

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Employee Reviews

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PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Employee Reviews
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Contents

General Preface

- About This PeopleBook Prefaceix**
- PeopleSoft Enterprise Application Prerequisites.....ix
- Application Fundamentals.....ix
- Documentation Updates and Printed Documentation.....x
 - Obtaining Documentation Updates.....x
 - Downloading and Ordering Printed Documentation.....x
- Additional Resources.....xi
- Typographical Conventions and Visual Cues.....xii
 - Typographical Conventions.....xii
 - Visual Cues.....xiii
 - Country, Region, and Industry Identifiers.....xiii
 - Currency Codes.....xiv
- Comments and Suggestions.....xiv
- Common Elements Used in PeopleBooks.....xiv

Preface

- PeopleSoft Enterprise Human Resources Manage Employee Reviews Preface.....xvii**
- PeopleSoft Products.....xvii
- PeopleSoft Enterprise HRMS Application Fundamentals.....xvii
- PeopleBook Structure.....xvii

Chapter 1

- Getting Started with Manage Employee Reviews.....1**
- Manage Employee Reviews Business Process Overview.....1
- Manage Employee Reviews Business Processes.....2
- Manage Employee Reviews Integrations.....2
- Manage Employee Reviews Business Process Implementation.....3

Chapter 2

- Setting Up Employee Reviews.....5**
- Assigning Roles and Permission Lists.....5
 - Permission Lists.....5

(USF) Updating the PERF-USF Document Type.....6
 Understanding the PERF-USF Document Type.....6
 Pages Used to Update the PERF-USF Document Types.....7
 Updating the PERF-USF Document Type.....7
 (JPN) Creating Review Identifiers.....8
 Understanding Review Identifiers.....8
 Page Used to Create Review Identifiers.....8
 Defining Review Identifiers.....8
 Creating Templates.....10
 Understanding BASIC Templates.....10
 (USF) Understanding Templates.....10
 Understanding Performance Ratings.....11
 Steps for Creating Templates.....13
 Prerequisites.....13
 Pages Used to Create Templates.....14
 Cloning Employee Review Templates.....14
 Defining Basic Template Information.....14
 Defining Template Structure and Content.....15
 (USF) Working with Profiles.....17
 Understanding How Profiles Work with Manage Employee Review.....17

Chapter 3

Managing Employee Reviews.....19
 Creating Employee Review Documents.....19
 Understanding the Create Employee Review Document Process.....19
 Pages Used to Create Employee Review Documents.....20
 Selecting Effective Date.....21
 Selecting Employee Groups.....21
 Selecting Employees.....22
 Creating Employee Review Documents.....23
 Reviewing Results.....24
 Completing Employee Review Documents.....25
 Pages Used to Complete Employee Reviews.....26
 Selecting Performance Documents.....26
 Reviewing Performance Document Details.....26
 Completing the Employee Review Document.....27
 (USF) Completing Employee Review Evaluations.....31
 Completing Employee Self-Evaluation Documents.....33
 Pages Used to Complete Employee Self-Evaluation Documents.....34

(USF) Recording Reviewer Comments..... 34

 Understanding Reviewer Comments..... 34

 Pages Used to Record Reviewer Comments..... 34

 Entering Reviewer Comments..... 34

Transferring Employee Review Documents..... 35

 Pages Used to Transfer Employee Review Document..... 36

Cancelling Employee Review Documents..... 36

 Understanding Cancelling Employee Review Documents..... 36

 Pages Used to Cancel Employee Review Documents..... 37

Viewing Employee Review Documents..... 37

 Pages Used to View Employee Review Document..... 37

Processing Employee Review Reports..... 37

 Pages Used to Process Employee Review Reports..... 38

 Running the Late Documents Report..... 38

 Running the Missing Documents Report..... 39

Glossary of PeopleSoft Enterprise Terms..... 41

Index 67

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.

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft 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 <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (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 ().

Typographical Convention or Visual Cue	Description
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

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.

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.

Once, Always, and Don't Run	<p>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.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
Process Monitor	<p>Click to access the Process List page, where you can view the status of submitted process requests.</p>
Report Manager	<p>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).</p>
Request ID	<p>An ID that represents a set of selection criteria for a report or process.</p>
Run	<p>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.</p>
SetID	<p>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.</p>
Short Description	<p>Enter up to 15 characters of text.</p>
User ID	<p>An ID that represents the person who generates a transaction.</p>

PeopleSoft Enterprise Human Resources Manage Employee Reviews 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 Human Resources Manage Employee Reviews.

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. Application Fundamentals PeopleBook*. Each PeopleSoft application has its own version of this documentation.

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

Chapters	Description
Preface	<p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	<p>This chapter discusses application implementation guidelines. It explains:</p> <ul style="list-style-type: none"> • The business processes documented within the book. • Integrations between the application 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	<p>(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.</p> <p>Note. Not all applications have delivered custom navigation pages.</p>
Understanding...	<p>(Optional) This is an introductory chapter that broadly explains the application and the functionality within the application.</p>
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of a application, 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.</p> <p>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.</p>

Chapters	Description
Business Process	<p>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 an application, 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.</p> <p>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.</p>
Appendixes	<p>(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.</p>
Delivered Workflow Appendix	<p>(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application.</p> <p>Note. Not all applications have delivered workflows.</p>
Reports Appendix	<p>(Optional) This appendix contains an abbreviated list of all of the application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.</p>

CHAPTER 1

Getting Started with Manage Employee Reviews

This chapter provides an overview of Manage Employee Reviews business process and discusses:

- Manage Employee Reviews business processes.
- Manage Employee Reviews business process integrations.
- Manage Employee Reviews business process implementation tasks.

Manage Employee Reviews Business Process Overview

Manage Employee Reviews is a business process in PeopleSoft Enterprise Human Resources and is a competency-based assessment tool with the ability to track individuals' goals and assess goals attainment. The primary purpose of the Manage Employee Reviews business process is to drive competency-based training, but it can also be used to drive competency-based rewards and compensation.

The Manage Employee Reviews business process comprises the following main phases of operation:

- Setting up supporting tables.
- Creating employee review documents.
- Managing employee review documents.

Setting Up the Supporting Tables

The following is a list of the basic setup tasks administrators complete before managers can create employee review documents:

1. Define rating models.
2. Define content items or competencies.
3. (Optional) (JPN) Define Japan review IDs.
4. Clone the Basic Employee Review Template, and update the new employee review template.

Creating Employee Review Documents

Managers can use these methods to create employee reviews:

- Create employee review documents for direct reports.
- Create employee review documents by group.

Note. The employee self appraisal document is created when the employee selects the Start hyperlink next to the Review Self Evaluation step on the Document Details page.

