency Section		Calculating Sum - Section 3 : SectionPoints: 4, RunningPoints: 52. (258)
102	CalcReview()			Review total points: 52. (260)
104	CalcReview()	Overall Summary Section		Calc All Ratings button clicked - End at 17.31.30.000000 (236)
105	CalcReview()			Calc All Ratings button clicked - Begin at 17.31.38.000000. (229)
106	CalcReview()			Calculation is not needed. (211)
107	CalcReview()	Overall Summary Section		Calc All Ratings button clicked - End at %1 (236)

ePerformance Debug/Trace Log page

Log Entry Type Select a log entry type to filter the output. Options are:

- *Trace:*

  Only those entries that show the steps performed in the calculation appear.

- *Info:*

  Informational entries only appear. For example, an information entry is created when the system attempts to calculate a section for which none of the subordinate items have been rated. Information entries help explain why a particular result is obtained from a calculation.

- *Errors:*

  Errors appear in red and generally indicate a setup problem.

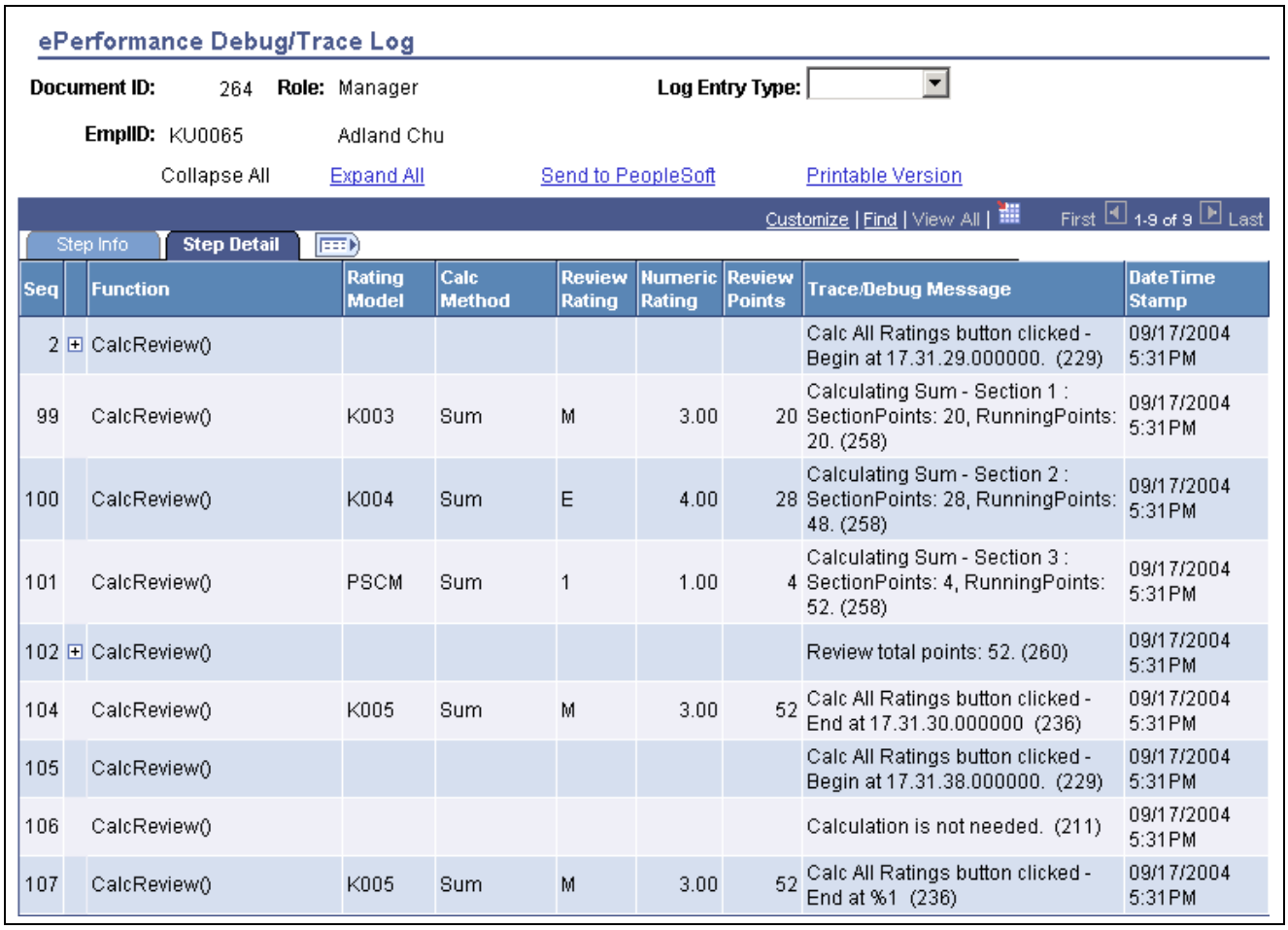
Printable Version Click to render a page that presents all trace information, without tabs, so that you can print a copy.

