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PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles

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PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles
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About This PeopleBook Preface

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

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Additional Resources

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

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

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Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

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Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

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PeopleSoft Enterprise Human Resources PeopleBook Manage Profiles Preface

This preface discusses:

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

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

PeopleSoft Products

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

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook.*

See Also

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

PeopleBook Structure

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

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

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

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

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Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

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

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CHAPTER 1

Getting Started with Manage Profiles

This chapter discusses:

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

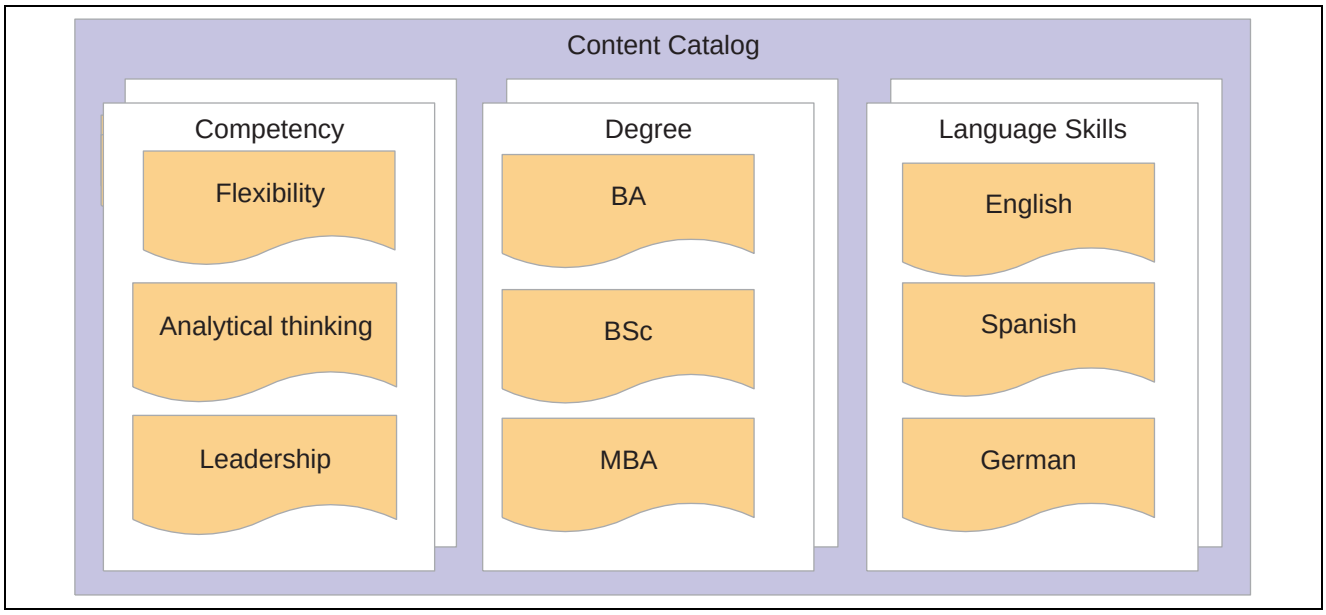
Manage Profiles Overview

Profiles are widely used by organizations to describe the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person. Profiles are valuable for tracking employees' skills, competencies and accomplishments, in career planning, for identifying training needs, for performance management, and in the recruitment process for identifying job requirements and suitable applicants. The Manage Profiles business process provides a framework for developing and managing profiles that meet your industry or organizational requirements. The search and compare profiles feature enables you to perform searches for profiles that match user-defined criteria and easily compare profiles.

Content Catalog

The content catalog is the source of competencies, accomplishments, and other data that administrators, managers, and employees add to their profiles as this diagram illustrates:

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Content Catalog

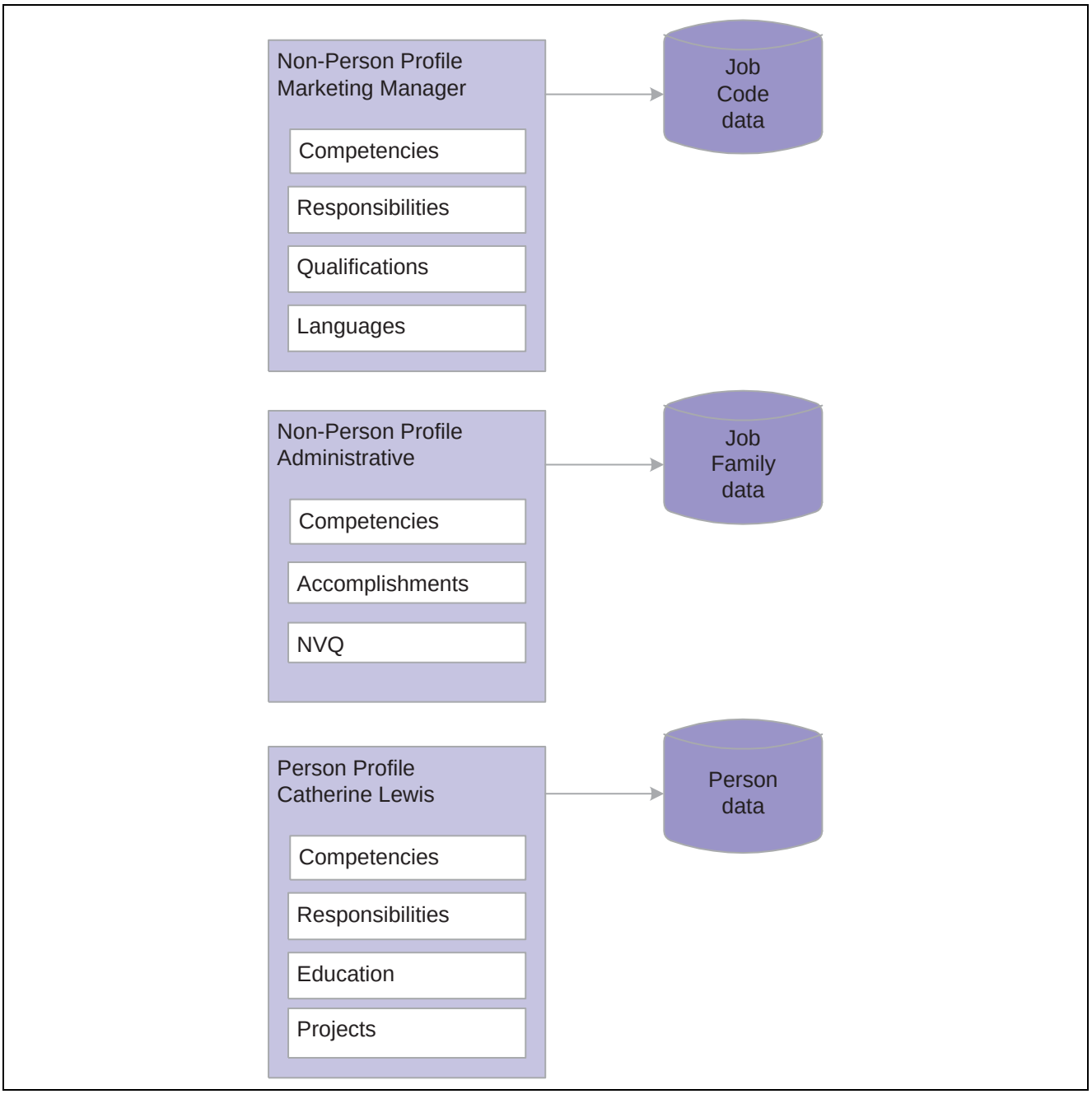
Information in the content catalog is organized by content type. A set of content types is delivered for the common content types such as competencies, language skills, degrees, licenses and certificates. Profile administrators add items for the delivered content types.

However, you are not limited to the delivered content types. You can extend the content catalog by defining additional content types and loading items for the new content types. This enables organizations to configure the content catalog to their specific needs and use this information in profiles.

Person and Non-Person Profiles

In the same way that you set up the content catalog to include the attributes that you want to track, you define a set of profiles that match your organization's requirements. This diagram illustrates how Manage Profiles enables you to configure profile content and link profiles to any object in the system:

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Profiles

You use the content types in the content catalog to create profile types that define the structure of your profiles. The profile type defines the content types and properties that appear in the profile, and the approvals processing associated with that content. The profile type also defines whether the profile is linked to a person ID to create person profiles, or linked to business entities, such as job code or positions, to create non-person profiles.

You can define as many profile types as you require for your business needs. Four profile types are delivered as system data. Use the CLUSTER, ROLE, and JOB profile types to create non-person profiles, and the PERSON profile type to create profiles that describe your employees.

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Manage Profiles offers syndication and import features to reduce the administration of profile content. Profile administrators can set up common profile content once and then reuse that content in related profiles. Syndication has the added benefit that changes to the source profile trigger automatic updates to the target profiles that contain the syndicated content.

Approvals processing is an optional aspect of profile management. If required, set up approval processing using the standard HRMS approvals framework and use it to control changes to particular sections of person and non-person profiles. PeopleSoft delivers approvals processing to cater for these scenarios, but you can modify or create new definitions according to your needs:

- Employee changes to their person profiles (using PeopleSoft Enterprise eDevelopment) are submitted to their manager for approval.
- Manager changes to non-person profiles (using eDevelopment) are submitted to the profile administrator for approval.

Search and Compare Profiles

The Search and Compare Profiles feature in Manage Profiles provides the ability to build searches that work with your content catalog and profiles. Here are a few examples of the search types that are possible:

- Search for job profiles that match an employee's profile.
- Search for an employee who matches the profile for a job opening.
- Select a job profile and search for similar job profiles.

Searches are linked to roles which enables you to create a set of searches that are appropriate to employees, managers, and administrators.

Search and Compare Profiles uses the Verity search engine to perform the search of profile data based on the search criteria. This returns a list of matching profiles ranked according to how well they match that criteria.

The Compare facility provides an online comparison of a given source profile against one or more target profiles. The contents of the source profile and the target profiles are displayed in adjacent columns, enabling the administrator to identify the differences between the profiles.

Manage Profiles Business Processes

PeopleSoft Enterprise Human Resources Manage Profiles provides these business processes:

- Manage person and non-person profiles.

  Administrators create profiles based on the profile types available and select items from the content catalog. They create and maintain employees' person profiles and non-person profiles for entities such as a job code, position, or role.

- Manage interest lists.

  An interest list is a collection of non-person profiles associated with an employee. It provides a way for employees to identify profiles that are of interest. Profile administrators can add to and remove profiles from employee interest lists.

- Manage profile approvals.

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Using Manage Approvals, administrators can view profile changes routed to them by the approvals workflow engine and approve or reject the changes. They can also view approvals information for changes previously approved or rejected.

- Search and compare profiles.

  Administrators have access to a set of searches that are configured for their role. Depending on the search type, administrators use the searches to identify target profiles that match a source profile or search criteria that they enter manually. The search results identify the best matches based on a profile score calculated by the search engine. Administrators can compare profiles listed in the search results or by using Compare Profiles to compare selected profiles.

- Match competencies and accomplishments to roles.

  The role matching options enable profile administrators to compare a person's competencies and accomplishments with those required by a role, or compare the competencies and accomplishments of a team with those required by a role.

- (GBR) Manage National Vocation Qualifications (NVQs).

  Manage Profiles provides content types and profile types for tracking and reporting employees who are enrolled in NVQs.

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

Manage Profiles Integrations

Manage Profiles integrates with other business processes within PeopleSoft Enterprise Human Resources, including:

- Plan Careers and Successions.
- Administer Training.
- Administer Workforce.

  This includes the process for adding employment instances for U.S. Federal government employees and military rank processing.

- Manage French Public Sector.

It also integrates with other PeopleSoft Enterprise HRMS applications, including

- eDevelopment

  eDevelopment provides the employee and manager self-service options that complement the administrator functionality in Manage Profiles.

- ePerformance
- Talent Acquisition Manager
- Candidate Gateway
- Campus Self Service

Manage Profiles also integrates with:

- PeopleSoft Enterprise Learning Management, Financials, CRM and Enterprise Performance Management.
- Third-party applications.

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You can integrate Manage Profiles with third-party content providers to load competency content into the content catalog.

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

Manage Profiles Implementation

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

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

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

Component	Component Interface	References
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_COMP	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_CRITERIA	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_ELEMENT	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_GOAL	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_HON	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_LIC	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_RESP	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_CAT_ITEMS	CI_JPM_CAT_ITEMS_SUBCOMP	See Chapter 2, "Setting Up the Content Catalog," page 9.
JPM_NON_PERS_PROFL	HJPM_JPM_NON_PERS_PROFL_SRV	See Chapter 5, "Managing Profiles," page 87.
JPM_PERSON_PROFILE	HJPM_JPM_PERSON_PROFILE_SRV	See Chapter 5, "Managing Profiles," page 87.

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Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, and business process maps.

See Also

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

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

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CHAPTER 2

Setting Up the Content Catalog

This chapter provides an overview of the content catalog and discusses how to:

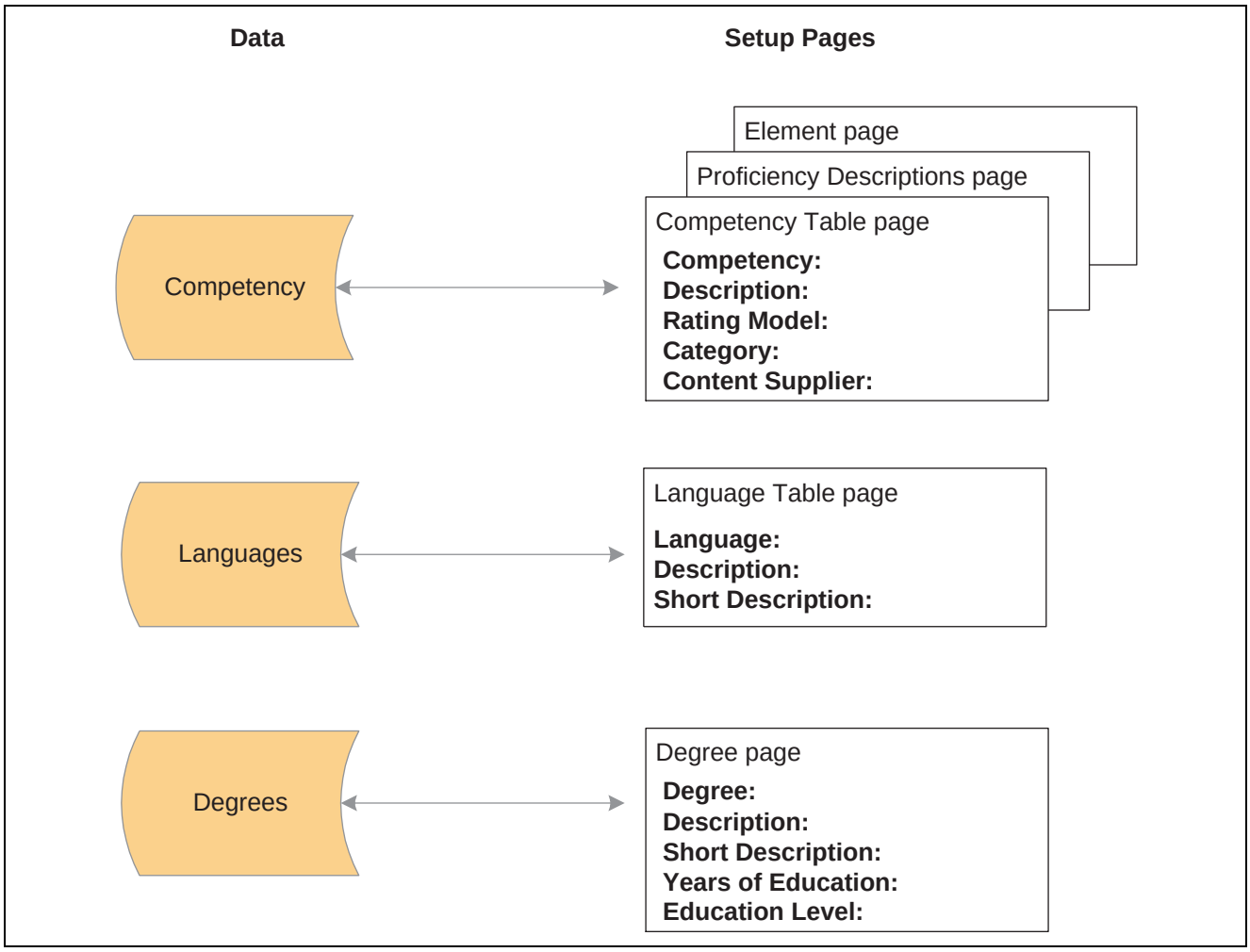
- Set up content types.
- Define content items.
- Define content groups.
- Define rating models.

Understanding the Content Catalog

The content catalog is a repository of the data that can be associated with person and non-person profiles, and is used by other applications such as PeopleSoft Enterprise ePerformance, Talent Acquisition Manager, Candidate Gateway, and Learning Management.

In earlier versions of PeopleSoft Enterprise HRMS, the information required for job and personal profiles was set up on different pages, as shown in the diagram below:

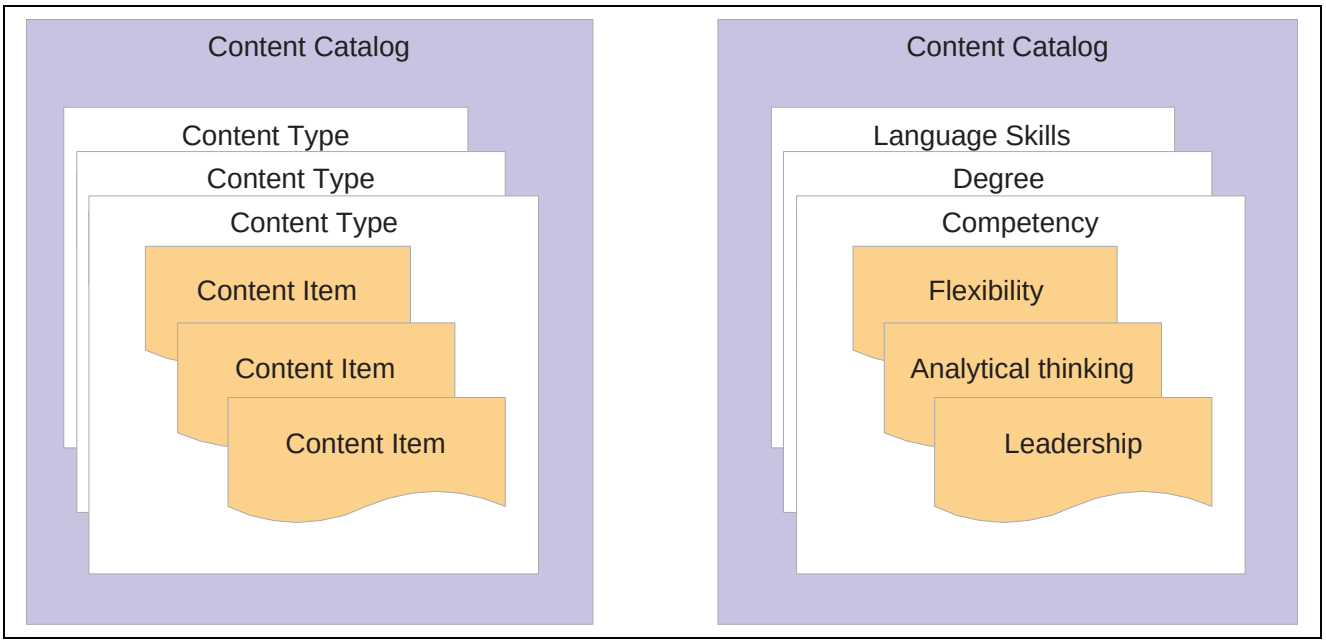
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Structure for Earlier HRMS Versions

In PeopleSoft Enterprise HRMS 9.0, the content catalog replaces these tables and pages, providing a generic structure for setting up different types of information:

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Content Catalog Structure

With the content catalog you define the different types of information (competency, degrees, languages, and so on) as *content types* and then set up the data for each content type as *content items*. For example, within the content type DEG (Degrees), a Bachelor of Arts degree (BA) is a content item.

The structure of the content catalog enables you to easily extend the content types that are available to add to your organization's profiles.

Content Catalog System Data

PeopleSoft delivers the content catalog already populated with a set of content types. You can add content types and content items to the content catalog to suit your organizational requirements.

Note. PeopleSoft delivers content items as sample data only.

The following content types are delivered as system data:

Content Type	Description
AREA STUDY	Areas of Study
COMPETENCY	Competencies
DEG	Degrees
EDLVLACHV	Education Level
EG SPCL PROJ	(E&G) Special Projects
ELEMENT	Competency Elements
GOAL	Goals and objectives
HON	Honors and awards

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Content Type	Description
INITIATIVE	Initiatives
LIC	Licenses and certifications
LNG	Language skills
MEM	Memberships
MISSION	Mission Statements
NVQ	NVQs
NVQ UNIT	NVQ Units
RANK	Military Rank.
RESP	Responsibilities
SPECL PROJ	Special Projects
SUB COMP	Sub-Competencies
SUCCESS	Success Criteria
TST	Tests/Examinations

Note. The RANK content type is for military customers to record rank in profiles. You can integrate Manage Profiles with Job Data using the HCM Event Manager, so that when a person's rank is updated in Job Data, the profile is automatically updated.

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

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with HCM Event Manager".

Setting Up the Content Catalog

To set up the content catalog you define the following:

- Content types.
- Content items.
- (Optional) Content group types and groups.

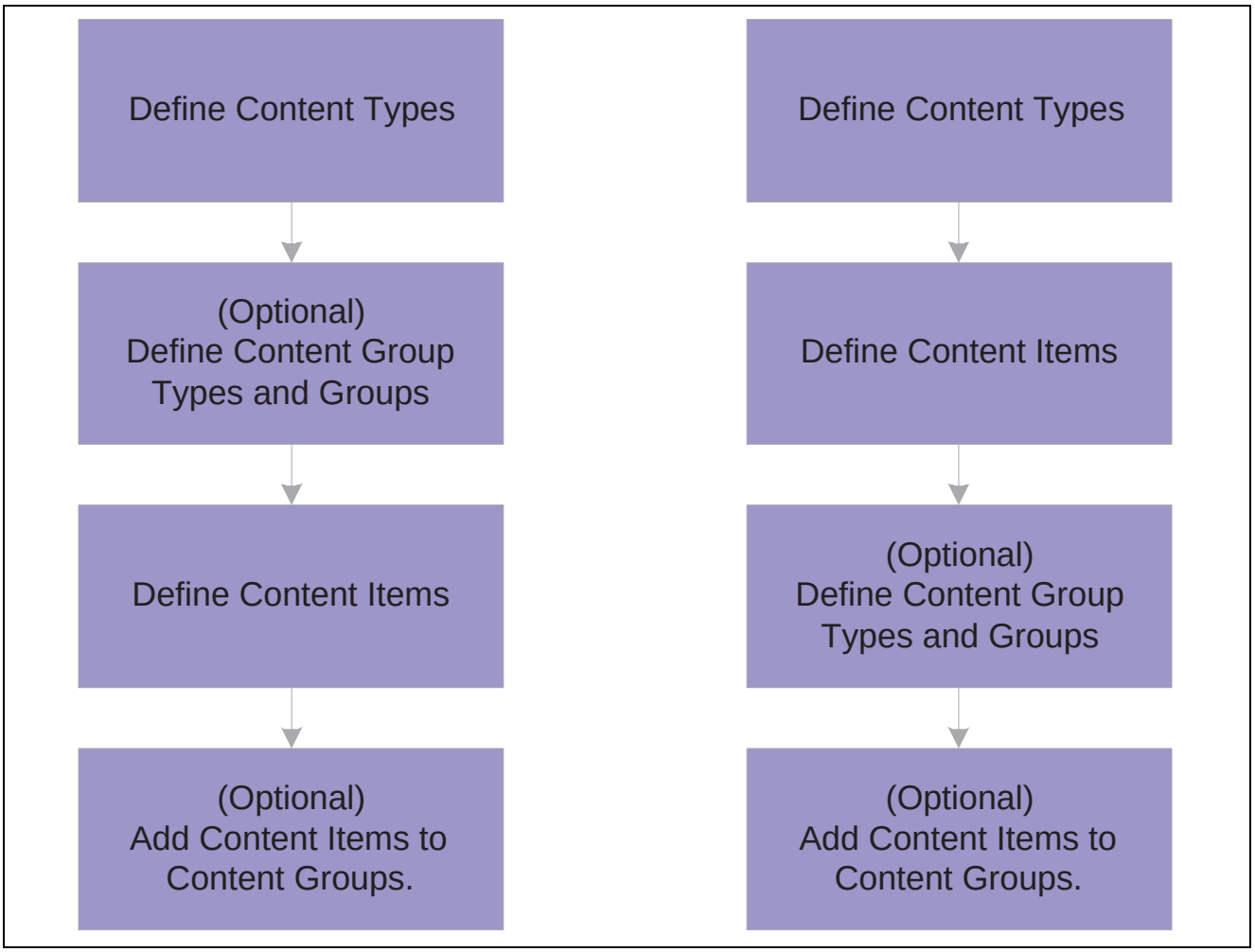
  Content groups enable you to categorize content items within a content type. This makes it easier for users to find content items if you have a large number of content items of the same type.

Note. If you want to use rating models with your content catalog, you must define these on the Rating Model page before you can associate content items with rating models.

See Chapter 2, "Setting Up the Content Catalog," Defining Rating Models, page 28.

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This diagram illustrates the two ways in which you can set up your content catalog:



Steps for Setting Up the Content Catalog

The first step in setting up the content catalog is to set up content types. After this, the order in which you set up content groups and content items is not determined by the system. If you know how you want to group your content items, create the content groups first and then set up your content items. Conversely if you know which content items you want to add but haven't decided how to group those items, you can set up the content items first, then create the groups and add the items to the groups.

Content Types and Content Items

The Content Type component (JPM_CAT_TYPES) has two pages:

- The Content Types page lists the properties (fields) for that content type.

  For each property, you define the attributes of the field as it appears on the Item Details page.
- The Relationship Rules page defines how the content type is related to other content types in the catalog.

The component for setting up content items is the same for all content types, but the pages and the fields that appear are determined by the content type definition. The Content Items component (JPM_CAT_ITEMS) has three pages:

- The Item Details page is where you set up the main details for the content item.

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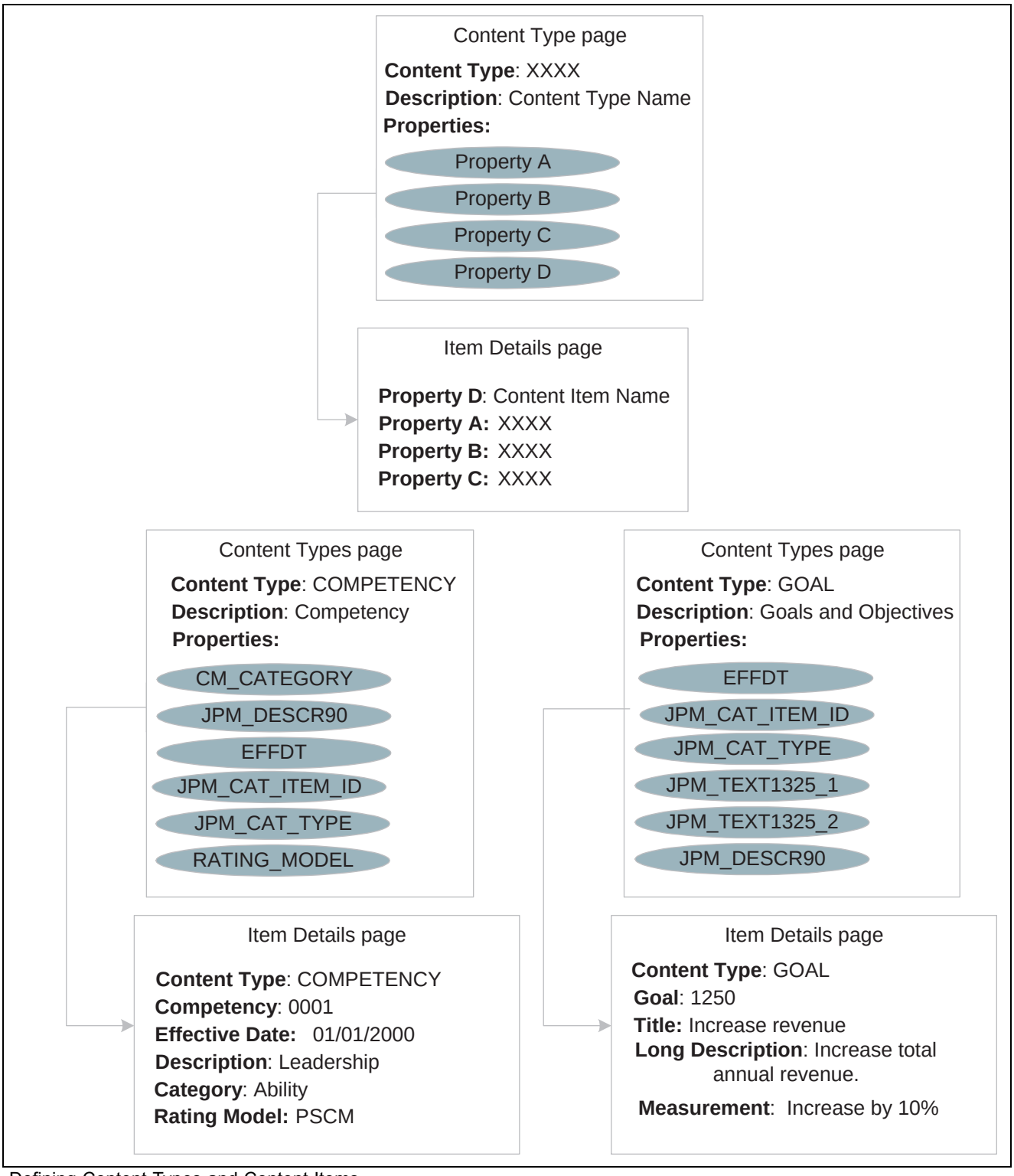
- The Relationships page defines relationships between content items.

  The system hides this page if there are no relationship rules defined for the content type.
- The Group Memberships page defines the groups to which the content item belongs.

  The system hides this page if there are no groups for the content type.

The fields on the Item Details page are entirely dependent on the properties selected on the Content Types page. This diagram illustrates how the selections on the Content Type page control the fields that appear on the Item Details page:

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Defining Content Types and Content Items

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Setting Up Content Types

This section provides overviews of content type properties and free form content types and discusses how to:

- Define content type properties.
- Define content type relationship rules.

Understanding Content Type Properties

A content type is a broad definition of a group of items that can be added to the content catalog. Within a content type, specify the properties that all items of this type can or must have. The system displays the properties you define for a content type as fields on the Item Details page. You can override the default label text, select default values, and indicate if the field should be available for entry, unavailable for entry, or hidden on the Item Details page.

See Also

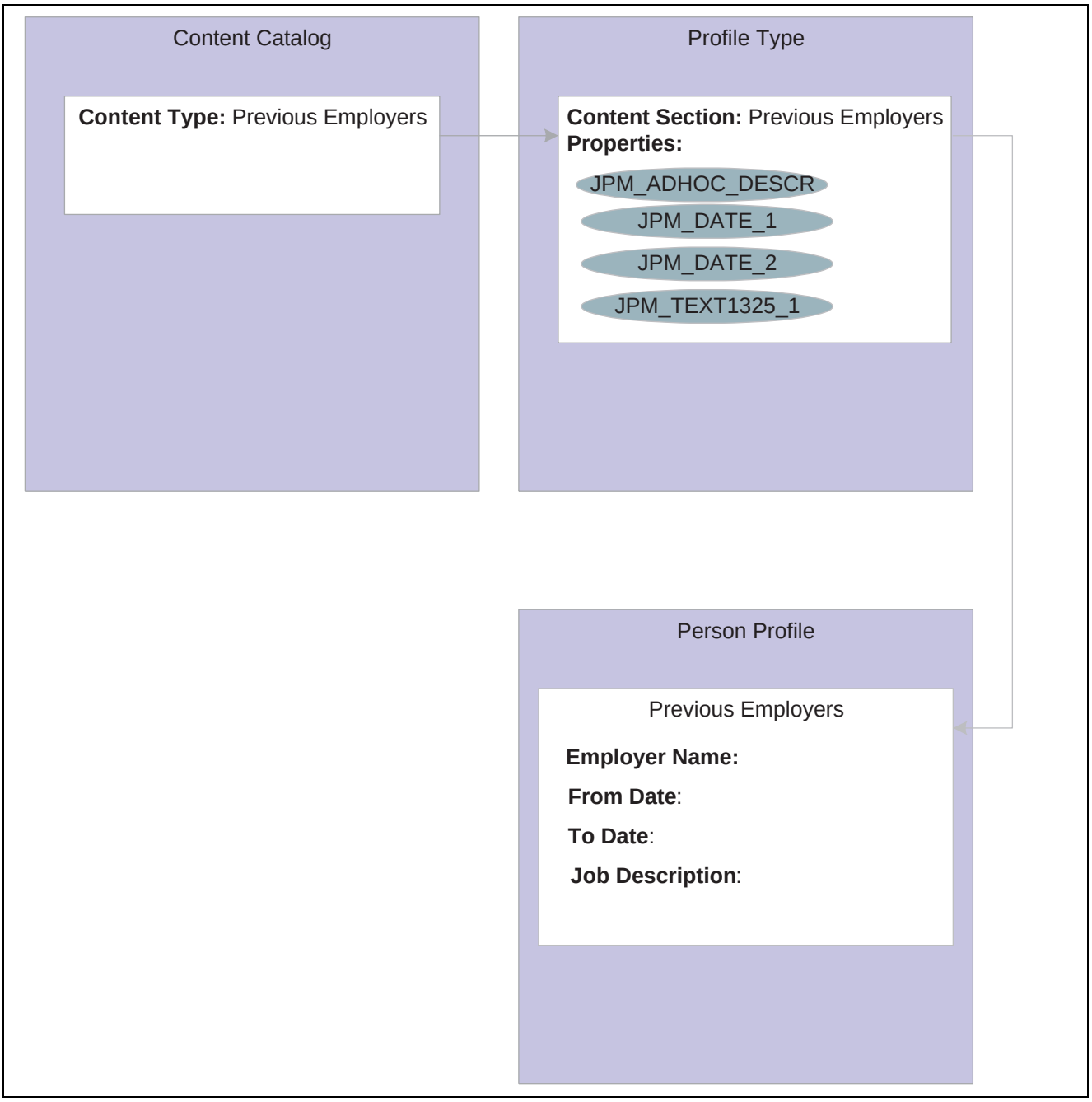
Appendix A, "Content Type and Profile Type Properties," Content Type Properties, page 183

Understanding Free Form Content Types

Depending on your organization's requirements, you may find that certain types of profile content are not suitable for storing in the content catalog due to the quantity or maintainability of the data. For example, you may want to include a section in person profiles for recording an employee's previous employers. However, employers are not stored in the database and the information is applicable to person profiles only. For this type of information, you can define free form content types that are basically empty placeholders. Free form content types do not include fields and you cannot create content items for them.

When you add a free form content type to a profile type, you add the properties (fields) that define the information entered for that specific profile type. This diagram illustrates how you could use free form content types to record previous employers:

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Example Free Form Content Type

In the example, the content type definition for previous employers has no fields or content items. When this content type is added to the profile type, fields are added for employer name, job start and end dates, and a descriptive field for the job description. On the Person Profiles page, employees add their previous employers information in these fields. There is no validation of the employers because it isn't defined as a record in the database.

To create a free form content type, select the Free Form Type Only check box on the Content Types page.

Note. You cannot include free form content sections when you use the search and compare profiles feature.

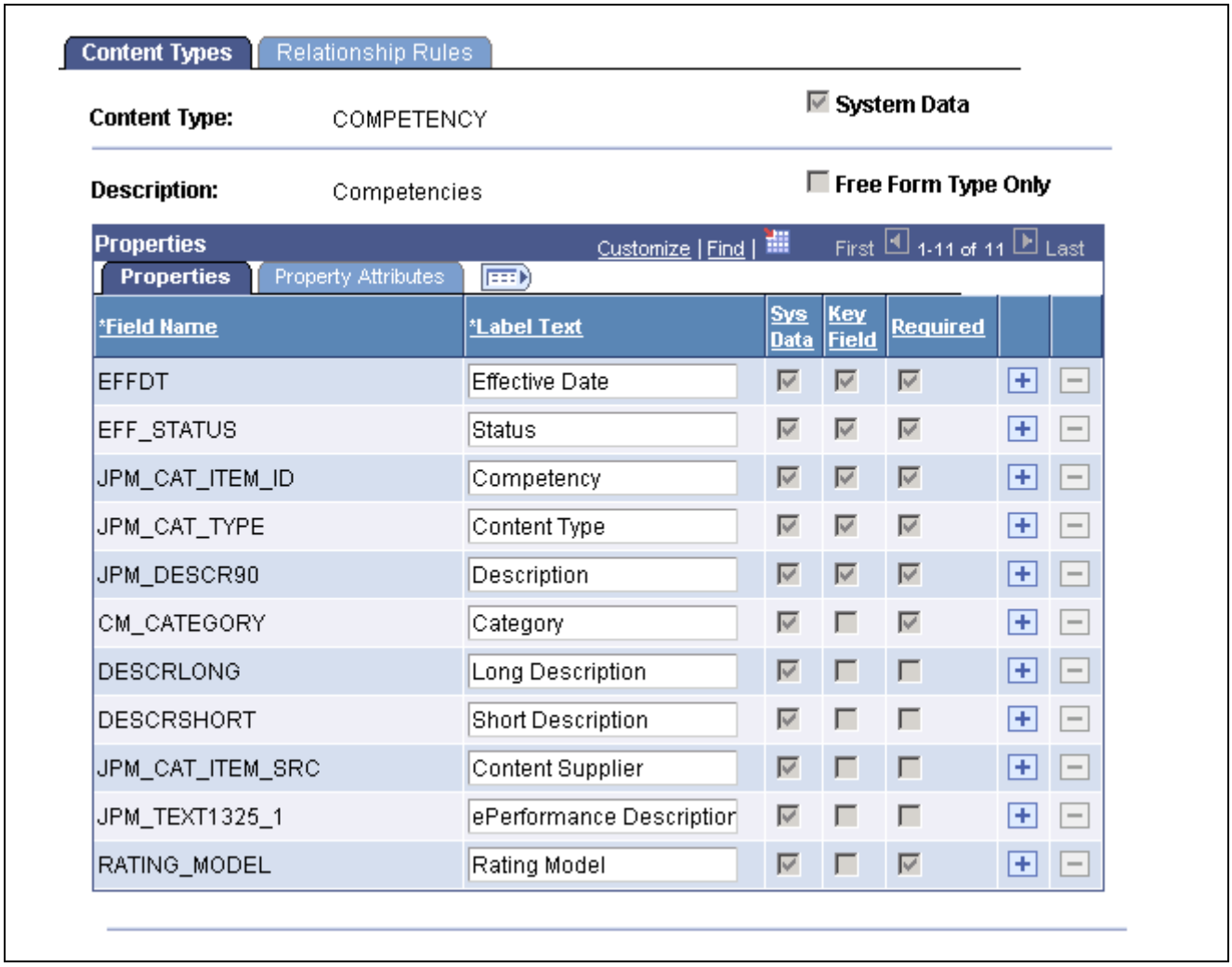
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Pages Used to Set Up Content Types

Page Name	Object Name	Navigation	Usage
Content Types	JPM_CAT_TYPES	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Types	Define the properties of content types. The properties selected for a content type determine which fields appear on the Item Details page and the attributes of those fields.
Relationship Rules	JPM_CAT_TYPE_RLAT	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Types, Relationship Rules	Set up and review relationships between content types.

Defining Content Type Properties

Access the Content Types page.



Content Types page: Properties tab

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System Data Content types with this check box selected are delivered with the system.

Free Form Entry Only Select this check box if you want to create a free form content type. You cannot define properties or content items for free form content types.

See Chapter 2, "Setting Up the Content Catalog," Understanding Free Form Content Types, page 16.

Properties

The system displays the properties that you select in this scroll area as fields on the Items Details page. Use the properties to define content items for this content type.

All content types must have the following five properties: Content Type (JPM_CAT_TYPE), Content Item ID (JPM_CAT_ITEM_ID), Effective Date (EFFDT), Status as of Effective Date (EFF_STATUS), and Description (JPM_DESCR90). When you create a new content type, the system automatically populates the grid with these properties and you can only edit the label text and the maximum length of the Content Item ID and the Description.

Add other properties to the content type that are required to track items of this type. For example, you can add a rating model to types whose items must be rated (such as competencies or language skills) or a duration property to types whose items are tracked by duration.

Property Select the properties to add to this content type from the list of available options. For content types that are delivered as system data you cannot delete the properties delivered, but you can add other properties.

See Appendix A, "Content Type and Profile Type Properties," Content Type Properties, page 183.

Label Text Displays the default label text for the selected property, but you can override it with a more meaningful label. The system displays the label text defined here on the Item Details page. If the property appears in the profile, the label text is also displayed on the Person Profiles and Non-person Profiles pages.