See [Chapter 3, “Managing Employee Reviews,” Creating Employee Review Documents, page 19.](#)

Managing Employee Review Documents

Managers, employees, and administrators perform these tasks to manage the employee review process:

- Managers update competencies and goals in the employee review document.
- The employee can update the competencies and goals contained in their self-evaluation document, and rate their own performance.
- The manager records an evaluation of the employee against the goals and competencies contained in the review document.
- The manager or an administrator can transfer the employee review document to another manager.
- Administrators can print reports that list late or missing employee reviews.
- The manager or an administrator can cancel an incorrectly created employee review document.

See [Chapter 3, “Managing Employee Reviews,” Completing Employee Review Documents, page 25.](#)

Manage Employee Reviews Business Processes

Manage Employee Reviews business process in PeopleSoft Enterprise Human Resources enables you to:

- Create employee review documents.
- Update and review goals and competencies associated with an employee review.
- Complete the employee review.
- Transfer employee review documents to another manager.
- Monitor late and missing employee review documents.
- Cancel an incorrectly created employee review document.

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

Manage Employee Reviews Integrations

Manage Employee Reviews business process integrates with these PeopleSoft applications:

- PeopleSoft Enterprise Profile Manager.
- PeopleSoft Enterprise Human Resources: Plan Salaries.

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

Manage Employee Reviews Business Process Implementation

Use the Excel to Component Interface utility in Profile Management with the Competencies component interface to populate the business process tables. This component interface helps you to load competencies into the Content Catalog used by Manage Employee Reviews business process.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, “Getting Started with Manage Profiles,” Manage Profiles Implementation.

This table lists the Employee Review component that has a component interface:

Component	Component Interface	References
EP_APPR_MAIN	CI_EP_APPR_MAIN	See Chapter 3, “Managing Employee Reviews,” Completing Employee Review Documents, page 25.

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

Important! The order in which you set up the tables that are required to implement Manage Employee Reviews business process may vary. The order may depend on the features that you want to use and whether you are implementing more than one PeopleSoft application. The information provided in this chapter offers a high-level overview of how our documentation maps to the overall implementation process; it doesn’t offer step-by-step guidance on how to perform an actual implementation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

CHAPTER 2

Setting Up Employee Reviews

This chapter discusses how to:

- Assign roles and permission lists.
- (USF) Update the PERF-USF document type.
- (JPN) Create review identifiers.
- Create templates.
- (USF) Work with job profiles.

Assigning Roles and Permission Lists

This section lists roles and permission lists that are available to federal customers.

Permission Lists

The following tables list the roles and associated permission lists that you can assign to users that allow them to use the employee review functionality.

- Employee Review Manager and Employee Review Employee roles enable the use of the self-service features.
- Employee Review Setup (USF) and Employee Review Administrator (USF) are roles that are specific to federal functionality.

Roles

Role	Permissions
Employee Review Setup (USF)	HCCPHR2070, HCCPHR2080
Employee Review Administrator (USF)	HCCPHR2060, HCCPHR2090, HCCPHR3250
Employee Review Manager	HCCPSS2145
Employee Review Employee	HCCPSS1340

Permission Lists

Permission List	Description
HCCPHR2060	Employee Review - Admin
HCCPHR2070	Employee Review - Setup
HCCHR2080	Employee Review - Setup USF
HCCPHR2090	Employee Review - Admin USF
HCCPHR3250	Employee Review - Reporting
HCCPSS2145	Employee Review - MGR
HCCPSS1340	Employee Review - EE

(USF) Updating the PERF-USF Document Type

To update the PERF-USF document type, use the Update Document Type (USF) (EP_REVIEW_TYPE_TBL) component.

This section provides an overview of the PERF-USF document type and discusses how to update the PERF-USF document type.

Understanding the PERF-USF Document Type

The system delivers a federal document type called PERF-USF that tells the system where to look for the template when it generates performance documents for federal employees. By default, the system prompts managers to select the template when they create the review documents.

If you prefer to have the system determine which template to use by checking the job profile that is associated to the employee's job data specify this on the Document Type page by adding a new effective-dated row to the table.

The system-delivered definition for the PERF-USF document type is dated 01/01/1900. According to this definition, the template sources is user-specified, meaning that managers must select the template to use when they create the performance review documents.

You can modify the definition for the PERF-USF document type by inserting a new effective-dated row. You can then instruct the system to look at the job profile that is associated with the employee's job data (job code, job family, position, salary grade, department, location or business unit) to determine which template to use.

Note. A second document type, PIP-USF, is provided for performance improvement plans. This document type is associated with the delivered PIP-USF template. You cannot modify or view the PIP-USF document type.

Pages Used to Update the PERF-USF Document Types

Page Name	Object Name	Navigation	Usage
Document Types	EP_REVIEW_TYPE_USF	Set Up HRMS, Product Related, Workforce Development, Employee Review, Update Document Type (USF)	Update the PERF-USF document type.

Updating the PERF-USF Document Type

Access the Document Types page.

Document Types

Document Type: PERF-USF

Document Type Detail Find | View All First 1 of 1 Last

Effective Date: 01/01/1900

*Description: Performance Plan

Template Source: User Specified Profile Management

Profile Type: [Dropdown]

Default Template: [Text Box]

Document Types page

- Document Type** PERF-USF is the delivered document type for federal employee reviews. You cannot create or modify other document types.
- Template Source** Identify where the system should look for the template when it generates employee review documents for federal employees.
To have the system make all templates available for selection when a performance document is generated, select *User Specified*.
See [Chapter 2, “Setting Up Employee Reviews,” \(USF\) Working with Profiles, page 17.](#)
- Profile Type** Select the profile type to use to determine the template when you create documents. The system finds the template associated with the profile based on the employee’s job data.
- Default Template** This field is available if you select one of the Profile Management option in the Template Source field. Select the template to use to generate performance documents for this document type when no template is associated with the profile.

(JPN) Creating Review Identifiers

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

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

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.

See Also




PeopleSoft Enterprise ePerformance 9.0 PeopleBook, “Setting Up Document Templates,” Defining General Template Information

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 review identifiers.

Defining Review Identifiers

Access the Review Definition Table JPN page.

Review Definition Table JPN	
SetID:	JGENL
Review ID:	J2006
*Description:	<input type="text" value="2006 Annual Review"/>
Short Description:	<input type="text" value="2006 Annual Review"/>
Period Begin Date:	<input type="text" value="01/01/2006"/> 
Period End Date:	<input type="text" value="12/31/2006"/> 
*Doc Type:	<input type="text" value="J01"/>  Japan Annual Review
Include in Grade Advance	<input type="checkbox"/>

Review Definition Table JPN page

Period Begin Date and Period End Date

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

See *PeopleSoft Enterprise ePerformance 9.0 PeopleBook*, “Setting Up Document Templates,” Defining General Template Information.

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 Templates

To create template, use the Clone Review Template (EP_CLONE_TMPL) and the Define Empl Review Template (EP_TMPL_BASIC) components.