Note. When using the browser's File, Print option to print this page, be sure to set the printer layout to landscape mode.

Step Detail Tab

Access the ePerformance Debug/Trace Log: Step Detail page.

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ePerformance Debug/Trace Log

Document ID: 264 **Role:** Manager **Log Entry Type:**

EmplID: KU0065 Adland Chu

Collapse All | Expand All | Send to PeopleSoft | Printable Version

Customize | Find | View All | First 1-9 of 9 Last

Step Info | **Step Detail**

Seq		Function	Rating Model	Calc Method	Review Rating	Numeric Rating	Review Points	Trace/Debug Message	DateTime Stamp
2	+	CalcReview()						Calc All Ratings button clicked - Begin at 17.31.29.000000. (229)	09/17/2004 5:31PM
99		CalcReview()	K003	Sum	M	3.00	20	Calculating Sum - Section 1 : SectionPoints: 20, RunningPoints: 20. (258)	09/17/2004 5:31PM
100		CalcReview()	K004	Sum	E	4.00	28	Calculating Sum - Section 2 : SectionPoints: 28, RunningPoints: 48. (258)	09/17/2004 5:31PM
101		CalcReview()	PSCM	Sum	1	1.00	4	Calculating Sum - Section 3 : SectionPoints: 4, RunningPoints: 52. (258)	09/17/2004 5:31PM
102	+	CalcReview()						Review total points: 52. (260)	09/17/2004 5:31PM
104		CalcReview()	K005	Sum	M	3.00	52	Calc All Ratings button clicked - End at 17.31.30.000000 (236)	09/17/2004 5:31PM
105		CalcReview()						Calc All Ratings button clicked - Begin at 17.31.38.000000. (229)	09/17/2004 5:31PM
106		CalcReview()						Calculation is not needed. (211)	09/17/2004 5:31PM
107		CalcReview()	K005	Sum	M	3.00	52	Calc All Ratings button clicked - End at %1 (236)	09/17/2004 5:31PM

ePerformance Debug/Trace Log: Step Detail page

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APPENDIX A

Delivered Workflow for ePerformance

This appendix discusses workflows for ePerformance.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflow for ePerformance

This section discusses ePerformance workflow. The workflows are listed alphabetically by workflow name.

See Also

Chapter 2, "Setting Up ePerformance," Modifying Self-Service Pages and Email Notifications, page 13

ePerformance Notification Events

This section discusses the ePerformance notification workflow.

Description

Event Description	When employees and managers use ePerformance to create evaluations, this generic notification event is used to support email notifications that are sent to the appropriate participant
Action Description	In ePerformance, workflow notification is configurable at each point in the evaluation process. Available email notifications are sent to inform the appropriate persons of: the availability of evaluations for viewing and update; a change in the status of documents; a request for review and approval of evaluation criteria, participant nominations, or evaluations; invitations to participate in evaluations; and acceptance or declination of invitations.
Notification Method	email

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APPENDIX B

Integrating with PeopleSoft Enterprise Learning Management

This appendix discusses how to integrate ePerformance with PeopleSoft Enterprise Learning Management.

Integrating with Learning Management

ePerformance uses the Integration Broker to faciliate communication between the ePerformance and Learning Management systems. Use the following steps to set up the integration between two systems.

Note. These steps assume that both systems are operating on PeopleTools 8.48.

1. Using the Human Resources system, define the password for the local node.
    a. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes
    b. Search for the local node.

    Note. For the Human Resources system, PSFT_HR is delivered as the local node and PSFT_LM as the remote node. For the Learming Management system, PSFT_LM is delivered as the local node and PSFT_HR as the remote node.

    c. In the Authentication Option field, select *Password*.
    d. In the Password field, enter a password.

    You will be asked to confirm the password.

    e. Click the Save button.
2. Verify the routings are active.
    a. From the Navigations Definitions page, click the Routings tab to display the Routings page.
    b. In the Routings Definition grid, search for HMCR.
    c. Verify the *HMCR_IS* and *HMCR_OS* are active.
3. Repeat steps 1 and 2 to define the password for the remote node and verify the routings are active.

    Note. The password for the Human Resources remote node should match the password of the Learning Management local node.