Note. We strongly recommend that you choose a meaningful label for the property so that users clearly understand what kind of information to enter in the field on the Item Details page.

Sys Data (system data) This field is display-only. PeopleSoft delivers some content types as system data. The system selects this check box if the property is delivered as part of this system data.

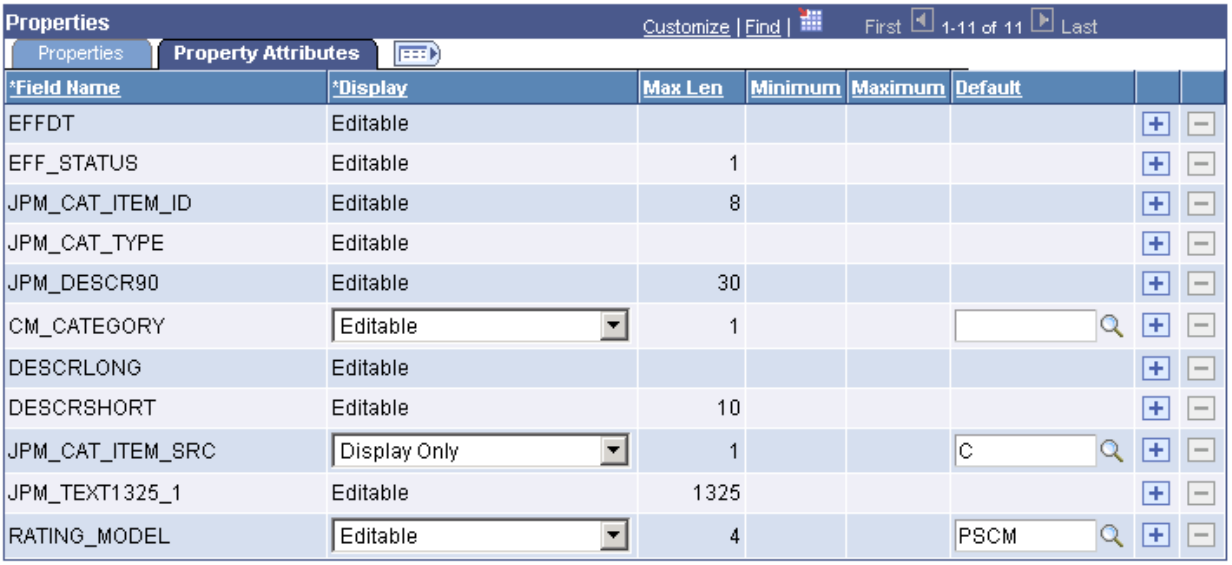
Key Field This field is display-only. The system selects it if the property is a key field for the record.

Required Select to make a property required when defining an item on the Item Details page.

Property Attributes

Access the Property Attributes tab.

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Content Types page: Property Attributes tab

Display Select whether the property should be available for entry (*Editable*), unavailable for entry (*Display Only*), or hidden (*Hidden*) on the Items Details page. When you select *Display Only* or *Hidden*, the system populates the property with the value you enter in the Default field.

When you add a content type to a profile type, the properties and attributes are copied by default, but you can adjust the display attribute. Therefore a property defined as *Display Only* or *Hidden* in the content type definition can be *Editable* in a profile.

Max Len (maximum length) Enter the field length of this property.

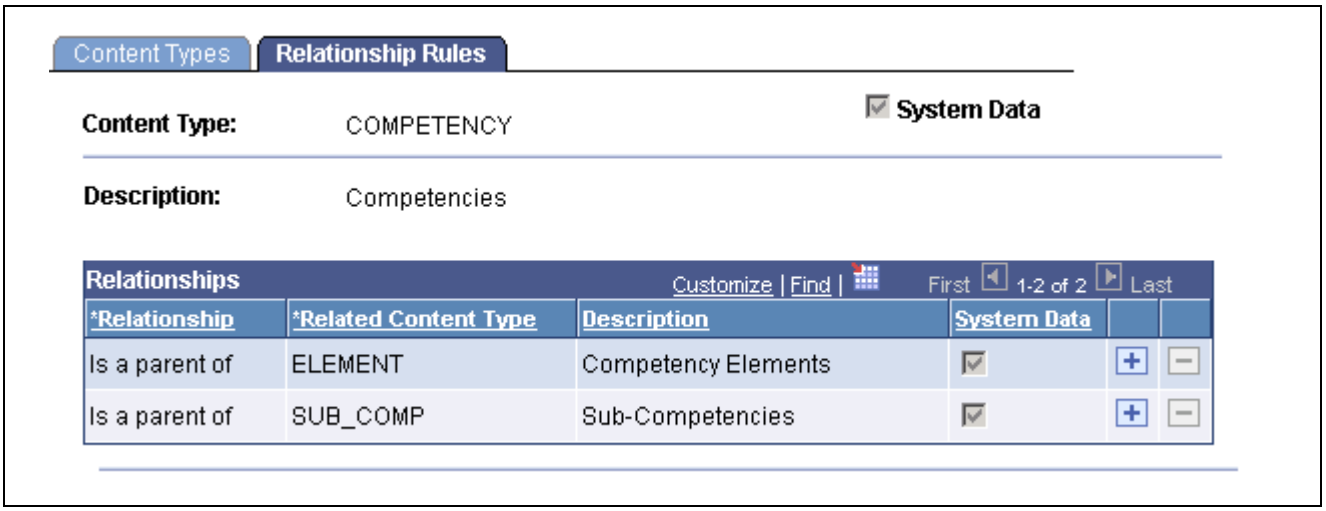
Minimum and **Maximum** For numeric properties, enter the minimum and maximum values.

Default Enter the default value for this property. On the Item Details page, the system populates the field with this value. You should select a default value if the property is display only or hidden. The Default field is available for properties that have predefined values or are associated with a prompt table only.

Defining Content Type Relationship Rules

Access the Relationship Rules page.

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Relationship Rules page

If a content type is related to other content types, define the relationship on this page. Leave the page blank if there are no relationship rules for the content type.

Relationship Select from one of the following relationships:

- *Is a Parent Of* or *Is a Child Of*.

  Child items are added to profiles under the parent items. These relationships create a hierarchy.

- *Supports* or *Is Supported By*.

  Supported or supporting items are not in a hierarchical relationship with one another (that is, the supports items do not have to go under the supported by items), but it enables you to apply the items of these types to a profile together and review them together. Examples of this relationship type are the Mission Statements that are supported by Initatives, and the ADA Requirements that are supported by Responsibilities.

- *Requires* or *Required By*.

  Use this relationship where an item is dependent on completion or accomplishment of the related content type. An example of this relationship type is the NVQ and NVQ unit content types, in which achieving an NVQ requires the completion of NVQ units. This relationship is not hierarchical.

Related Content Type Select the content type to which this content type is related.

System Data This field is display-only. The system selects this check box if the content type is system data delivered by PeopleSoft.

When you create a relationship here and save the content type, the system enters the opposite relationship for the related content type. For example, suppose you set up content type A and define the relationship:

Content type A *Is a parent of* content type B.

The system updates the content type B definition to define the relationship:

Content type B *Is a child of* content type A.

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You cannot create two kinds of relationships between two types or create a relationship between a type and itself. The system displays a duplicate insert error when you attempt this. For example, the content type COMPETENCY cannot have both the relationship *Is a parent of* and the relationship *Supports* with the content type *SUB_COMP*.

Defining Content Items

This section discusses how to:

- Define content item details.
- Define proficiency descriptions.
- Define content item relationships.
- Add content items to groups.

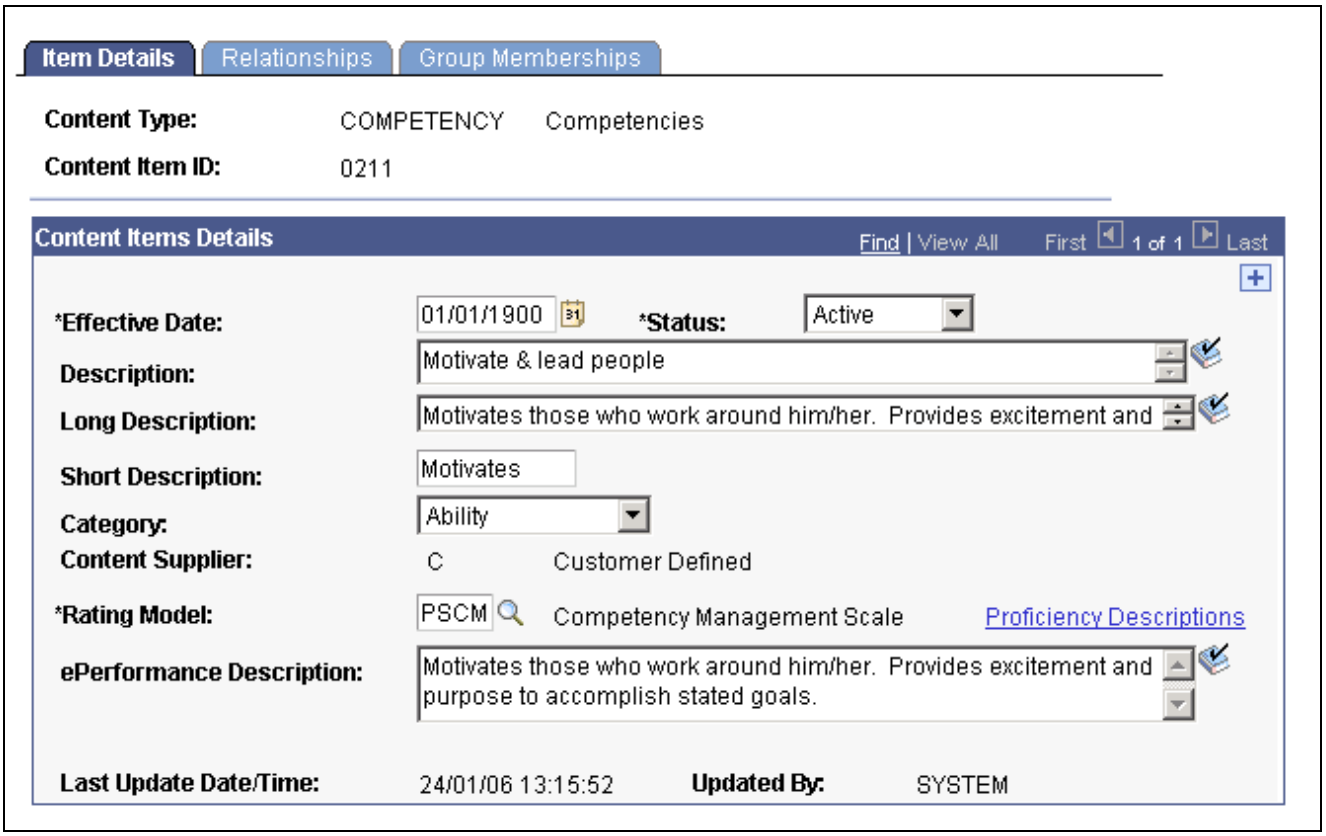
Pages Used to Define Content Items

Page Name	Object Name	Navigation	Usage
Item Details	JPM_CAT_ITEMS	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Item Details	Define content items for the selected content type.
Content Item Proficiency Descriptions	JPM_CAT_ITMRD_SEC	Click the Proficiency Descriptions link on the Item Details page.	Enter descriptions of the ratings for the content item. **Note.** The Proficiency Descriptions link appears only if the RATING_MODEL property is included in the content type definition and a rating model is selected.
Relationships	JPM_CAT_ITEM_RLAT	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Relationships	Set up and review the relationship between content items.
Group Memberships	JPM_CAT_ITEM_GMEMB	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Group Memberships	Add the content item to existing content groups. From this page you can also view all the members of the selected content groups.

Defining Content Item Details

Access the Item Details page.

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Item Details page

Note. The fields on the page vary depending on the properties of the content type. Each content type property is a field on the Item Details page and the system labels the fields using the label you entered in the Label Text field on the Content Types page.

Proficiency Descriptions This link appears only if the RATING_MODEL property is included in the content type definition and a rating model is selected. Click the link to access the Content Item Proficiency Descriptions page, which you use to enter descriptions of the ratings for the content item.

Proficiency descriptions are optional. They enable you to set up a rating description for a specific item. However, employees and managers can evaluate content items without proficiency descriptions.

Note. If you change the rating model for an item that has proficiency descriptions associated with it, the system issues a warning because the descriptions may be invalid for the new rating model.

Rating models are defined on the Rating Model page.

See Chapter 2, "Setting Up the Content Catalog," Defining Rating Models, page 28.

See Also

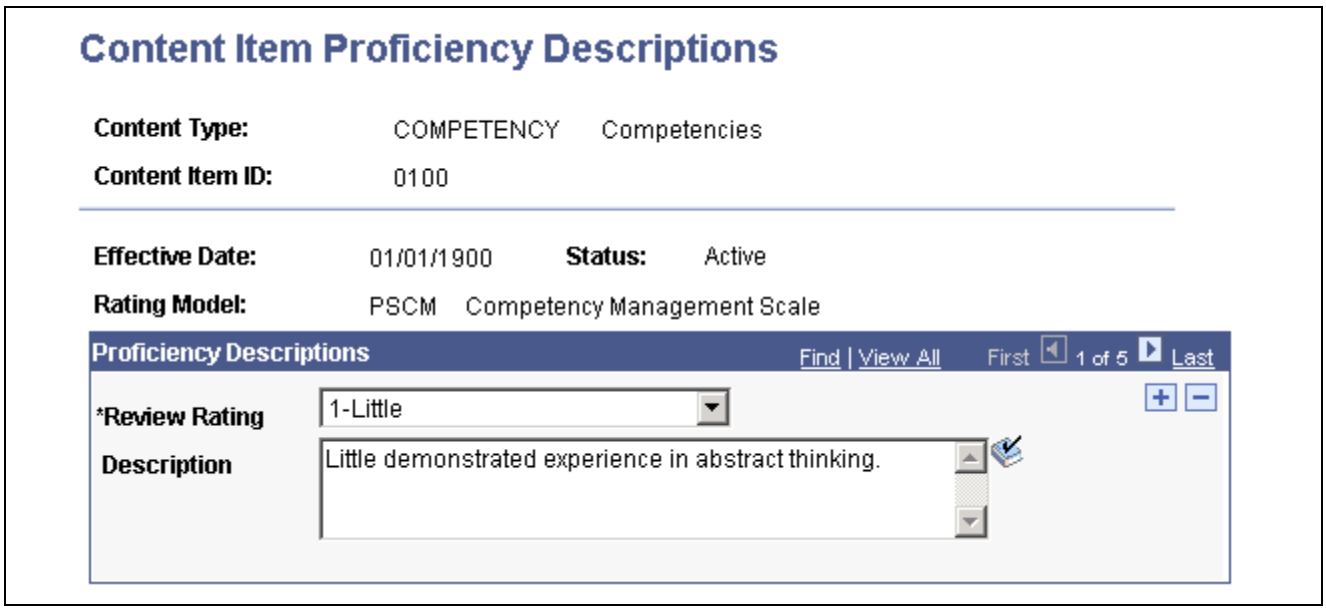
Appendix A, "Content Type and Profile Type Properties," Content Type Properties, page 183

Chapter 2, "Setting Up the Content Catalog," Setting Up the Content Catalog, page 12

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Defining Proficiency Descriptions

Access the Content Item Proficiency Descriptions page.

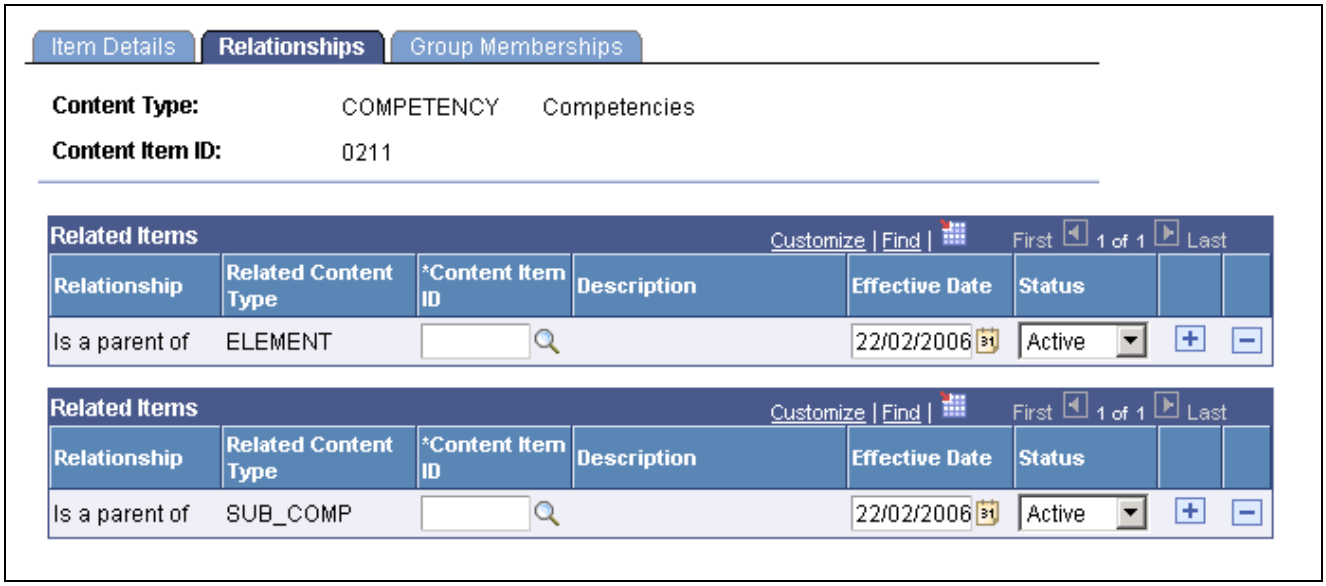


Content Item Proficiency Descriptions page

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

Defining Content Item Relationships

Access the Relationships page.



Relationships page

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The Relationships page is displayed if there are relationship rules for the content type defined on the Content Types — Relationship Rules page. If there are no relationship rules for the content type, the system hides this page.

Note. It is not mandatory to define relationships at the content item level.

Related Items

Relationship Displays the relationship rule defined for the content type.

You can't define relationships between content items that differ from the relationship rules for the content types. For example, the COMPETENCY type has a parent/child relationship with the SUB_COMP type. Therefore you can't set up a supports/supported by relationship between a competency and a sub-competency at the content item level.

Related Content Type Displays the content type of the related item.

Content Item ID Select the item to which this item is related. You can only select items of the type defined by the Related Content Type field.

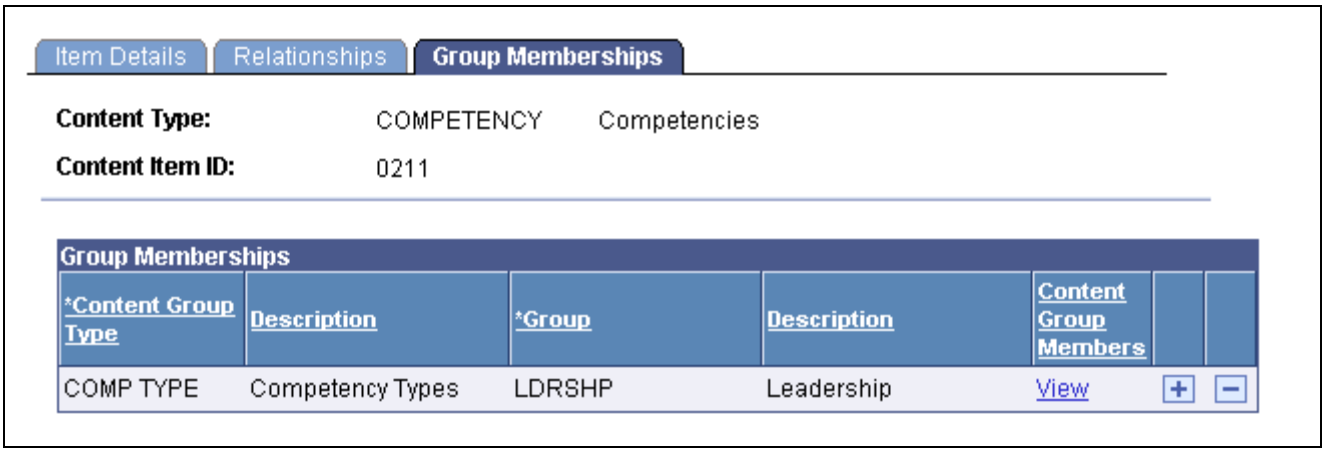
Mandatory This check box is displayed if the Relationship field is *Requires* or *Is Required By* only. Select the check box if the related content item must be achieved or completed in order to complete the content item that requires it. For example, if a certain NVQ unit must be completed in order to complete an NVQ, select this check box for these content items.

If the check box is not selected, the related item is optional.

See Chapter 8, "(GBR) Managing National Vocational Qualifications," page 175.

Adding Content Items to Groups

Access the Group Memberships page.



Group Memberships page

The Group Memberships page is displayed if content groups have been set up for the content type. If there are no content groups, the system hides this page. Content groups are defined on the Content Group Type page.

Content Group Type Select the content group type.

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Group Select a group from the list of groups.

Content Group Members Click the View link to access the Content Group Members page that lists the content items in the selected group.

Defining Content Groups

Use the Content Groups component (JPM_CAT_GROUPS) and the Content Group Members component (JPM_CAT_GMEMB) to set up content groups. This sections discusses how to:

- Define content groups.
- Define content group members.

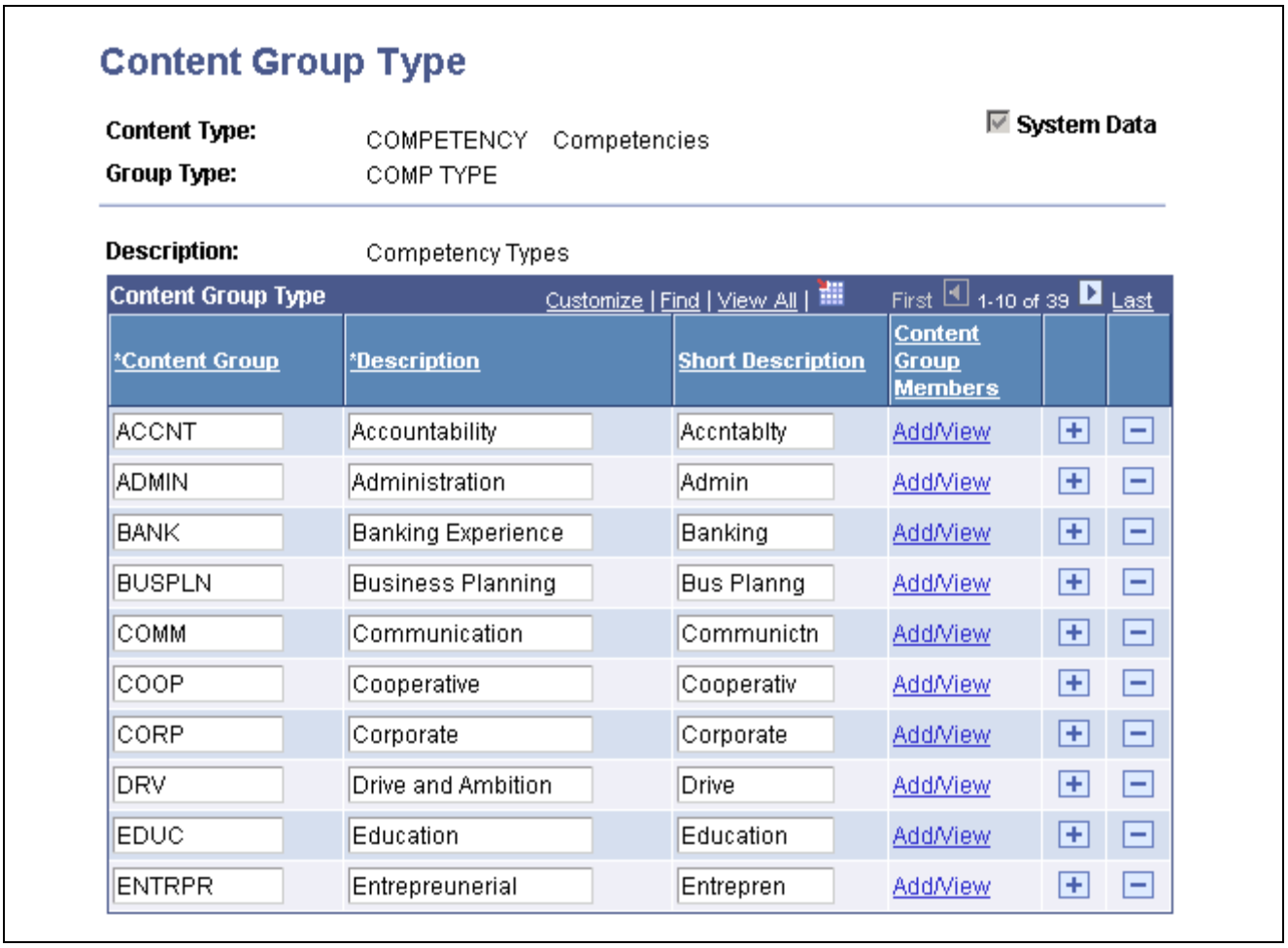
Pages Used to Define Content Groups and Members

Page Name	Object Name	Navigation	Usage
Content Group Type	JPM_CAT_GROUPS	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Groups	Define content group types and the groups within each content group type.
Content Group Members	JPM_CAT_GMEMB	• Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Group Members • Click the View link on the Content Item — Group Memberships page. • Click the Add/View link on the Content Group Type page.	Add content items to the content groups that you have created on the Content Groups page.

Defining Content Groups

Access the Content Group Type page.

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Content Group Type page

Content Group Type

This group box lists all the content groups defined for the selected Content Group Type.

Content Group Enter the name of the content group.

Content Group Members Click the Add/View link to access the Content Group Members page that lists the content items belonging to the group.

Defining Content Group Members

Access the Content Group Members page.

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Content Group Members page

Edit/View Click this link to view or edit the item definition. When you click the link, the system displays the Content Item component.

Defining Rating Models

To define rating models, use the Rating Model component (RATING_MDL_TBL).

This section provides overviews of rating models and (USF) rating models, and discusses how to:

- Set up rating models.
- Add review rating explanations.

Understanding Rating Models

Rating models define the values that can be used to rate an employee's performance or level of proficiency. The rating model defines the qualitative values, such as A, B, C, or D, that the system uses to rate or score an employee's performance. Each qualitative value can have a numeric rating, review points, and a review band (range of points).

Rating models are used by several applications within HRMS, including:

- Manage Profiles business process.

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In Manage Profiles, rating models are used to rate employees' proficiency level for items on their person profiles. In non-person profiles you can specify the proficiency levels expected for items in the profile. The RATING_MODEL property is associated with the rating model table. Add this property to your organization's content types and profile types that are measured using rating models and specify the rating model used at the content item level. The COMPETENCY content type includes the RATING_MODEL property.

- PeopleSoft Enterprise ePerformance.

  In ePerformance, rating models are used to define values for the rating sections of a performance document as well as rating overall performance. The calculation method that you select for the overall rating (the Overall Summary section of the document) determines which of these values you must define in rating models. When you design document templates, you select the rating model that applies to each section of the document and to each item that is rated. You can use the same rating model for the entire document or select a different rating model for each item and section.

- Manage Employee Reviews business process.
- Plan Careers and Successions business process.
- Manage Base Compensation and Budgeting business process.

See Also

PeopleSoft Enterprise ePerformance 9.0 PeopleBook, "Setting Up ePerformance," Working with Manage Profiles

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Employee Reviews, "Setting Up Employee Reviews"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Plan Careers and Successions, "Planning Careers," Evaluating Employee Strengths and Developmental Areas

(USF) Understanding Rating Models

PeopleSoft delivers two rating models that have specific uses:

- GUSF (goal status for USF).
- PIP (performance improvement plans).

These rating models define statuses, rather than ratings, that you can assign to goals and performance improvement plans in performance evaluations. GUSF values are *Not Met, Met,* and *Exceeded.* PIP values are *In Progress, Satisfactory,* and *Unsatisfactory.*

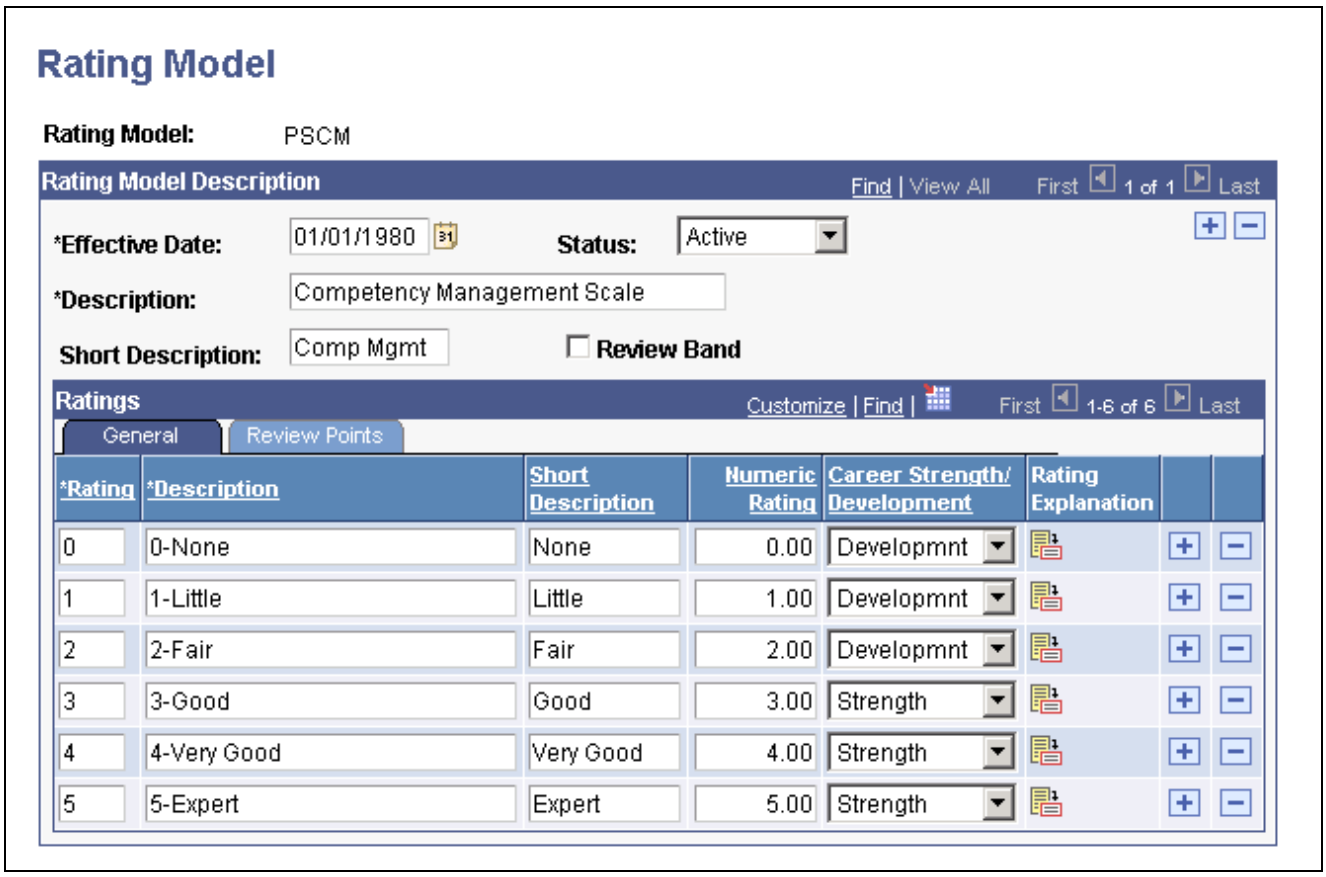
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Pages Used to Define Rating Models

Page Name	Object Name	Navigation	Usage
Rating Model	RATING_MDL_TBL	Set Up HRMS, Product Related, Profile Management, Content Catalog Rating Model	Define the values used to rate an employee's proficiency level.
Review Rating Explanation	REVW_RATING_SEC	Click the  icon on the Rating Model page.	Add rating explanations.

Setting Up Rating Models

Access the Rating Model page.



Rating Model page: General Tab

Rating Model Description

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

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

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See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "(JPN) Updating Salaries for Japan".

OPM Pattern (Office of Personnel Management pattern) (USF) Select the pattern that applies to this rating model. This field appears for U.S. Federal users only.

General Tab

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

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

Numeric Rating This field is used by ePerformance only. Enter a numeric value for the rating, if applicable. The value you enter serves two purposes:

- For sections of a performance document that use the average calculation method, the system uses this value to calculate the section's average or weighted average. It also uses this value to calculate the average rating for each item in the section (when sub-items exist).
- If you select the Show Numeric Ratings/Points check box on the Rules/Roles page (EP_TMPL_DEFN3) of the Template Definition component, the value you enter here displays next to the rating on the performance document. This feature is useful when ratings are alphabetic.

Career Strength/Development The system uses this value when transferring competencies between the Manage Profiles and Plan Careers business processes. Select:

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

Strength if the rating indicates an area of strength.

Transfer competencies between an employee's career plan and the PERSON profile from the Career Plan - Career Strength/Develop Areas page using the Synchronize with Profile link, or from the Person Profile page by selecting *Link to Career Planning* in the Profile Action field.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Plan Careers and Successions*, "Planning Careers," Evaluating Employee Strengths and Developmental Areas.

See Chapter 5, "Managing Profiles," Synchronizing Person Profiles with Career Plans, page 106.



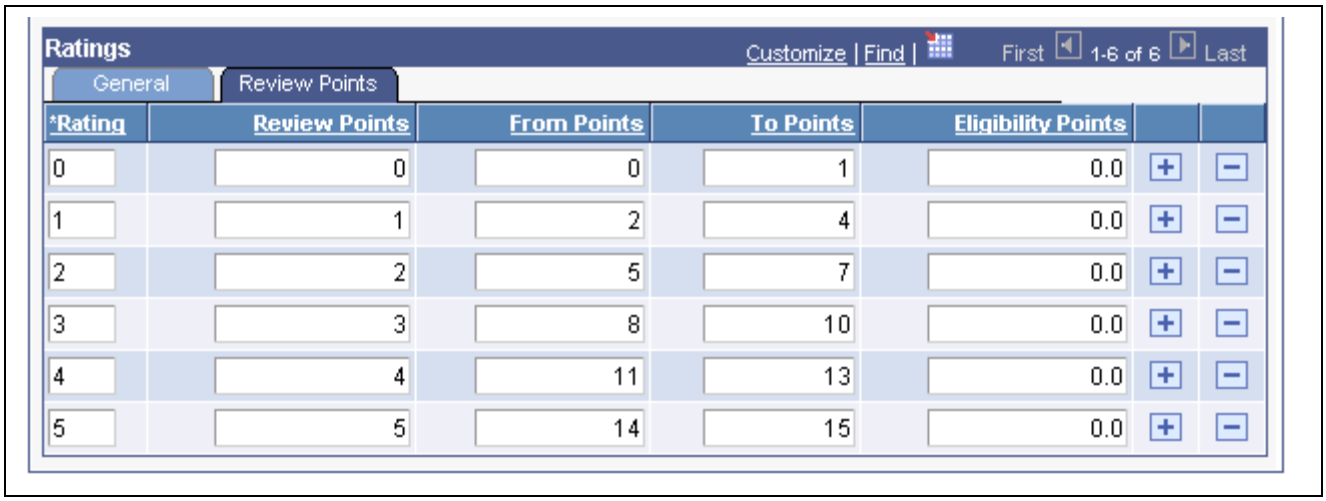
Click to display the Review Rating Explanation page.

See Chapter 2, "Setting Up the Content Catalog," Adding Review Rating Explanations, page 33.

Review Points Tab

Access the Rating Model page: Review Points tab.

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Rating Model page: Review Points tab

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

Rating

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

Review Points

Enter a number from 0 to 999 for the rating. This field is used by both ePerformance and Manage Profiles.

- ePerformance uses this field for section calculation use Summation method. The system uses the review points that you enter here in its calculations.

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

- Manage Profiles uses the matching function to determine how well an employee matches the competencies for a given role. The matching function uses the review points that you enter here. However, the review points are not used in the search and compare profiles feature.

  See Chapter 6, "Matching Competencies to Roles," page 143.

  See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "Administering Salary Plans, Grades, and Steps".

From Points, To Points

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

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

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

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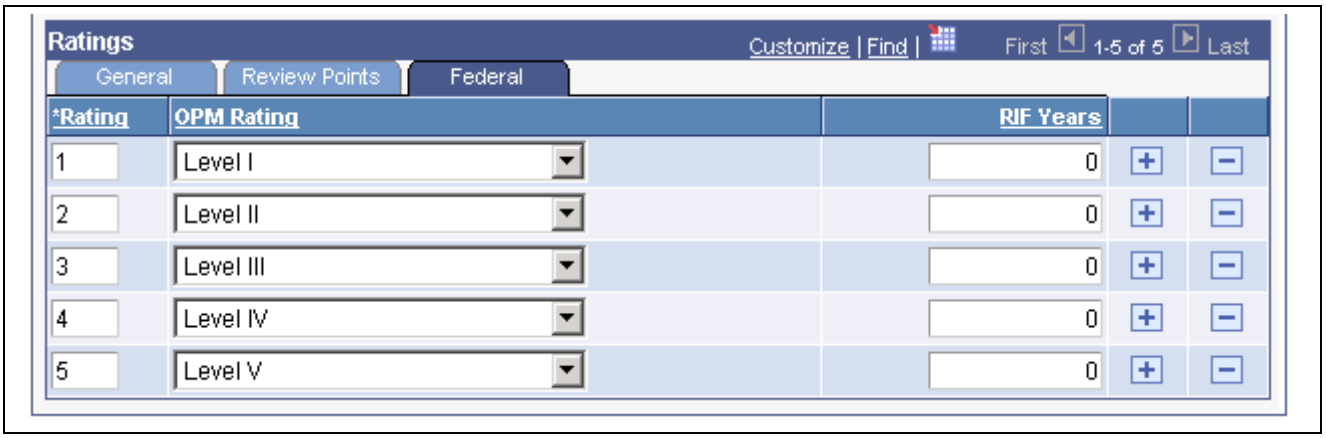
Eligibility Points If applicable, enter the number of points used by the Shohkaku (JPN), or Grade Advance eligibility feature of the Plan Salaries business process. This is used only if the Appl for Grade Advance Prc check box is selected on the JPN Review Definition.

See *PeopleSoft Enterprise ePerformance 9.0 PeopleBook*, "Setting Up Document Templates," (JPN) Creating Review Identifiers.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "(JPN) Updating Salaries for Japan".

(USF) Federal Tab

Access the Rating Model page: Federal tab.



Rating Model page: Federal tab

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

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting PeopleSoft Applications for Your Installation.

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

RIF Years (Reduction in Force years) Enter the number of RIF Years associated with this rating level.

See Also

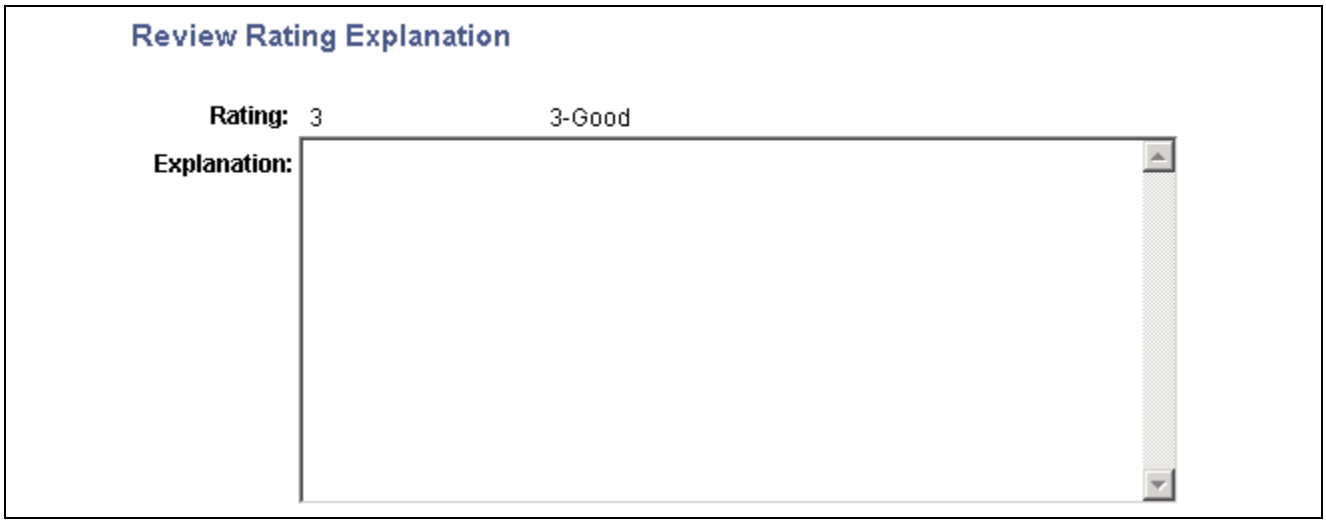
Chapter 6, "Matching Competencies to Roles," page 143

Chapter 5, "Managing Profiles," Synchronizing Person Profiles with Career Plans, page 106

Adding Review Rating Explanations

Access the Review Rating Explanation page.