This section provides an overview of employee review templates, performance ratings, and discusses how to:

- Clone templates.
- Define BASIC template information.
- Define template structure and content.

Understanding BASIC Templates

Templates are the foundation for employee review documents. PeopleSoft provides a BASIC template. The BASIC template has sections linked to it that are used to define the structure of an employee review document. These sections are:

- Competency
- Goals
- Overall Summary
- Signature

The BASIC template cannot be modified. To create a template to match your organizations need, you must clone the basic template and then modify the newly created template. New templates can contain one or more of the linked sections.

Competency

The Competency section enables users to evaluate an employee's performance for specific items. Items can be added manually or from the Content Catalog.

Goals

The Goals section enables users to add employee goals to the review document. Goals are not assigned to the template, but are added to the review document after it is created.

Overall Summary

The Overall Summary section identifies the employee's overall performance ratings. The system converts the ratings from the Competency sections into an overall summary rating.

Signature

When the document is printed, this section provides an area for employee and manager signatures.

(USF) Understanding Templates

Employee review templates are the foundation for employee review documents. PeopleSoft provides two templates:

- Performance Plan (PERF-USF).
- Performance Improvement Plan (PIP-USF).

These templates cannot be modified. To create a template to match your organizations need, you must clone the template and then modify the newly created template.

Performance Plan Template (PERF-USF)

This template is designed for employee performance reviews. It contains four sections:

- Performance Elements

The Performance Elements section enables you enter free-form performance criteria against which you want to evaluate the employee's performance.

- Goals

The Goals section enables users to add employee goals to the review document. Goals are not assigned to the template, but are added to the review document after it is created.

- Overall Summary

The Overall Summary section identifies the employee's overall performance ratings. The system converts the ratings from the Competency sections into an overall summary rating.

- Signature

When the document is printed, this section provides an area for employee and manager signatures.

Performance Improvement Plan (PIP-USF)

This template is designed to address issues that have adversely impacted the employee's performance review. It contains two sections:

- Performance Improvement Plan.

This section is used to assess performance improvements and assign a status.

- Signature Section.

When the document is printed, this section provides an area for employee and manager signatures.

Understanding Performance Ratings

Two sections enable you to assign ratings that measure the employee's performance. These sections use rating models and calculation methods to determine the employee's rating.

These sections are:

- Competency
- Overall Summary

Note. This topic does not apply to the USF Employee Review process. It supports only the average calculation rating.

Competency

The competency section enables you to select from two calculation methods:

- Average

This calculation method uses the numeric ratings that corresponds to the qualitative ratings (defined on the rating model) to calculate a weighted average, if weightings exist; otherwise, it calculates a straight average. It then converts this average back to a qualitative rating, again using the rating model.

To use this calculation method, rating models that are associated with the competencies section and its individual competencies must have defined numeric ratings.

Note. Weights are used when the calculation method is *Average*. Weighting a competency enables you to place more or less significance on a particular competency relative to the other competencies in the review.

- **Summation**

This calculation method converts qualitative ratings to review points (defined in the rating model), calculates the total review points, and refers to the point range that is defined on the competency section's rating model to convert this total into the corresponding review rating for the competency section. Weightings are ignored.

To use this calculation method, rating models that are associated with the competencies and the competency section and must define review points. The rating model for the competency section must also define point ranges in the From Points and To Points fields.

Note. PeopleSoft recommends using the Average method over the Summation method. Its easier to understand, set up, and maintain, and you can achieve the same results by using weighted averages.

Overall Summary

The Overall Summary section identifies the employee's overall performance rating. The system converts the rating from the Competencies section into an overall summary rating by using the calculation method and rating model that are specified for the Overall Summary section.

PeopleSoft provides three calculation methods for calculating an overall summary rating:

- **Average**

Same as above.

- **Summation**

Same as above.

- **Review Band**

This calculation method is similar to Summation, and is unique to the Overall Summary section of a review document.

To use this method, the rating model that is associated with the overall summary section must have Review Band selected and define review points as well as point ranges in the From Points and To Points fields.

During the calculation process, the system computes the total review points for the Overall Summary section and converts this total into the equivalent review band on the employee review.

Because the Competency and Overall Summary sections can have different calculation methods, the calculation method that you select for the overall rating (the Overall Summary section) determines which calculation methods the competency and Performance Elements sections can use. This table lists the allowed calculation methods:

Calculation Methods Allowed in Overall Summary Section	Calculation Methods Allowed in Competency Section
Average	Average
Summation	Average*, Summation (see note)
Review Band	Average*, Summation (see note)

Steps for Creating Templates

To create templates that can be used to generate performance-related documents, use the following steps:

1. Clone an existing template using the Clone Template Definition page.

At least one template must be cloned from the BASIC template before you can begin the employee review process. The basic template cannot be modified and is used strictly for cloning purposes.

PeopleSoft recommends that you limit the number of templates that you create for each document type. This makes it easier for users to select the correct template when they generate review documents, and it simplifies template maintenance.

2. Define general information for the newly created template using the Define Empl Review Template – General page.

Use the general information section to identify the document type for the template. Document types help organize employee review documents. You can use them to narrow the focus when printing late or missing employee review reports or to limit the search criteria when looking up employee reviews. PeopleSoft provides five document types:

- Performance/Salary Evaluation
- Performance Document
- Salary Planning
- (USF) Performance Plan
- (USF) Performance Improvement Plan

Also identify where the documents that are generated from this template are official. If a document is identified as being official, the Salary Planning by Group business process and the Salary Increase Matrix function in PeopleSoft Enterprise Human Resources Results uses the results. If an employee has more than one official document, these processes use the results of the document with the latest period end date.

For Japan, the review ID is identified and is used by the JPN salary increase processes in Plan Salaries. In some organizations, the types of reviews that are given and the review periods in one business unit may differ from the types of reviews that are given and the review period in another business unit. You use review IDs to identify which document types are valid for a particular setID. You also define whether the performance results are to be considered by the Grade Advance Eligibility feature of the Plan Salaries business process. The Plan Salaries business process recognizes employee review results by the review ID that is linked to the template that is used to create the employee review document.

3. Define the content and structure for the newly created template using the Define Empl Review Template - Structure/Content page.

Select rating models, define performance criteria, weight the items, and indicate if they are critical.

Prerequisites

Before you create templates, set up the rating table.

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

Pages Used to Create Templates

Page Name	Object Name	Navigation	Usage
Clone Template Definition	EP_CLONE_TMPL	Set Up HRMS, Product Related, Workforce Development, Employee Review, Clone Employee Review Template, Clone Template Definition	Create a new employee review template.
Define Empl Review Template - General (define employee review template - general)	EP_TMPL_BASIC1	Set Up HRMS, Product Related, Workforce Development, Employee Review, Define Empl Review Template, General	Describe and activate an employee review template.
Define Empl Review Template - Structure/Content (define employee review template - structure/content)	EP_TMPL_BASIC2	Set Up HRMS, Product Related, Workforce Development, Employee Review, Define Empl Review Template, Structure/Content	Define the rating model, calculation method, competencies, and goals, and the weight of the competencies for the employee review template.