    The password for the Human Resources local node should match the password of the Learning Management remote node.

4. For the remote node only, enable the remote service invocation.

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a. From the Nodes Definitions page, click the Properties link to display the Nodes Properties page.

b. In the Name Type field, select *Category*.

c. In the Property Name field, enter *SOA_ENABLE*D.

d. In the Value field, enter *True*.

e. Click the OK button to display the Node Definition page.

5. Using the Learning Management system, repeat steps 1 through 4.

6. Using the Human Resources system, define the local gateway.

a. Navigate to PeopleTools, Integration Broker, Configuration, Gateways

b. In the URL field, enter the URL address for the local gateway.

Use the following format: http://<machine name or IP address>:<jslport>/PSIGW /PeopleSoftListeningConnector

c. Click the Load Gateway Connectors button.

d. Click the Save button.

e. Click the Ping Gateway button to verify the integration gateway is responding.

7. Configure the gateway.

a. From the Gateways page, click the Gateway Setup Properties link.

b. In the User ID field, enter *administrator*.

c. In the Password field, enter *password*.

d. Click the OK button.

The system displays the PeopleSoft Node Configuration page.

e. Verify that the APP Server URL field is the same as the URL entered in the URL field on the Gateways page, and the User ID and Password fields are the administrator's rights.

f. In the PeopleSoft Nodes grid, add the message nodes *PSFT_HR* and *PSFT_LM*.

To complete the fields in the grid, type <ctrl><J> and copy the tools release and application server information into the corresponding fields. Use the following format for the Web Server URL field: //<machine name or IP Address>:<jslport>

Note. For the PSFT_LM message node, you will need to access the Learning Management system to type <ctrl><j> so you can get the correct tools release and application server information.

---

g. Click the Save button.

h. Click the OK button.

8. Repeat steps 6 and 7 for the Learning Management system.

The URL of the gateway for the Learning Management system is the same URL address entered for the Human Resources system.

9. Using the Learning Management system, define the single-signon.

a. Navigate to PeopleTools, Security, Security Objects, Single Signon.

The system displays the Single Signon page.

b. Add PSFT_HR to the Trust Authentication Tokens issued by these Nodes group box.

c. Click the Save button.

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10. Using the Human Resources system, define the single-signon.
    a. Navigate to PeopleTools, Security, Security Objects, Single Signon.

       The system displays the Single Signon page.
    b. Add PSFT_LM to the Trust Authentication Tokens issued by these Nodes group box.
    c. Click the Save button.
11. Using the Human Resources system, verify the nodes are ready to receive transactions.
    a. Navigate to From the Gateways page, click the Gateway Setup Properties link.
    b. In the User ID field, enter *administrator*.
    c. In the Password field, enter *password*.
    d. Click the OK button.

       The system displays the PeopleSoft Node Configuration page.
    e. Click the Ping Node button for both nodes to verify the node is ready to receive transactions.

       Note. If the results for the Ping Node are not successful, go to step 1 to verify that all passwords and the URLs are the same.

    f. Repeat this step on the Learning Management system.
12. Using the Human Resources system, identify the target location URL
    a. Navigate to PeopleTools, Integration Broker, Configuration, Service Configuration
    b. In the Target Location field, enter the URL address entered in the URL field on the Gateways page.
    c. Click the Save button.
13. Validate the HMCR_SYNCH_PORT message definition
    a. Navigate to PeopleTools, Integration Broker, Integration Setup, Messages
    b. Verify that the fields match the following table.

Message	HMCR_SYNCH_PORT
Version	Version_1
Description	HMCR Synchronous Port
Owner ID	HCM Service Framework
Comment	HCM Service Framework synchronous port
Message Type	Nonrowset-based

14. Verify the schema fields.
    a. From the Message Definition page, click the Schema tab.
    b. Verify that the fields match the following table.

Message	HMCR_SYNCH_PORT
Version	Version_1

15. Verify the HMCR_FRAMEWORK service.
    a. Navigate to PeopleTools, Integration Broker, Integration Setup, Services
    b. Verify that the fields match the following table.

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Service	HMCR_FRAMEWORK
Description	HCM Service Framework
Comments	HCM Service Framework
Object Owner ID	HCM Service Framework
Namespace	http://xmlns.oracle.com/Enterprise/HCM/services
Operation.Default Version	HMCR_SYNCH_PORT.VERSION_1
Description	Default Version
Active	Checkbox is selected.
Operation Type	Synch

16. Validate the HMCR_SYNCH_PORT service operation.
    a. Navigate to PeopleTools, Integration Broker, Integration Setup, Service Operations
       The system displays the Service Operation – General page.
    b. Search for HMCR_FRAMEWORK.
    c. Verify that the fields match the following table.