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Review Rating Explanation page

Explanation Enter a description for the rating. You can enter up to 1325 characters. This description is used by ePerformance on the performance document.

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CHAPTER 3

Setting Up Profile Management

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

- Configure Manage Profiles.
- Define education-related information.
- Define instance qualifiers.
- Set up profile identity and association options.
- Set up profile types.
- Create profile group types and profile groups.
- Set up to use XML Publisher reports and profiles.

Understanding Profile Management

Organizations typically use two types of profile:

- Non-person profiles

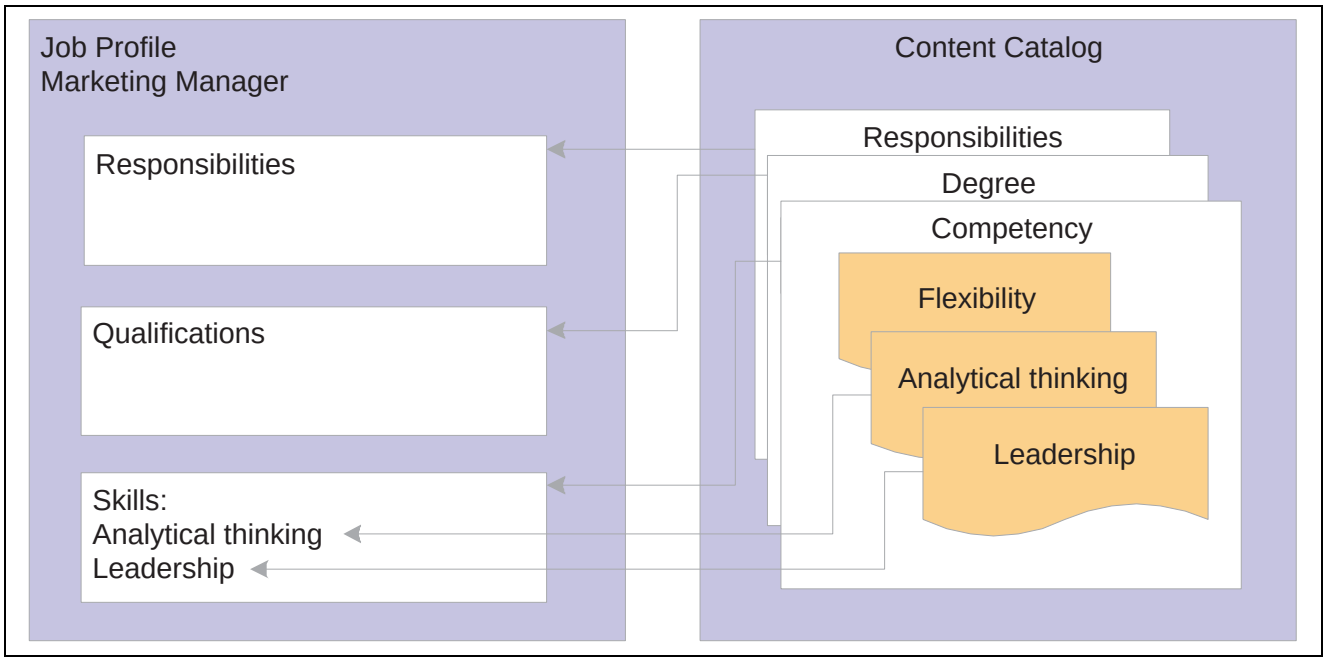
  These describe the competencies, qualifications, and responsibilities of a certain job code, position, job family, or salary grade, or other entities in the system.

- Person profiles

  These describe people's skills, competencies, accomplishments, and performance. Manage Profiles enables you to create profiles for employees, contingent workers, and persons of interest.

With the Manage Profiles business process, the content catalog provides the foundation for creating all profiles. This diagram shows how profiles are constructed by selecting from the content types and content items that are defined in the content catalog:

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Relationship Between Profiles and the Content Catalog

In the same way that you configure the content catalog to suit your organization, you define a set of profiles that are configured to your requirements. When employees, managers, and administrators create profiles they select the profile type that they want to use.

The profile type controls the following aspects of the new profile:

- The type of entities to which users can link the profile.
- The content of the profile.
- Profile security (who can update the profile).
- Whether approval is required for changes to the profile.

Entity Types

Profiles fall into two categories:

- Non-person profiles (also known as job profiles).

  These are profiles that are created for a business entity, such as a position or a job code.

- Person profiles.

  A person profile is created for a specific person ID.

When you define a profile type, you specify the type of entities that the user can select when creating a profile. For example, suppose that you create a profile type and specify that it can be linked to job codes and salary grades. When users create a profile based on that profile type, they can only select job codes, salary grades, or both job codes and salary grades for the new profile. A profile type cannot be linked to both business entities and people.

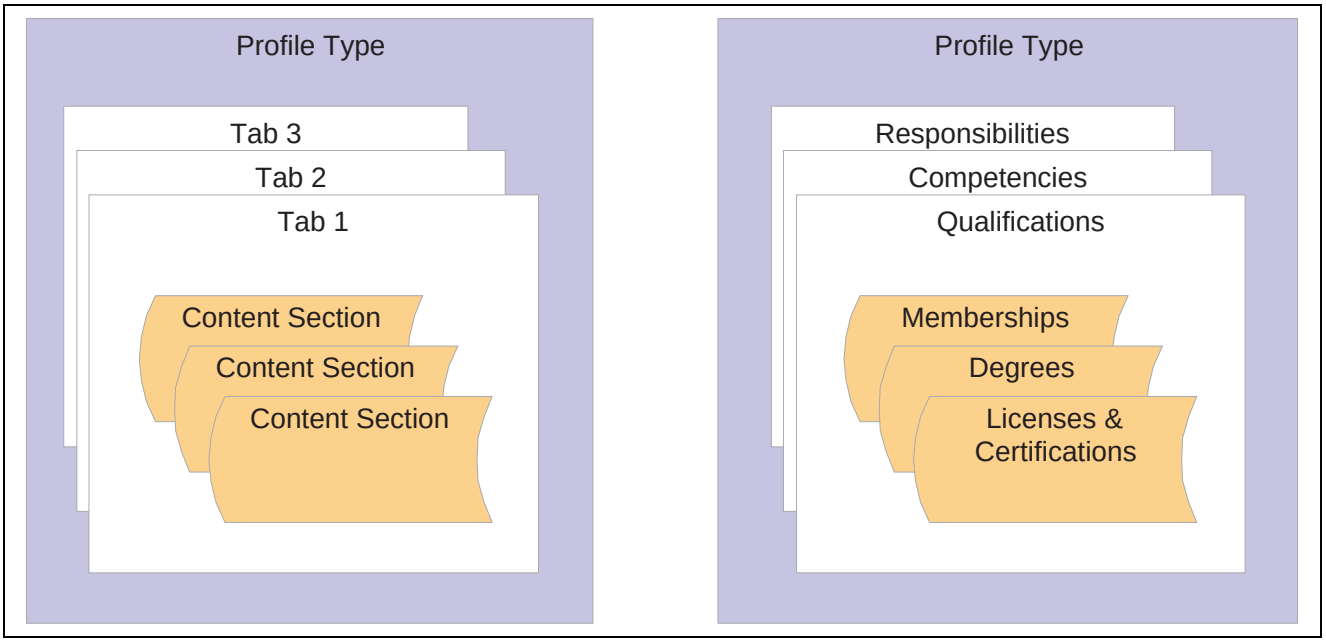
The entities to which you can link a profile type are known as *profile identity options*. Use the Profile Identities Options page to maintain the list of profile identity options available.

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In addition to profile identities, you can also link a profile type to entities outside the Manage Profiles business process. These entities are known as *profile association options.* ePerformance templates are linked to profile types in this way. The Profile Association Options page defines all the entity types that can be associated to profile types.

Profile Content

This diagram shows how the content of profile types (and profiles created from those profile types) is divided into tabs and content sections:



Profile Type Content Structure

When you set up a profile type you define the name of each tab and the order in which they are displayed in the profile. You add one or more content types to each tab to create *content sections*. For example, the previous diagram shows a tab labelled Qualifications that has three content sections for three different content types: Memberships, Degrees, Licenses & Certifications. When users create a profile using this profile type, they can only add content items of the type DEG (Degrees) to the Degrees content section. You define the order in which the content sections are listed within the tab.

When you add a content type to a tab, the properties and property attributes defined for the content type are copied to the content section. However, you can also add other properties to the content section or modify the attributes of the properties inherited from the content type definition.

Note. The profile type definition does not include content items. The purpose of the profile type is to provide the structure for the new profile and not the detailed content. Users add content items when they create a profile.

Profile Security

When you set up a content section, you specify the roles that can view that section of the profile. This enables you to display or hide sections to different types of users. There is an additional check box that enables you to control which roles can update the items in the section. There are three roles available:

- Administrator

  The administrator is any user who has access to the Profile Management menu in Workforce Development.

- Manager

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Managers are users that can access the self-service transactions for managing profiles, using the Manager Self Service menu.

- Employee

  Employees use employee self service to access the profile management self-service transactions.

The manager and employee self service transactions are delivered in PeopleSoft Enterprise eDevelopment.

See *PeopleSoft Enterprise eDevelopment 9.0 PeopleBook*, "Maintaining My Profiles".

Profile Approvals

Approvals processing is an optional aspect of profile management. If you want to use approval workflow to control changes to profiles, you:

1. Set up approval processing using the standard HRMS approvals workflow engine.
2. Associate the approvals definition with the profile type.

   On the Profile Type —Attributes page, you define one approvals workflow transaction and approval definition for the profile type.
3. Specify whether identities require approval (non-person profile types only).

   You can specify that approvals workflow is triggered when users add or change the profile identities associated with a non-person profile. To do this, select the Approval Req'd for Identities check box on the Profile Type — Identities page. This applies to non-person profile types only. The check box is not available when you are working with person profile types.
4. Specify which content sections require approval.

   Each content section within a profile type has an Approval Required check box that controls whether changes to that content section require approval. However, approvals is only triggered if you have specified the approval at the profile level. If you have set up approval processing for a content section when users add items to a profile, delete existing items, or modify existing items, this initiates the approvals process.
5. (Optional) Add properties to content sections to track workflow status.

   We recommend you add the workflow status property (JPM_WF_STATUS) to content sections that require approval to enable users to view the status of profile items as they are processed by the approvals workflow engine. Other useful properties for tracking approval are the last updated date and time property (LASTUPDDTTM), and the last updated user ID property (LASTUPDOPRID).

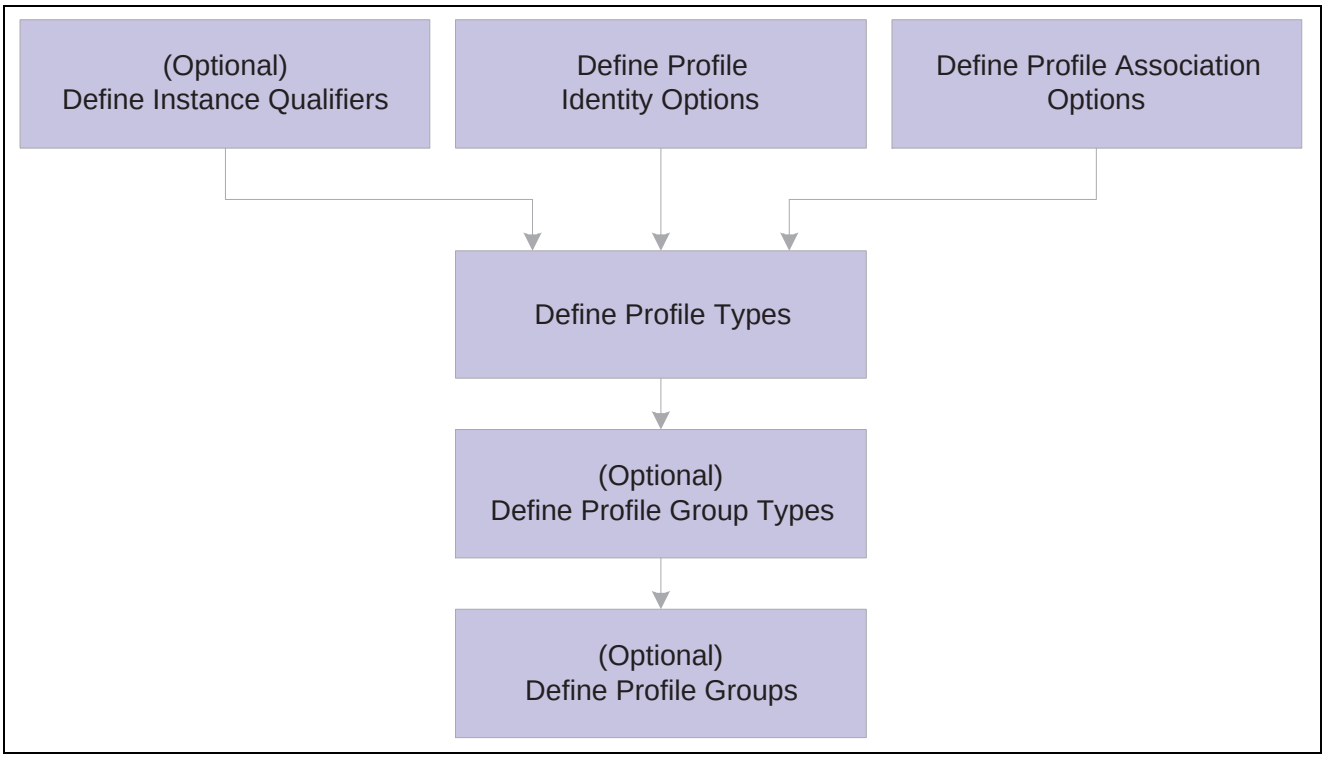
See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals".

See Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 60.

Setting Up Manage Profiles

This diagram illustrates the steps for setting up profile management:

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Setting up profile management

To set up profile management you define the following:

- (Optional) Instance qualifiers.

  Typically instance qualifiers are used to identify who updated the profile or the type of evaluation. You can also use instance qualifiers to restrict the profile item rows that are visible to employees and managers using self-service transactions.

- Profile Identity Options.
- (Optional) Profile Association Options.

  Note. You do not need to define profile association options for the Manage Profiles business process. However, if you have installed ePerformance and you want to use profile content to create performance or development documents, you must define profile association options for ePerformance.

- Profile Types.
- (Optional) Profile Group Types and Profile Groups.

  Profile group types and profile groups enable you to categorize profile types. You can use profile groups as search criteria in the search and compare profiles feature to filter the search results.

Note. Before you can use Manage Profiles, you must also set up the installation settings on the Profile Management Installation page. This is described in the next section.

See Also

Chapter 5, “Managing Profiles,” Searching and Comparing Profiles, page 118

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Common Elements Used in This Chapter

Sys Data (system data) This check box appears on setup pages for instance qualifiers, profile identities, profile associations, and profile types. It is system-maintained and indicates if the data is delivered as system data. When this check box is selected, the row of data is display-only.

Configuring Manage Profiles

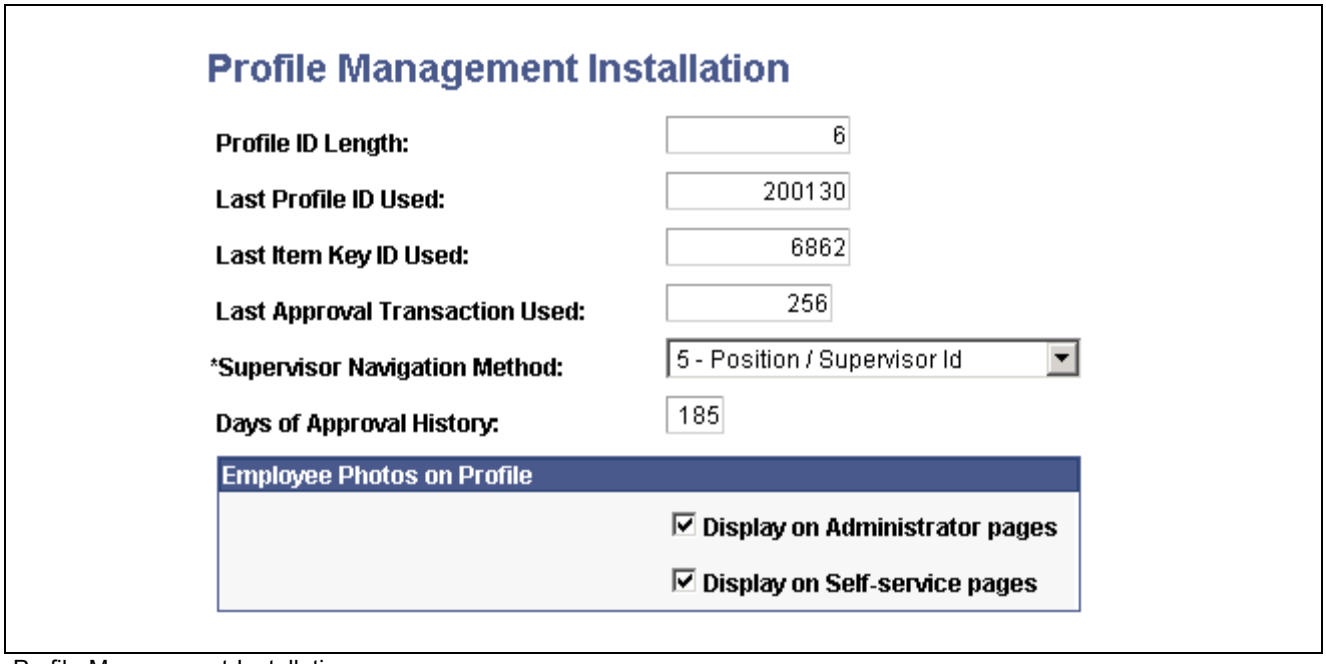
This section discusses how to configure Manage Profiles installation.

Page Used to Configure Manage Profiles

Page Name	Object Name	Navigation	Usage
Profile Management Installation	JPM_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, Profile Management Installatn, Profile Management Installation	Define installation settings for the Manage Profiles business process. This includes setting up the profile ID length and the last numbers used for profile ID and approval transaction. You complete this page once during implementation only.

Configuring Manage Profiles Installation

Access the Profile Management Installation page.



Profile Management Installation page

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Profile ID Length Enter the number of characters in the profile ID. The maximum profile ID length is defined in Application Designer and the system displays an error message if you enter a length that exceeds this maximum.

Last Profile ID Used To let the system assign numbers for profile IDs, enter the last number that you used. The system automatically increases the number in this field each time that it assigns a new profile ID.

You can manually assign profile IDs to non-person profiles when you create the profile.

Note. To avoid maintaining two different sets of numbers, either always assign profile IDs manually or always let the system do it.

Last Item Key ID Used Displays the last number used to identify items on profiles. The system automatically assigns an item key ID to each content item added to a profile. The field is set to *1* at installation and the system automatically increases the number in the field each time you add content items to a profile.

Note. The item key ID is not visible to users when setting up or using profiles.

Last Approval Transaction Used Displays the last approval transaction number. The system automatically increases the number in the field each time that an approval transaction for Manage Profiles is generated.

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

Supervisor Navigation Method Select the method that is used by the Build Manager List process to determine supervisor relationships. Select from these options: *2 — Supervisor Id*, *3– Department Manager Id*, *4–Reports to Position*, *5– Position/Supervisor Id*, or *6–Position/Dept Manager*.

See Chapter 4, "Setting Up Search and Compare Profiles," page 73.

Days of Approval History Enter the number of days of approval history that is available from the Person or Non-person Profile pages. Links on the profile pages indicate how many profile items have been approved or denied approval over a period that is determined by the setting of Days of Approval History field. When users view a profile, the system checks the approval history for the period between the system date (current date) and the system date minus the number of days you specify in this field.

For example, if you enter *31* days in this field and the system date is August 2, the system checks for profile items that have been approved or denied in the period July 2 to August 2.

Employee Photos on Profile

Display on Administrator Pages Select this check box to display employee photos on the person profile pages that are used by adminstrators. These are the pages accessed from the Workforce Development, Profile Management menu.

Display on Self-Service Pages Select this check box to display employee photos on the self-service person profile pages that are accessed from these menus:

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Self Service, Learning and Development

Manager Self Service, Learning and Development

See Also

Chapter 5, “Managing Profiles,” page 87

Defining Education-Related Information

This section provides an overview of education-related information and discusses how to:

- Track schools.
- (JPN) Define faculty information.

Understanding Education-Related Information

To set up information about educational establishments and areas of study use the School Types (SCHOOL_TYPE_TABLE), Schools (SCHOOL_TABLE), Majors (MAJOR_TABLE), and Faculty Table JPN (FACULTY_TABLE_JPN) components.

If you want to include school type, school, major, or faculty codes in profiles, add the appropriate property to content sections in your profile types. These are the properties that are associated with the education tables:

- SCHOOL_TYPE
- SCHOOL_CODE
- MAJOR_CODE
- FACULTY_CODE
- SUBFACULTY_CODE

The delivered PERSON profile type is configured to enable you to record employees’ education information. The Education tab in this profile type has content sections for School Education, Degrees and Areas of Study that use the information in the education tables.

See Also

Appendix A, “Content Type and Profile Type Properties,” Profile Type Properties, page 187

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Pages Used to Define School Information

Page Name	Object Name	Navigation	Usage
School Type Table	SCHOOL_TYPE_TBL	Set Up HRMS, Common Definitions, School Information, School Types, School Type Table	Set up codes for the types of schools that employees might have attended, for example, high schools, universities, or professional schools.
School Table	SCHOOL_TABLE	Set Up HRMS, Common Definitions, School Information, Schools, School Table	Define codes for specific schools. The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.
Major Table	MAJOR_TABLE	Set Up HRMS, Common Definitions, School Information, Majors, Major Table	Define codes for areas of study most commonly associated with school degrees or certificates.
Faculty Table JPN	FACULTY_TABLE_JPN	Set Up HRMS, Common Definitions, School Information, Faculty Table JPN, Faculty Table JPN	(JPN). Define faculties and associate sub-faculties and a major category with them.

Tracking Schools

Access the School Table page.



School Table page

Country Select the country code for the school. The Country codes are stored in the Country Table. Depending on the country that you select, the system displays an associated field (State, Province, or County) for defining the area of the country in which the school is located.

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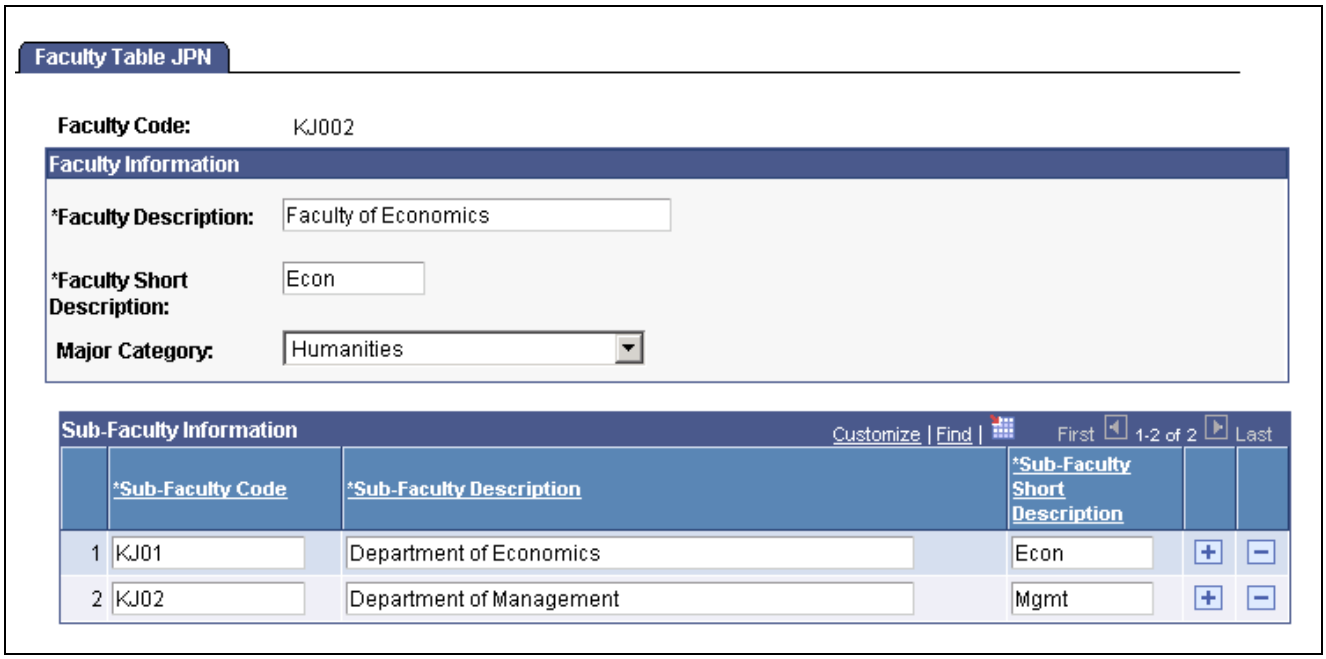
Public, Private Select to indicate whether the school is a public school or privately-funded.

(AUS) Australia

Institute Type Select an institute type for an Australian school.

(JPN) Defining Faculty Information

Access the Faculty Table JPN page.



Faculty Table JPN page

Major Category Select a major category value.

The value that you select here is the default major category wherever you select this faculty on a profile. You can also override the default.

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

Defining Instance Qualifiers

This section provides an overview of instance qualifiers and discusses how to set up instance qualifiers.

Understanding Instance Qualifiers

Instance qualifiers are an optional element of profile types, used to identify individual instances (rows) of a profile item.

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Use the Instance Qualifiers component (JPM_JP_INST_QUAL) to define your instance qualifier sets. Define instance qualifiers in one of two ways:

- Entering the value of each instance qualifier.

  When you define instance qualifiers in this way you can also specify those that employees and managers can view using self-service. This is useful if, for example, you don't want employees to view ratings given by peers, or you want to prevent employees and managers from viewing evaluations made by an executive committee.

- By selecting a record in the database.

  For example, if you specify the PERSON_NAME record, the person ID is the instance qualifier.

Once you have set up instance qualifier sets you link them to content sections in the profile type. When users add a content item or update an item in a section that includes instance qualifiers, they select the instance qualifier that is inserted in that row. You can link a content section with up to two instance qualifier sets.

Note. The instance qualifier properties must be included in the content section definition in order for users to be able to select an instance qualifier when they add or update profile items.

These are the properties for instance qualifiers:

- JPM_CAT_ITEM_QUAL (instance qualifier 1).

  The instance qualifier 1 field can only be associated with instance qualifier sets where you define each value.

- JPM_CAT_ITEM_QUAL2 (instance qualifier 2).

  The instance qualifier 2 field can only be associated with instance qualifier sets defined by a record.

The delivered PERSON profile type includes two content sections, Competencies and NVQs, that are configured to use instance qualifiers. This table lists the instance qualifier fields, the field name, and the instance qualifier sets for the Competencies section:

Field	Field Label	Instance Qualifier Set
JPM_CAT_ITEM_QUAL	Evaluation Type	EVAL_TYPE
JPM_CAT_ITEM_QUAL2	Reviewer ID	REVIEWER_ID

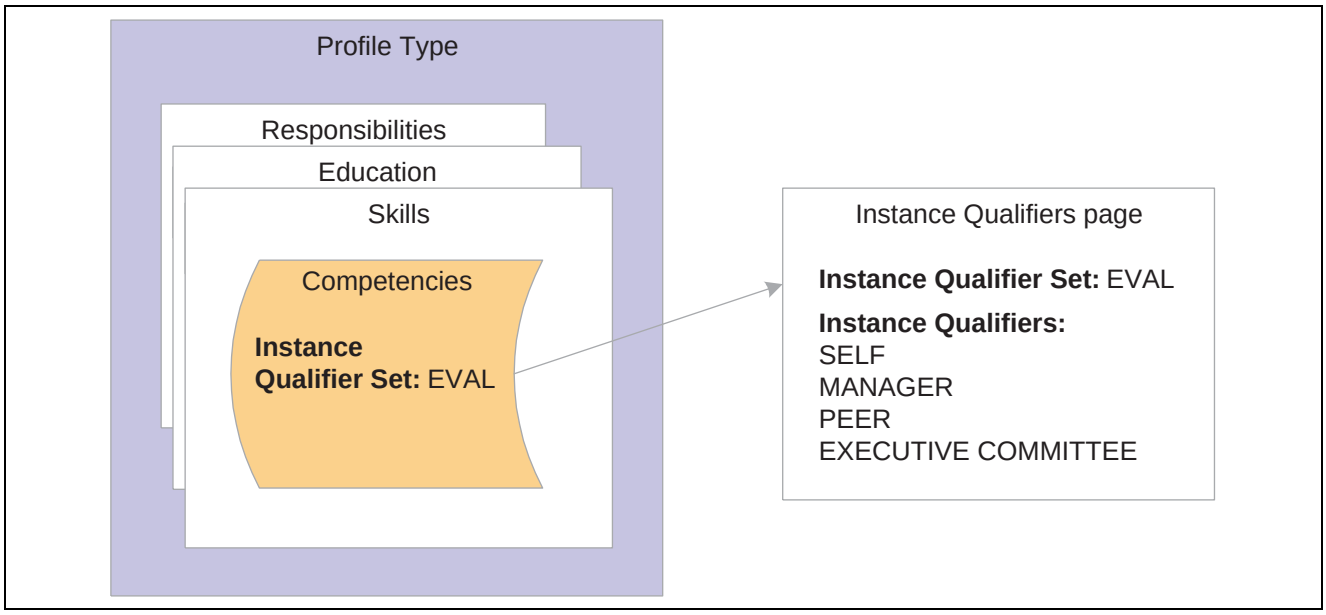
This lists the instance qualifier fields, the field name, and the instance qualifier sets for the NVQ section:

Field	Field Label	Instance Qualifier Set
JPM_CAT_ITEM_QUAL	Review Type	REVIEW_TYPE
JPM_CAT_ITEM_QUAL2	Reviewer ID	NVQ_REVIEWER

Example: Using Instance Qualifiers

This diagram illustrates how a section within a profile can be linked to a set of instance qualifiers:

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Example Instance Qualifiers

In this example, the tab called Skills contains a content section for the COMPETENCY content type, and this section is linked to a set of instance qualifiers called EVAL.

Suppose that an employee creates a profile, and he or she adds the competencies Abstract Thinking and Analytical Thinking to the profile, and enters a rating, the system creates two profile items with the following information:

Profile Item	Effective Date	Rating	Instance Qualifier
Abstract Thinking	April 16, 2006	3 (Good)	SELF
Analytical Thinking	April 16, 2006	5 (Expert)	SELF

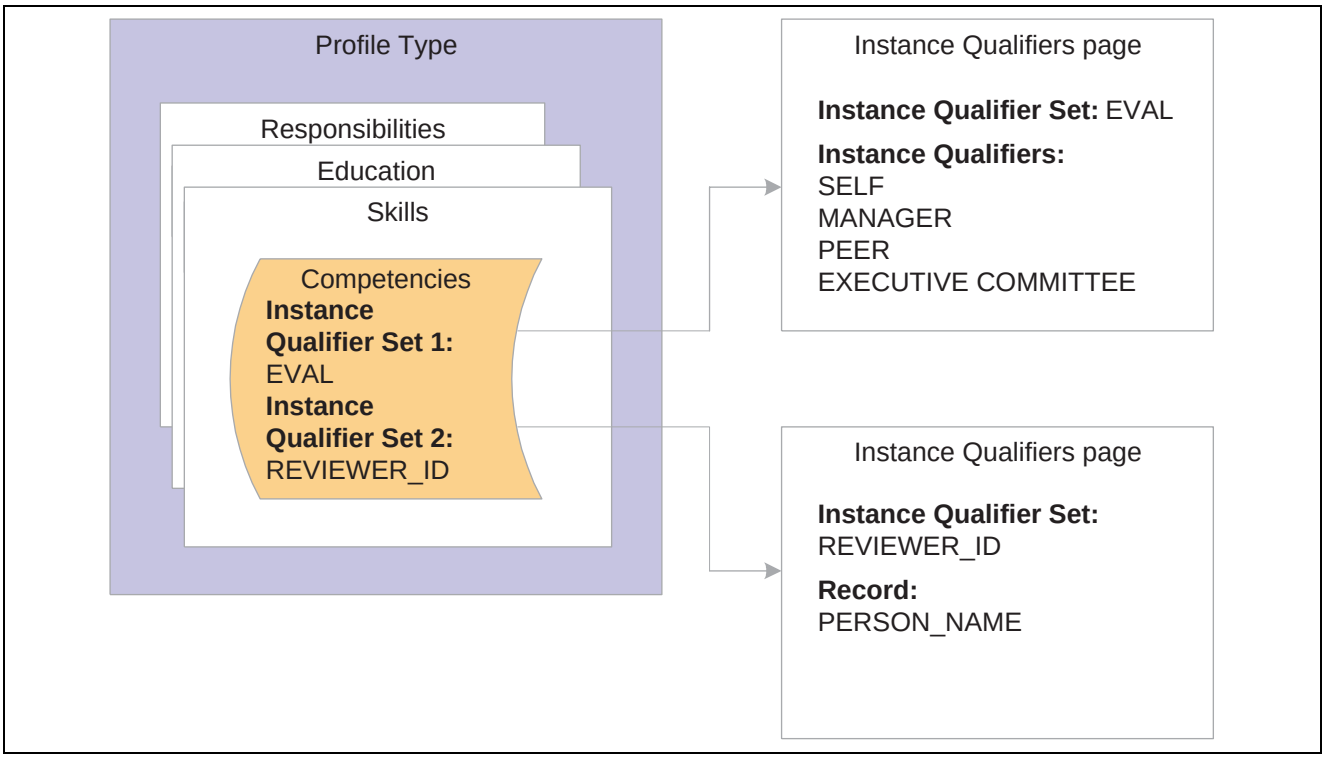
If the manager reviews the employee's profile and adds a rating for the competencies, the profile now contains these rows for the profile items:

Profile Item	Effective Date	Rating	Instance Qualifier
Abstract Thinking	April 16, 2006	3 (Good)	SELF
Abstract Thinking	April 16, 2006	4 (Very Good)	MANAGER
Analytical Thinking	April 16, 2006	5 (Expert)	SELF
Analytical Thinking	April 16, 2006	4 (Very Good)	MANAGER

Example: Using Two Instance Qualifier Sets

You can link a content section with up to two instance qualifier sets. Using the previous example, suppose that the Competencies section is linked to the EVAL instance qualifier set and a second instance qualifier set that is linked to the PERSON_NAME record, as illustrated in this diagram:

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Example Using Two Instance Qualifier Sets

Using two qualifier sets you can uniquely identify rows that have the same instance qualifier 1. For example, if a person is evaluated by a committee you can use the instance qualifiers to record the ratings given by each member of the committee. This table shows the rows created for each committee member's evaluation of the same profile item:

Profile Item	Effective Date	Rating	Instance Qualifier 1	Instance Qualifier 2
Abstract Thinking	May 14, 2006	3 (Good)	EXECUTIVE COMMITTEE	KU0045
Abstract Thinking	May 14, 2006	5 (Expert)	EXECUTIVE COMMITTEE	KU0016
Abstract Thinking	May 14, 2006	4 (Very Good)	EXECUTIVE COMMITTEE	KU0119

Understanding Instance Qualifier Integration

Applications that publish data to Manage Profiles can use instance qualifiers. In ePerformance, when you define a document template, you can specify the instance qualifier to use for each role that participates in a performance or development document. When users complete the document, the system updates the person profile data in Manage Profile using the instance qualifier specified.

In PeopleSoft Enterprise Learning Management, you can also specify the instance qualifier that the system uses when publishing profile data to PeopleSoft Enterprise HRMS. When learners complete learning objectives that came from HRMS, the system marks the objective as *Met* and publishes profile data to HRMS, using the specified instance qualifier value.

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See Also

PeopleSoft Enterprise ePerformance 9.0 PeopleBook, "Setting Up Document Templates," Defining Sections

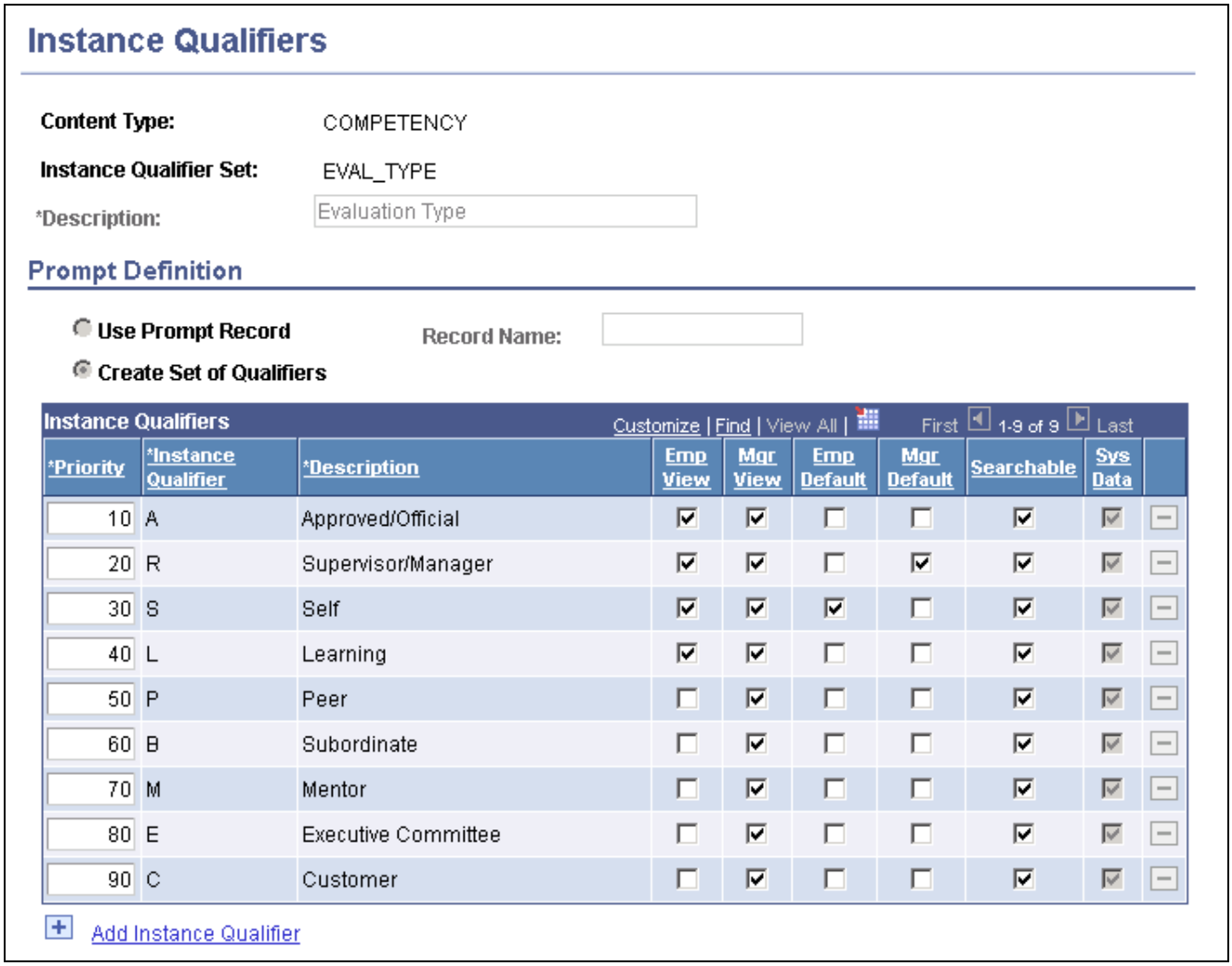
PeopleSoft Enterprise Learning Management 9.0 PeopleBook

Page Used to Define Instance Qualifiers

Page Name	Object Name	Navigation	Usage
Instance Qualifiers	JPM_JP_INST_QUAL	Set Up HRMS, Product Related, Profile Management, Profiles, Instance Qualifiers, Instance Qualifiers	Define instance qualifiers for a content type, and define which instance qualifiers employees and managers can view.

Setting Up Instance Qualifiers

Access the Instance Qualifiers page.



Instance Qualifiers page

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Prompt Definition

Select *Use Prompt Record* to use a record in the database as the instance qualifiers. For example, you might use the PERSON_NAME record as the instance qualifier. The system makes the Record Name field available and hides the Instance Qualifiers scroll area. When you define a content section in a profile type, instance qualifiers that use a prompt record can be associated with the Instance Qualifier 2 field only. You can't specify instance qualifiers that use prompt record in the Instance Qualifier 1 field.

Select *Create Set of Qualifiers* to create a new set of instance qualifiers in the Instance Qualifiers scroll area. Instance qualifiers of this type can be associated with the Instance Qualifier 1 field on the Content Section page; they can't be specified in the Instance Qualifier 2 field.