Cloning Employee Review Templates


Access the Clone Template Definition page.

Clone Template Definition


Document Type: BASIC

Template ID: BASIC Basic Employee Review Template

Effective Date: 01/01/1900

New Document Type: 

New Template ID:



Effective Date: 

Clone Template Definition page

New Document Type Select the document type that you want to copy into the new employee review template.

Defining Basic Template Information

Access the Define Empl Review Template - General page.

General		Structure/Content	
Document Type:	PERF&SAL Performance/Salary Evaluation		
Template ID:	HXPSOFF	Effective Date:	01/01/1990
*Description:	<input type="text" value="PS Performance Review"/>		
*Status:	<input type="text" value="Active"/>		
	<input checked="" type="checkbox"/> Official Review		
▼  Japan			
Review ID:	<input type="text"/> 		
	<input type="checkbox"/> Include in Grade Advance		

Define Empl Review Template - General page

Official Review

Select to designate that review documents generated for this document type are official. You can designate any number of templates as official.

For commercial users, selecting this check box enable the Salary Planning by Group process to retrieve rating and review points for review documents that are created from this template. It also enables the Salary Increase Matrix function to retrieve the rating.

For federal users, On the PERF-USF template, this check box is selected by default on the PERF-USF template. It also enables salary increases to be tied to employee performance reviews. It also enables the Within-Grade Increase (WGI) process to pick up completed performance reviews.

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

(JPN) Review ID

Select an ID to enable the (JPN) Salary Planning business process by review ID. You define IDs on the JPN Review Definition Table page. The prompt table displays only those review documents that are defined for the selected document type.

(JPN) Include in Grade Advance

Select to indicate whether the selected review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is set up on the JPN Review Definition Table page.

Defining Template Structure and Content

Access the Define Empl Review Template - Structure/Content page.

General		Structure/Content	
Document Type:	PERF&SAL Performance/Salary Evaluation		
Template ID:	HXPSOFF	Effective Date:	01/01/1990
Sections Find View All First 1 of 3 Last			
Section Type:	Competency Section		
Rating Model:	<input type="text" value="K001"/>		
Calculation Method:	<input type="text" value="Average"/>		
Section Items Find View All First 1 of 1 Last			
Item ID:	<input type="text" value="0513"/>	<input type="button" value="+"/> <input type="button" value="-"/>	
Title:	Technical Knowledge		
Rating Model:	<input type="text" value="PSCM"/>		
Weight:	<input type="text" value="50"/>		

Define Empl Review Template - Structure/Content page

Sections

Rating Model

Select a value to use to rate an employee's performance or proficiency when calculating the rating for the competencies section across the employee's individual competencies.

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

Calculation Method

Select the method for calculating the section rating. Options are *Summation* and *Average*.

Note. If this is an Overall Summary section, the calculation method that you select here determines which calculation methods are valid for the other sections.

See [Chapter 2, "Setting Up Employee Reviews," Understanding BASIC Templates, page 10](#).

Sections

Item ID

This field is available for Competency sections only.

Select an item or competency by which you want evaluated in every review document created from this template.

Title

For Performance Element sections, enter text that describes the performance criteria you want to evaluate.

For Competency sections, this field displays the title associated with the item selected in the Item ID field.

Weight Enter the weight of this competency relative to all other competencies. Use only when *Average* is selected as the calculation method. Leave the field blank if all competencies are to be weighted equally.

(USF) Critical Select this check box if you want to indicate that this criteria is critical. This is for used for informational purposes only.

Sub-Items

Define any performance criteria or sub-items for the element.

(USF) Working with Profiles

This section provides an overview of working with job profiles.

Understanding How Profiles Work with Manage Employee Review

The employee review process has the capability to use profiles to find the appropriate template associated with an employee's job data. To use profiles in Manage Employee Review:

1. Create a new non-person profile type or use an existing non-person profile type. The profile type must have at least one of the following profile identity options defined: job code, job family, position, salary grade, department, location or business unit.
2. Create the profiles and associate the profiles to the job data.

Creating Job Profiles

To set up a job profile:

1. Create a profile ID and enter a description of the profile.
2. Using the profile identities section select the profile identity option (job code, job family, position, salary grade, department, location or business unit) then select the appropriate identities (such as job code 11000 — Accountant) for the profile.
3. Using the profile association section select the profile association option of performance template then enter the document type (PERF-USF) and the template to be used for this profile

Associate Job Profiles with Employees

When (USF) Employee Review documents are created and Profile Management is selected as the Template Source on the PERF-USF Document Type the system will locate the appropriate template based upon the employee's job data. If Profile Management is selected, the system:

1. Identifies the profile type entered in the Profile Source field on the PERF-USF Document Type.
2. Retrieves the employee job data record.
3. Identifies all Profile IDs associated with the profile type.
4. Identifies all the profile identity options and keys associated with the Profile IDs.
5. Orders those profile identity options according to the sequence defined on the Profile Identity Options — Configuration page.

6. Uses the first profile identity option in the sequenced list and finds the appropriate employee job data.
 7. Finds the profile that is associated to the job data.
 8. Selects the template associated with the profile based upon the document type that is being used to create the documents. If the system can find a profile that matches the employee data then the system uses the next profile identity option in the sequenced list. If the system is unable to locate a profile associated to the employee job data or a template on the profile, the system will use the default template indicated on the document type to create the document.
- Job Code Profile
 - Job Family
 - Position Data
 - Salary Grade Table

CHAPTER 3

Managing Employee Reviews

This chapter provides an overview of the employee review process and discusses how to:

- Create employee review documents.
- Complete employee review documents.
- Complete employee self-evaluation documents.
- Transfer employee review documents.
- Cancel employee review documents.
- View employee review documents.
- Process employee review reports.

Creating Employee Review Documents

This section discusses how to:

- Select effective dates.
- Select employees.
- Select groups.
- Create employee review documents.
- Review results.

Note. The process for creating employee reviews, whether it is by direct reports or group IDs, is similar. Creating employee reviews by group has one extra step at the beginning. The manager or HR administrator first selects the group ID for which employee reviews are to be created and then continues with the process.

Understanding the Create Employee Review Document Process

Creating employee reviews is a simple process. The manager selects the employees for which they want to create review documents and enters the review period, document type, and template. The system creates the documents based on the selection criteria. Then, the manager and the employees can access the documents to add the ratings and comments.