Service Operation	HMCR_SYNCH_PORT
Service	HMCR_FRAMEWORK
Operation Type	Synchronous
Operation Description	HCM Service Framework Synch
Operation Comments	HCM Service Framework Synchronous
Object Owner ID	HCM Service Framework
Version	Version_1
Version Description	Default Version
Version Comment	Default Version
Default	Check box is selected
Active	Check box is selected
Type	Request
Message.Version	HMCR_SYNCH_PORT.VERSION_1
Type	Response
Message.Version	HMCR_SYNCH_PORT.VERSION_1

17. Validate the web service access.
    a. From the Service Operation - General page, click the Service Operation Security link.
       The system displays the Web Service Access page.
    b. Verify the fields on the page match the following table.

Service	HMCR_FRAMEWORK

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Operation	HMCR_SYNCH_PORT
Permission List	• HCCPHR9000 • HCCPHR9100
Access	• Full Access • Full Access

c. Close the window.

18. Activate the HMCR_SYNCH_PORT handler.

a. From the Service Operation – General page, click the Handler tab.

b. In the Handlers grid, select the Active check box for the REQUESTHDLR row.

c. Click the Detail link.

The system displays the Action Details page.

d. Validate the fields on the Action Details page match the following table.

Handler Name	REQUESTHDLR
Handler Type	OnRequest
Description	On Synch Request
Comment	On Synch Request
Handler Owner	HMCR
Package Name	HMCR_FRAMEWORK
Path	ServiceFramework:Handlers
Class ID	SynchRequestHandler
Method	OnRequest

e. Click the OK button.

The system displays the Service Operations - Handlers page.

19. Validate routings information.

a. From the Service Operations - Handlers page, click the Routings tab.

b. Validate that HMCR_IS is a row in the Routings Definition grid and the values for the row match the following table.

Sender Node	PSFT_LM
Receiver Node	PSFT_HR
Direction	Inbound
Status	Active

c. Validate that HMCR_OS is a row in the Routings Definition grid and that the values match the following table.

Sender Node	PSFT_HR
Receiver Node	PSFT_LM

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Direction	Outbound
Status	Active

20. Validate the inbound routing definition information.
    a. From the Routings page, click the HMCR_IS link.

       The system displays the Routings Definition page.
    b. Validate that the Sender Node field is PSFT_LM.
    c. Validate that the Receiver Node field is PSFT_HR.
    d. Validate that the Routing Type field is Synchronous.
    e. Validate that the Object Owner ID field is HCM Service Framework.
    f. Validate that the Log Detail field is No Logging.
    g. Validate that the Active check box is selected.
21. Validate the inbound external alias information.
    a. From the Routings Definition page, click the Parameters tab.
    b. Verify that the External Alias fields for the Inbound Request and Outbound Response is *HMCR_SYNCH_PORT.VERSION_1*.
    c. Click the Return button.

       The system displays the Routings page.
22. Validate the outbound routing definition information.
    a. Click the HMCR_OS link.

       The system displays the Routings Definition page.
    b. Validate that the Sender Node field is PSFT_HR.
    c. Validate that the Receiver Node field is PSFT_LM.
    d. Validate that the Routing Type field is Synchronous.
    e. Validate that the Object Owner ID field is HCM Service Framework.
    f. Validate that the Log Detail field is No Logging.
    g. Validate that the Active check box is selected.
23. Validate the outbound external alias information.
    a. From the Routings Definition page, click the Parameters tab.
    b. Verify that the External Alias fields for the Inbound Request and Outbound Response is *HMCR_SYNCH_PORT.VERSION_1*.
    c. Click the Return button.

       The system displays the Routings page.
24. Validate the outbound connector properties.
    a. From the Routings page, click the Connector Properties tab.
    b. Verify that the fields match the following table.

Routing Name	HMCR_OS
Service Operation	HMCR_SYNCH_PORT
Service Operation Version	VERSION_1

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25. Validate the domain status.
    a. Navigate to PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status

       The system displays the Domain Status page.
    b. In the Domains grid, validate that the Domain Status field is Active for all machines.
26. Repeat steps 9 through 23 using the Learning Management system.
27. Using the Human Resources system, define the portal node information.
    a. Navigate to PeopleTools, Portal, Node Definition, Portal

       The system displays the Portal page.
    b. Search for the *PSFT_LM* remote node.

       Use this format: http://<machine name or IP address>:<jslport>/psc/ps/
    c. In the Content URL Text field, enter the name of the Learning Management machine.