Record Name

Select the record that contains the instance qualifiers. This field is available only if you select *Use Prompt Record.*

Priority

Enter a number that indicates the priority of the instance qualifier. The priority increases as the number decreases, so that the instance qualifier with the lowest number is considered the highest priority. The priority value determines the order in which instance qualifiers are displayed. This field is also used by the Maintain Profile Indexes process (JPM_BLD_INDX) that builds the Verity indexes used by the search and compare profiles feature. The process uses the priority value to determine which profile item row is included in the index. The process includes the row that has the instance qualifier with the highest priority.

See Chapter 4, "Setting Up Search and Compare Profiles," Building the Search Indexes, page 78.

Instance Qualifier

Enter the instance qualifier code and enter a description in the Description field.

Emp View (employee view)

Select this check box to enable employees to view rows in a profile that are assigned the selected instance qualifier.

Mgr View (manager view)

Select this check box to enable managers to view rows in a profile that are assigned the selected instance qualifier.

Emp Default (employee default)

Select this check box to specify the instance qualifier that is automatically used in the employee self-service transactions. If you select a check box in this column, when employees add or update rows in self-service, the system inserts the selected instance qualifier and employees cannot change the instance qualifier.

Mgr Default (manager default)

Select this check box to specify the instance qualifier that is automatically used in the manager self-service transactions. If you select a check box in this column, when managers add or update rows in self-service, the system inserts the selected instance qualifier and managers cannot change the instance qualifier.

Searchable

Select this check box if you want profile items with the selected instance qualifier to be included in the Verity indexes. The Maintain Profile Indexes process (JPM_BLD_INDX) uses this field to determine which profile item rows are included in the Verity indexes that are used by the Search and Compare Profiles feature.

If the Searchable check box is not selected, any profile item rows that are assigned the selected instance qualifier are always excluded from the Verity index.

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Setting up Profile Identity and Association Options

To set up profile identity options and profile association options for your organization, use the Profile Identity Options component (JPM_RLAT_SETUP) and the Profile Association Options component (JPM_RLAT_ASC_SETUP). This section discusses how to:

- Define profile identity options.
- Enable profile association options.

Common Elements Used in This Section

Identity Option Enter the name of the entity to which you can link a profile. For the delivered identity and association options, this field is display-only.

Identity options are entities within the Profile Management business process, such as job code or position, whereas association options are entities external to the Profile Management business process. One association option is delivered that enables you to associate a profile type to an ePerformance template.

Enabled Select this check box to allow profile types to be linked to the entity specified in the Identity Option field.

If this check box is cleared, you can't set up a profile type for this entity. For example, if you clear the check box for the Job Sub Function option, you can't define a profile type using the job sub function identity option.

Record Name Select the record that defines the entity specified in the Identity Option field. This field is display-only for identity options that are delivered as system data (Sys Data check box is selected).

Key 1 Field Name Displays the key field for the record selected in Record Name.

Key 2 Field Name, Key 3 Field Name, Key 4 Field Name Displays the additional key fields for the record. These fields are hidden if the record has one key field only.

SetID Indicates if SetID is a key field for the selected record. The system automatically selects this check box based on the record definition and makes the field display-only.

Eff Date (effective date) Indicates if the effective date field is a key field for the selected record. The system automatically selects this check box based on the record definition and makes the field display-only.

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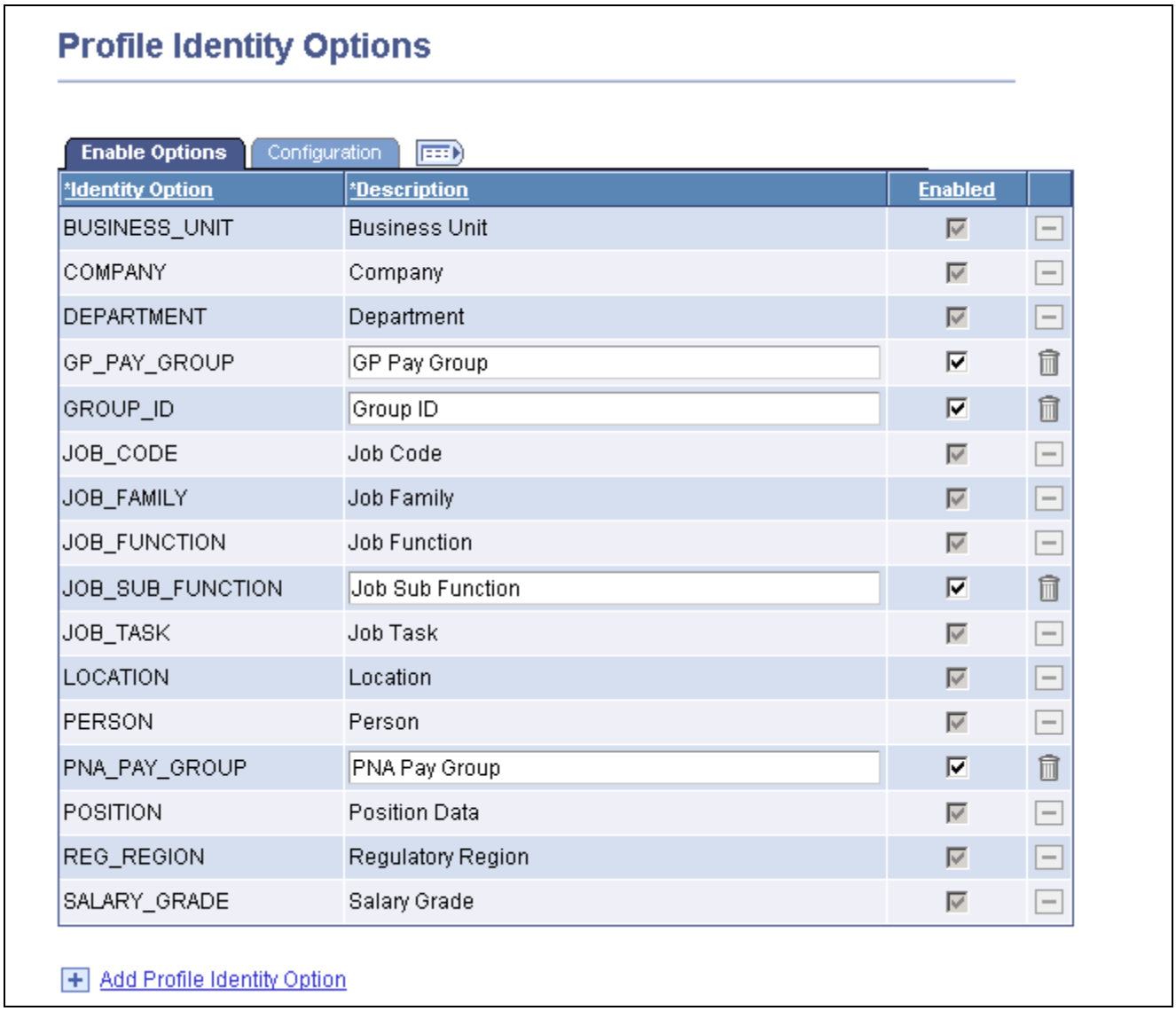
Pages Used to Define Profile Identity and Association Options

Page Name	Object Name	Navigation	Usage
Profile Identity Options	JPM_RLAT_SETUP	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Identity Options	Define the entities to which you can link profile types. Entities include job codes, job functions, job families, people, and salary grades. The entities enabled on this page determine which options are available on the Identities page of the Profile Type component. For example, if you enable Job Codes you can set up a profile type that is linked to job code. A set of default profile identity options is delivered but you can delete options and add to the list according to your requirements.
Profile Association Options	JPM_RLAT_SETUP	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Association Options	Define the entities external to the Manage Profiles business process to which you can link profile types. One association option is delivered that enables you to link a profile type to ePerformance templates. You can add other associations according to your requirements.

Defining Profile Identity Options

Access the Profile Identity Options page.

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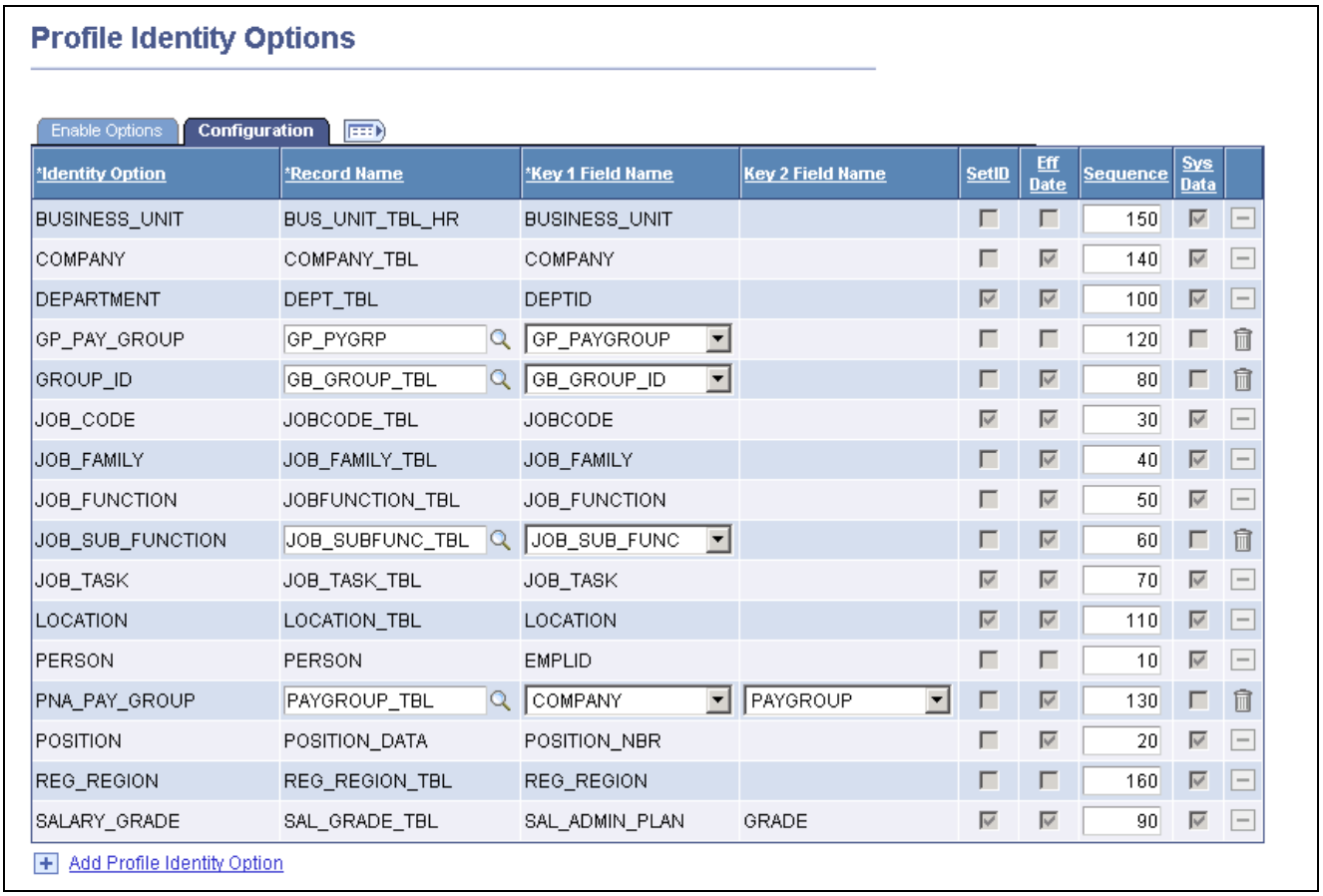
Profile Identity Options page: Enable Options tab

Add Profile Identity Option Click this link to add a new profile identity option.

Configuration

Access the Configuration tab.

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Profile Identity Options page: Configuration tab

Sequence Enter the number that determines the order in which non-person profiles related to a person's job are listed. The system uses the sequence value as follows:

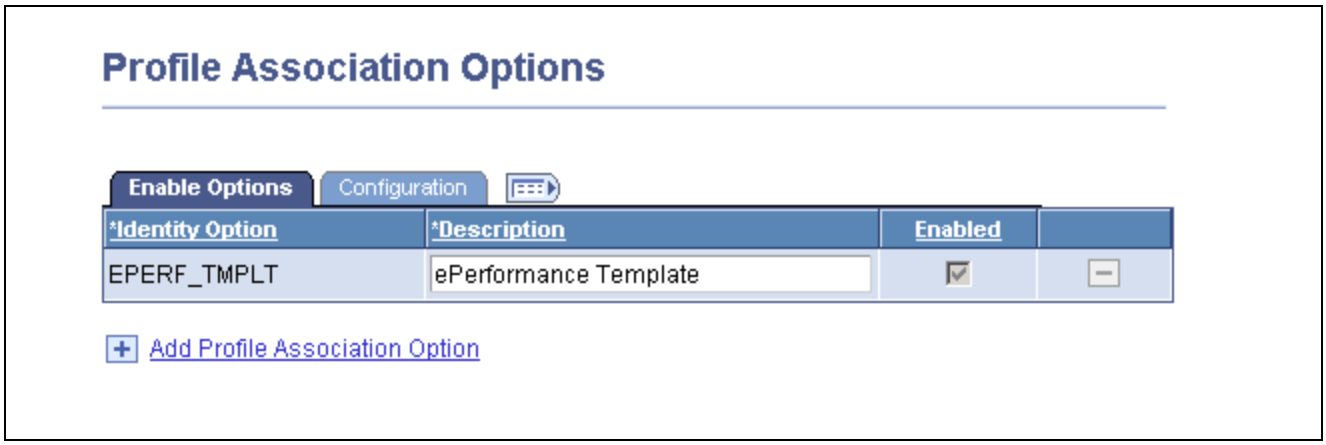
- On the Person Profile page, when you select *View Related Job Profiles* in the Profile Actions field, the system uses the sequence values to define the order in which the related profiles are listed. Profiles with the lowest sequence number are displayed first.
- In eDevelopment, when employees select My Job Profiles, the system uses the sequence values to define the order in which the related profiles are listed. Profiles with the lowest sequence number are displayed first.
- In ePerformance when you are creating a document for an employee, the system retrieves all matching job profiles for an employee, and then copies content from the profile with the highest priority (lowest sequence value).

See Chapter 3, "Setting Up Profile Management," Common Elements Used in This Section, page 50.

Enabling Profile Associations

Access the Profile Association Options page.

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Profile Association Options page: Enable Options tab

Add Profile Association Option Click this link to add a new profile association option.

See Chapter 3, "Setting Up Profile Management," Common Elements Used in This Section, page 50.

Setting Up Profile Types

Use the Profile Types component (JPM_JP_TYPES) to set up profile types. This section discusses how to:

- Set up profile type attributes.
- Define profile type identities.
- Define profile type content.
- Select content types.
- Define content sections.
- Set up profile type associations.

Pages Used to Set Up Profile Types

Page Name	Object Name	Navigation	Usage
Profile Types — Attributes	JPM_JP_TYPE_ATTRIB	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Attributes	Define basic details of the profile type. If the profile type is associated with approvals workflow, specify the transaction and the approval definition on this page.

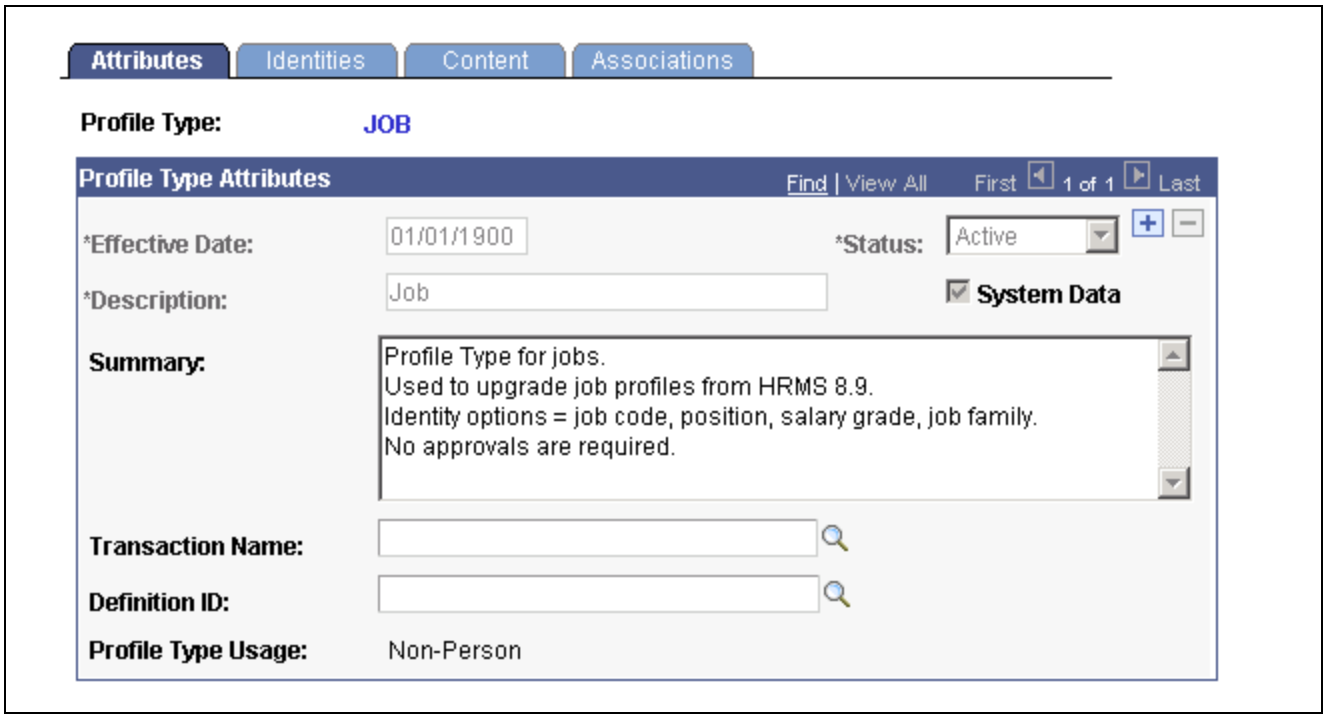
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Page Name	Object Name	Navigation	Usage
Profile Types — Identities	JPM_JP_TYPE_IDENT	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Identities	Select the identity options to which the profile type is linked. Identity options are entities such as a job code, position number, or person. When users create profiles based on a profile type, they can only create profiles for the entities that are defined on this page. Active profile types must be have at least one identity option. Define the identity options available on the Profile Identity Options page.
Profile Types — Content	JPM_JP_TYPE_CONT	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Content	Define the content of the profile type. The content of a profile is divided into tabs and each tab comprises one or more sections. Use the Content page to set up the tabs in the profile, and add content types to each tab.
Add Content Section	JPM_JP_ADD_CNT_SEC	• Click the Add Content Section link on the Content page. • Click the Add Sub-section link on the Content page.	Lists the content types available to add to the profile type. Select the content type you want to add and the system displays the Content Section page.
Content Section	JPM_JP_CONTENT_SEC	• Select a content type on the Add Content Section page. • Click the section name link on the Content page.	Define the properties (fields) that appear in a content section and the attributes of those properties. You also use this page to define the users that can access the content section when creating or updating profiles.
Profile Type — Associations	JPM_JP_TYPE_ASSOC	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Types, Associations	Select the associations to which the profile type is linked. Associations are entities external to the Profile Management business process. Define the association options available on the Profile Association Options page.

Setting Up Profile Type Attributes

Access the Profile Types — Attributes page.

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Profile Types — Attributes page

Summary Enter a brief description of the profile type.

Transaction Name Select the approvals workflow transaction associated with the profile type. You must complete this field if any of the content sections in the profile type has the Approval Required check box selected or the Approval Req'd for Identities check box on the Profile Type — Identities page is selected.

See Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 60.

Definition ID Select the approvals definition for the profile type. If you leave this field blank, the system uses the default approval definition ID for the approval process ID specified in the Transaction Name field.

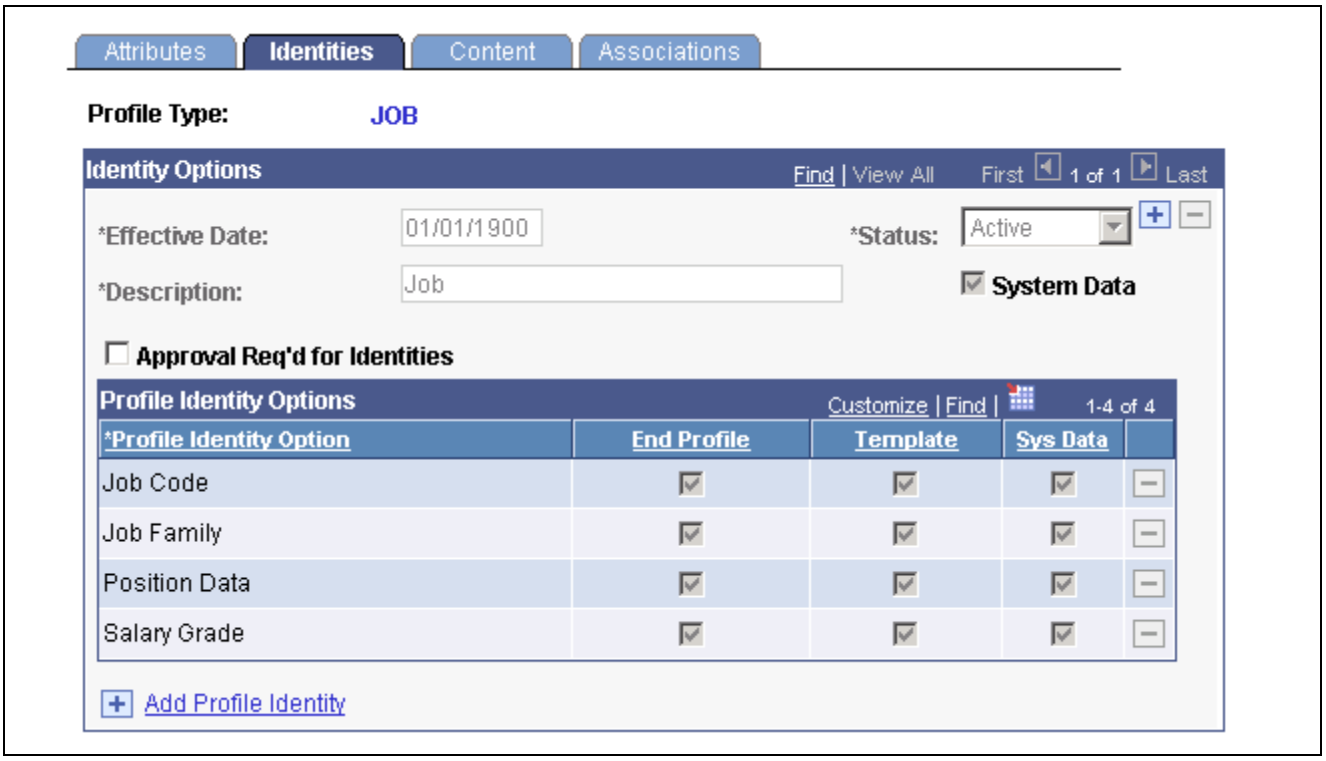
If multiple approval definition IDs exist, the approval framework will decide which approval definition ID to use, based on the criteria and priority configured on the Approval Process Definition component. For the definition IDs used for Manage Profiles approvals processing, the default definition has a priority of 1 and the non-default definitions have a priority of 9.

Profile Type Usage Displays the usage value: *Person* or *Non-Person*. The usage is determined by the Profile Identity Options selected on the Identities page. If the profile type is linked to a record that has EMPLID as a key field, the Profile Type Usage field is *Person*. Otherwise, the usage is *Non-Person*.

Defining Profile Type Identities

Access the Profile Types — Identities page.

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Profile Types — Identities page

Approval Req'd for Identities (approval required for identities) Select this check box if approval is required for changes to the profile identities associated with profiles of this profile type. This check box is enabled when you select a non-person profile identity option.

Profile Identity Option Select one or more objects to which the profile type can be linked. The objects available are determined by the profile identity options enabled on the Profile Identity Options page.

Profile types must be linked to either person or non-person identity options. You cannot add both person and non-person identity options to a profile type. The system validates that there is only one active profile per identity within a given profile type.

See Chapter 3, "Setting Up Profile Management," Defining Profile Identity Options, page 51.

End Profile Select this check box if the profiles linked to the object specified in the Profile Identity Option field are end profiles. An end profile is a profile that is displayed in employee and manager self-service, and is used in search, match and browse.

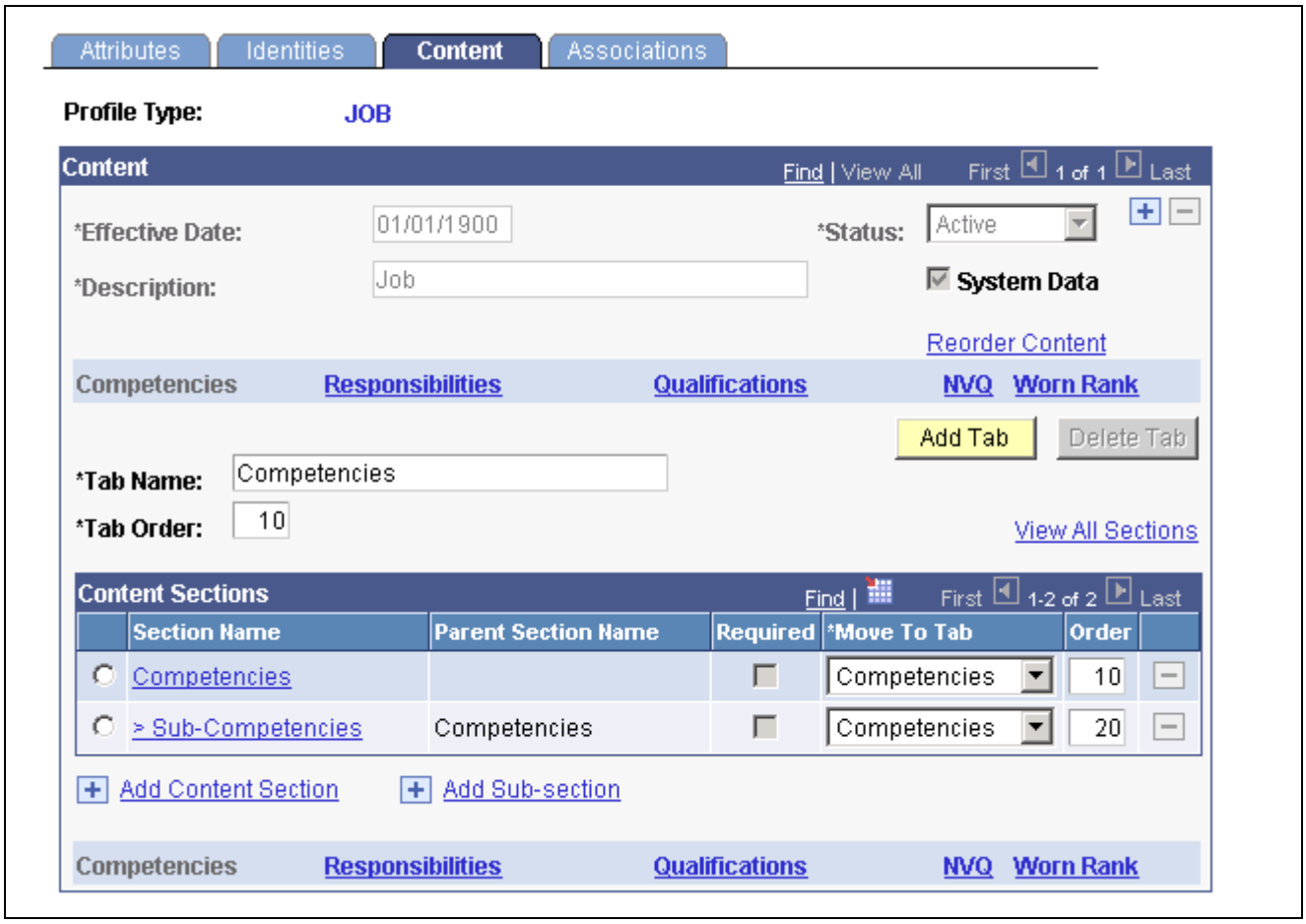
Template Select this check box if the profiles linked to the object specified in the Profile Identity Option field are template profiles. A template profile is a profile that is used to build other profiles.

Add Profile Identity Click to add another profile identity option to the page.

Defining Profile Type Content

Access the Profile Types — Content page.

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Profile Types — Content page

Use this page to define the content of a profile type. The content is divided into tabs that appear as links on the page as shown in the following example:



Example Tabs on the Profile Types — Content page

In this example, there are five tabs and the Competencies tab is the one currently selected. Click the tab name link to move to that tab.

The order in which the tabs are displayed is determined by the Tab Order field. Within each tab, you specify the content types in the Content Sections scroll area.

Reorder Content Click this link if you have changed the Tab Order or the section Order field. The system refreshes the page to show the new ordering of tabs or content sections.

Add Tab Click this button to add a new tab to the profile type.

Delete Tab Click this button to delete the selected tab.

Tab Name Enter a name for the tab. When users create a profile using this profile type, the tab name appears as a link in the profile. Therefore it is important to use meaningful names and not leave the default name of *Tab 1, Tab 2,* and so on.

Tab Order Enter a value to specify the order in which the tab is displayed.

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View All Sections Click this link to display the sections for all the tabs in the profile type. The system updates the Content Section group box to list the sections in all tabs, and hides the Tab Name and Tab Order fields.

Content Sections

This scroll area lists the sections in the selected tab. If you click the View All Sections link, the scroll area lists the sections for all the tabs in the profile type.

Section Name Click the section name to view and update details of the section or sub-section. The system displays the Content Section page.

Parent Section Name Displays the name of the parent section. This field is only populated for sub-sections.

Required Select this check box if the section is a required section of the profile. When users create a profile, the system uses this check box to validate that required sections have at least one profile item.

Move to Tab If you want to move a section to a different tab, select the tab from the list and click the Reorder Content link.

Order Enter a value to specify the order in which the sections are displayed within the tab in the profile.

Add Content Section Click this link to add a new section to the Content Sections scroll area. The system displays the Add Content Section page that lists all the content types available. Content types are defined using the Content Types component.

See Chapter 2, "Setting Up the Content Catalog," Setting Up Content Types, page 16.

Add Sub-Section Select the section that you want to create a sub-section for, and click this link. Use sub-sections to add content types that are related to the content type of an existing section.

Relationships between content types are defined on the Relationship Rules page in the Content Types component

See Chapter 2, "Setting Up the Content Catalog," Defining Content Type Relationship Rules, page 20.

For example, if you add a Competencies section to a tab, you can add the Element or Sub Competencies content type as sub-sections because these content types are related to the competencies type.

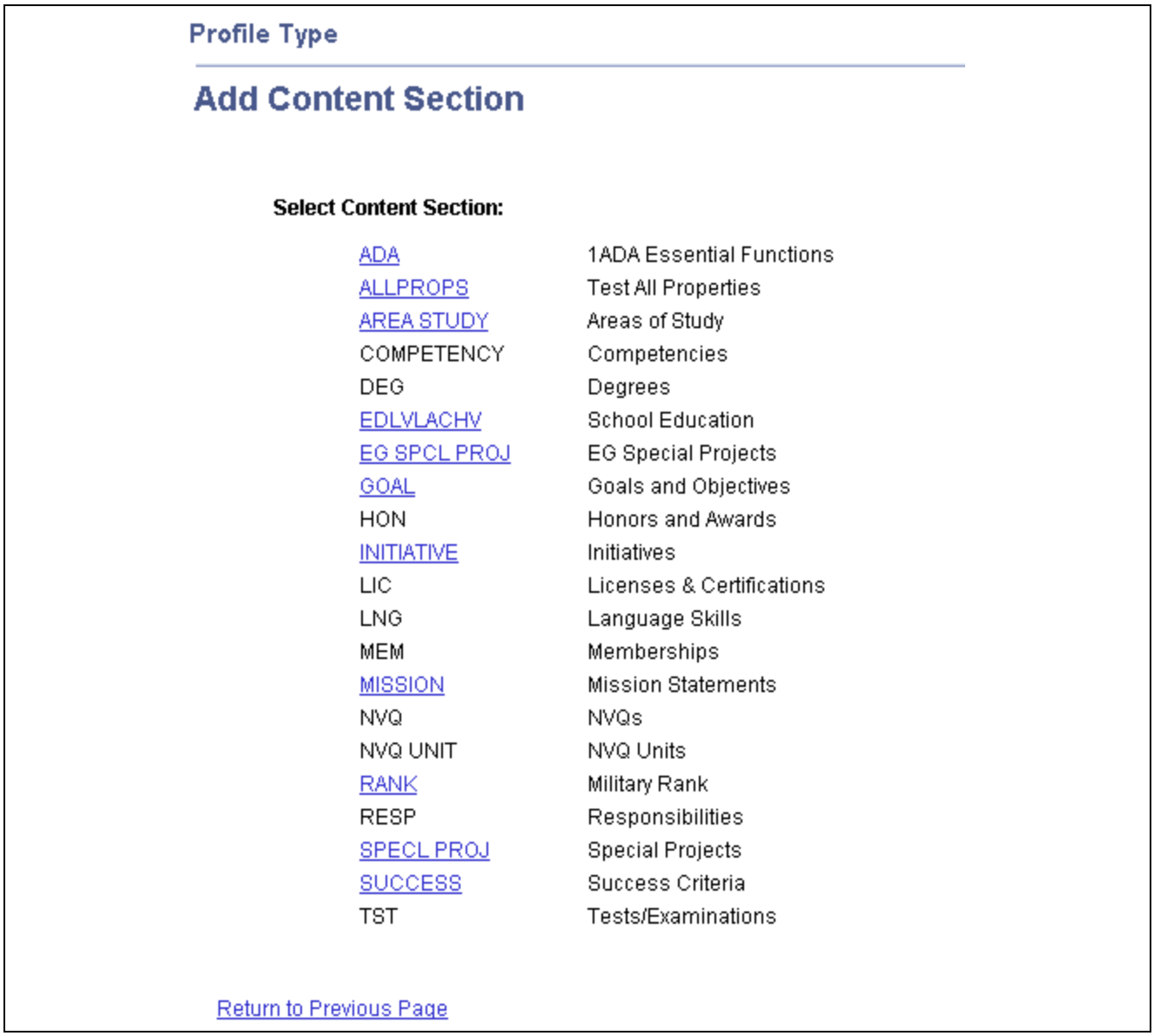
When you click this link the system displays the Add Content Section page, which lists the content types that are defined as any of the following:

- A child of the content type of the parent section.
- Required by the content type of the parent section.
- Supports the content type of the parent section.

Selecting Content Types

Access the Add Content Section page.

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Add Content Section page

This page lists the content types that you can add to the profile type. Those content types that are already included in the profile type are shown in normal text and do not have a link.

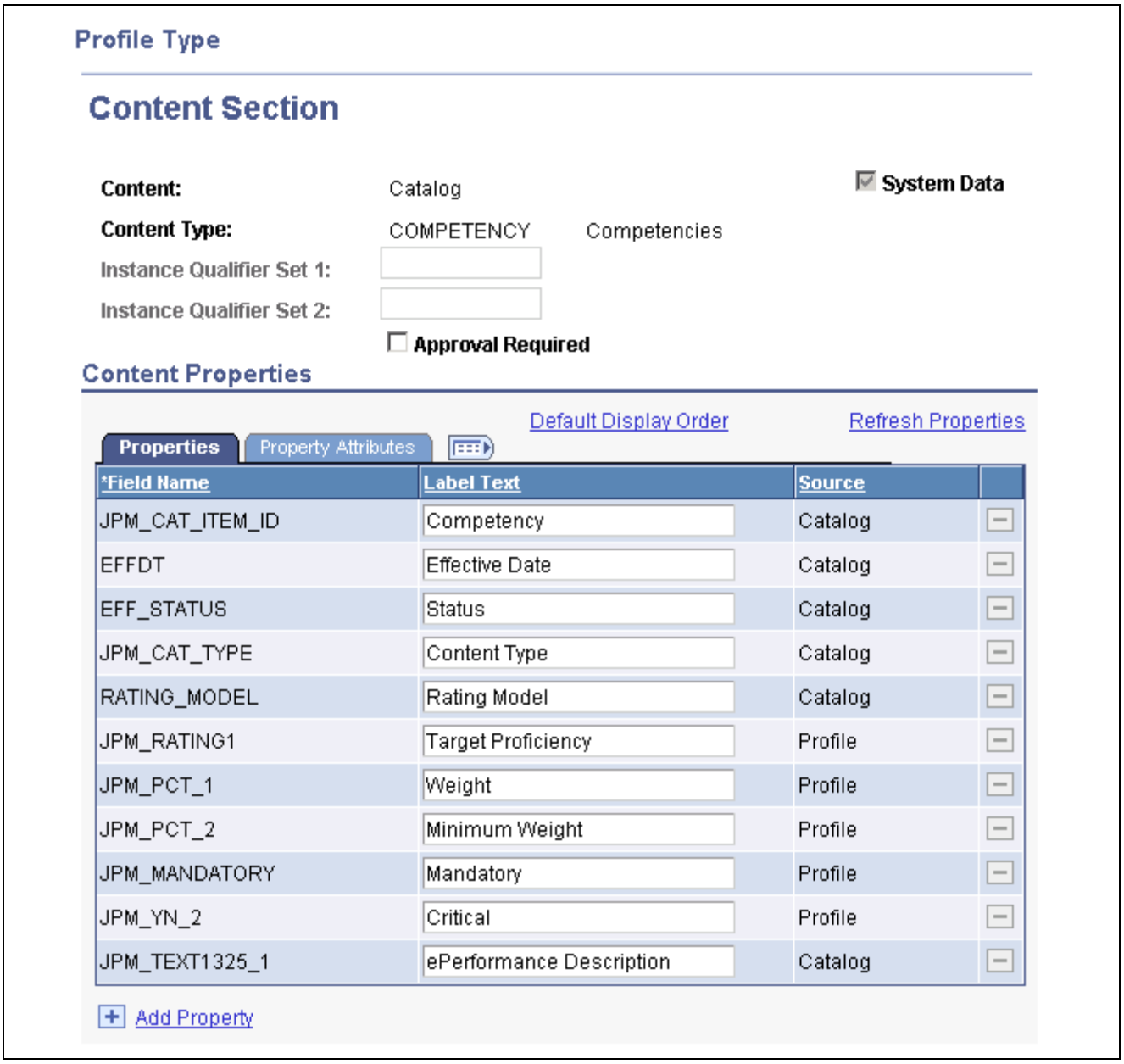
If you are adding a sub-section, the system displays the content types that have a subordinate relationship with the content type of the parent section. See the previous section for details.

Click the link for the content type that you want to add, or click the Return to Previous Page link to cancel the addition.

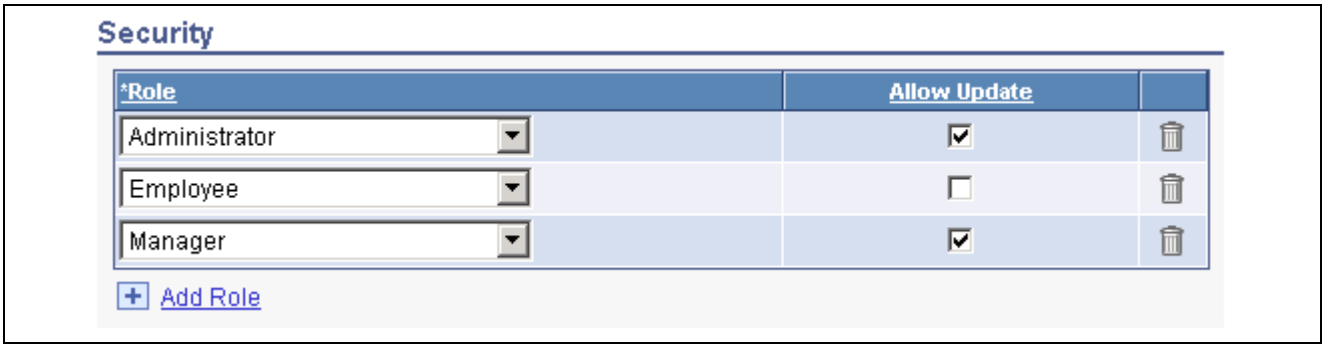
Defining Content Sections

Access the Content Section page.

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Content Section page (1 of 2)



Content Section page (2 of 2)

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Instance Qualifier Set 1 (Optional). Select the instance qualifier set that you want to use with this section. You can only select instance qualifiers that are associated with the content type of the section and are defined as sets of values. You cannot select instance qualifier sets that are based on prompt records. Define instance qualifiers using the Instance Qualifiers page.

See Chapter 3, "Setting Up Profile Management," Defining Instance Qualifiers, page 44.

Instance Qualifier Set 2 (Optional). If you want to use two different instance qualifier sets with the section, select the second instance qualifier set in this field. You can only select instance qualifiers that are based on prompt records.

Add/Delete Unrelated Items Select this check box to enable users to add related items to profiles, even if there isn't a a relationship defined at the content item level. This check box appears if the content section you are defining is related to an existing content section.

For example, if you create a content section for competencies and then add a sub-section for sub-competencies, this check box is displayed for the sub-competencies content section. In this example, if you select the check box, users could add any sub-competency to the profile.

However, if the check box is not selected, users can only add a sub-competency if it is related to a competency on the profile. Relationships between content items are defined on the Content Items — Relationship page.