Pages Used to Create Employee Review Documents

Page Name	Object Name	Navigation	Usage
Create Performance Documents (select date)	HR_DR_ADDL_INFO	<ul style="list-style-type: none"> • Manager Self Service, Performance Management, Performance Documents, Create Documents by Group • Manager Self Service, Performance Management, Performance Documents, Create Documents 	Enter the effective date.
Create Performance Documents (select group)	HR_DR_SELECT_GROUP	Click Continue on the Create Performance Documents (select date) page.	Select a group.
Create Performance Documents (select employees)	HR_DR_SELECT_EMPS	Manager Self Service, Performance Management, Performance Documents, Create Documents Click Continue on the Create Performance Documents (select date) page.	Select employees.
Create Performance Documents (review list)	HR_DR_CART	Click View Selected Employees link on the Create Performance Documents (select employees) page.	View a list of selected employees. To remove an employee, click Remove next to the employees name. To add additional employees, click Return to Previous Page. If you are finished adding employees, click Continue to enter the document details.
Create Performance Documents (details)	EP_CREATEAPPR_MGR	Select the Document Type, Template and dates. Click the Continue button on the Create Performance Documents (select employees) page.	Create employee review documents.
Create Performance Documents - Results	EP_CREATE_RESULTS	Click the Create Documents button on the Create Performance Documents (details) page.	Review results.
Current Performance Documents	EP_APPR_SELECT	Manager Self Service, Performance Management, Performance Documents, Current Documents	Select the employee review document from which you want to update or view.

Page Name	Object Name	Navigation	Usage
Current Performance Documents - Document Details	EP_APPR_DETAIL	Click the Document Type link on the Current Performance Documents page.	View the performance document details and progress, and select a performance document to start, edit or view.

Selecting Effective Date

Access the Create Performance Documents (select date) page.

Create Performance Documents

Create new performance documents for a group of employees.

▼ Instructions

Follow this 4-step process to create performance documents for a group of employees that you manage:

1. Enter the date used to find the groups that you manage.
2. Select the group you want to use.
3. Select the employees you are creating new performance documents for.
4. Enter the document details and select Create Documents.

Enter the Effective Date

Enter the effective date for determining your groups.

31

Continue

Create Performance Documents (select date) page

Enter the effective date to use to find the groups or the employees that you manage. Click Continue to access the Create Performance Documents (select group) or Create Performance Documents (select employees) page.

Selecting Employee Groups

Access the Create Performance Documents (select group) page.

Create Performance Documents

Select a Group to Process

▼ Instructions

Below is a list of groups that you manage. Select the group you want to use for creating new performance documents.

Select *Continue* when finished

Select a Group

Select Group	
<input type="radio"/>	HXPSGRP1 Merit Increase Group
<input type="radio"/>	HXPSGRP10 PlanSal Group
<input type="radio"/>	HXPSGRP11 Merit Inc Gp
<input type="radio"/>	HXPSGRP12 Sal Plan Unoffc
<input type="radio"/>	HXPSGRP13 PS Unoffc
<input type="radio"/>	HXPSGRP2 Merit Increase Group
<input type="radio"/>	K0BUDGET2002 Salary Budget Group 2002
<input type="radio"/>	K0MERIT2001 Merit Increase 2001
<input type="radio"/>	KU100 Department 13000
<input type="radio"/>	KU120 Project Group for KU0007

Continue
Cancel

Create Performance Documents page

Select the group for which you are creating documents and click the Continue button.

Selecting Employees

Access the Create Performance Documents (select employees) or the Create Performance Documents (select group) page.

Create Performance Documents

Select the employees to create new performance documents for.

Instructions

Below is a list of employees that belong to the group you selected. Select the employees you are creating new performance documents for.

Once you have finished click *Continue* to enter the document details.

[View Selected Employees](#)
[Cancel](#)

Select Employees

Reports To: Betty Locherty
As Of: 05/08/2006

Continue

	Name	EmplID	HR Status	Job Code	DeptID
<input checked="" type="checkbox"/>	Carmichael Espinosa	KU0015	Active	310015	10000
<input checked="" type="checkbox"/>	Antonio Santos	KU0010	Active	170005	10000
<input type="checkbox"/>	Antonio Santos	KU0010	Active	310005	27000

Select All
Deselect All

Continue

Create Performance Documents (select employees) page

Select the employees that you want to use for creating new performance documents. When you are done, click the Continue button.

View Selected Employees Click this link to access the Create Performance Documents (review list) page where you can review or delete the employees that you selected.

Cancel Click to return to the Create Performance Document (select date) page.

Creating Employee Review Documents

Access the Create Performance Documents (create) page.

Create Performance Documents

Below is a list of employees that you selected for Performance Document Creation. Complete the information in the *Document Creation Details* section below, then click the **Create Documents** pushbutton to generate documents for these employees.

Document Creation Details

Period: 01/01/2006 - 05/31/2006

Document Type: Performance Review

Template: Performance Review - Average

Create Documents

Selected Employees

Employee ID	Last Name	First Name
KU0010	Santos	Antonio
KU0015	Espinosa	Carmichael

[Return to Select Employees](#)

Create Performance Documents (create) page

- Document Type** Select the review type you want to associate with this group of employee review documents.

- Period** Enter the dates that the review period begins and ends. The review period is the segment of time for which you are reviewing the employee.

- Template** Select the template that should be used to generate the review documents.

Note. For (USF) Federal employees, this field is available only when the Template Source field on the Document Type is set to User Specified. If Template is not available, the system uses the Template associated with the Employee’s non-person profile.

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

- Create Documents** Click to create review documents for the selected employees and to access the Create Performance Documents - Results page.

Reviewing Results

Access the Create Performance Documents - Results page.

Create Performance Documents - Results

Below is a list of employees you selected for Performance Document Creation and the results of the process. Employees with errors will need to be re-run after correcting the source of the error.

The "Current Documents" hyperlink at the bottom of the page can be used to access individual performance documents.

Selected Employees				
Employee ID	Name	Template	Successful Creation?	Status
KU0010	Antonio Santos	Performance Review - Average	Yes	Document created successfully
KU0015	Carmichael Espinosa	Performance Review - Average	Yes	Document created successfully

Go To: [Create Documents](#)

[Current Documents](#)

Create Performance Documents-Results page

Successful Creation?	Displays a <i>Y</i> if the system successfully created a document for the employee. Displays a <i>N</i> if the system did not create a document for the employee and the Status column displays an error message. You must correct the source of the error and rerun the process.
Create Documents	Click to access the Create Performance Documents (select date) page.
Current Documents	Click to access the Current Performance Documents page to review or select current individual performance documents.

See Also

PeopleSoft Enterprise ePerformance 9.0 PeopleBook, "Generating Documents," Generating Documents as a Manager

Completing Employee Review Documents

To complete employee reviews, use the Performance Document (EP_APPR_MAIN) component. Use the CI_EP_APPR_MAIN component interface to load data into the tables for this component

This section discusses how to:

- Select performance documents.
- Review performance document details.
- Complete the employee review documents.