       Use this format: http://<machine name or IP address>:<jslport>/psc/ps/
    d. In the Portal URL Text field, enter the name of the Learning Management machine.

       Use this format: http://<machine or IP address>:<jslport>/psp/ps/
    e. Click the Save button.
28. Using the Human Resources system, clear the cache.
    a. Navigate to Setup HRMS, System Administration, HCM Registry, Service Registry
    b. Click the Refresh Cache button.
    c. Repeat this step on the Learning Management system.

       For the Learning Management system, the navigation is Setup ELM, System Administration, Service Registry.
29. Using the Human Resources system, update the content references to Learning Management.
    a. Navigate to PeopleTools, Portal, Structure and Content Select the Workforce Development folder
    b. Select the Workforce Development folder.
    c. Select the Performance Management folder.
    d. Select the ELM Learning folder.
    e. For each content reference, click the Edit link.

       The Content Ref Administration page appears.
    f. In the Node Name field within the URL Information group box, replace the content with the name of the remote node.
    g. Click the Save button.
    h. Repeat this step for all 8 content reference entries.
30. Verify that the access type for the Human Resources.
    a. Navigate to Set Up HRMS, Common Components, Direct Reports for Managers, Configure Direct Reports UI
    b. For the EP_APPR_SELECT, EP_CREATE_MY_DVL, and EP_CREATE_MY_PRF components in the Manager Desktop Transactions group box, click the Configure button to verify that the Access Type field should be *By Part Posn Mgmt Supervisor*.
    c. Click the Save button.

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APPENDIX C

ePerformance Reports

This appendix provides an overview of ePerformance reports.

Note. For samples of these reports, see the PDF files that are published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

ePerformance Reports: A to Z

This table lists the ePerformance reports, sorted alphanumerically by report ID. The reports listed are all Structured Query Reports (SQRs). If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
HEP001 Missing Documents	Create a list of missing documents for a group of employees and a given document type and date range. **Note.** A document is reported as missing if it is not created by the mass review creation process or directly by a manager for the date range and document type specified (the report ignores former employees.	Workforce Development, Performance Management, Reports	RUNCTL_EP_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
HEP002 Late Documents	Create a list of late documents for a group of employees and a given document type. **Note.** To determine whether a document is late, the system looks at the document due date and compares this date to the current date. If the current date is greater than the due date, and the status of the document is not yet complete, the document is reported as late (the report ignores documents that are canceled).	Workforce Development, Performance Management, Reports, Late Documents Report, Late Documents	RUNCTL_EP_RPT

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Glossary of PeopleSoft Enterprise 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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise 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

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	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 Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
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 Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
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 Enterprise 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."

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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 Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise 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 Enterprise product families and are supported by the Business Process Engineering group. 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 *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

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 Enterprise 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.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

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.

cash drawer A repository for monies and payments taken locally.

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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise 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 *copy* 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 *population* and *division*.

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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, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise 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 *communication key.*

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 *comm keys* or *speed keys*) 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 Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise 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 Enterprise. 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).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

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

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	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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
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 *class.*
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.

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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 Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). 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 rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise 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 *population* and *cohort*.

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 Enterprise 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 Enterprise 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 *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise 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 Enterprise 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.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

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.

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fund In PeopleSoft Enterprise 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 *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise 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.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* 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 *General Ledger Interface process.* 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.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

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, and user interaction objects.

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incentive rule In PeopleSoft Enterprise 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 Enterprise 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 *update access.*

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 Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise 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 ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise 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 Enterprise 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.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

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.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise 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 *key performance indicator.* 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.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise 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.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

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.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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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 *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise 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 Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise 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 *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise 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 *3C engine.*

match group In PeopleSoft Enterprise 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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise 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.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise 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 Enterprise 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.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

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 *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

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 Enterprise and non-PeopleSoft Enterprise 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 *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise 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 Enterprise 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.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise 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 Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

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.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise 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 Enterprise 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

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	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 Enterprise 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.

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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 Enterprise 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 appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft 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 Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise 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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise 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.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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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 *record input value-added tax flag.* Within PeopleSoft Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

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 Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

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 Enterprise 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.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

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.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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.

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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.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise 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 Enterprise 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.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

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 Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise 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 Enterprise 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.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

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.

task A deliverable item on the detailed sourcing plan.

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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise 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 Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* 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 *Communications, Checklists, and Comments group.* 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.

trace usage In PeopleSoft Enterprise 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 Enterprise 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 *locked*) 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 Enterprise 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.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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 *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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 Enterprise 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 *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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