Approval Required Select this check box if approval is required to add, remove, or update profile items.

Content Properties

If you are setting up a content section, this group box lists the properties defined for the content type in the content catalog. You can add other properties as required.

Note. If the content type is a free form content type, only one property, a description field, JPM_ADHOC_DESCR, is included. You need to add all other properties that are required.

Default Display Order Click this link to list the properties in the order that they will appear in the profile. The ordering of properties is defined by the system.

See Appendix A, "Content Type and Profile Type Properties," Profile Type Properties, page 187.

Refresh Properties Click this link to update the list of properties based on the current content type definition. The system compares the content type definition with the properties that have a property source *Catalog,* and updates the list of properties and the property attributes accordingly. This enables you to synchronize the content section with the content type definition in the content catalog.

When you create content sections for a profile type, the system uses the content type definitions that are current on the date that you add the content types. If you later add or delete properties, or change the property attributes of those content types, the content sections in the profile type are not automatically updated to match this revised definition. The Refresh Properties link enables you to update the content section as required.

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Field Name Displays the name of the field if the property is part of the content type definition.

If you are adding a new property, select the field name from the available options.

See Chapter 2, "Setting Up the Content Catalog," Understanding Content Type Properties, page 16.

See Appendix A, "Content Type and Profile Type Properties," Profile Type Properties, page 187.

Label Text Displays the label specified for the field if the property is part of the content type definition. If you are adding a new property, enter the text that you want to appear for this field on the profile pages.

Note. We strongly recommend that choose a meaningful label for the property so that users clearly understand what kind of information to enter in the field when they create profiles.

Source Displays the source of the property:

Catalog: If the property is included in the content catalog definition of the content type.

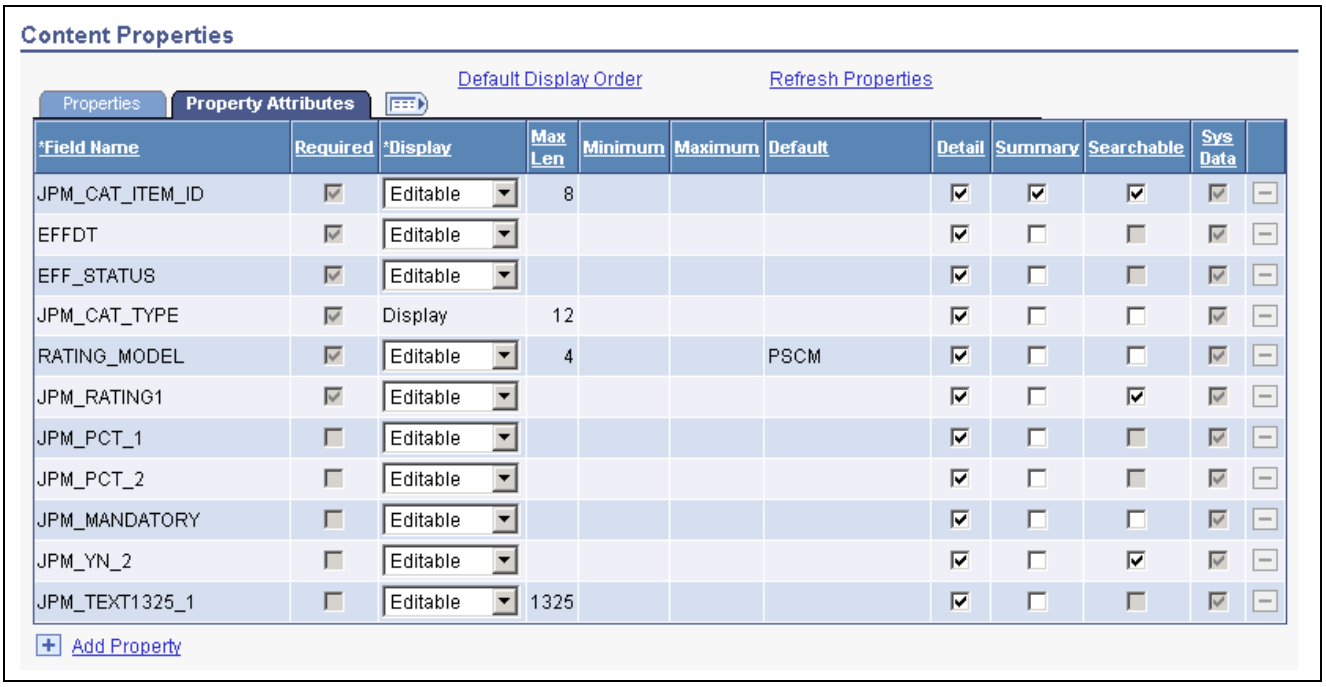
Profile: If you added the property to the content section from this page.

Add Property Click this link to add a property to the section.

See Appendix A, "Content Type and Profile Type Properties," Profile Type Properties, page 187.

Property Attributes

Access the Property Attributes tab.



Content Section page: Property Attributes tab

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Required Select to make a property required when creating a profile using this profile type. If the check box is selected, users must complete the field when they set up a profile. If the property source is *Catalog,* the setting of this check box is inherited from the content type definition and you cannot change it.

Display Select whether the property should be available for entry (*Editable*), unavailable for entry (*Display*), or hidden (*Hidden*) on the profile pages. When you select *Display* or *Hidden*, the system populates the property with the value you enter in the Default Value field. If you select *Editable,* the system populates the default value at the profile, but users can override that value.

Max Len (maximum length) This field applies to character properties only. If the property source is *Catalog,* the system displays the field length defined in the content catalog. If you added the property to the profile type, enter the field length of this property.

Minimum, Maximum These fields apply to numeric properties only. Displays the minimum and maximum values for numeric properties defined in the content catalog. If you added the property to the profile type, enter the minimum and maximum values.

Default Displays the default value defined in the content catalog. If you added the property to the profile type, enter the default value. A default value must be provided if the field is defined as *Display* and the Required check box is selected.

Detail Select this check box if you want the field to appear on the details page for the content section.

Summary Select this check box to display the field on the summary page when creating or viewing a profile. Fields that are marked as summary automatically appear on the details page.

See Chapter 5, "Managing Profiles," page 87.

Searchable Select this check box if you want to include the property in the search index that is used by the search and compare profiles feature. The check box is display-only if the property is not searchable.

Note. The item ID (JPM_CAT_ITEM_ID) must be searchable if you make other properties in the content section searchable.

Security

The Security group box lists the roles that can access the content section when creating a profile.

Note. If you don't select a role, users can't create profiles using this profile type.

Role Select the role that you want to access the content section. There are three roles available:

Administrator: Administrators create profiles using the options in Workforce Development, Profile Management menu.

Employee: Employees create their own profiles using the options available in Self Service, Learning and Development.

Manager: Managers use the manager self-service transactions available in Manager Self Service, Learning and Development.

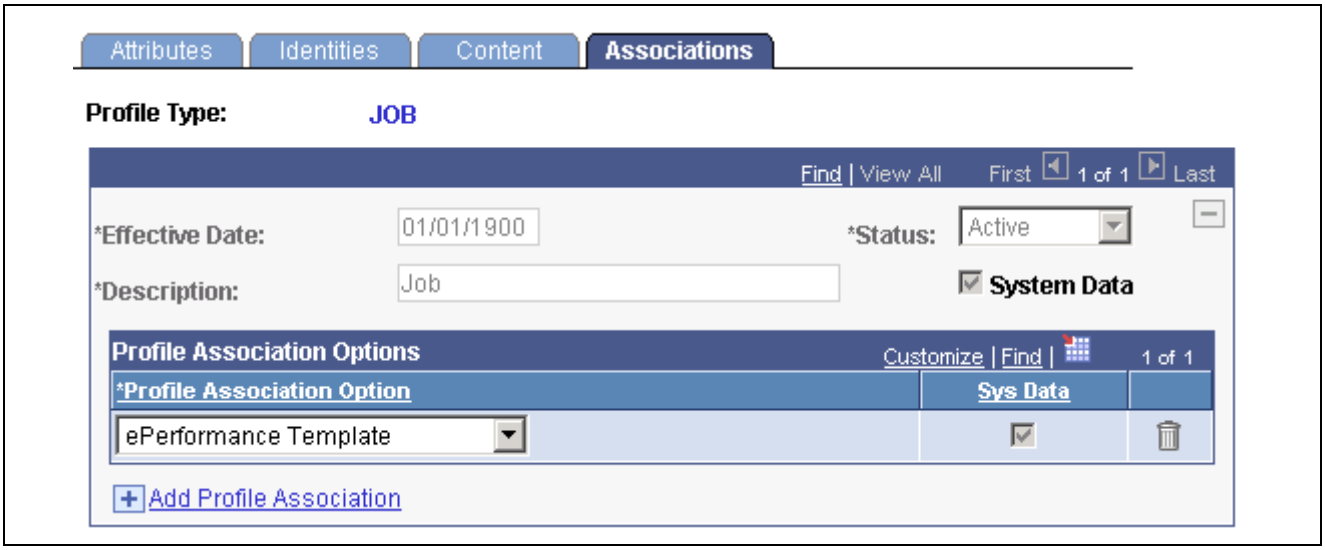
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Allow Update Select this check box to enable users with the specified role to update the content section within a profile. If this check box is left clear, users cannot add items to the content section in the profile.

Add Role Click this link to add another role to the list of roles that have access to the profile type.

Setting Up Profile Type Associations

Access the Profile Types — Associations page.



Profile Types — Associations page

Profile Association Option Select the object you want to link to the profile type. The objects available are determined by the profile association options enabled on the Profile Association Options page. The system allows multiple active profiles per association within a given profile type.

See Chapter 3, "Setting Up Profile Management," Enabling Profile Associations, page 53.

Add Profile Association Click this link to add another association to the profile type.

Creating Profile Group Types and Profile Groups

Use the Profile Group Types (JPM_JP_GTYPE_GRP) and Profile Groups (JPM_JP_GROUPS) components to set up profile groups. This section discusses how to:

- Create profile group types.
- Create profile groups.

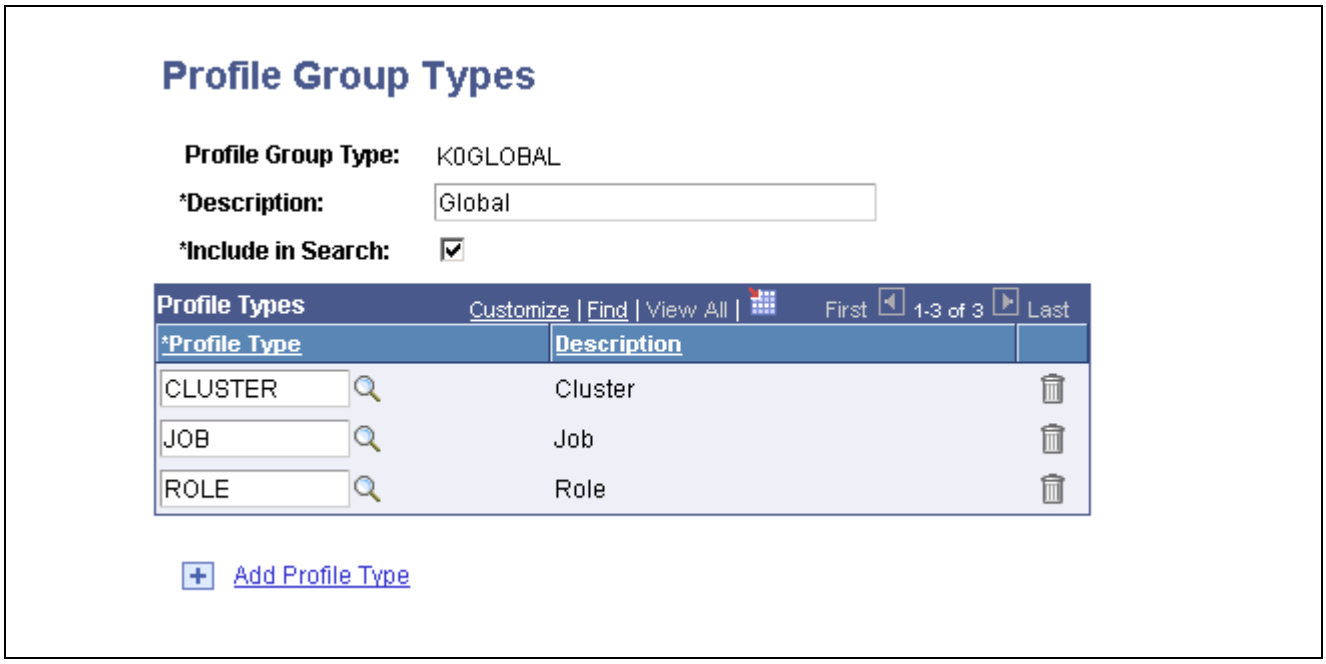
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Pages Used to Create Profile Group Types and Groups

Page Name	Object Name	Navigation	Usage
Profile Group Types	JPM_JP_GTYPE_GRP	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Group Types	Set up profile group types.
Profile Groups	JPM_JP_GROUPS	Set Up HRMS, Product Related, Profile Management, Profiles, Profile Groups	Set up profile groups.

Creating Profile Group Types

Access the Profile Group Types page.



Profile Group Types page

Include in Search Select this check box to include all profile groups within this profile group type in the search index.

Profile Type Select the profile type to add to the profile group type. Set up profile types using the Profile Types component.

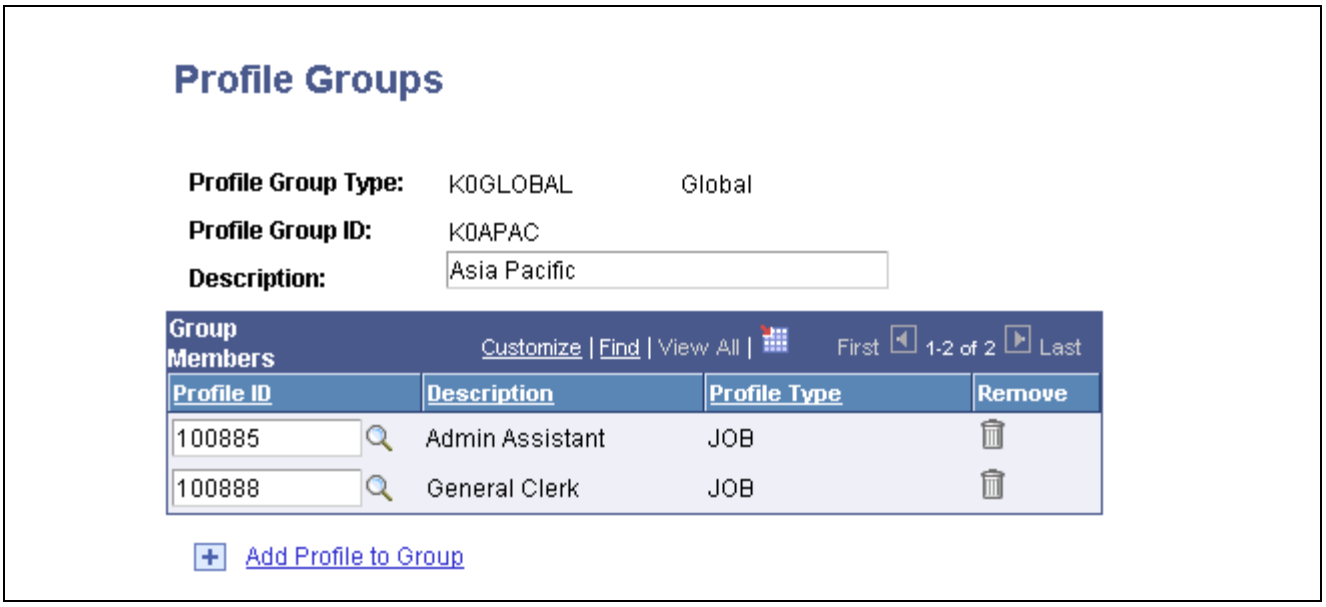
See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54.

Add Profile Type Click this link to add another profile type to the profile group type.

Creating Profile Groups

Access the Profile Groups page.

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Profile Groups page

Profile ID Select the profile that you want to add to the profile group. The system displays the profile description.

Add Profile to Group Click this link to add another profile to the group.

Setting Up to Use XML Publisher Reports and Profiles

This section provides an overview of XML Publisher reports and templates, lists prerequisites, and discusses how to:

- View delivered report templates.
- Modify an existing template.

Understanding XML Publisher Reports and Templates

Manage Profiles uses the PeopleTools XML Publisher (XMLP) to generate the Content Catalog Listing report as well as the online profiles and profile reports for person and non-person profiles.

Delivered Report Definitions

This table lists the delivered report definitions and data sources for the related RTF templates:

Report Name	Description	Data Source Type	Data Source ID
JPM_CATI_RPT	Content Items Reports	PS Query	JPM_CONTENT_ITEMS
JPM_JPNP_RPT	Non Person Profile Batch	XMLDoc	JPM_PROFILE
JPM_JPPP_RPT	Person Profile Batch	XMLDoc	JPM_PROFILE

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Report Name	Description	Data Source Type	Data Source ID
JPM_NP_PROF	Non Person Profile Online	XMLDoc	JPM_PROFILE
JPM_PP_PROF	Person Profile Online	XMLDoc	JPM_PROFILE

Delivered Data Sources

This table describes each of the delivered data sources:

Data Source ID	Description
JPM_CONTENT_ITEMS	PS Query that is used only for content items reports.
JPM_PROFILE	XML document structured by row sets. All profile reports use the same data structure. All data elements are included in the data structure and are available for both person and non-person profile report templates.

Delivered Templates

To format the reports, we deliver three template files that specify the content and layout:

- One template file for the Content Items reports.
- One template file for both the online and batch Person Profile reports.
- One template file for both the online and batch Non-Person Profile reports.

You can modify the delivered template files to address your specific reporting requirements. After modifying each template, you must upload it to the corresponding report definition. You can modify one instance of each of the profile reports and attach that same updated template file to both of the corresponding report definitions.

See Chapter 3, “Setting Up Profile Management,” Viewing Delivered Report Templates, page 69.

See Chapter 3, “Setting Up Profile Management,” Modifying an Existing Template, page 70.

Profile Report Nodes

This table describes the report nodes for profile reports:

Node	Data Elements Summary
JPM_PROFILE	High level data elements related to the profile.
JPM_IDENTITY_WK	Profile identities and associations.
JPM_JP_SECTION	Sections defined in the profile type.
JPM_JP_CRITM_VW	Profile content items in the sections in the profile. All properties are included whether the content type uses them or not.
JPM_CATITMAXD_VW	Definitions of the content items in the content catalog. All properties are included whether the content type uses them or not.
RUN_PARAMETERS	Criteria used to generate the report.

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See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Chapter 7, “Running Content Catalog and Profile Reports,” page 167

Chapter 5, “Managing Profiles,” page 87

Chapter 2, “Setting Up the Content Catalog,” page 9

Prerequisites

To use XML Publisher reports, you must configure PeopleSoft Integration Broker and PeopleSoft Process Scheduler to implement PeopleSoft Report Manager.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise

Pages Used to View and Modify XML Publisher Reports and Templates

Page Name	Object Name	Navigation	Usage
Definition	PSXPRPTDEFN	ReportingTools, XML Publisher, Report Definition, Definition	View the report properties and download or view the data schema and data source.
Template	PSXPRPTTMPL	ReportingTools, XML Publisher, Report Definition, Template	View or update the existing template.
Design Helper	PSXPSETUPDWNLD	ReportingTools, XML Publisher, Setup, Design Helper	Download plug-ins to facilitate template design and modification.

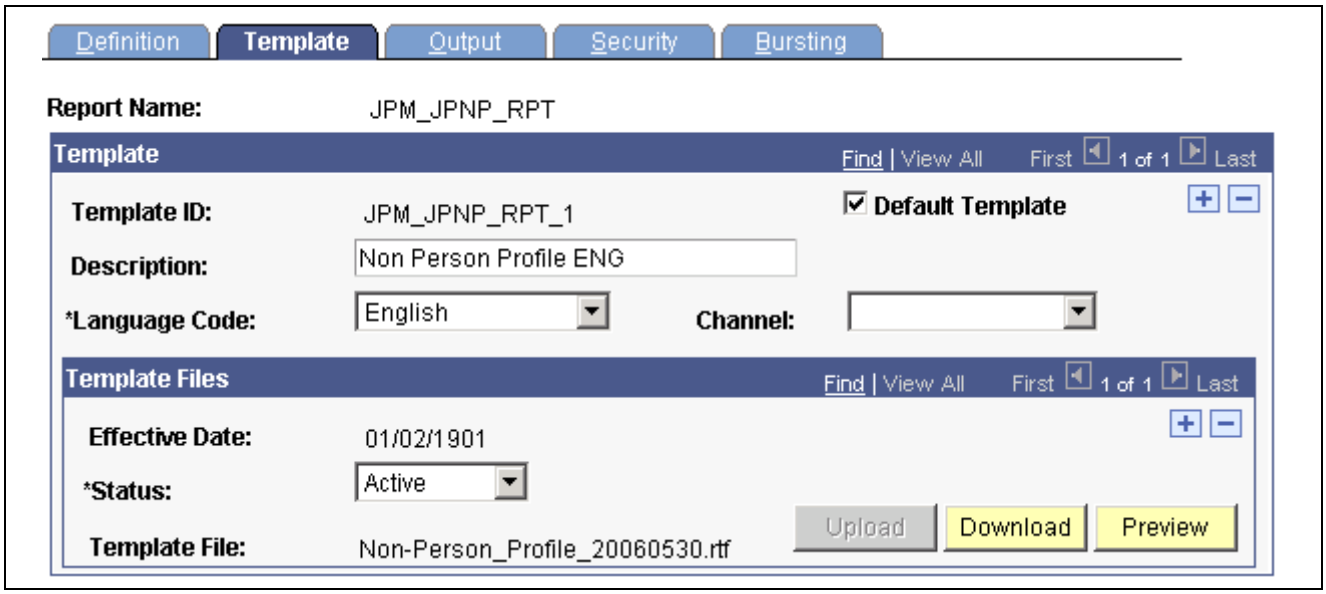
See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise, Using XML Publisher,” Creating Report Definitions

Viewing Delivered Report Templates

Access the Template page.

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Template page

Viewing the Existing Template

Download Click to open the RTF template in a new window or save it to a location of your choice.

Preview Click to view an example of the report using sample data registered with the data source.

Note. The person profile online and batch reports share the same person profile template file. Similarly, the non-person batch and online reports share the non-person profile template file.

Modifying an Existing Template

The existing templates contain two sections at the end to print out the ID and description of any additional items for content types that you added after the template was created. If you want to display more specific information about your new items, you must create an additional section in the template and define the data that you want to display.

The reports group and display content items in order of profile tab number and profile section sequence number based on the profile type definition that you set up for online display. Regardless of where you place a new section in the template, the report sorting order governs the order of display in the report. To change the report display order, you must edit the sorting. To sort new sections properly, you must also add within the correct loops in the report's driving logic.

Note. Become familiar with XML Publisher before modifying either of the delivered templates.

Setting Up to Modify a Template

To prepare to modify an existing template:

1. Access the Design Helper page and download the plug-in design helper for Microsoft Word to facilitate template modifications.
2. Access the Definition page for the appropriate report definition and click the links to download the data schema and sample data files.

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3. Click Download on the Template page and row for the existing RTF template that you want to edit.

Creating a New Section in a Template

To create a new section:

1. Copy an entire section defined by <?when: JPM_JP_SECTION.JPM_CAT_TYPE=…..end when?> and paste it into the template.
2. Modify the conditional statement to identify the item that you want to add.
3. Insert fields into the table to identify the data that you want to display on the report.
4. Save the revised template any file name and the .rtf file extension (*.rtf).

Uploading the Revised Template

To upload the revised template:

1. Add a new effective dated row in the Template Files scroll area on the Template page.

   Update these options:

   Effective Date Enter the date that the system should begin to print and display reports and profiles with this template.

   Status Select the *Active* status for the new template.

2. Click Upload and select the revised template file.
3. Repeat the last two steps to provide the new template to both the online and the batch report definitions.

See Also

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise, “Setting Up XML Publisher,” Working with Template Design Helpers

Enterprise PeopleTools PeopleBook: XML Publisher for PeopleSoft Enterprise, “Appendix B: Creating Report Templates”

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CHAPTER 4

Setting Up Search and Compare Profiles

This chapter provides an overview of search and compare profiles and discusses how to:

- Set up searches.
- Build the search indexes.

Understanding Search and Compare Profiles

The Search and Compare Profiles feature uses the Verity search engine that is provided as part of PeopleTools to search and compare profiles. Search and Compare Profiles enables employees, managers, and administrators to search for profiles that match selected search criteria. You configure searches for your profile types and your users. Here are examples of the types of searches that are possible:

- Employees can search for jobs that match their own personal profile.
- Managers can select an employee who reports to them and search for other employees in the team with similar skills.
- Managers can search for employees in their team who match the profile for a job opening that they want to fill.
- Administrators can select a job profile and search for similar job profiles.

Define search types for your organization on the Search Configuration page. For each search, you define:

- Who can run the search.

  You can set up searches for one or more of the roles: employee, manager, and administrator. Users can only run the searches that are defined for their role. In addition, the search results list only those profiles to which the user has the appropriate security. For example, if a manager searches for employees that match a job opening, the search results include those employees in the manager's team only.

- Source and target profile types.

  The source and the target profile types are the two profile types that are being compared in the search. The source is the profile type that forms the basis for the search criteria and the target is the profile type being searched for matching profiles. For example, if an employee searches for jobs that match their personal profile, the source is the employee's person profile type and the target is the job profile type.

- Criteria rule.

  The Criteria Rule field defines two aspects of the search:

  - Whether the system populates the search criteria based on the profile that the user selects for the search.

    If you select the criteria rule *Default and Display* or *Default, No Display*, the system populates the search criteria using the source profile that the user selects for the search.

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- Whether users can view and adjust the search criteria.

  If you select the criteria rule *Default, No Display,* the system populates the search criteria and runs the search without displaying the search criteria page. If you select any other criteria rule, the system displays the search criteria page and users can adjust the criteria before running the search.

• The maximum number of profiles listed in the search results at a time.

The profile type definitions are the basis for Search and Compare Profiles so it's important to understand how they affect the search results. When users select a search, to build the search criteria the system:

1. Identifies the content sections to include in the search criteria.

   The system compares the source and target profile types to identify which content sections appear in both source and target. Only the content sections that are common to the source and target profile types are included in the search criteria.

2. Identifies the properties to include in the search criteria for each of the content sections identified in the previous step.

   The properties included are those defined as searchable in the target profile type.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54.

Example Search Criteria

To illustrate how Search and Compare Profiles works, consider the example of an administrator searching for employees who match a given job profile. In this example:

• Source profile type is JOB.

• Target profile type is PERSON.

Suppose that the JOB profile type has the following content sections and properties that are defined as searchable:

Content Section	Searchable Properties
Competencies	JPM_CAT_ITEM_ID (Competency) JPM_RATING1 (Target Proficiency)
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country)
Test/Examinations	JPM_CAT_ITEM_ID (Test)
Responsibilities	JPM_CAT_ITEM_ID (Responsibility) JPM_YN_2 (Critical)

Suppose that the PERSON profile type has the following content sections and properties that are defined as searchable:

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Content Section	Searchable Properties
Competencies	JPM_CAT_ITEM_ID (Competency ID) JPM_RATING1 (Proficiency) JPM_INTEREST_LEVEL (Interest Level)
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country) MAJOR_CODE (Major Code)
School Education	JPM_CAT_ITEM_ID (Education Level) SCHOOL CODE (School Code) COUNTRY (Country) AVERAGE_GRADE (Average Grade)
Test/Examinations	JPM_CAT_ITEM (Test)

In this example, the search criteria are:

Content Section	Properties
Competencies	JPM_CAT_ITEM_ID (Competency) JPM_RATING1 (Target Proficiency) JPM_INTEREST_LEVEL (Interest Level)
Degrees	JPM_CAT_ITEM_ID (Degree) COUNTRY (Country) MAJOR_CODE (Major Code)
Test/Examinations	JPM_CAT_ITEM_ID (Test)

Notice that:

- Responsibilities and School Education are missing because these content sections do not appear in both the source and the target profile types.
- The properties included in the search criteria are those defined as searchable in the target profile type.
- The labels displayed on the Search Criteria page are those defined in the source profile type for those properties that are defined in both the source and the target profile type.

  In the example, the label for the property JPM_RATING1 is Target Proficiency in the source profile type and Proficiency in the target profile type. When users run the search, the JPM_RATING1 field is labelled Target Proficiency on the Search Criteria page.

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Importance and Mandatory Properties

The Importance (JPM_IMPORTANCE) and Mandatory (JPM_MANDATORY) properties appear on the Search Criteria page for each of the content sections included in the search criteria. The system automatically adds these fields to enable users to adjust the search as follows:

- The Mandatory check box enables users to specify profile items that must appear in the matching profiles.

  If the Mandatory check box is selected for any profile item, the search results include only those profiles containing that profile item and having the same property values as those in the search criteria. For example, if the search criteria includes an item *0100 – Abstract Thinking* and a proficiency of *Good* for the item, if you specify that the item is Mandatory, the search results include profiles that contain both the item and the proficiency only. Any profiles that have the item but a different proficiency are not included in the search results.

  If the Mandatory property is included in a content section definition, the system uses the setting of the check box in the profile as the default value in the search criteria, but users can override the default.

- The Importance field is a way to define the profile items that are most or least important.

  When the search runs, the Verity search engine uses the Importance field to determine the ranking of matching profiles. The default value is *3– Average* but users can override this value depending on the criteria rule.

  For searches with a criteria rule of *Default, No Display* that don't allow users to modify the search criteria, the system automatically assigns the default Importance value (*3– Average*).

See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 118.

Search Filters

The Search Criteria page includes an Add Search Filter link if you have set up searchable profile group types for the target profile type. Search filters enable users to narrow the search to specific profile groups.

To illustrate how this works, consider the following example:

- The profile group type GLOBAL includes the profile type JOB.
- The profile groups for GLOBAL are REGION1, REGION2, and REGION3.

When users select a search where the target profile type is JOB, the search filter link enables users to select one or more of the profile groups REGION1, REGION2, and REGION3. The search results are limited to profiles that belong to the selected profile groups. The Search Filter feature is particularly useful if your organization has large numbers of profiles.

See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 118.

See Chapter 3, "Setting Up Profile Management," Creating Profile Group Types and Profile Groups, page 65.

Setting Up Searches

Use the Define Search Configuration component (JPM_SRCH_CFG) to define the search types for your users. This section discusses how to set up search types.

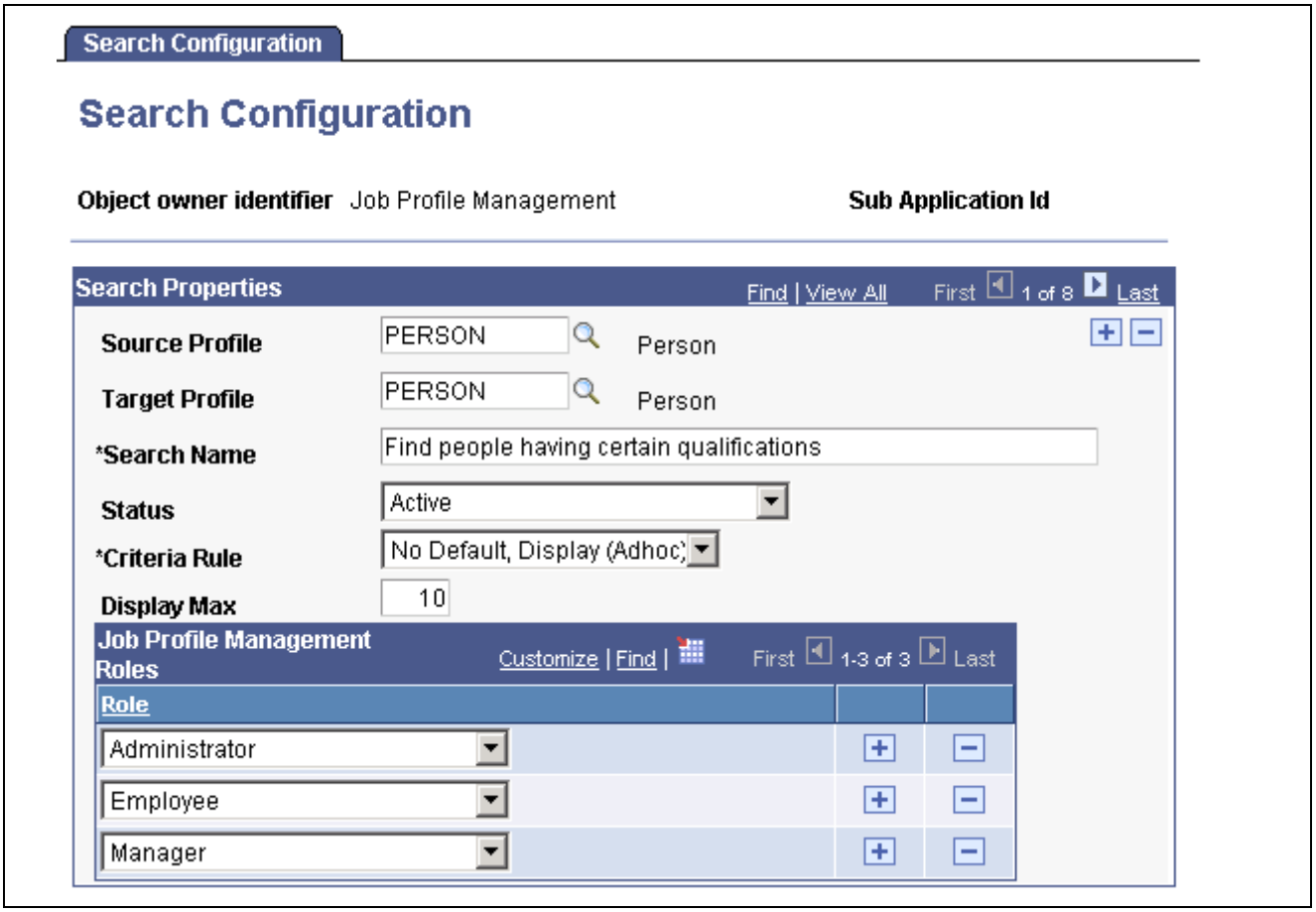
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Page Used to Set Up Search Types

Page Name	Object Name	Navigation	Usage
Search Configuration	JPM_SRCH_CFG	Set Up HRMS, Product Related, Profile Management, Profiles, Define Search Configuration, Search Configuration	Set up profile searches for employees, managers, and administrators.

Setting Up Search Types

Access the Search Configuration page.



Search Configuration page

Object Owner Identifier Select *Job Profile Management* to view and define searches for profile management.

Sub Application Id Leave this field blank for all profile searches. It is not used by profile management.

Source Profile Select the profile type to use as the basis for the search criteria.

Target Profile Select the profile type that you want to search for matching profiles.

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Search Name	Enter a descriptive name for the search. Employees, managers, and administrators see the search name when they select the Search and Compare Profiles option. Therefore, it's important that the name accurately describes the search.
Criteria Rule	Select one of these options: *Default and Display:* The system populates the search criteria using data from the profile that the user selects and displays the Search Criteria page. This option enables users to adjust the search criteria before running the search. *Default, No Display:* The system generates the search criteria using data from the profile that the user selects and immediately runs the search. Use this option if you don't want users to adjust the search criteria. *No Default, Display (Adhoc):* The system displays the Search Criteria page without populating the search criteria. The user has to set up the search criteria from scratch for this type of search, which requires knowledge of the profile types. Typically, you use this option to enable administrators to run adhoc searches.
Display Max (display maximum)	Enter the maximum number of profiles to display in the search results at a time. For example, if you specify a maximum of ten, the system lists ten profiles at a time. Users click the Next and Previous links to navigate through the profiles in the search results.
Job Profile Management Roles	Add the roles that have access to the search. The options are: *Administrator, Manager,* and *Employee.*

Building the Search Indexes

This section provides overviews of the search indexes and Verity index maintenance, lists prerequisites, and discusses how to:

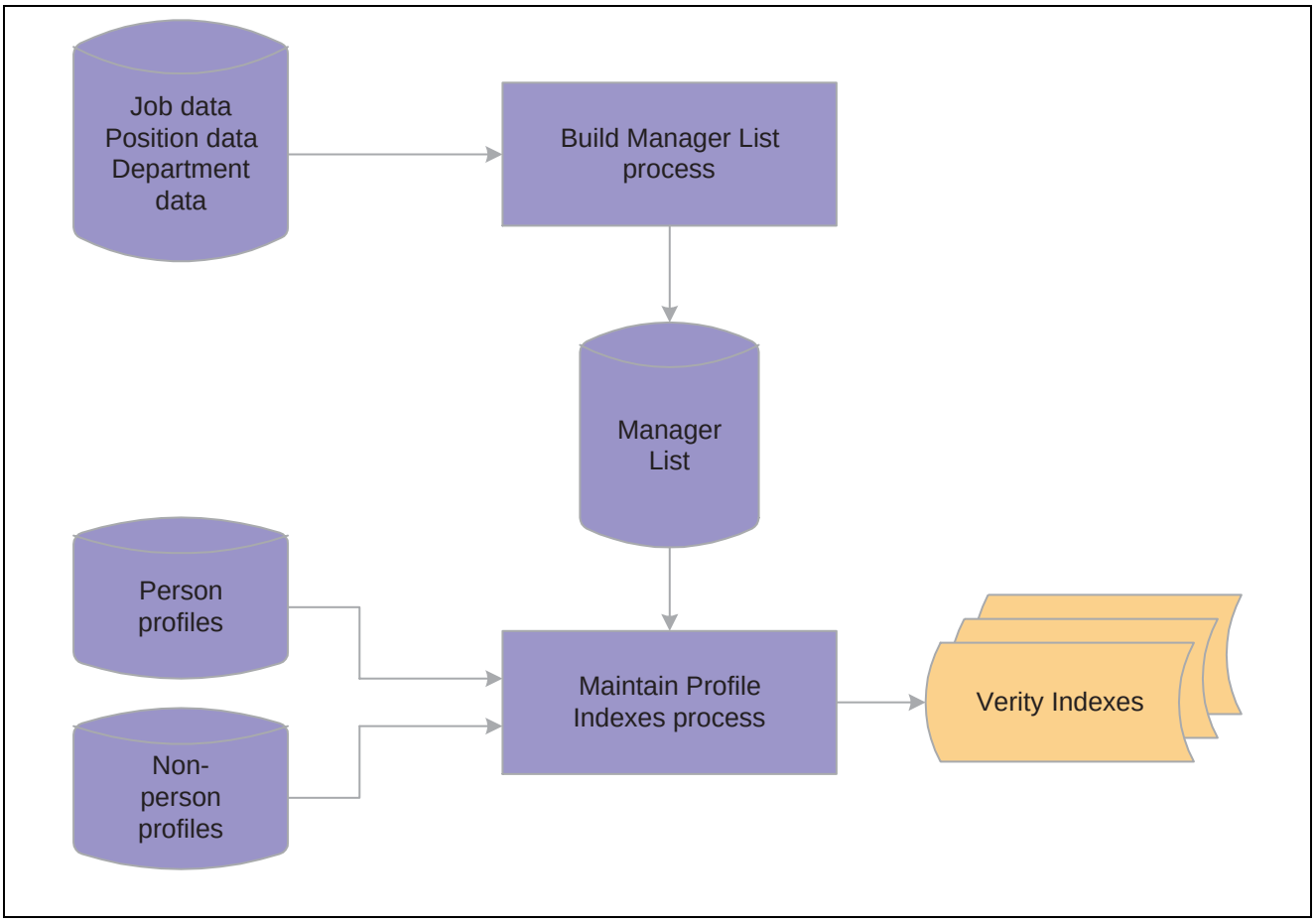
- Run the Build Manager List process.
- Run the Maintain Profile Indexes process.

Understanding the Search Indexes

Search and Compare Profiles uses the Verity search engine to generate search results and perform comparisons between matching profiles. In order to complete searches, the Verity search engine uses a set of Verity indexes that contain data about the profiles in your system; it does not search the database tables directly.

This diagram shows how to create the Verity indexes using the Build Manager List and Maintain Profile Indexes processes:

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Processes for Maintaining Verity Indexes for Search and Compare Profiles

Build Manager List Process

The Build Manager List Application Engine process (JPM_DR_UNLD) creates the manager list which is a record of the manager for each job held by a person. The Navigation Method field on the Profile Management Installation page determines how the process retrieves reporting information for your organization. Select from these options: *2 — Supervisor Id*, *3– Department Manager Id*, *4–Reports to Position*, *5– Position/Supervisor Id*, or *6–Position/Dept Manager*.

See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles, page 40.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Direct Reports Functionality.