Pages Used to Complete Employee Reviews

Page Name	Object Name	Navigation	Usage
Current Performance Documents	EP_APPR_SELECT	Manager Self Service, Performance Management, Performance Documents, Current Documents	Select the employee review document from which you want to update or view.
Create Performance Documents - Details page	EP_APPR_DETAIL	Click the Document Type link on the Current Performance Documents page.	View the performance document details and progress, and select a performance document to start, edit or view.
Maintain Performance Documents	EP_APPR_MAIN1	Click the Start link on the Current Performance Documents - Document Details page.	You can add or delete goals and competencies, and finalize the employee review document

Selecting Performance Documents

Access the Current Performance Documents page.

Current Performance Documents

Listed below are the current performance documents for which you are the Manager.

Performance Documents					
Employee	Document Type	Begin Date	End Date	Job Title	Status
Adland Chu	Performance Document	01/01/2004	12/31/2004	Clerk-Payroll Sr	In Progress
Adland Chu	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr	In Progress
Angela McKay	Annual Review	01/01/2002	12/31/2002	Auditor-General	In Progress
Antonio Santos	Performance Review	01/01/2006	05/31/2006	WCS BAT	In Progress
Antonio Santos	Project Review	06/15/2002	12/31/2002	WCS BAT	In Progress
Carmichael Espinosa	Performance Review	01/01/2006	05/31/2006	Consultant-Senior	In Progress
Carmichael Espinosa	Project Review	06/15/2002	12/31/2002	Consultant-Senior	Available for Review
Christelle Stevenson	Performance Document	01/01/2004	12/31/2004	Clerk-Payroll Sr	In Progress
Christelle Stevenson	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr	In Progress
Connie Chung	Annual Review	01/01/2002	12/31/2002	Auditor-General	Available for Review
Patrick Seto	Performance Document	01/01/2004	12/31/2004	Auditor-General	In Progress
Wendy Kwan	Annual Review	01/01/2002	12/31/2002	Analyst-Financial	In Progress

Current Performance Documents page

Document Type Click the link in this column to access the Current Performance Documents - Details page.

Reviewing Performance Document Details

Access the Current Performance Documents - Document Details page.

Current Performance Documents

Document Details

Antonio Santos, WCS BAT
 Performance Review: 01/01/2006 - 05/31/2006

Performance Document Details			
Employee: Antonio Santos	Job Title: WCS BAT		
Document Type: Performance Review	Period: 01/01/2006 - 05/31/2006		
Template: Performance Review - Average	Document ID: 413		
Manager: Betty Locherty	Status: In Progress		

Document Progress				
Step		Status	Due Date	
Complete Manager Evaluation	<input type="radio"/>	Not Started	05/31/2006	Start

[Return to Select Documents](#)

Current Performance Documents - Document Details page

Next Action links

Click these actions to access a step or launch the next available action in a manager or employee evaluation. The values are:

- **Start:**
 Click to launch the performance document process. The status of the performance document changes from Not Started to In Progress.
- **Edit:**
 Click to update or change performance document information.
- **Complete:**
 Click to finalized and complete the performance document. The status of the performance document changes from In Progress to Complete.
- **View:**
 Click to display performance document information. This link is available when the status of the document is Complete.

Completing the Employee Review Document

Access the Manager Evaluation page.



Performance Document - Performance Review

Manager Evaluation

Antonio Santos, WCS BAT
 Performance Review: 01/01/2006 - 05/31/2006

Author: Betty Locherty **Role:** Manager
Status: In Progress **Due Date:** 05/31/2006
Approval: Not Required


Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.



[Return to Document Detail](#)


Manager Evaluation page (1 of 5)

Section 1 - Employee Goals


Goal 1: Increase customer satisfaction by 10%

Description: Increase customer satisfaction by 10% by year end. 


Measurement: Based upon customer satisfaction surveys received by the end of Q4.

Rating:  [Writing Tools](#)



Goal 2: Increase Cash Reserves

Description: Increase current year cash reserves by 10%. 

Measurement: Based upon year end financial results compared to previous year.

Rating:  [Writing Tools](#)

Goals Summary

Rating:   [Override](#)

Manager Evaluation page (2 of 5)

Section 2 - Responsibilities

Responsibility 1: Prepare Quarterly and Annual Financial Reports

Description: Prepare corporate and subsidiary financial reports on a quarterly and annual basis.

- Critical: No

Rating: 0.00

[Writing Tools](#)

Responsibility 2: Manage Company's Investment Portfolio

Description: Oversee the mangement of the Company's internal investment portfolio

- Critical: Yes

Rating: 0.00

[Writing Tools](#)

Responsibilities Summary

Rating: 0.00 [Override](#)

Manager Evaluation page (3 of 5)

Section 3 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Competency 1: Teamwork and cooperation

Description:

- Brainstorms and solicits input
- Credits others

Rating: 0.00

Competency 2: Team leadership

Description:

- Sets and communicates high standards for group performance.
- Stands up for the group in relation to the larger organization.



Rating: 0.00

Competencies Summary


Rating: 0.00 [Override](#)

Manager Evaluation page (4 of 5)

Section 4 - Overall Summary

Rating: 0.00  

Comments:




Check Language

Calculate All Ratings

Cancel Evaluation

Manager Evaluation page (5 of 5)

Section 1 - Competencies

- Rating** Select a qualitative rating for this competency from the list of available options. The values appearing in the list come from the rating model associated with this competency on the Competency table.
- Weight** Enter a weight here to assign different relative weights to competencies. Enter the weight as a percentage, for example enter 40 to indicate that this competency accounts for 40% of the summary rating across all competencies. If used, all weights must add up to 100.
- Comments** Enter comments regarding the employee’s proficiency level, in support of the rating you’ve assigned.
- Add Competency** Click to add a new competency to the evaluation.
- Delete Competency** Click to remove an exiting competency.
-  Click the Calculate Rating button to have the system calculate the ratings for each section, using the calculation method and rating model defined on the template that generated this review document.
- Competencies Summary** Click the Calculate Rating button to have the system calculate the rating for the Competencies section, or select an override rating.

Section 2 - Employee Goals

- Add Goal** Click to add a new goal to the evaluation.
- Delete Goal** Click to remove an existing goal.
- Edit Details** Click to edit specific details of the employee goal.

Section 3 - Overall Summary

- Calculate All Ratings** Click to calculate the Competencies and Overall Summary section ratings. Ratings are not calculated for sections or summaries that have been overridden.
- Cancel Evaluation** Click to terminate and discard the entire employee evaluation.
- Save** Click to save work already in progress for later editing. The system calculates all ratings contained in the review prior to saving the review.
- Complete** Click this button to change the status of the employee document from In Progress to Complete.
- Cancel** Click to return to the Document Details page without saving.

(USF) Completing Employee Review Evaluations

Access the Manager Evaluation page.



Performance Document - Performance Plan

Manager Evaluation







Cynthia Adams, Officer-Loan
Performance Plan: 01/01/2006 - 05/31/2006

Author: Betty Locherty **Role:** Manager
Status: In Progress **Due Date:** 05/31/2006
Approval: Not Required

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

  [Return to Document Detail](#)

Manager Evaluation page (1 of 3)

Section 1 - Performance Elements	
Element #1: Maintain Applicant Supply File	
• Critical: Yes	
<hr/>	
Element #1 Sub-Item#1: Fill Items in Supply File	
	0.00
<hr/>	
Rating:	<input type="text" value=""/>  0.00 
Weight:	50 %
Element #2: Manage Personal Action Forms	
• Critical: Yes	
Rating:	<input type="text" value=""/>  0.00 
Weight:	50 %
Performance Elements Summary	
Rating:	0.00  
Summary Weight:	100 %

Manager Evaluation page (2 of 3)

The screenshot displays a web interface for a manager evaluation. It is divided into two main sections: 'Section 2 - Goals' and 'Section 3 - Overall Summary'.
Section 2 - Goals: This section features a header 'Goal #1: Complete EMT Training'. Below it, a 'Description:' field contains a bullet point 'Date Met 04/07/2006'. To the right of the description are icons for editing (pencil) and deleting (trash). Below the description is a 'Goal Status:' dropdown menu currently set to 'Met', with a print icon to its right. A '+ Add Goals' button is located below the goal details.
Section 3 - Overall Summary: This section shows a 'Rating:' of '0.00' with a print icon and a calculator icon. An 'Override' link is positioned to the right of the rating. Below the rating is a large 'Comments:' text area with a vertical scrollbar and a checkmark icon in the top right corner.
Buttons: At the bottom of the page, there are several buttons: 'Calculate All Ratings', 'Cancel Evaluation', 'Save', 'Complete', and 'Cancel'. To the right of these buttons is a 'Return to Document Detail' link.

Manager Evaluation page (3 of 3)

Note. When you click Calculate All Ratings, Save, or Complete, the system displays a warning if the numeric rating in the Overall Summary section is 0.6 higher or lower than the numeric element ratings.

Completing Employee Self-Evaluation Documents

This section lists the pages used to complete employee self-evaluation documents.

The process that employees follow to complete their self-evaluation documents is similar to the process managers follow to complete their evaluation of their direct reports.

See [Chapter 3, “Managing Employee Reviews,” Completing Employee Review Documents, page 25.](#)

Pages Used to Complete Employee Self-Evaluation Documents

Page Name	Object Name	Navigation	Usage
Current Performance Documents	EPP_APPR_SELECT	<ul style="list-style-type: none"> Self Service, Performance Management, My Performance Documents, Current Documents Self Service, Performance Management, My Development Documents, Current Documents 	Select the document that you want to work on.
Current Performance Documents - Document Details	EP_APPR_DETAIL	Click the link in the Document Type column on the Current Performance Documents page.	View the performance document details and progress, and select the employee self-evaluation to start, edit, complete or view.
Performance Document - [name] - Employee Evaluation	EP_APPR_MAIN1	Click the Edit link on the Current Performance Documents - Document Details page.	Add or update competencies and goals to the employee self-evaluation.

(USF) Recording Reviewer Comments

This section discusses how to enter reviewer comments.

Understanding Reviewer Comments

Managers can add comments about an employee's performance that are received from the employee's peers, subordinates, customers, or other reviewers.

Pages Used to Record Reviewer Comments

Page Name	Object Name	Navigation	Usage
Maintain Reviewer Comments - USF	EP_APPR_SELECT	Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Maintain Reviewer Comments USF	Select the employee review document to which you want to add comments.
Reviewer Comments USF	GVT_EP_COMMENTS	Click the employee name link on the Maintain Reviewer Comments - USF page.	Enter comments about an employee's performance from multiple reviewers.

Entering Reviewer Comments

Access the Reviewer Comments USF page.

Maintain Reviewer Comments USF

Reviewer Comments USF

Add comments from other reviewers on this employee's performance.

Employee: Angelica Alvarez **Job Title:** Analyst-Financial Sr
Document Type: Performance Plan **Period:** 01/01/2006 - 05/31/2006
Manager: Betty Locherty **Status:** In Progress

Reviewer Comments Find | View All First 1 of 1 Last

*Reviewer ID: Cynthia Jones

Reviewer Role: Peer

Comments: I am the project manager for Quest. Angelica has been a key factor in the success of this project.

[Return](#)

Reviewer Comments USF page

Reviewer Comments

- Reviewer ID** Select or enter the identification number of the reviewer.
- Reviewer Role** Select the role that best describes the relationship between the reviewer and the employee being reviewed.

Transferring Employee Review Documents

This section lists the pages used to transfer an employee review document to another manager.

Pages Used to Transfer Employee Review Document

Page Name	Object Name	Navigation	Usage
Transfer Document	EP_APPR_SELECT	<ul style="list-style-type: none"> • 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.

Cancelling Employee Review Documents

This section lists the pages used to cancel employees' review documents.

Understanding Cancelling Employee Review Documents

Managers and Employee Review Administrators (Employee Review Admin USF) can cancel an employee review document. Managers can only cancel documents with a status of In Progress. Employee Review 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 a document is cancelled the system removes the competency evaluations that were sent to the Person's Profile in Profile Management when the document was originally completed

Pages Used to Cancel Employee Review Documents

Page Name	Object Name	Navigation	Usage
Cancel Document	EP_APPR_SELECT	<ul style="list-style-type: none"> • Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Cancel Document • Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Cancel Document 	Cancel employee review documents.
Confirm Cancellation	EP_APPR_CANCEL	Select one or more documents and click the Continue button on the Cancel Document page.	Confirm the cancellation of employee review documents.

Viewing Employee Review Documents

This section lists the pages used view employees' review document.

Pages Used to View Employee Review Document

Page Name	Object Name	Navigation	Usage
View Performance Documents	EP_APPR_SELECT	<ul style="list-style-type: none"> • Manager Self-Service, Performance Management, Performance Documents, View - Only Documents • Workforce Development, Performance Management, Performance Documents, View Documents 	View documents.

Processing Employee Review Reports

This section discusses how to:

- Run the late employee review report.
- Run the missing employee review report.

Pages Used to Process Employee Review Reports

Page Name	Object Name	Navigation	Usage
Late Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Late Documents Report	Generate a list of late review documents, by document type, for a group of employees. The system considers a review document to be late if the review's due date (review period end date) is less than, or equal to the current date.
Missing Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Missing Documents Report	Generate a list of missing employee review documents for a group of employees (group ID) and a given document type and date range. If an active employee has no review document with review period begin/end dates that would cause any part of the review period to fall within the date parameters specified for the report.

Running the Late Documents Report

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.

Running the Missing Documents Report

Access the Missing Documents page.