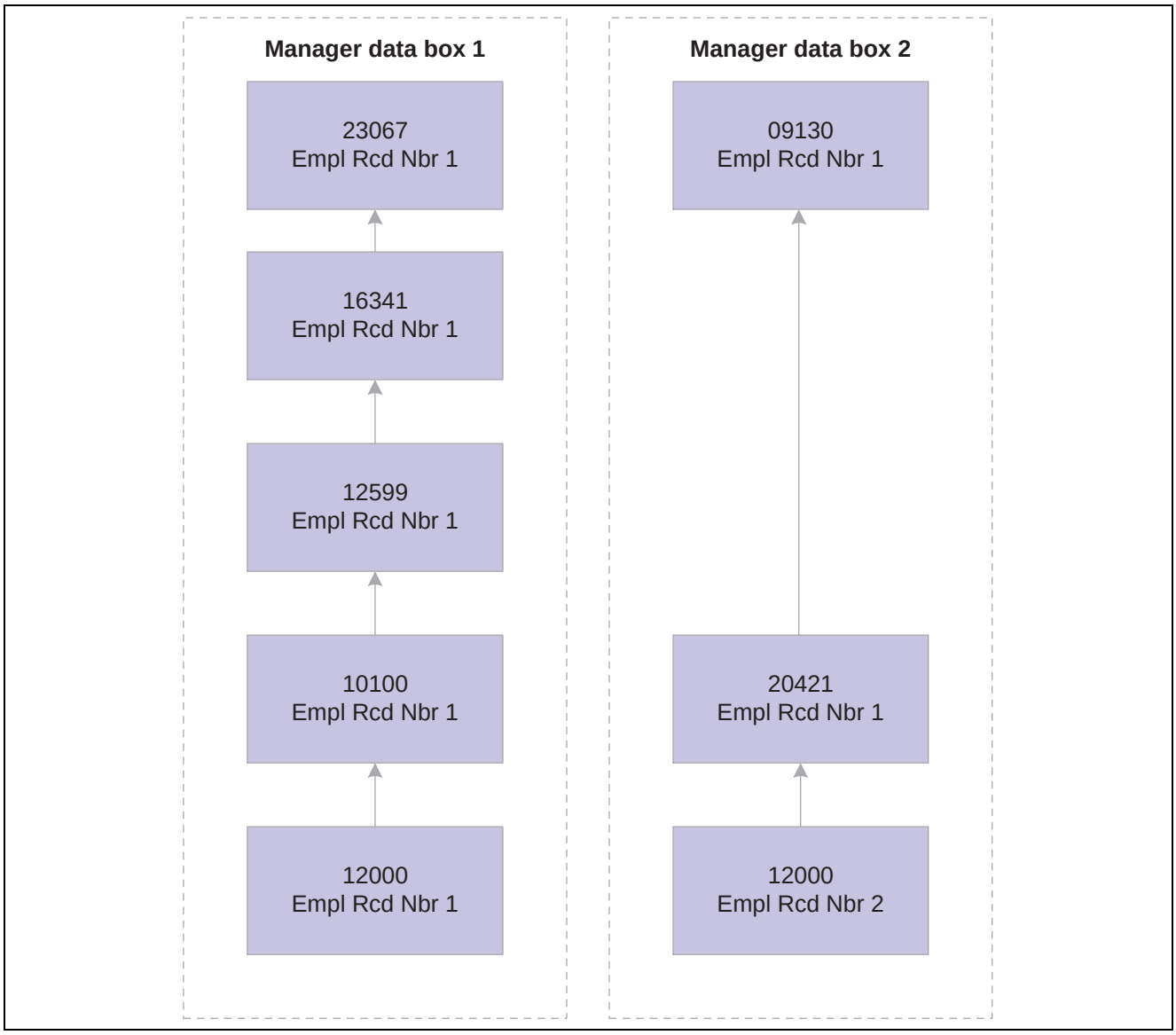
You can run the Build Manager List process in two modes:

- *Full — Complete Rebuild* creates the full manager list, overwriting any existing data.
- *Incremental — 1 Assignment* updates the manager information for a selected assignment (job) specified by an person ID and employee record number.

When you run the process in incremental mode, the process updates the manager information for the selected assignment and the associated reporting structure.

To illustrate how the Build Manager List process works in incremental mode, consider the following example of a reporting structure for employee 12000 who has two assignments (empl rcd nbr 1 and 2):

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Example Reporting Structure

This table lists the direct and indirect managers for each of the employee's assignments:

Person ID	Employee Record Number	Manager Data Updated
12000	1	Manager data box 1
12000	2	Manager data box 2

Maintain Profile Indexes process

The Maintain Profile Indexes Application Engine process (JPM_BLD_INDX) builds a Verity index for one or all profile types. Create a Verity index for each profile type that you want to include in Search and Compare Profiles. You cannot create a Verity index for a profile type if it:

- Is Inactive.
- Is a template profile type.

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When you set up a profile type, you can specify if the profile type is an end profile or a template profile type on the Profile Type — Identities page. If you select the Template check box only for all the profile identity options, the profile type is considered a template profile type. The delivered CLUSTER profile type is an example of a template profile type.

- Does not have searchable properties.

  When you set up content sections for a profile type, you select the Searchable check box for the properties that you want to include in the Verity index. If none of the content sections contain searchable properties, you can't create a Verity index.

The process uses the profile type definition to determine what profile information is included in the Verity index. Only those properties defined as searchable in the profile type are selected for indexing. The process retrieves active profiles, the profile items in those profiles, and the searchable properties to include in the index. For profile types with a Profile Type Usage of *Person*, the Maintain Profile Indexes process retrieves manager list data for the person ID associated with the profile. If a profile type belongs to a profile group type that is defined as searchable, the profile group is also included in the Verity index.

The Verity index created by this process is separate from the database. It is a snapshot of the database at one point in time and does not remain synchronized with the profile data in the database unless you routinely update the index.

The Application Server and Process Scheduler must have access to the same file server $PS_HOME directory because the Verity collection is in the directory $PS_HOME\data\search*database*.

The Maintain Profile Indexes process extracts information from the database and loads it into Verity-formatted files on the Process Scheduler server. The Verity indexing application transforms the files into an index that is used for searching. The Maintain Profile Indexes process supports one language (ENG) because the process indexes codes only.

The Maintain Profile Indexes process creates two files:

- INPUT_ENG.BIF
- INPUT_ENG.DAT

The BIF file defines the Verity document and includes all information for the Verity fields in the index and pointers to the .DAT file (in the form of offset and size). The DAT file contains the Verity zones. The Verity application creates the index from these two files using the utility mkvdk.

Understanding Verity Index Maintenance

The manager list and Verity indexes represent a "snapshot" of the manager and profile data as of the date that you last ran the Build Manager List and Maintain Profile Indexes processes. To ensure that your Search and Compare Profiles results are accurate, run these processes periodically to update the manager list and Verity indexes.

You can run the Maintain Profile Indexes process in two modes:

- *Create New Index* creates or recreates the Verity Index for the selected profile type.
- *Update Existing Index* updates an existing Verity index.

  Run the process in this mode regularly to incorporate changes to profiles or add new profiles to the Verity index. You can select this process to run immediately or schedule it to run at intervals using Process Scheduler when the system usage is low.

Run the Maintain Profile Indexes process using the *Create New Index* mode when any of the following changes are made:

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- A new profile type is defined that has searchable properties.
- The Searchable check box for a property is selected.

  When you select the Searchable check box for a property that previously was not searchable, the Verity index must be recreated to include the property in the index for profiles of that type.
- The Priority field for an Instance Qualifier is changed.

  The Maintain Profile Indexes process uses the priority field to determine which profile item row is included in the Verity index when instance qualifiers are associated with a content section of a profile type. The row with the highest priority and highest effective date for that priority is selected for indexing only.

To illustrate how the Maintain Profile Indexes process selects rows in the profile for indexing, suppose that you have defined an Instance Qualifier Set to identify the evaluation type. This table lists the instance qualifier values and their assigned priorities:

Instance Qualifier	Description	Priority	Searchable
A	Approved	10	Y
R	Supervisor/Manager	20	Y
S	Self	30	Y

Note. The priority decreases as the value in the Priority field increases. In this example, the instance qualifier with the highest priority is A and the instance qualifier with the lowest priority is S.

In this example, the employee's profile has three profile items for competencies 0010, 0200, and 0120. This table lists the profile item rows:

Competency	Date	Proficiency	Evaluation Type
0010	May 1, 2006	3–Good	A
0010	June 21, 2006	4–Very Good	S
0200	June 21, 2006	4–Very Good	S
0200	June 21, 2006	5–Expert	R
0120	January 30, 2006	2–Fair	A
0120	May 1, 2006	2–Fair	A

This table lists the rows that are included in the Verity index for this profile:

Competency	Date	Proficiency	Evaluation Type
0010	May 1, 2006	3–Good	A
0200	June 21, 2006	5–Expert	R
0120	May 1, 2006	2–Fair	A

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Notice that:

- For competency 0010, the row with the highest priority (lowest sequence number) instance qualifier (A) is selected even though the effective date for this row is earlier than the row dated June 21, 2006.
- For competency 0200, the two rows have the same effective date. In this case the system selects the row that is assigned the instance qualifier with the highest priority (R-Supervisor/Manager).
- For competency 0120, the system selects the row with the highest effective date.

Note. Instance qualifiers that are defined by a prompt record are not searchable and not included in Verity indexes.

See Chapter 3, "Setting Up Profile Management," Defining Instance Qualifiers, page 44.

Using the HCM Event Manager to Track Profile Changes

The HCM Event Manager is used to track changes to searchable profiles (and therefore the Verity index). When an employee, manager or administrator creates or updates a profile one of these events is triggered depending on the type of change made:

- JPMProfileAdded

  This event is triggered when users creates a new profile.

- JPMProfileUpdated

  This event is triggered when a user adds a new profile item, updates an existing profile item, or deletes a profile item. For example if an employee updates their profile by adding a new evaluation for a competency, this triggers the JPMProfileUpdated event. This event is also triggered when you run the Build Manager List process in incremental mode to update the manager information for a selected assignment.

The Event Handler UpdateVerityIndex adds a trigger to the trigger table JPM_IDX_UPDCTL for the profile that has been created or updated. The Maintain Profile Indexes process accesses this trigger table to determine which profiles to select for indexing when you run the process in *Update Existing Index* mode.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with HCM Event Manager".

Prerequisites

Before you run the Build Manager List process, you must define the Navigation Method field on the Profile Management Installation page. The Navigation Method specifies the reporting structures for your organization.

Before you run the Maintain Profile Indexes process, you must set up the content catalog, define your profile types, and set up the HCM Event Manager. Set the Event Status for the JPMProfileAdded and JPMProfileUpdated events to *Active* in the Event Registry.

See Also

Chapter 2, "Setting Up the Content Catalog," page 9

Chapter 3, "Setting Up Profile Management," page 35

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with HCM Event Manager"

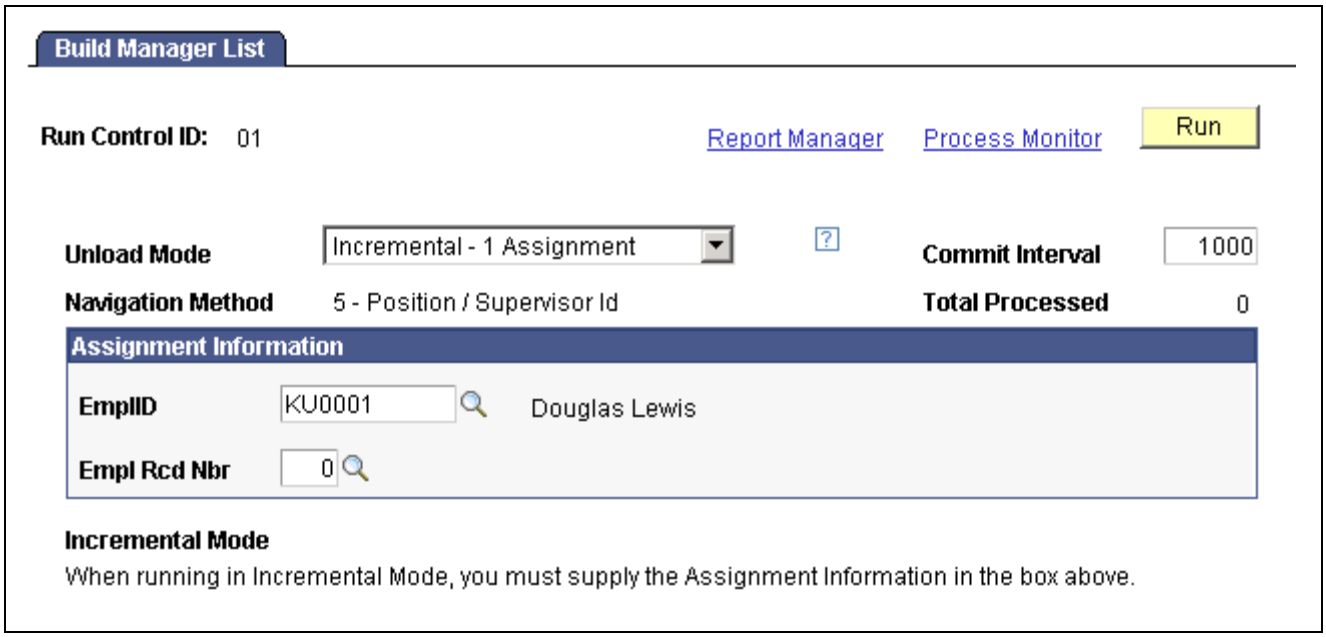
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Pages Used to Build the Search Indexes

Page Name	Object Name	Navigation	Usage
Build Manager List	RUNCTL_JPM_DR	Set Up HRMS, Product Related, Profile Management, Profiles, Build Manager List, Build Manager List	Run the Build Manager List process to create or update the manager list information.
Maintain Profile Indexes	RUNCTL_JPM_INDX	Set Up HRMS, Product Related, Profile Management, Profiles, Maintain Profile Indexes, Maintain Profile Indexes	Run the Maintain Profile Indexes process that creates or updates the Verity indexes required for Search and Compare Profiles.

Running the Build Manager List Process

Access the Build Manager List page.



Build Manager List page

Unload Mode Select one of these modes:

Full — Complete Rebuild: Creates the full manager list. Any existing data is overwritten by this process.

Incremental — 1 Assignment: Updates the assignment data for one employee. The system displays the Assignment Information group box when you select this option. When you run the process for one assignment, the system updates the manager information for that assignment and then checks and updates the reporting structure for each of the identified managers. This iterative process is continued until the top of the reporting structure is reached.

The Unload Mode field is display-only if the process failed the last time it was run using the selected Run Control ID. The Restart Information group box is displayed.

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Commit Interval Enter the number of assignments that are processed before the Build Manager List process saves the changes to the database. An assignment is a person's job, as defined by each combination of person ID and employee record number.

The default for this field is 1000 assignments. Typically you do not need to change this value. However, if your system has resource problems you can use this field to adjust the frequency at which the database is updated during processing.

Navigation Method Displays the navigation method that was selected for your installation on the Profile Management Installation page.

See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles, page 40.

Total Processed If the Build Manager List process is in progress, this field displays the number of assignments that have been processed and saved to the database. If the process did not successfully complete the last time it was run, this field shows the number of assignments that were saved before the process ended in error.

If the process completed successfully, this field is not displayed.

Assignment Information

Select the employee whose data will be updated by the Build Manager List process. This group box is hidden if you select *Full — Complete Rebuild* in the Unload Mode field.

Restart Information

This group box is displayed if the Build Manager List process did not successfully complete the last time it was run. It shows the EmplID (employee ID) and Empl Rcd Nbr (employee record number) that will be processed when you rerun the process using the selected Run Control ID. You cannot change the details in this group box; the process automatically restarts processing with this assignment.

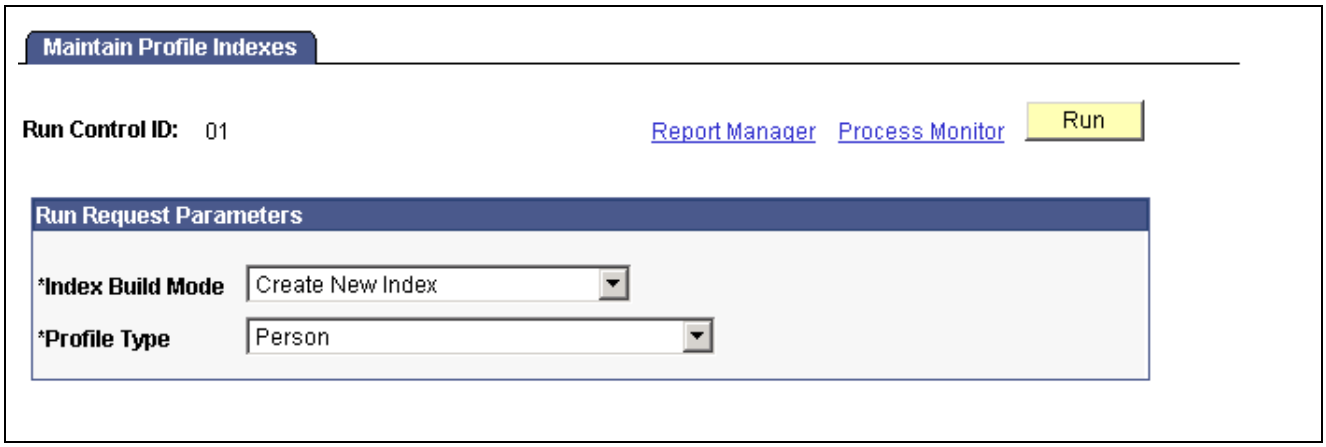
Process Information

This group box is displayed if the Build Manager List process is in progress. It shows the EmplID (employee ID) and Empl Rcd Nbr (employee record number) last processed and saved to the database.

Running the Maintain Profile Indexes Process

Access the Maintain Profile Indexes page.

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Maintain Profile Indexes page

Index Build Mode Select one of these values:

Create New Index: Builds a new index.

Update Existing Index: Updates the existing index for the selected profile type.

Profile Type Select the profile type for which you want to run the process or select *All Profile Types* to run the process for all profile types. The system does not include profile types that are defined as template profile types.

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CHAPTER 5

Managing Profiles

This chapter provides an overview of profile management and discusses how to:

- Maintain profiles.
- Approve profile changes.
- Search and compare profiles.
- Manage interest lists.
- Track training.

Understanding Profile Management

This chapter discusses the profile management options available to profile administrators that enable them to:

- Create and maintain person and non-person profiles.

  Person profiles are those profiles that are linked to a person ID, while non-person profiles describe business entities such as job codes, positions, and roles.

- Review and approve changes to profiles.

  Depending on the configuration of your profile types, approvals workflow is triggered when employees update their personal profiles and managers make changes to non-person profiles. Typically, managers approve changes to their employees' person profiles and administrators approve non-person profile changes.

- Complete searches for profiles that match certain criteria.

  Administrators use Search and Compare Profiles to run any of the search types that have been configured for them.

- Compare profiles.

  Administrators can compare the content of a source profile with one or more target profiles. The Compare Profiles option provides a summary of the common content sections in a simple readable format.

- Manage interest lists.

  An interest list is a collection of non-person profiles that is associated with an employee. Any profile can be added to an interest list, but it is typically used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile. Employees maintain their own interest list using a self-service transaction. However, an employee's manager and administrators can also add profiles to an interest list or remove profiles from them.

- Track training.

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Manage Profiles provides profile administrators access to employees' training history for training that is managed by the Administer Training business process. In addition, Manage Profiles enables you to track other types of training that is not managed using Administer Training.

For information about the employee and manager self-service transactions, refer to the *PeopleSoft Enterprise eDevelopment 9.0 PeopleBook*

See Also

PeopleSoft Enterprise eDevelopment 9.0 PeopleBook, "Maintaining My Profiles"

Prerequisites

Before administrators can create profiles, approve changes to profiles, or run searches for profiles you must:

- Define the content catalog.
- Define your profile types.
- (Optional). Define and configure approvals for profiles.

  The use of approval processing for profiles is optional. You associate approvals workflow to profile types.
- Define search types and run the Build Manager List and Maintain Profile Indexes processes required by the Search and Compare Profiles feature.

See Also

Chapter 2, "Setting Up the Content Catalog," page 9

Chapter 3, "Setting Up Profile Management," page 35

Chapter 4, "Setting Up Search and Compare Profiles," page 73

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

Maintaining Profiles

This section provides overviews of profiles and profile types, profile copy, import, and syndication, lists prerequisites and common elements, and discusses how to:

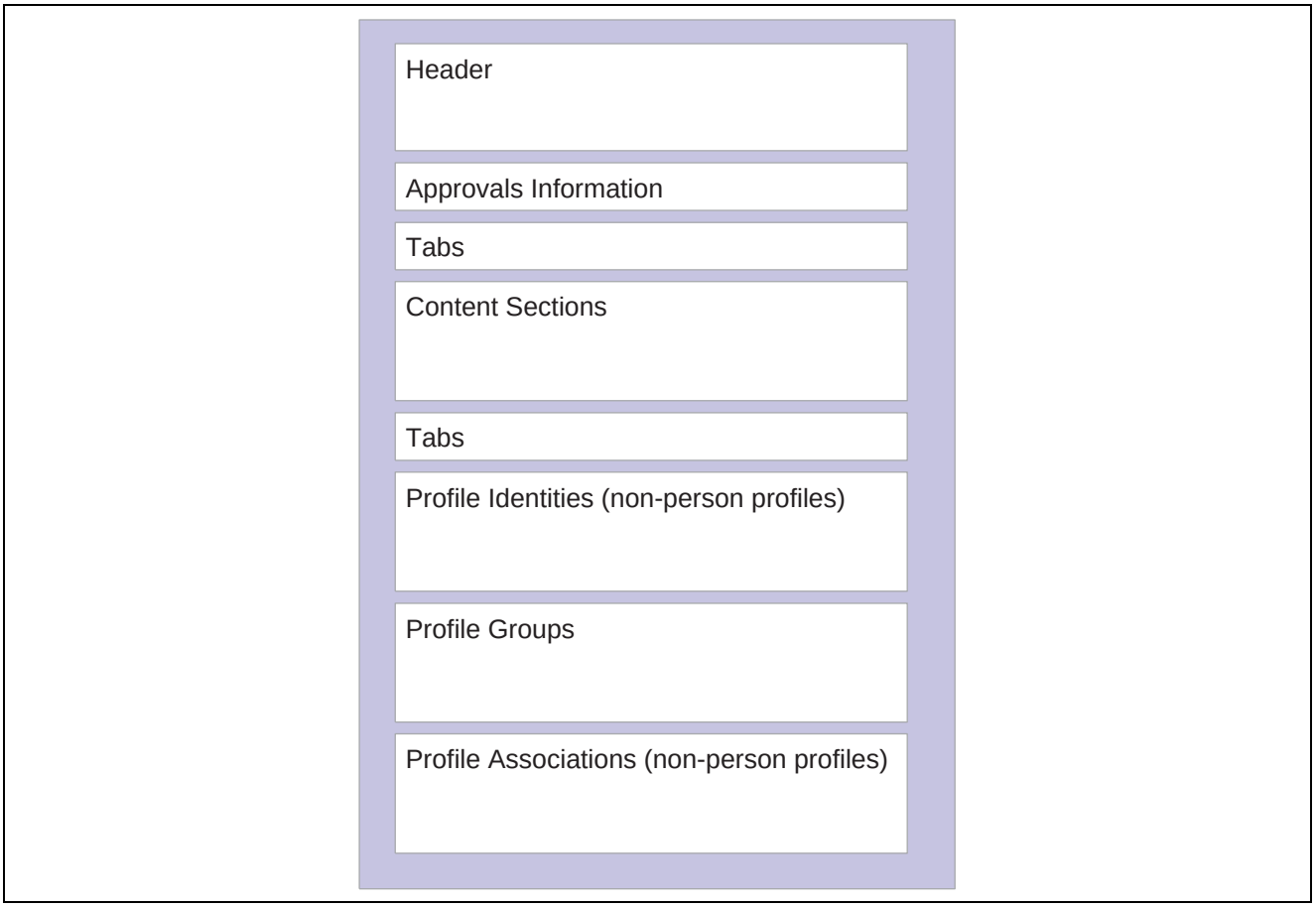
- Create and update person profiles.
- Create and update non-person profiles.
- Add, update, and view profile item details.
- Add related profile items.
- View profile item rows.
- Synchronize person profiles with career plans.
- Select profiles for import or syndication.

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- View syndication sources and targets.
- Submit changes to person profiles.
- Submit changes to non-person profiles.
- Review syndication exceptions.
- Review syndication exception details.

Understanding Profiles and Profile Types

Administrators use the Person Profile page and the Non-person Profile page to create and maintain profiles. Both pages have a similar format as illustrated in this diagram:



Format of a Profile

Here is a description of the parts of a profile:

- Header.

  The header includes general information such as the profile ID, profile type, profile status, and effective date. For a person profile, the header includes the person ID.

- Approvals Information.

  This section includes links that indicate how many profile items are saved (but not submitted for approval), pending approval, approved, or were denied approval.

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Note. The profile pages displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear on the profile tabs. Use the links in this area of the profile to view the changes that are unapproved.

- Tabs.

  Profile content is divided into tabs that are displayed as links in navigation bars. When you select a tab, the system displays the content sections defined for that tab. The navigation bar appears above and below the content sections for the tab. The naming and order of the tabs in a profile are determined by the profile type.

- Content sections.

  Tabs consist of one or more content sections. The content sections are defined by the profile type. Users add profile items to the content sections.

- Profile identities (non-person profiles only).

  On the Non-person Profile page, the Profile Identities scroll area lists the entities to which the profile is linked. The type of profile identities available are controlled by the profile type selected. For example, if the profile type allows job codes to be linked to the profile, users insert a row for each job code for the profile, but they cannot link the profile to a position number. An active profile must be linked to at least one profile identity.

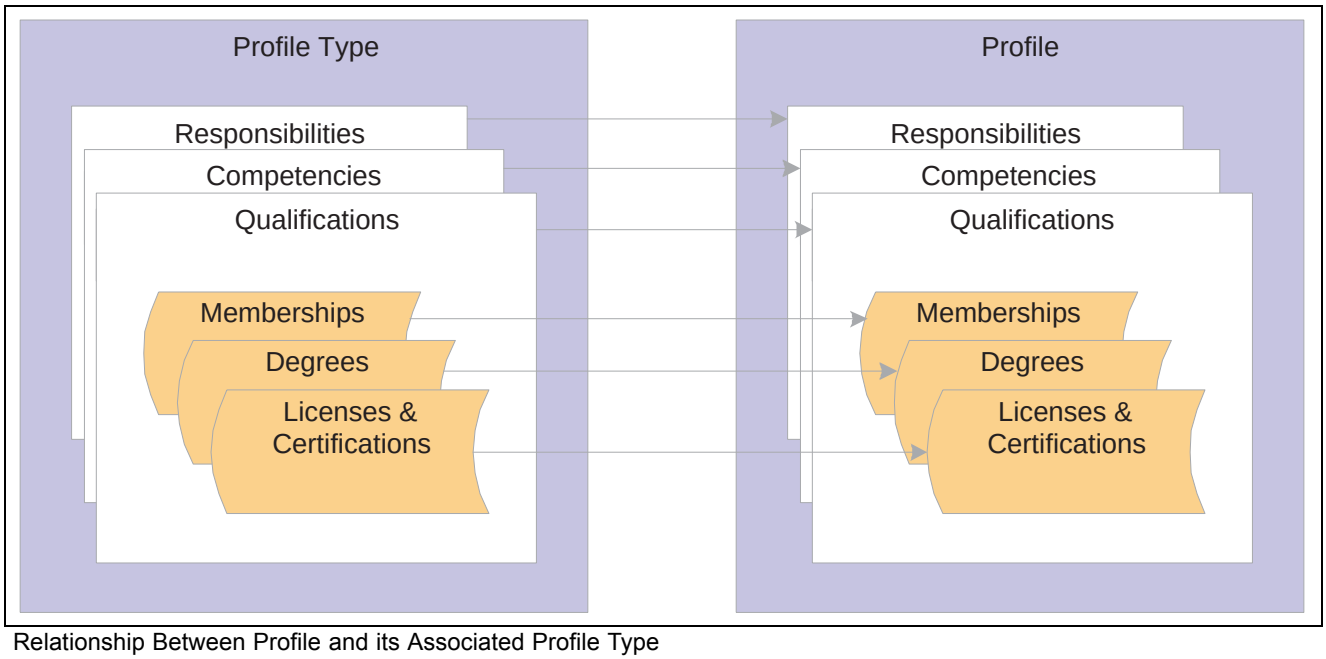
- Profile groups.

  If you want to categorize your profiles by profile groups, use the Profile Group scroll area to list the profile group types and profile groups.

- Profile Associations (non-person profiles only).

  On the Non-person Profile page, the Profile Associations scroll area lists any entities to which the profile is associated. Profile associations are entities, such as ePerformance templates, that are outside of the Manage Profiles business process. The profile type defines the profile associations available.

This diagram shows how the tabs and content sections of a profile are determined by the tabs and content sections of the profile type:

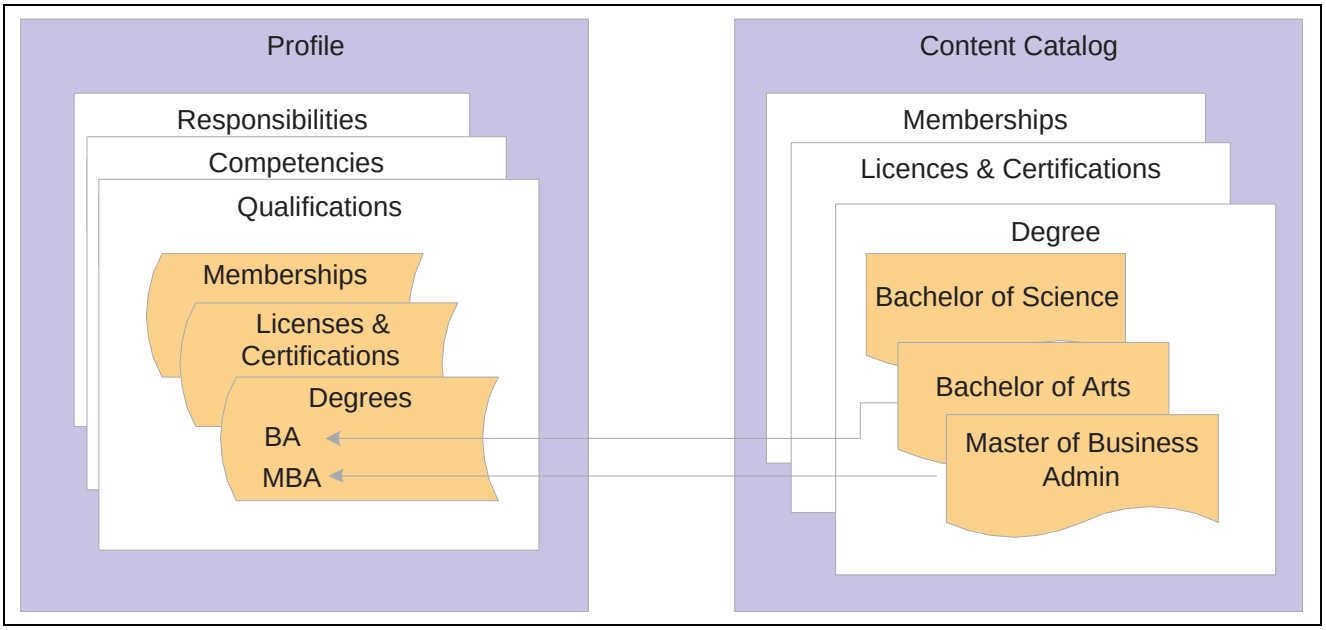


Relationship Between Profile and its Associated Profile Type

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The profile type provides the structure for a profile, it does not provide the actual content. To complete the profile, users add profile items, such as competencies or education information, by selecting from the content items available in the content catalog.

This diagram illustrates how you complete the Degrees content section by selecting from the degrees defined in the content catalog:



Adding Items to Profiles

Note. The profile type controls whether approvals workflow is triggered when the profile is updated, and the user roles that can view and update each section of the profile.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54.

Understanding Profile Copy, Import, and Syndication

Often the same profile items appear in related profiles. For example, employees' profiles may contain profile items that also appear in the profiles for their job code or position. Non-person profiles for similar or related jobs may have common profile items. To streamline the process of creating and maintaining profiles, Manage Profiles provides three ways to copy profile items. You can:

- Load profile items into a person profile from a related non-person profile.

  The Profile Action field on the Person Profile page has an option, *Copy from Job Profile,* that enables you to select a non-person profile from a list of related profiles. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. For example, the system checks for active profiles that match the employee's job codes, positions, and salary grades.

- Import content from one non-person profile to another.

  When you import content, the system copies the profile items from the source profile into the target profile. Any changes made to the source profile after the import do not affect the target profile. Use the Import/Syndicate Content link on the Non-person Profile page to import content.

- Syndicate content from one non-person profile to another.

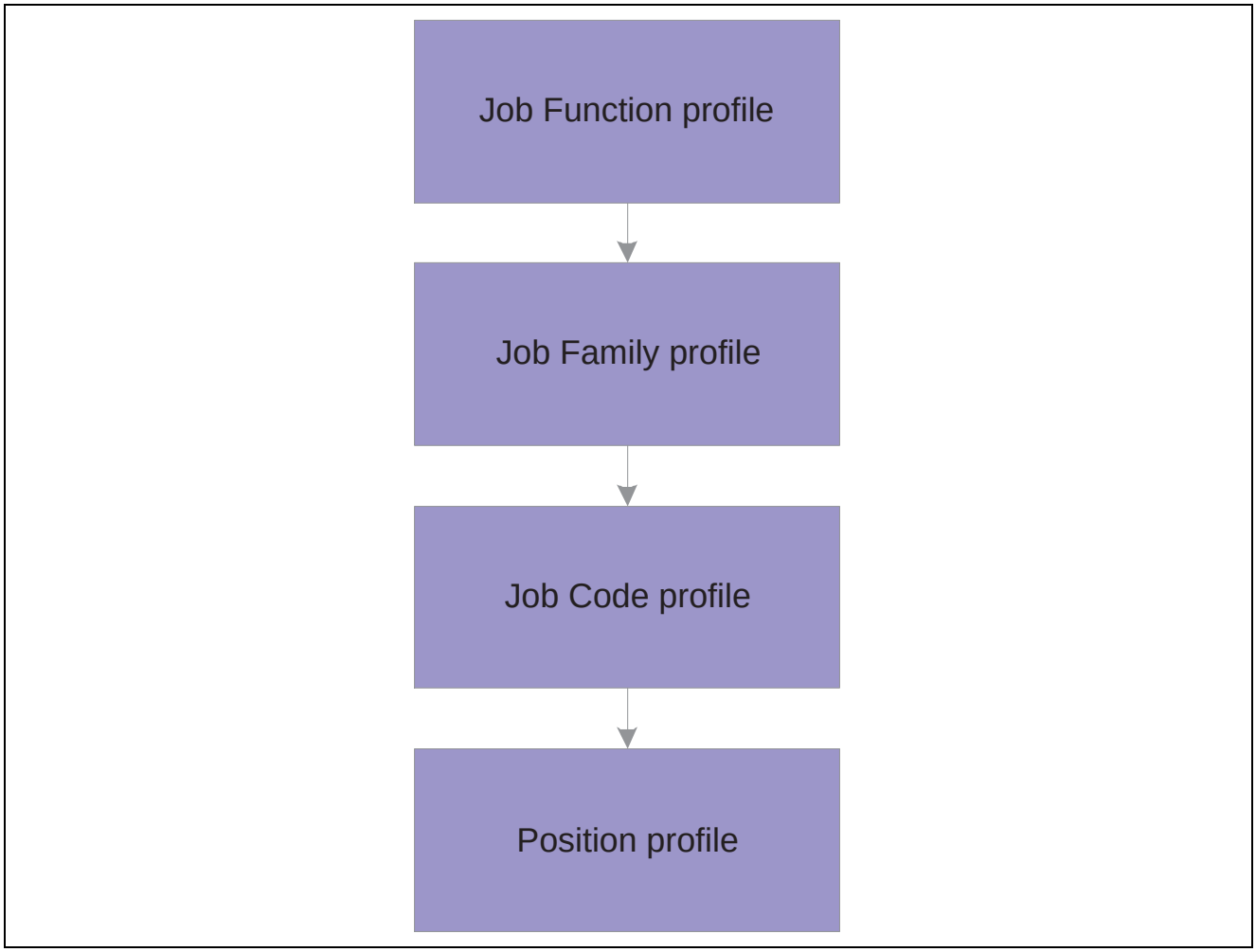
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When you syndicate content, the system copies profile items from the source profile to the target profile. However, it also sets up a relationship between the source profile and the target profile that contains the syndicated content. Whenever syndicated content is updated, the changes are incorporated into the target profiles automatically. Use the Import/Syndicate Content link on the Non-person Profile page to syndicate content.

Note. The Copy from Job Profile, Import, and Syndicate actions copy properties that are defined in the target content type definition. Additional properties in the non-person (source) profile type are not copied. If the target profile has additional properties that are not used in the source profile, the system uses the default values defined for these properties. The default values can be defined by the profile type, or in the record in Application Designer.

Setting Up Syndication

Syndication reduces maintenance by enabling administrators to set up common content once in a source profile and copy it to multiple target profiles. You can also syndicate content through a series of related profiles. This diagram shows how you could set up a job function profile and syndicate the content through the hierarchy to job family, job code, and position number profiles:



Cascading syndication

If you set up cascading syndication, we recommend that you use it in a similar hierarchical method.

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When setting up syndication, you should consider what happens when the target profile already includes an item that is in the syndicate source profile. For example, if you syndicate content from more than one source profile into a target profile, it is possible for the same item to occur in the source profiles but with different values. These are known as syndication exceptions. In this situation, the system updates the target profile with the values from the source profile, effectively overriding the existing values.

View syndication exceptions using the Review Syndication Exceptions page.

Prerequisites

Before you can syndicate content:

- Configure the application server for publish/subscribe.
- Configure the integration broker and make it active.

  Ensure that the:

  - The HCR_EVENT_MANAGER queue is running.
  - The service operation HCR_EM_EVENT is active.
  - The associated routing definitions are active.
- Set up the HCM Event manager.

  Make the event JPMProfileItemsUpdated and the associated event handlers active. We also recommend that you enable logging for the event and handler.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Enterprise PeopleTools PeopleBook: System and Server Administration

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with HCM Event Manager"

Common Elements Used in this Section

Status Select one of these values:

Active: If the profile type does not require approval, update the status to *Active* to make the profile available to other users.

Inactive: Profiles that are inactive are not available to employees and managers in self-service. When you update the status to *Inactive*, the system removes the profile from the profile groups to which it belongs.

When you create a non-person profile, the default status is *Inactive*. You can only update the status to *Active* when the profile is linked to one or more profile identities and approved. Employees and managers can view active non-person profiles only.

Profile Type Select the profile type for the new profile. When you update an existing profile, this field is display-only. The Profile Type determines the tabs that appear in the profile.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54.

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Profile Actions

This field appears on the Non-person Profile and Person Profile page. Select an action and click the Go button if you want to do one of the following:

Search and Compare Profiles: To run a search. The system displays the Search for Profiles page.

Express Interest for Employee: To add the profile to a person's interest list. This profile action is available from the Non-person Profile page only. The system displays the Person Search page, which you use to search for the employee whose interest list you want to update.

Copy from Job Profile: To copy items from a non-person profile to the employee's profile. The system displays the Copy Items from Job Profile page that lists the profiles related to the employee's active jobs. This profile action is available from the Person Profile page only.

Link to Career Planning: To transfer items between the employee's profile and the career plan. You can select items on the profile to transfer to the career plan, or import items from the career plan into the profile. This profile action is available from the Person Profile page and the profile type must be PERSON.

View Denied Items: To view the profile items that have been submitted for approval but the approver denied.

View Pending Items: To view the profile items that have been submitted for approval.

View Saved Items: To view the profile items that have been saved but not submitted. This includes profile items that have been added, amended, or deleted. When you click the Submit button these items are submitted for approval. If approval is not required, the system automatically makes the items approved.

View Related Job Profiles: Displays a list of non-person profiles that are related to the employee's job data. The system determines which non-person profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching non-person profiles. This profile action is available from the Person Profile page only.

Pages Used to Maintain Profiles

Page Name	Object Name	Navigation	Usage
Person Profile	JPM_PROFILE_PERS	Workforce Development, Profile Management, Profiles, Person Profiles	Create and update person profiles.
Non-person Profile	JPM_PROFILE1	Workforce Development, Profile Management, Profiles, Non-person Profiles	Create and update non-person profiles.