Missing Documents

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

Language: English

Report Request Parameter(s)

*Group As Of Date: 05/11/2006 Group ID:

Document Type:

From Date: To Date:

Period Basis

- Period Begin Date
- Period End Date
- Due Date

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.

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

	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	<p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p>
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

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 <i>receivables specialist</i> . 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."

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. <i>See also detailed business process.</i>
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.

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 <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft 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 <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, 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 <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft 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

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 <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	<p>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.</p> <p>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.</p>
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	<p>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.</p> <p>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.</p>
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 <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	<p>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.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>
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 <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft 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	<p>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.</p> <p>In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.</p>
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	<p>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.</p> <p>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).</p>
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund	In PeopleSoft 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 <i>donor pyramid</i> 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 <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
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.

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 <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft 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 <code>ADVANCED_SHIPPING_ORDER</code> 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 <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft 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 <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft 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 <i>1</i> —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 <i>3C engine</i> .
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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft 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.

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 <i>Non-Discountable Products</i> . 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 <i>need analysis</i> .
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 <i>compensation object</i> .
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.

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 <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
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

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.

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 <i>giveaways</i>).
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.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft 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 <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft 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.

REN server	Abbreviation for <i>real-time event notification server</i> 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 <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
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	<p>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.</p> <p>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.</p>
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.

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 <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft 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.

summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>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).</p> <p>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).</p>
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.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies 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 <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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 <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft 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.

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 <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft 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 <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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.

Index

A

- additional documentation x
- application fundamentals ix
- average calculation methods
 - using 11

B

- BASIC template
 - competency section 10
 - goals section 10
 - overall summary section 10
 - signature section 10
 - structure 10

C

- calculation methods
 - average 11
 - types of in competency sections 11
 - types of in overall summary sections 12
- Cancel Document page 37
- cancelling documents 36
- Clone Template Definition page 14
- comments, submitting xiv
- common elements xiv
- competency section 10
 - example of 27
 - rating calculations 11
- Confirm Cancellation page 37
- Confirm Transfer page 36
- contact information xiv
- Create Performance Documents - Details page 26
- Create Performance Documents - Results page 20, 24
- Create Performance Documents page
 - (create) 23
 - (details) 20
 - (review list) 20
 - (select date) 20, 21
 - (select employees) 20, 22
 - (select group) 20, 21, 22
- cross-references xiii
- Current Performance Documents - Document Details page 21, 26, 34

- Current Performance Documents page 26, 34
- Customer Connection website x

D

- Define Empl Review Template – General page 14
- Define Empl Review Template – Structure/Content page 15
- Define Empl Review Template - General page 14
- Define Empl Review Template - Structure/Content page 14
- document types
 - updating PERF-USF 7
- document types (USF)
 - defining default template 7
 - overview 6
- Document Types page 7
- Document Types page (USF) 7
- documentation
 - printed x
 - related x
 - updates x
- documents, *See* employee review documents

E

- employee review documents
 - cancelling 36
 - completing 25, 27
 - creating 19, 23
 - creating for multiple employees 22
 - reviewing 37
 - transferring 35
- employee review templates
 - cloning 14
 - creating 14
 - modifying 14
 - updating 15
- employee reviews
 - business processes 2
 - document setup steps 1
 - implementing 3
 - integrations 2

- managing features 2
 - overview 1
 - reviewing setup prerequisites 1
 - setting up templates 10
 - setup steps 1
 - employee self-appraisal documents 33
 - employees
 - determining direct reports 21
 - EP_APPR_DETAIL page 34
 - EP_APPR_MAIN1 page 34
 - EP_CLONE_TMPL page 14
 - EP_CREATE_RESULTS page 20
 - EP_CREATEAPPR_MGR page 20
 - EP_TMPL_BASIC1 page 14
 - EP_TMPL_BASIC2 page 14
 - EPP_APPR_SELECT page 34
 - evaluations
 - monitoring, late 38
 - monitoring, missing 39
- F**
- federal employees
 - PERF-USF template 11
 - PIP-USF template 11
- G**
- glossary 41
 - goals section 10, 11
 - example of 27
 - Grade Advance Candidate process (JPN) 9
 - groups
 - Late Documents report 38
 - Missing Evaluations report 39
- H**
- HR_DR_ADDL_INFO page 20
 - HR_DR_CART page 20
 - HR_DR_SELECT_EMPS page 20
 - HR_DR_SELECT_GROUP page 20
- J**
- Japan
 - creating review definitions 8
 - defining reviews 8
 - Grade Advance Candidate process 9
 - Review Definition Table JPN page 8
 - setIDs and review identifiers 8
 - understanding review identifiers 8
- job profiles
 - using in employee reviews 17
 - JPN Grade Advance Candidate process 9
- L**
- Late Documents page 38
 - Late Documents report 38
- M**
- Maintain Documents page 20, 26
 - Maintain Performance Documents page 26
 - Maintain Reviewer Comments - USF page 34
 - Manager Evaluation page 31
 - Missing Documents page 38, 39
 - Missing Evaluations report 39
- N**
- notes xiii
- O**
- overall summary section 10, 11
 - example of 27
 - rating calculations 12
- P**
- PeopleBooks
 - ordering x
 - PeopleCode, typographical conventions xii
 - Performance Document - [document type] - Manager Evaluation page 27
 - Performance Document - [name] - Employee Evaluation page 34
 - performance elements section 11
 - performance improvement plan (PIP-USF) section 11
 - performance improvement plan template (PIP-USF)
 - structure 11
 - performance plan (PERF-USF)
 - structure 11
 - performance plan section
 - example of 31
 - performance ratings
 - overview 11
 - permission lists
 - assigning 5

- plan salaries
 - integration 2
- prerequisites ix, 1
- printed documentation x
- profile manager
 - integration 2

R

- rating calculations
 - competency sections 11
 - overall summary sections 12
- related documentation x
- reports
 - processing 37
- REV_DEF_TBL_JPN component 8
- Review Band calculation method
 - description 12
- Review Definition Table JPN
 - (REV_DEF_TBL_JPN) component 8
- Review Definition Table JPN page 8
- reviewer comments (USF)
 - entering 34
 - overview 34
- Reviewer Comments USF page 34
- reviews
 - including in JPN Grade Advance
 - Candidate process (JPN) 9
 - (JPN) creating 8
- roles
 - assigning 5

S

- self-appraisals, *See* employee self-appraisal documents
- signature section 10, 11
- suggestions, submitting xiv
- summation calculation method
 - description 11

T

- template source
 - defining rules 7
- templates 10
 - delivered BASIC template 10
 - overview 10
 - PERF-USF 11
 - PIP-USF 11
 - steps to create 13
- templates (USF)

- assigning default to document type 7
 - overview 10
- terms 41
- Transfer Document page 36
- transferring documents 35
- typographical conventions xii

V

- View Performance Documents page 37
- visual cues xiii

W

- warnings xiii