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Page Name	Object Name	Navigation	Usage
Add New <content type>, , Update <content type>	JPM_PROF_DTL_SEC	Click a profile item ID on the Non-person Profile page or Person Profile page. Click the Add New <content type> link on the Non-person Profile page or Person Profile page.	View and update profile item details. You can also use this page to add a profile item.
Related Items	JPM_PROF_DETAIL	Click the related content link on the Add <content type> or Update <content type> page.	Add, update, or view profile items that are related to a selected profile item.
View All Rows	JPM_PROF_HIST_SEC	Click the View All Rows icon on the Person Profile page or Non-person Profile page.	View all effective-dated rows for a profile item.
Saved Items, , Pending Items, , Denied Items	JPM_JP_PRF_VW_CHGS	• Click the Items Saved link or select View Saved Items in the Profile Action field on the Person Profile page or Non-person Profile page. • Click the Items Pending Approval link or select View Pending Items in the Profile Action field on the Person Profile page or Non-person Profile page. • Click the Items Denied link or select View Denied Items in the Profile Action field on the Person Profile page or Non-person Profile page.	Lists the profile items that are saved, pending approval, or have been denied approval. You can edit saved items only; items that have been submitted for approval can't be changed.
Copy Items from Job Profile	JPM_COPY_PROFL_SEC	Select *Copy From Job Profile* in the Profile Action field on the Person Profile page and click the Go button.	Lists the job profiles from which you can copy profile items. Select the profile from which you want to copy profile items and click the Select button. The system adds the profile items to the employee's profile.
Select Profile	JPM_JP_REL_PRF_EMP	Select *View Related Job Profiles* in the Profile Action field on the Person Profile page and click the Go button.	Lists the job profiles that are related to an employee's job data. Select the profile that you want to view and click the Select button. The Non-person Profile page is displayed.

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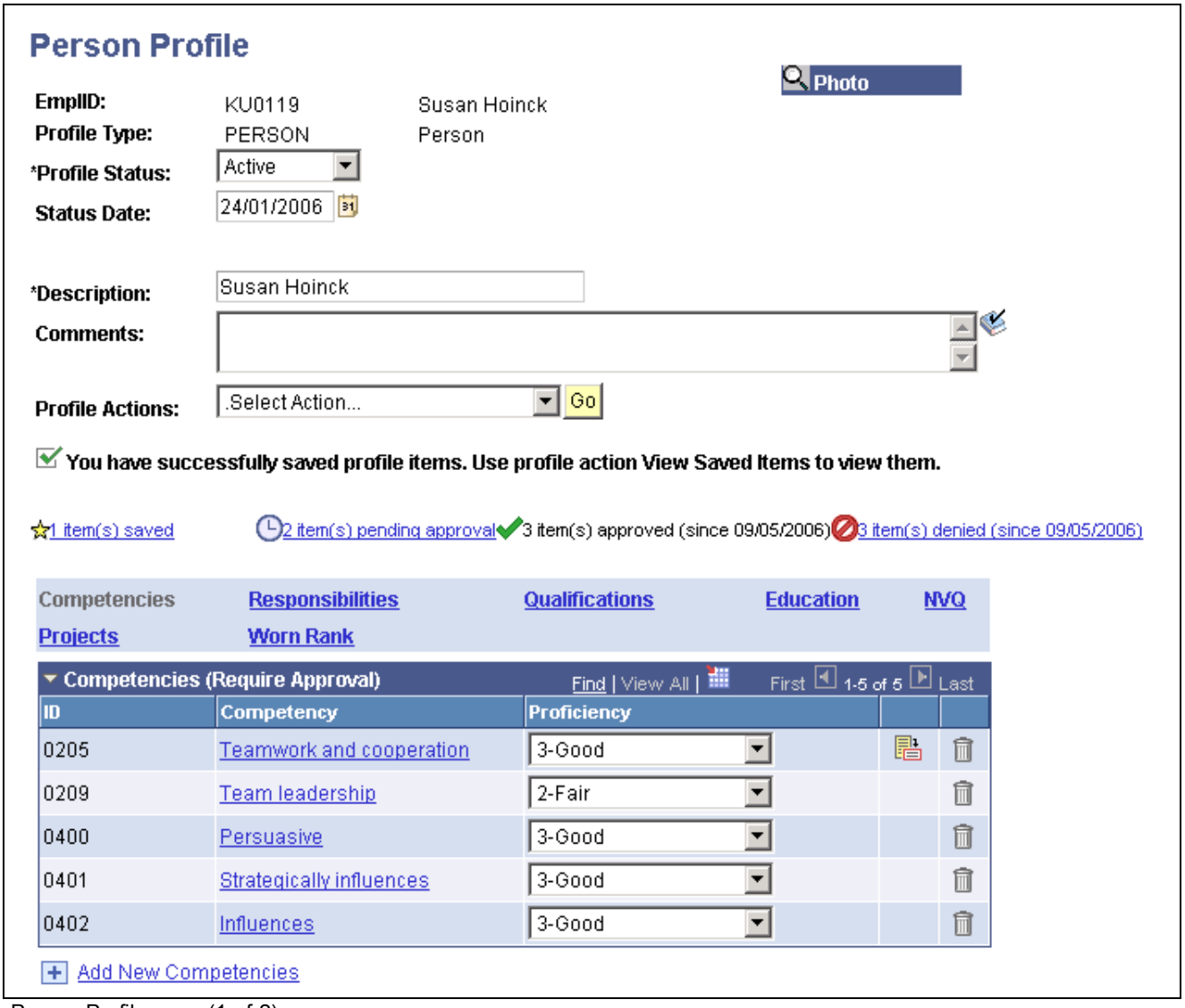
Page Name	Object Name	Navigation	Usage
Plan Careers/Manage Profiles Link	COMP_STRDVLP_SEC	Select Link to Career Planning in the Profile Action field on the Person Profile page and click the Go button.	Transfers profile items between employees' profiles and their career plan.
Non-person Profile — Search Profile and Catalog	JPM_PROF_SRCH_SEC	Click the Import/Syndicate Content link on the Non-person Profile page	Select the profiles from which content will be imported or syndicated.
Non-person Profile — Syndication Sources and Targets	JPM_PROF_SYND_SEC	Click the Syndication Source and Targets link on the Non-person Profile page.	View the syndication source and target profiles. You can also remove syndicated content from this page.
Profile Identity Search	JPM_JP_PID_SRCH	Click the Search button in the Profile Identities scroll area on the Non-person Profile page.	Search for profile identities to add to the profile.
Profile Association Search	JPM_JP_P_ASSC_SRCH	Click the Search button in the Profile Associations scroll area on the Non-person Profile page.	Search for profile associations to add to the profile.
Person Profile — Summary of Changes	JPM_JP_PERSUMM_SEC	Click the Submit button on the Person Profile page.	Lists the changes that have been made to the person profile. Click the Submit button to submit the changes for approval or click Cancel to return to the Person Profile page.
Non-person Profile — Summary of Changes	JPM_JP_NPSUMM_SEC	Click the Submit button on the Non-person Profile page.	Lists the changes that have been made to the non-person profile. Click the Submit button to submit the changes for approval or click Cancel to return to the Non-person Profile page.
Approvals	JPM_JP_PROFL_APPR	• Click the Submit button on the Person Profile — Summary of Changes page. • Click the Submit button on the Non-person Profile — Summary of Changes page.	Confirms the changes have been submitted. If approval is required, the Approval Routing group box provides a summary of the approval path. It shows the number of approvers and the sequence of approvals.

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Page Name	Object Name	Navigation	Usage
Review Syndication Exceptions	JPM_JP_SYND_EXC1	Workforce Development, Profile Management, Profiles, Syndication Exceptions	Display the syndication exceptions for a profile. Syndication exceptions occur when an content item is syndicated from multiple source profiles but has different property values from each source profile.
Exception Details	JPM_JP_SYND_EX_SEC	Click the View Details link on the Review Syndication Exceptions page.	Display details of profile items with exceptions.

Creating and Updating Person Profiles

Access the Person Profile page.



Person Profile page (1 of 2)

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Person Profile page (2 of 2)

Profiles are divided into tabs that appear as links as shown in this example:



Example Tabs

When you click the tab name, the content sections for that tab are displayed.

Note. The tabs that appear on the profile and content section within each tab are determined by the profile type selected. Define the tabs and content sections for profile types using the Profile Type — Content page.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54.

Note. The Person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear on the profile tabs. Instead links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or denied approval. Use these links to view the changes.

Items saved, Items pending, Items denied Click these links to view a list of the items that have been saved, are pending approval, or denied approval.

Items approved Displays the number of items that have been approved. The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles Installation, page 40.

Add New <content type> Click this link to add a new profile item. The Add <content type> page is displayed. The fields on this page are determined by the profile type associated with the profile.

Profile Group Type Select the profile group type.

Profile Group ID Select the profile group to which the profile is added.

Add Profile to Group Click this link to add the profile to another group.

Save Click this button to save the changes you have made. When you click the Save button, the system updates the Person Profile page to display approved items only. All the changes that you made before saving are no longer shown

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on the profile tabs, even if approval is not required for the changes. If you are creating a new profile, it appears to have no profile items. However, the Saved Items link appears to enable you to view the changes you have saved but not submitted.

You can save changes without submitting them for approval if you want to return to the profile later to make further changes. The system tracks the saved items and the next time you return to the profile, the Items saved link enables you to view and update those changes before submitting them for approval.

Submit

Click this button to submit the profile for approval. The Person Profile — Summary of Changes page is displayed that lists the new, deleted, and changed items.

This button is not available until you click the Save button to save the changes you have made. All changes to the profile must be submitted, whether approval is required or not, for the new, deleted and changed items to appear on the profile.



Click the View All Rows icon to display the View All Rows page. This icon is displayed when a profile item has more than one effective-dated row only.



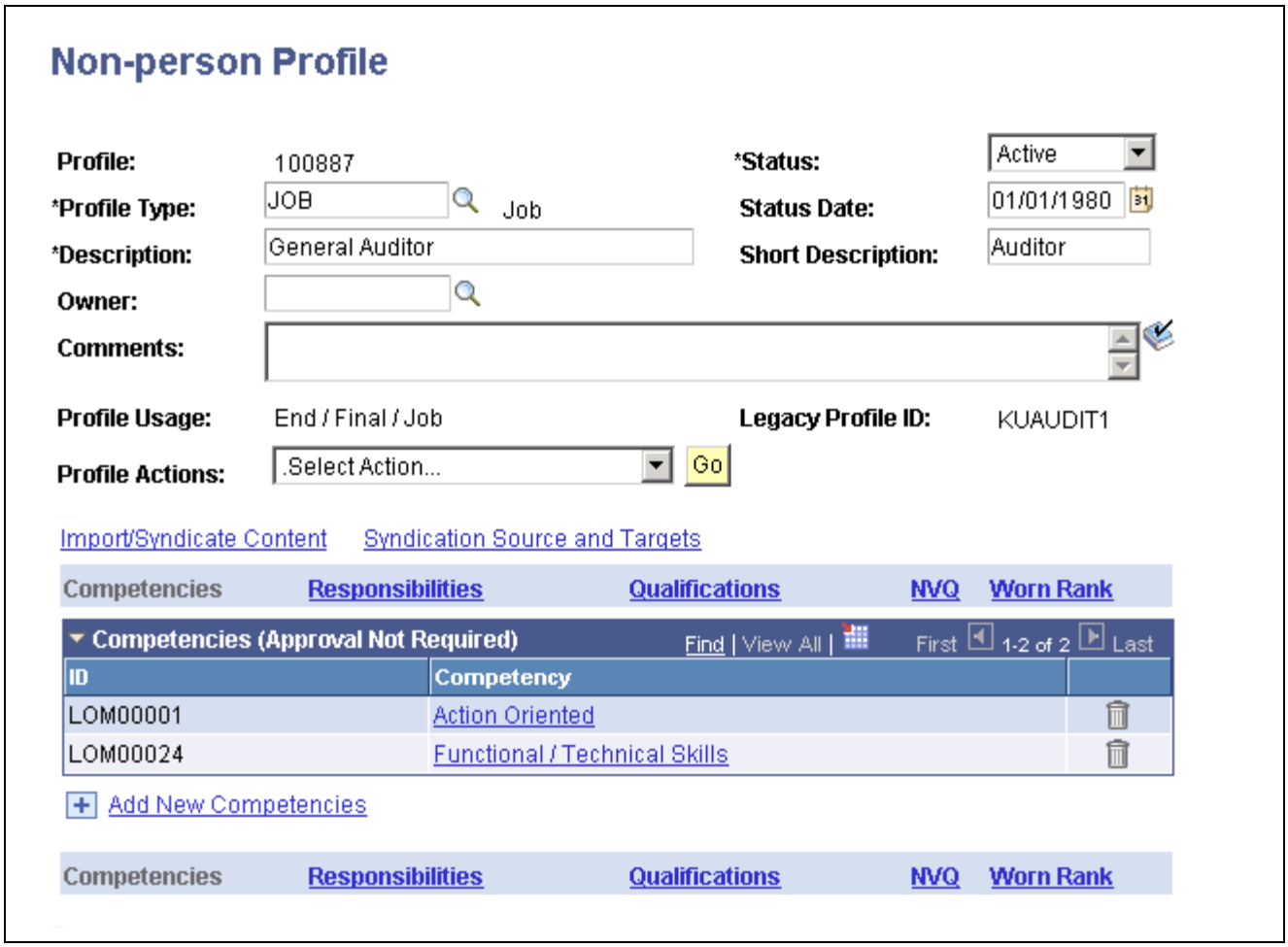
Click the View Profile as Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. XML Publisher technology generates the printable file using the same template and layout as the Person Profile batch report.

See Chapter 3, “Setting Up Profile Management,” Setting Up to Use XML Publisher Reports and Profiles, page 67.

Creating and Updating Non-Person Profiles

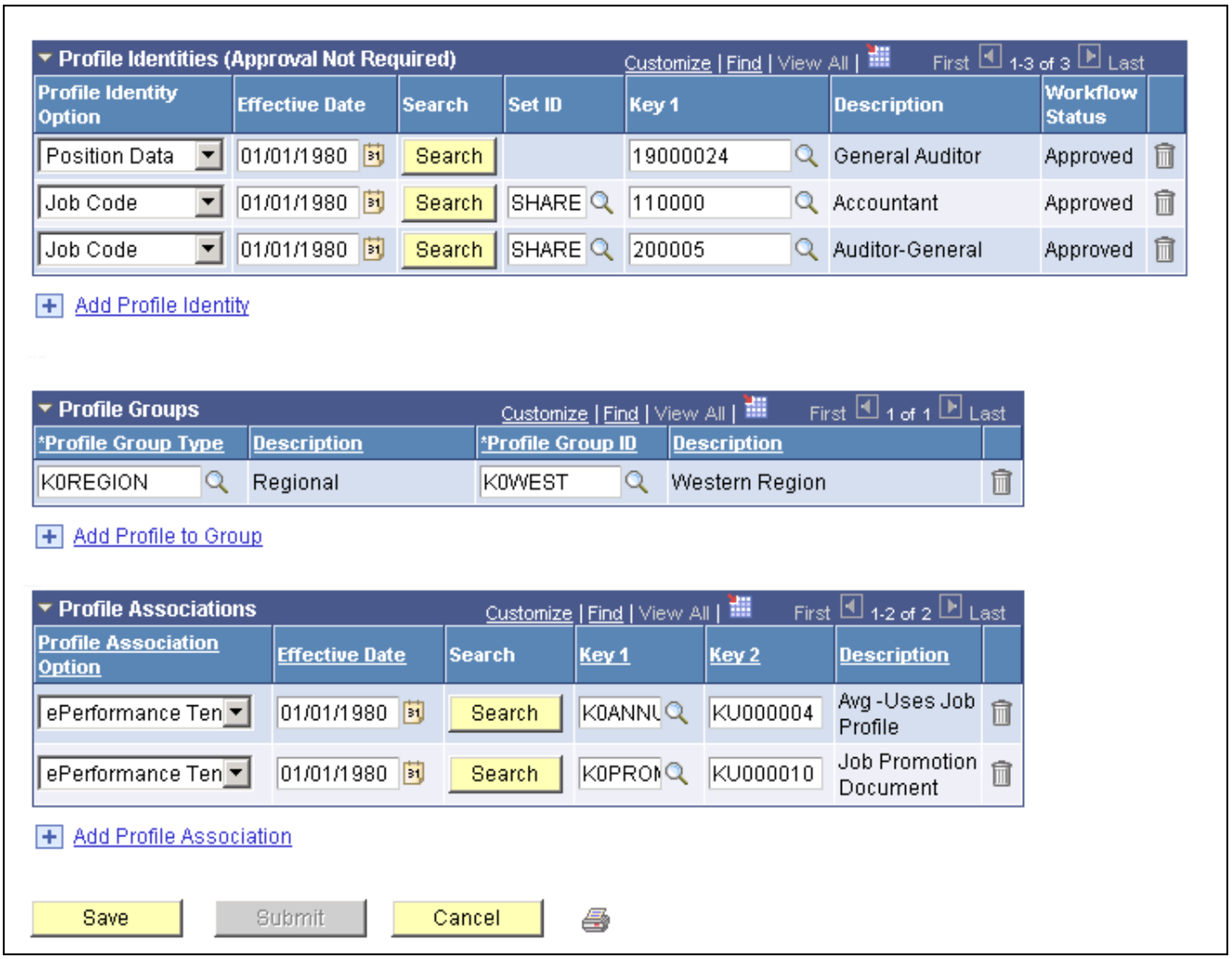
Access the Non-person Profile page.

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Non-person Profile page (1 of 2)

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Non-person Profile page (2 of 2)

Note. The tabs that appear on the profile and content sections within each tab are determined by the profile type selected. Define the tabs and content sections for profile types using the Profile Type — Content page.

See Chapter 3, "Setting Up Profile Management," Defining Profile Type Content, page 57.

Note. The Non-person Profile page displays approved items only. Any new profile items, changes to existing items, or deletions that have not been approved do not appear on the profile tabs. Instead links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or denied approval. Use these links to view the changes.

Owner Select the employee ID of the profile owner. Use this field if you want to assign owners to profiles for reporting or other purposes.

Profile Usage Displays a value that indicates how the profile is used. It is determined by the profile identities linked to the profile and whether those profile identities are defined in the profile type as an end profile or template profile (on the Profile Type — Identities page). For example, if you link a profile to a job code, the system checks whether job code is specified as an end profile or template in the profile type. Displays one of these values:

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Administrator Only: Indicates that the profile is not linked to a profile identity or the profile identities linked to the profile are defined as neither end profile nor template (that is, the End Profile and Template check boxes are not selected). Employees and managers cannot view profiles that are Administrator Only.

Template: Indicates a template profile. Profiles are assigned this value if any of the profile identities linked to the profile are defined as template only (the End Profile check box is not selected and the Template check box is selected) and none of the profile identities is defined as end profile. Employees and managers cannot view template profiles.

End/Final/Job: Indicates an end profile. Profiles are assigned this value if at least one of the profile identities linked to the profile is defined as an end profile (the End Profile check box is selected). Employees and managers can view end profiles using self-service options.

Legacy Profile ID Displays the legacy profile ID assigned to the profile during upgrade. This field is displayed for some types of profiles that existed in earlier versions of PeopleSoft Enterprise Human Resources.

Import/Syndicate Content Click to import or syndicate content from another profile.

Syndication Source and Targets Click to display the Syndication Source and Targets page which lists:

- The source profiles that provide syndicated content for the profile.
- The target profiles that contain content syndicated from the profile.

Remove Syndicated Content, Source Click to remove profile items that were syndicated from another profile. This link is displayed only if the profile contains syndicated profile items. The Source column displays the name of profile from which the profile item was copied. Click the Source link to view the source profile.

Items saved, Items pending, Items denied Click these links to view a list of the items that have been saved, are pending approval, or denied approval.

Items approved Displays the number of items that have been approved. The date displayed is determined by the value in the Days of Approval History field on the Profile Management Installation page.

See Chapter 3, "Setting Up Profile Management," Configuring Manage Profiles Installation, page 40.



Click the View All Rows icon to display the View All Rows page. This icon is displayed when a profile item has more than one effective-dated row only.



Click the View Profile as Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. XML Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report.

See Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 67.

Profile Identities

This group box lists the profile identities to which the profile is linked.

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Profile Identity Option Select the profile identity option. The options available are determined by the profile type definition.

See Chapter 3, "Setting Up Profile Management," Defining Profile Type Identities, page 56.

Search Click this button to search for a profile identity.

SetID Select the setID for the profile identity you want to link to this profile. This field appears if the profile identity selected has setID as a key field. SetID is a key field for job codes and salary grades.

Key 1, Key 2, Key 3, Key 4 Select the profile identity you want to link to the profile. The Key 2, Key 3, and Key 4 fields appear if the profile identity has two, three, or four key fields. For example, if you select *Salary Grade* in the Profile Identity Option field, the Key 1 field is for the salary administration plan and Key 2 field is for the salary grade.

Add Profile Identity Click to link the profile to another profile identity.

Profile Groups

This group box lists the profile groups to which the profile belongs.

Profile Group Type Select the profile group type.

Profile Group ID Select the profile group to which you want to add the profile.

Add Profile to Group Click to add the profile to another group.

See Chapter 3, "Setting Up Profile Management," Creating Profile Group Types and Profile Groups, page 65.

Profile Associations

This group box lists the associations for the profile. Profile associations are entities outside the Manage Profiles business process. PeopleSoft Enterprise ePerformance templates are linked to profiles in this way.

Profile Association Option Select the profile association option. The options available are determined by the profile type definition.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Type Associations, page 65.

Search Click this button to search for profile associations.

Key 1, Key 2, Key 3, Key 4 Select the profile association that you want to link to the profile. The Key 2, Key 3, and Key 4 fields appear if the profile association has two, three, or four key fields. For example, if you select ePerformance in the field, the Key 1 field is for the Document Type and the Key 2 field is for document template ID.

Add Profile Association Click to add a profile association.

Adding, Updating, and Viewing Profile Item Details

Access the Add <content type> or Update <content type> page.

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Update <content type> page

Note. The fields and field labels that appear on this page vary according to the item's content type and the content section definition in the profile type. Define content sections using the Profile Type — Content page.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54.

Related Content Click this link to display the Related Items page that you use to add, update, and view items that are related to the selected profile item. This link is displayed only if the content type of the profile item is related to another content type and the profile type definition includes this related content type.

See Also

Chapter 2, "Setting Up the Content Catalog," Defining Content Type Relationship Rules, page 20

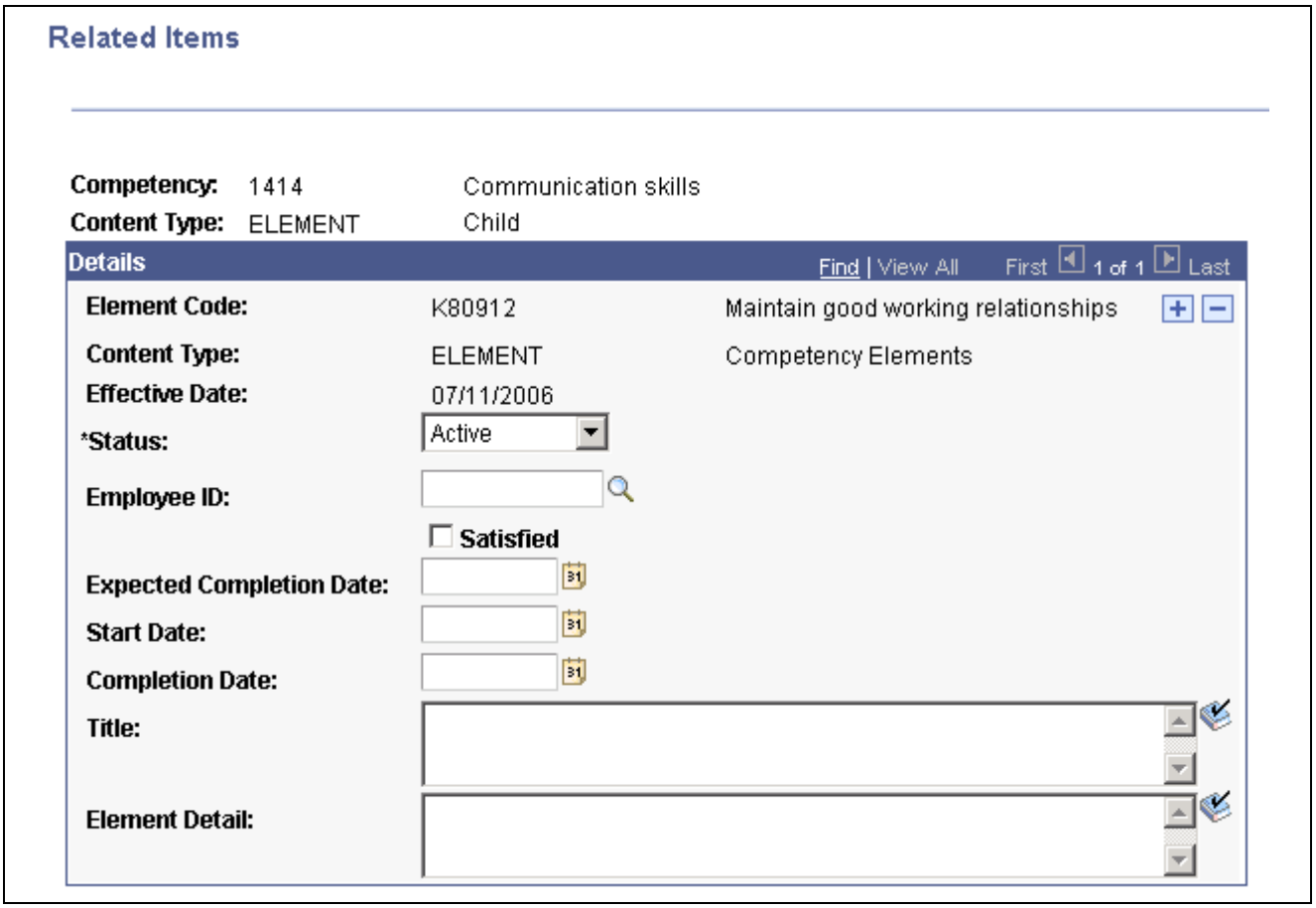
Chapter 2, "Setting Up the Content Catalog," Defining Content Item Relationships, page 24

Chapter 3, "Setting Up Profile Management," Defining Profile Type Content, page 57

Adding Related Profile Items

Access the Related Items page.

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Related Items page

Use this page to add profile items to a profile that are related to an existing profile item. The related items that you can add to a profile are determined by the content section definitions in the profile type and the relationships defined in the content catalog.

Note. The fields and field labels that appear on this page vary according to the related item's content type and the content section definition in the profile type.

Content Type Displays the content type that is related to the profile item and shows the relationship type. In the example shown, the element item is a *CHILD* of the competency item.

See Also

Chapter 2, "Setting Up the Content Catalog," Defining Content Type Relationship Rules, page 20

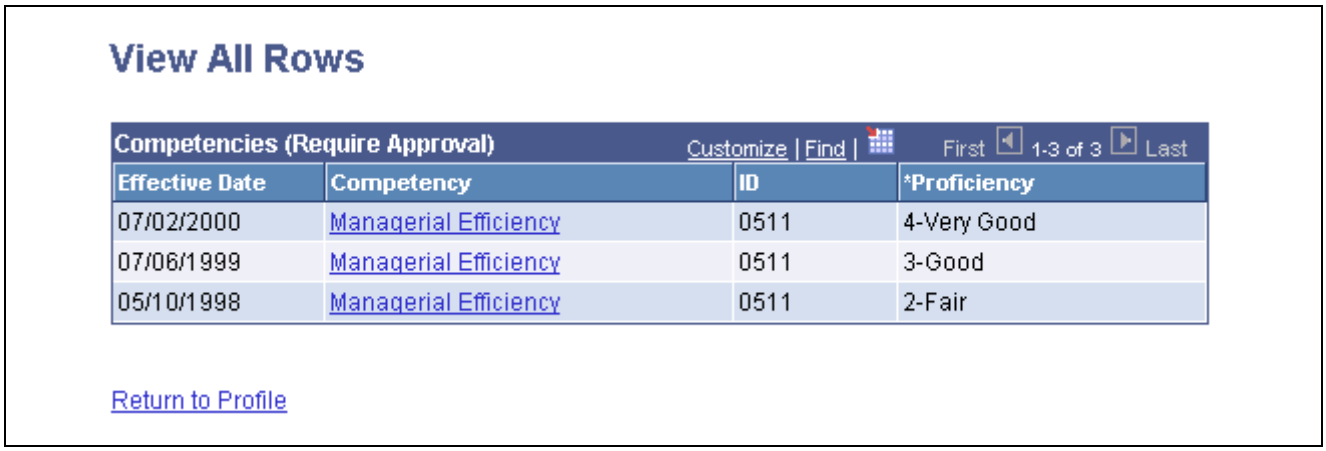
Chapter 2, "Setting Up the Content Catalog," Defining Content Item Relationships, page 24

Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 60

Viewing Profile Item Rows

Access the View All Rows page.

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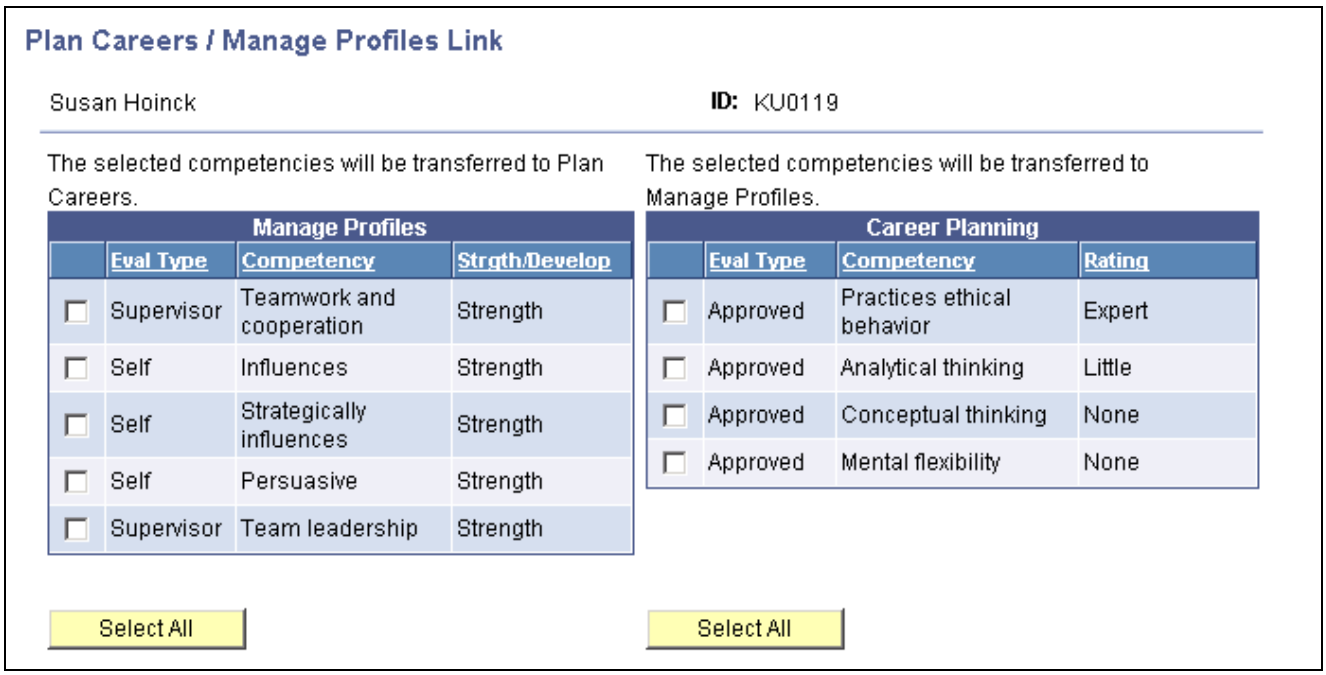
View All Rows page

This page lists the current, future, and historical rows for an item in a person or non-person profile, enabling you to track the history of a profile item. For example, you can use this page to review the changes to an employee's rating for a profile item, or the desired rating of an item in a job profile. Click the profile item link to view details of the profile item for the selected effective date.

Click Return to Profile to return to the Person Profile page or the Non-person Profile page, depending on the profile type.

Synchronizing Person Profiles with Career Plans

Access the Plan Careers/Manage Profiles Link page.



Plan Careers/Manage Profiles Link page

Manage Profiles

This group box lists the competencies that exist in the employee's PERSON profile that are not included in the career plan. Select the check box next to those competencies that you want to add to the career plan.

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Competencies are added to the Career Strength/Development Areas page.

Career Planning

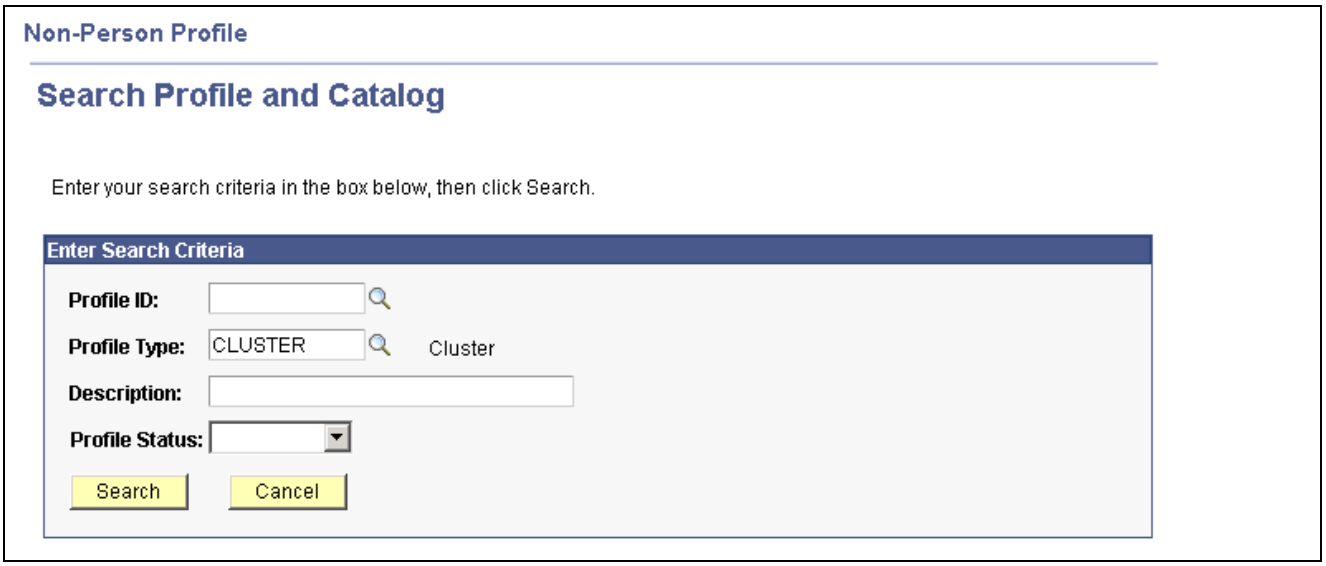
This group box lists the competencies in the employee's career plan that are not included in the employee's profile. Select the check box next to those competencies that you want to add to the profile. Competencies are added to the employee's PERSON profile.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Plan Careers and Successions, "Planning Careers," Evaluating Employee Strengths and Developmental Areas

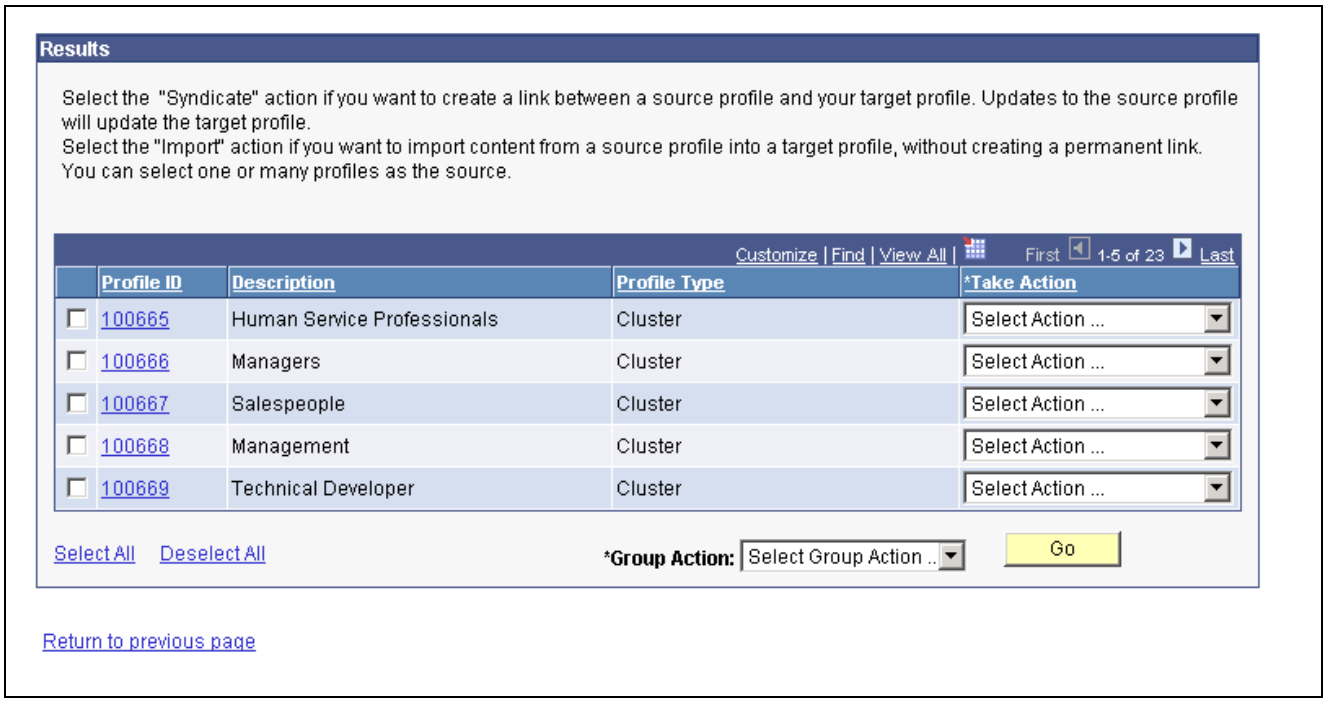
Selecting Profiles for Import or Syndication

Access the Search Profile and Catalog page.



Search Profile and Catalog page (1 of 2)

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Search Profile and Catalog page (2 of 2)

Enter Search Criteria

Select the search criteria and click the Search button to search for profiles that you want to use for the import or syndication.

Results

This group box lists the profiles that meet your search criteria. Select the profiles from which you want to import or syndicate content by selecting the check box next to the profile ID.

Profile ID Click the profile ID to view the profile.

Take Action Select one of these values:

Import Content: To import the content of the selected profile. When you import content, the system does not establish a link between the source and the target profile. This means that changes to the content of the source profile made after the import action do not affect the target profile.

Syndicate Content: To copy the content of the selected profile. When you syndicate content, you establish a relationship between the source and target profile such that changes to the source profile result in the same changes occuring in the target profiles. View syndication relationships using the Syndication Sources and Targets page.

Group Action If you have selected more than one profile, use the Group Action field to apply the same action to all the selected profiles. Select *Import Content* to import content from the selected profiles or *Syndicate Content* to syndicate content from the selected profiles.

Go Click to import or syndicate content from the profiles you selected. Click Return to Previous Page to go back to the Non-person Profile page.

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Viewing Syndication Sources and Targets

Access the Syndication Sources and Targets page.



Syndication Sources and Targets page

Syndication Sources Lists the profiles that provide content for the selected profile. If you want to remove syndicated content, select the check box next to the source profile ID.

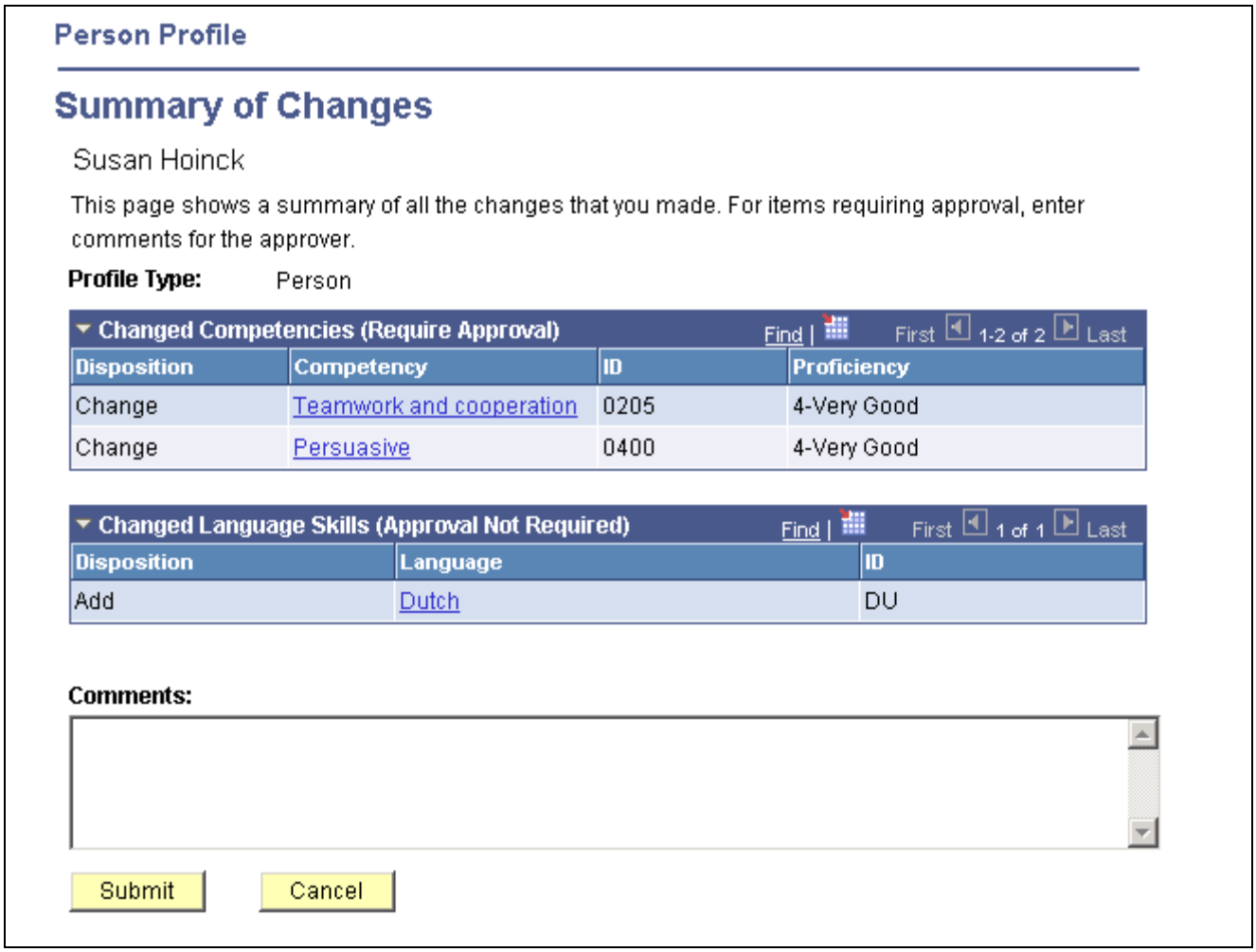
Delete Selected Click this button to remove the link between the source profile you selected and the target profile. Profile items that were originally syndicated remain on the profile, but they are no longer maintained by the system.

Syndication Targets Displays the profiles that are targets for syndication. These profiles contain content from the selected profile. If you make changes to the selected profile, the syndicated profiles are automatically updated.

Submitting Changes to Person Profiles

Access the Person Profile — Summary of Changes page.

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Person Profile — Summary of Changes page

This page lists the changes that have been made to the person profile. The title of the scroll areas for each content section indicates which items require approval and those that don't need approval. The fields displayed on this page are determined by the definition of the content section in the profile type. The properties in the content section with the Summary check box selected are displayed on this page only.

See Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 60.

Profile Type Displays the profile type for the profile.

Disposition Displays the type of change made:

Add: If it is a new profile item

Change: If you have made any changes to the item properties.

Delete: If you have deleted a profile item.

Workflow Status Displays *Saved*. When you click the Submit button, the system changes the workflow status to *Approved* if the item doesn't require approval, or *Pending* if it does need approval.

The Workflow Status field is displayed only if the content section definition includes the JPM_WF_STATUS property and the Summary check box is selected for the property.

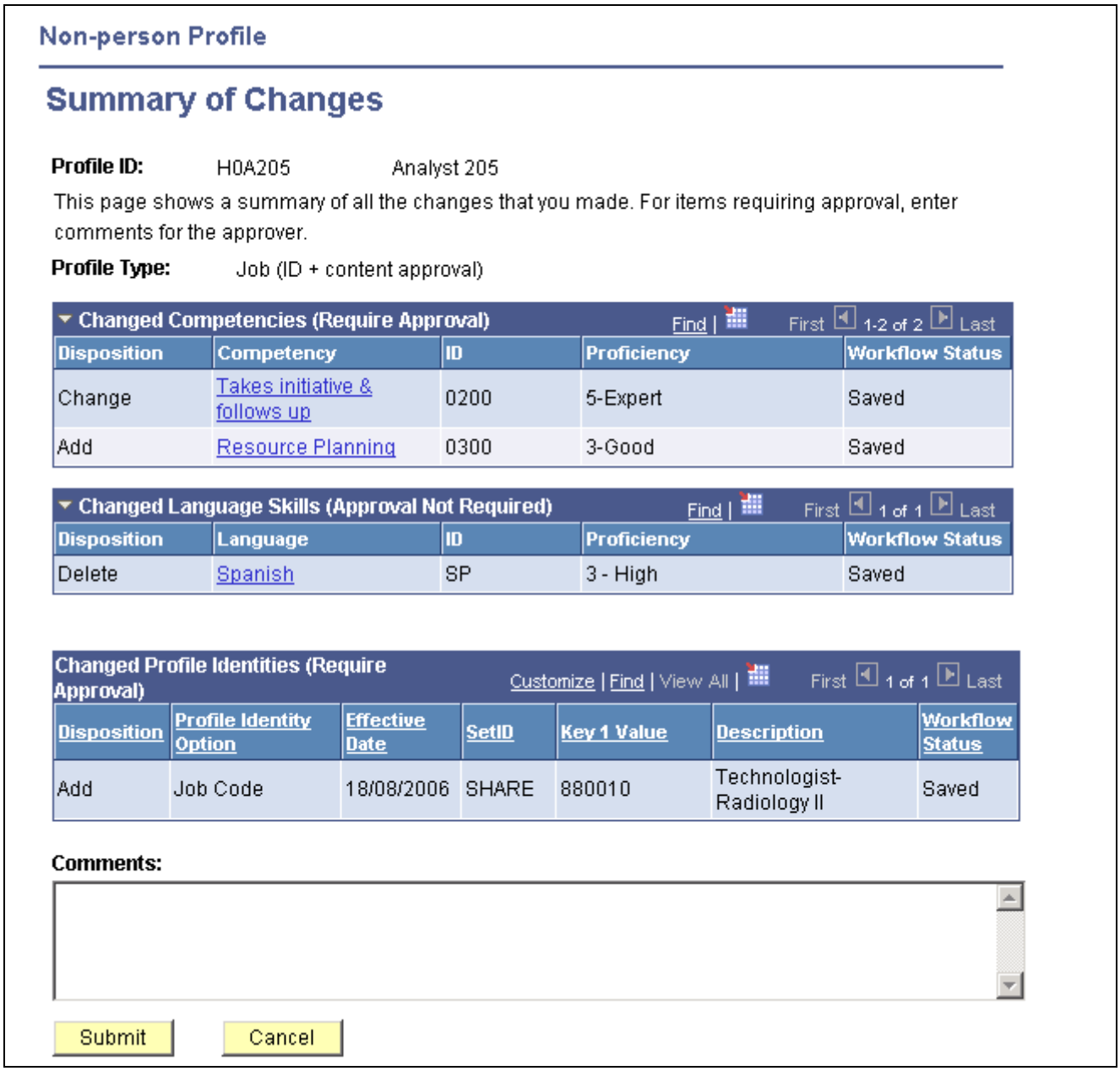
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Comments	Enter comments for the approver if required. This field is hidden if the changes do not require approval.
Submit	Click this button to submit the changes for approval. If the changes to the profile do not require approval, the changes are automatically approved and appear on the profile tabs. If approval is required, the Approvals page is displayed.
Cancel	Click this button to return to the Person Profile page without submitting the items for approval.

Submitting Changes to Non-Person Profiles

Access the Non-person Profile — Summary of Changes page.

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Non-person Profile — Summary of Changes page

This page lists the changes to the non-person profile shown in the Profile ID field. The fields on this page are similar to the Person Profile — Summary of Changes page.

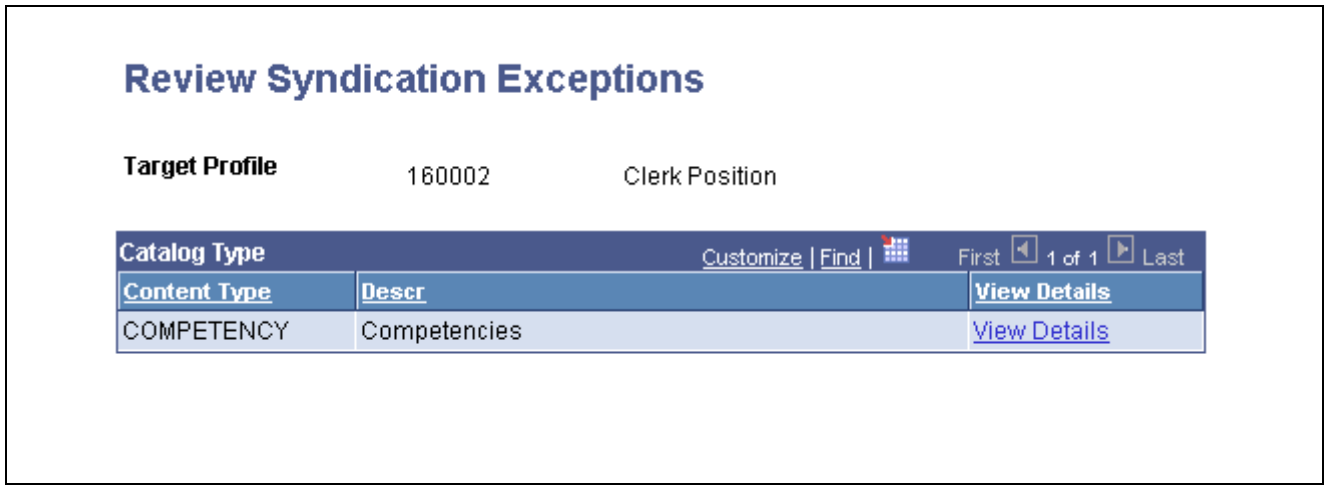
See Also

Chapter 5, "Managing Profiles," Submitting Changes to Person Profiles, page 109

Reviewing Syndication Exceptions

Access the Review Syndication Exceptions page.

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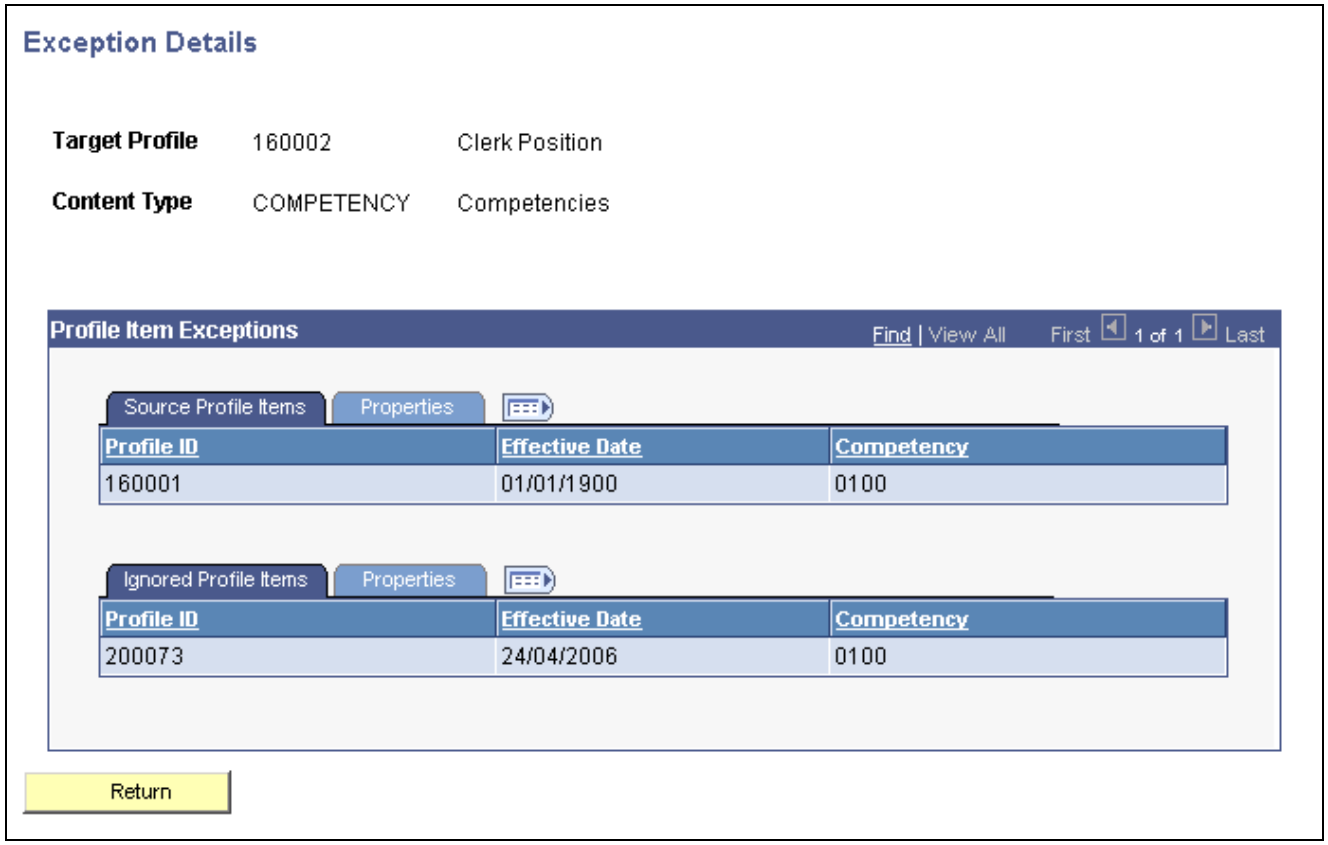


Review Syndication Exceptions page

This page lists the content types that include syndication exceptions. Click the View Details link to access the Exception Details page that lists the profile items with syndication exceptions.

Reviewing Syndication Exception Details

Access the Exception Details page.



Exception Details page

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Source Profile Items

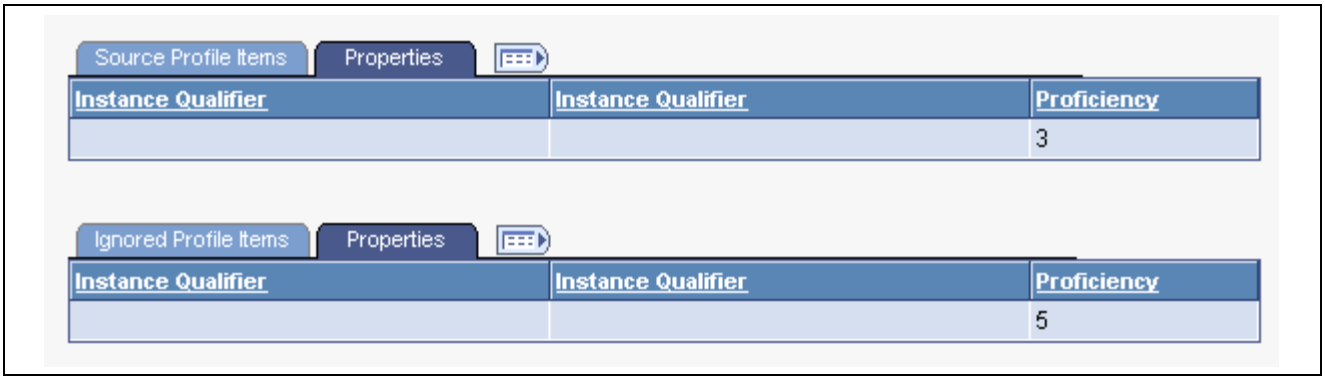
This tab displays the details of the source profile and profile items that have been syndicated into the target profile.

Ignored Profile Items

This tab displays the details of the source profile that conflicts with the syndicated profile items specified in the Source Profile Items tab.

Properties

Access the Properties tab.



Exception Details: Properties tab

The Properties tabs display the field values in the syndicate source profiles. In the example shown, the Proficiency field has different values in the two source profiles. The values shown for the Source Profile Items are those inserted into the target profile.

Approving Profile Changes

This section provides an overview of profile approval processing and discusses how to:

- View profile approval transactions.
- View, approve, and deny profile changes.

Understanding Profile Approval Processing

You can use approval processing to control:

- Updates to profile items on person profiles.

  If approval processing is configured for a content section, when profiles items are added, deleted, or updated, it triggers approval processing.

- Updates to profile items and profile identities associated with non-person profiles.

  If approval is required for profile identities, any changes to the list of profile identities associated with the profile triggers approval processing.

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Configure profile approvals at the profile type level. You associate an approval definition with the profile type and then specify which content sections in the profile type require approval. For non-person profiles, you can also specify whether profile identities require approval.

Profile approvals uses the Approval Workflow Engine (AWE) for managing approval of person and non-person profiles. The delivered approvals definitions provide the following profile approval processing:

- When employees make changes to their person profiles, the changes are routed to their manager for approval.

  When managers or administrators update person profiles, these changes do not require approval.

- When managers create or update non-person profiles, the changes are routed to the profile administrator for approval.

  When administrators update non-person profiles, the changes do not require approval.

You can use the delivered definitions or set up new approval definitions for managing profiles, according to your business needs.

See Also

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

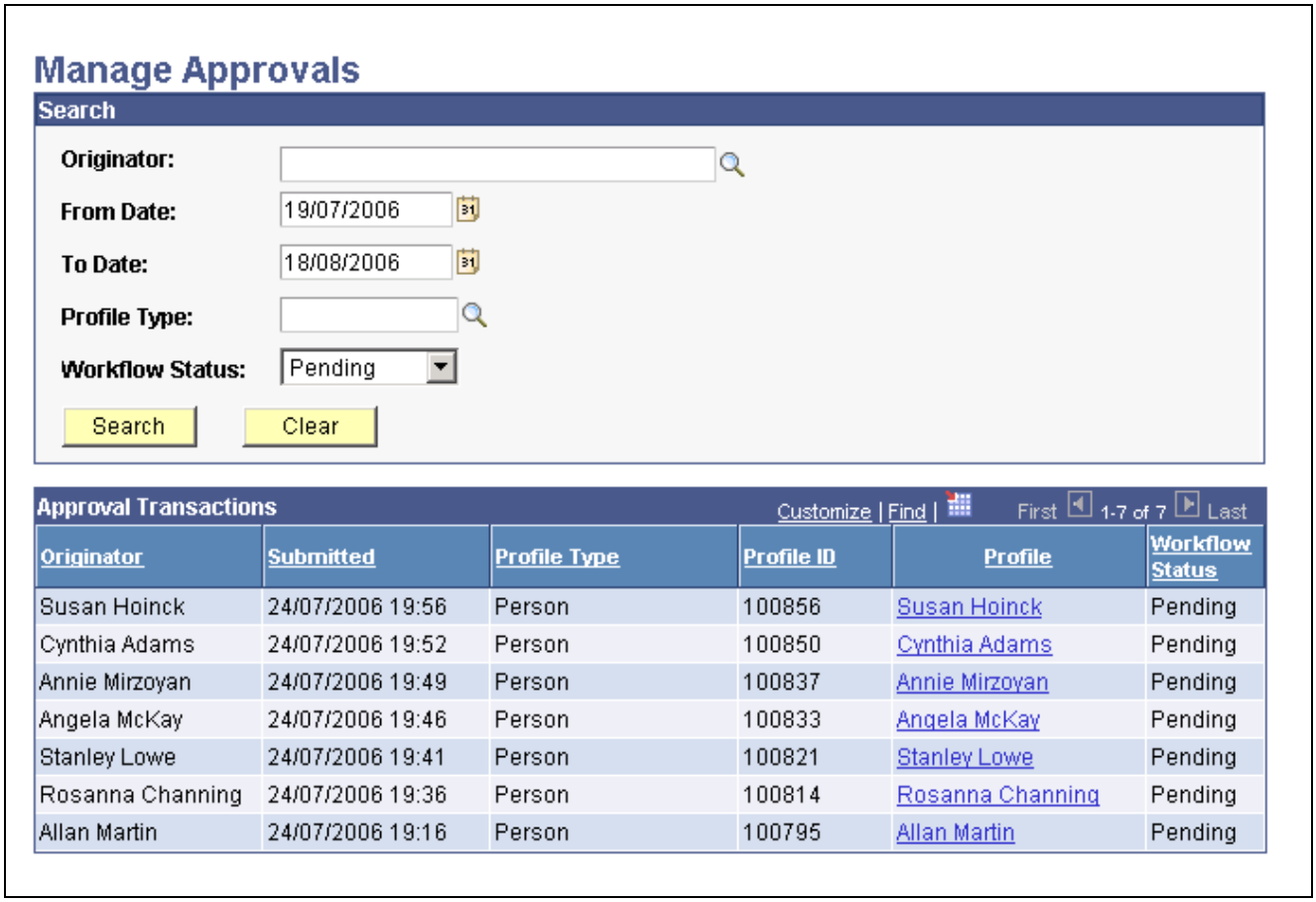
Pages Used to Approve Profiles

Page Name	Object Name	Navigation	Usage
Manage Approvals	JPM_JP_MNG_APPRVL	Workforce Development, Profile Management, Profiles, Profile Approvals	View a list of profiles waiting approval, with approved changes, or with changes that have been denied.
Person Profile — Approval	JPM_JP_PERS_APPR	Click a profile ID on the Manage Approvals page.	View a list of the changes to a selected person profile. If the profile changes are pending approval, you can either approve or reject the changes.
Non-person Profile — Approval	JPM_JP_NONPER_APPR	Click a profile ID on the Manage Approvals page.	View a list of the changes to a selected non-person profile. If the profile changes are pending approval, you can either approve or reject the changes.
<content type>	JPM_APR_DTL_SEC	Click a profile item ID on the Approval page.	View details of a profile item that has changed.
Approval Confirmation, , Deny Confirmation	JPM_JP_PER_APR_CNF	Click the Approve button or Deny button on the Person Profile — Approval page.	Displays a confirmation message. When you click OK, you return to the Manage Approvals page.

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Viewing Profile Approval Transactions

Access the Manage Approvals page.



Manage Approvals page

Originator Select an employee ID to search for profile changes submitted by that employee.

From Date, To Date Enter period begin and end dates to search for approvals that were submitted between the selected dates.

Profile Type Select a profile type to search for approvals for a specific profile type.

Workflow Status Select the status of the approvals you want to view:

Pending: To view profile changes that have been routed to you for approval.

Approved: To view profile changes that you have previously approved.

Denied: To view profile changes that you rejected.

Search Click to populate the Approval Transaction scroll area with profiles that match your search criteria.

Approval Transactions

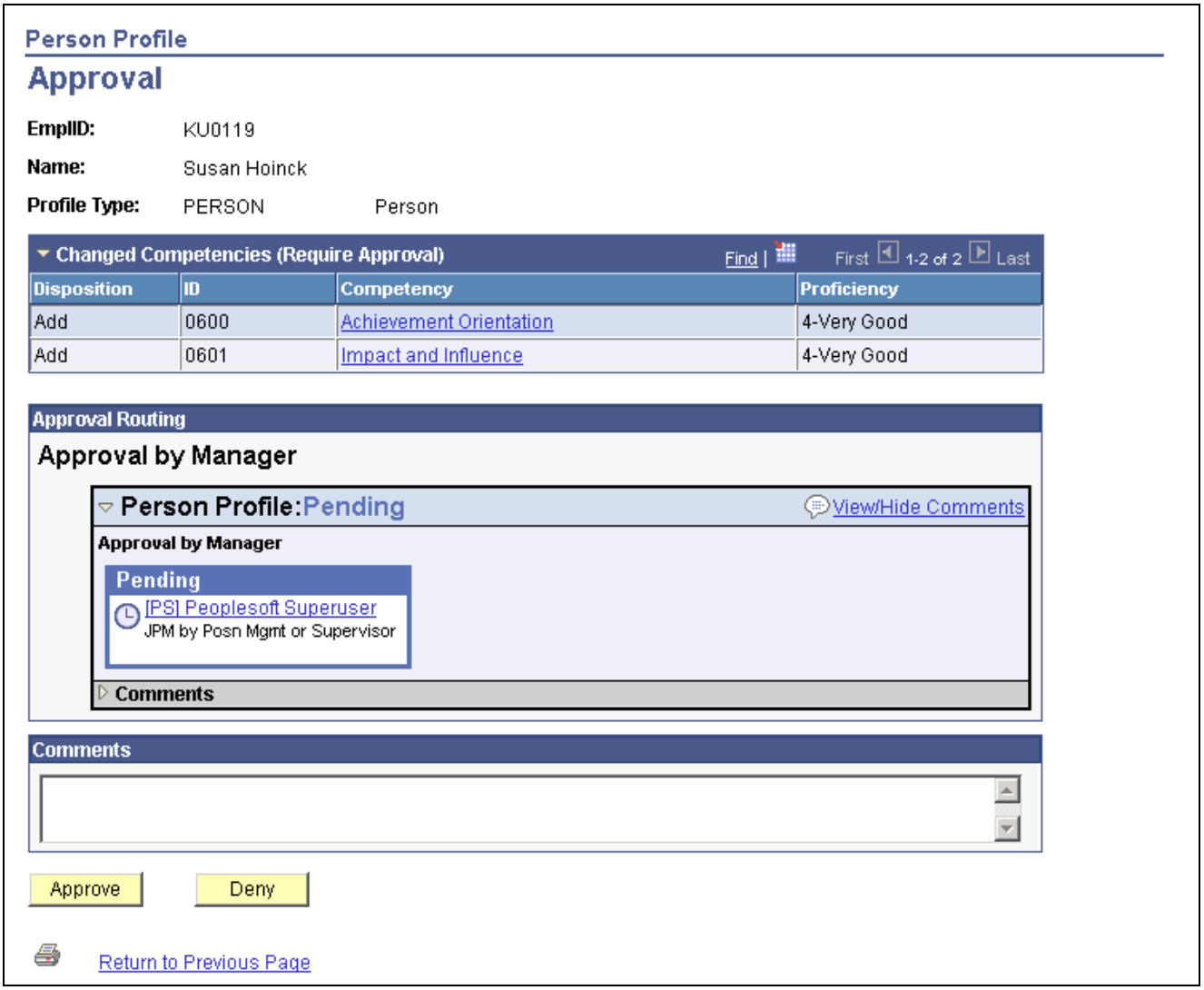
Submitted Displays the date that the profile changes were submitted for approval.

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Profile Click the profile link to view the changes to the profile that require approval. The system displays the Approval page.

Viewing, Approving, and Denying Profile Changes

Access the Person Profile — Approval page.



Person Profile — Approval page

Disposition Displays one of these values to indicate the type of change:

Add: Indicates a new profile item.

Change: Indicates that the originator changed one or more properties for the profile item.

Delete: The originator has deleted the profile item.

<content type> Click a link in this column to view details of the changes to the profile item. The item properties are determined by the profile type definition.

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Comments Enter any comments for the originator relating to this approval transaction. The comments field is available only if the profile changes are pending approval.

Approve Click this button to approve the profile changes. This button appears only for profile changes with a *Pending* workflow status.

Deny Click this button to reject the profile changes. This button appears only for profile changes with a *Pending* workflow status.



Click the View Profile as Printable Page icon to display the profile in a PDF file that you can print from Adobe Acrobat. XML Publisher technology generates the printable file using the same template and layout as the Non-Person Profile batch report. The printable file displays approved items only.

See Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 67.

Approval Routing

This group box displays the routing information from the Approval Workflow Engine.

View/Hide Comments Click to view or hide the comments entered by the originator when he or she submitted the profile changes for approval.

Searching and Comparing Profiles

This section provides overviews of search and compare profiles and scores, and discusses how to:

- Select a source profile.
- Set up search criteria.
- View search results.
- Select profiles to compare.
- View comparison results.

Understanding Search and Compare Profiles

The search and compare profiles feature enables employees, managers, and administrators to search for profiles that match selected search criteria and compare profiles. Before users can run any searches, you must build the Verity indexes and define the search types available on the Search Configuration page. For each search type you define:

- Source and target profile types.

  The source and the target profile types are the two profile types that are compared in the search. The source is the profile type that forms the basis for the search criteria and the target is the profile type being searched for matching profiles.

- Criteria rule.

  The Criteria Rule field controls how the search works. There are three types of criteria rule:

  - *Default, No Display:* The search has default search criteria based on a source profile and the search criteria are not displayed.

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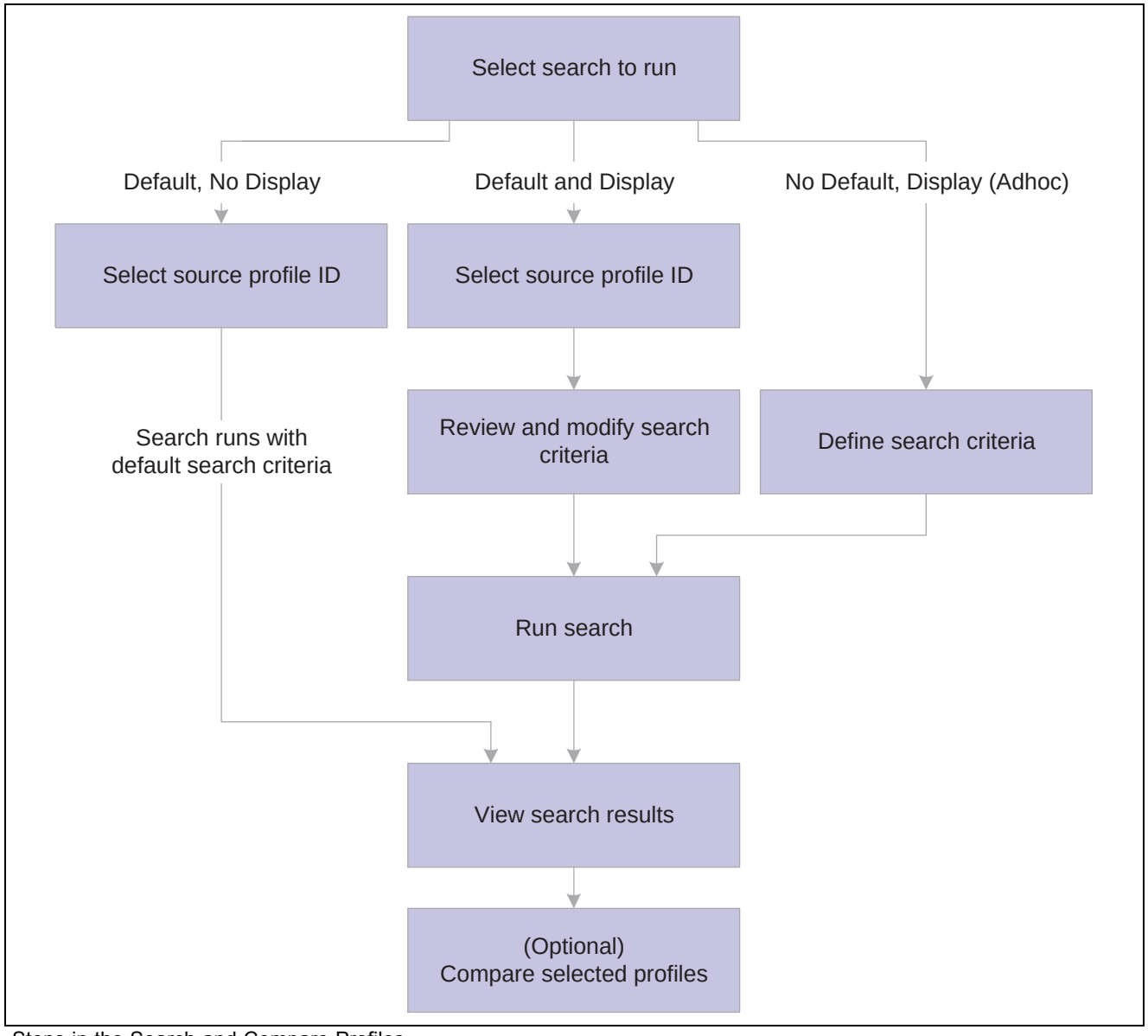
- *Default and Display:* The search has default search criteria based on a source profile and users can view and adjust the search criteria before running the search.
- *No Default, Display (Adhoc):* The search does not have default search criteria and users define the search criteria manually. For this type of search, the source and target profile types are not mandatory in the configuration. However, if these fields are blank, users must select source and target profile types before they define the search criteria.

• Roles associated with the search.

  Users can only run the searches that are defined for their role.

See Chapter 4, "Setting Up Search and Compare Profiles," page 73.

This diagram outlines the steps for Search and Compare Profiles for each type of search:



Steps in the Search and Compare Profiles

The steps are discussed in detail in the sections that follow.

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Selecting a Search

Administrators can run search and compare profiles in two ways:

- By selecting the Search and Compare Profiles option from the Profiles menu.
- By selecting *Search and Compare Profiles* in the Profile Actions field on the Person Profile or Non-person Profile page.

Whichever navigation you use, the system displays only those searches that are configured for the administrator role. Roles are associated with searches on the Search Configuration page. In addition, if you run search and compare profiles from the Person Profile or Non-person Profile page, the list of searches is restricted to those that have a source profile type that matches the profile you are viewing.

The *PeopleSoft Enterprise eDevelopment 9.0 PeopleBook* discusses the employee and manager self-service options for search and compare profiles.

See *PeopleSoft Enterprise eDevelopment 9.0 PeopleBook*, "Maintaining My Profiles," Searching and Comparing Profiles.

Selecting a Source Profile ID

If you select a search with a criteria rule of *Default, No Display* or *Default and Display,* you must select a source profile ID that provides the default search criteria for the search and compare. The Source Profile field on the Search Configuration page defines the profile type that you can select for the search.

Note. If you run the search from the profile pages, the system automatically uses the profile that you were viewing as the source profile ID and therefore you are not prompted for a source profile ID.

If the search has the criteria rule of *Default, No Display*, the system automatically runs the search after you select the source profile ID. For this type of search, the search criteria is based on the profile items that default from the source profile and you can't adjust the criteria before running the search.

Defining Search Criteria

When you run a search with a criteria rule of *Default and Display* or *No Default, Display (Adhoc)*, you define or modify the search criteria using the Search Criteria page.

If you are running a search with a criteria rule of *Default and Display,* the page has default criteria based on the source profile type defined in the configuration. You can modify the default search criteria and add other criteria before you run the search.

If the search has a criteria rule of *No Default, Display (Adhoc),* there are no default criteria; use the Search Criteria page to define the items you want to search for in the target profiles. You are prompted for the source and target profile types if these are not defined for the search. The system then refreshes the Search Criteria page with the content sections and search filters that you can use for the search.

The Search Criteria page includes a Search Filter group box if you have set up searchable profile group types for the target profile type. Search filters enable you to narrow the search to specific profile groups.

When you have defined the search criteria, click the Search button to run the search.

Viewing Search Results

The Search Results page lists the profiles that match the search criteria. Matching profiles are ranked according to the profile scores calculated by the system. Profile scores are in the range 0 to 100, where a score of 100 means that the profile meets all the search criteria. Profile scores are discussed later in this chapter.

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See Chapter 5, "Managing Profiles," Understanding Search and Compare Profile Scores, page 121.

If you want to adjust the search criteria and rerun the search, click the Modify Search Criteria link to return to the Search Criteria page. You can also run a new search by clicking the Search for Profiles link.

Comparing Profiles

The profile scores shown on the Search Results page give an overall indication of how closely each profile matches the search criteria. However, you can also view a breakdown of the score at the item level. From the Search Results page you can:

- Compare the item scores for one profile in the search results with the search criteria by clicking the score.
- Compare up to ten profiles listed in the search results with the search criteria.

Note. The Compare Profiles option is also available from the Profiles menu. However, when you run the compare from the menu, the comparison doesn't include profile scores.

Understanding Search and Compare Profile Scores

This section discusses:

- The scoring calculation.
- Calculating property and item scores.
- Calculating item weighting based on the Importance field.
- Calculating the rating property score.
- Calculating the interest level property score.
- Calculating item scores for mandatory items.

Overview of the Scoring Calculation

This section discusses how the system calculates scores for target profiles to determine the profiles that best match the search criteria. Search and compare profiles uses the Verity search engine to determine which profiles most closely meet the specified criteria. The Verity search query is constructed of search elements generated from each profile item property in the search criteria. A full text search is performed to return matching profiles with a score which represents the match percentage. The scores are displayed in descending order with the profile having the best fit listed first.

To calculate the score for a target profile, the system calculates:

- Property scores for each property associated with an item.

  The search criteria comprises a set of profile items that you want to search for in the target profile. However, items in the search criteria can have multiple properties. For example, if you add a competency to the search criteria you can also specify the desired rating for the competency, or if you add a language skill you can specify the desired writing proficiency for that language. The competency rating and the writing proficiency are properties of the competency and language skill profile items. The system calculates a property score for each property that you specify in the search criteria and these contribute to the item scores.

- Item scores for each item in the search criteria.

  The item score is an average of the property scores for the properties associated with an item.

- Weighted item scores based on the Importance field.

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The Importance field is used to denote the relative importance of each item in the search criteria. The system applies a weighting to item scores that reflect the Importance values assigned to the items. The default for Importance is *3–Average*, but this can be changed.

- The sum of the weighted item scores.

  The overall profile score is the sum of the weighted item scores. This is the value that you see on the Search Results page.

Profile scores are also determined by the setting of the Mandatory check box. This is discussed later in this section.

Calculating Property and Item Scores

The property score varies according to the property. For most properties, profiles with matching properties score 100 and those that don't score 0. However, properties with a rating scale such as the rating property and the interest level property have scores that are in the range 0–100 according to how closely the source and the target match. This is discussed later in this section.

To calculate the item score the system calculates the average of the property scores as follows:

Total Property Score/ Property Count

In this example, the source profile contains three profile items for these content types:

Content Type	Item ID	Other Properties
Degree	BA (Bachelor of Arts)	Country: USA
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

For the degree item BA (Bachelor of Arts), the system searches for two properties, the Item ID and the Country. Therefore, the score for the degree item is calculated as follows:

(Property score item ID + Property score Country) / 2

This means that only profiles with the Degree BA and Country USA have an item score of 100.

To show how the system calculates the property scores, this example compares the source profile with three person profiles, for Nicola Edwards, Rachel Norris, and Helen Scott.

This table lists the items in the person profile for Nicola Edwards:

Content Type	Item ID	Other Properties
Degree	BA (Bachelor of Arts)	Country: USA
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Rachel Norris:

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Content Type	Item ID	Other Properties
Language	DU (Dutch)	
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the items in the person profile for Helen Scott:

Content Type	Item ID	Other Properties
Degree	BA (Bachelor of Arts)	Country: GBR
Tests/Examinations	1006 (Accounting Aptitude Test)	

This table lists the item scores for each person profile:

Item ID	Country Property	Person Profile		
		Nicola Edwards	Rachel Norris	Helen Scott
BA	USA	100 = (100+100)/2	0	50 = (100+0)/2
DU (Dutch)		0	100	0
1006		100	100	100

Calculating Item Weighting Based on the Importance Field

The system automatically includes the Importance field for each item in the search criteria and assigns the default value of *3-Average*, which means that each item is of equal importance. Depending on the search type, you can override the default Importance to specify the relative importance of each profile item. When you run the search, the system applies a weighting to each item score according to the Importance that you assigned to that item. The result is that profiles that include the most important items are assigned a higher score than profiles that only include the least important items.

The system calculates the weighting for each item as follows:

Importance % = (Item Importance / Total Importance) x 100

To show how this works, suppose you specify the following Importance values to items in the search criteria:

Content Type	Item ID	Importance
Degree	BA (Bachelor of Arts)	4-Above Average
Language	DU (Dutch)	3-Average
Tests/Examinations	1006 (Accounting Aptitude Test)	1-Low

In this example, the total Importance points is 8 = 4 + 3 + 1

This table shows how the weighting is calculated for each item in the search criteria:

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Item ID	Importance	Weighting
BA (Bachelor of Arts)	4-Above Average	4/8 x 100 = 50%
DU (Dutch)	3-Average	3/8 x 100 = 37.5% = 38 rounded
1006 (Accounting Aptitude Test)	1-Low	1/8 x 100 = 12.5% = 13 rounded

The system uses the item weighting value to calculate the weighted item score using this formula:

Item Score (weighted) = Item score x Importance %

Using the person profiles from the earlier examples you can see how the weighting affects the overall score. This table lists the item scores and the weighted scores for Nicola Edwards:

Item	Item Score	Item Score (weighted)
BA (Bachelor of Arts) /USA	100	50 = 100 x 50%
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	12.5 = 100 x 12.5% = 13 rounded

Nicola's overall score is the sum of the weighted item scores:

Total score = 50 + 12.5 = 62.5 (63 rounded)

Note. The system rounds the score to the nearest integer value.

This table lists the item scores and the weighted scores for Rachel Norris:

Item	Item Score	Item Score (weighted)
BA (Bachelor of Arts) / USA	0	0
DU (Dutch)	100	37.5 = 100 x 37.5% = 38 rounded
1006 (Accounting Aptitude Test)	100	12.5 = 100 x 12.5% = 13 rounded

Total score = 37.5 + 12.5 = 50

This table lists the item scores and the weighted scores for Helen Scott:

Item	Item Score	Item Score (weighted)
BA (Bachelor of Arts) / USA	50	25 = 50 x 50%
DU (Dutch)	0	0
1006 (Accounting Aptitude Test)	100	12.5 = 100 x 12.5% = 13 rounded

Total score = 25 + 12.5 = 37.5 = 38 rounded

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Calculating the Rating Property Score

If the search criteria includes items with the rating or interest level property (JPM_RATING1, JPM_RATING2, JPM_RATING3, or JPM_INTEREST_LEVEL), the system calculates property score differently than other properties. Instead of scoring 100 or 0, the system assigns a score that depends on how closely the rating or interest level in the target profile matches the rating or interest level specified in the search criteria.

The interest level property is discussed in the next section.

The system calculates the rating property score based on the number of levels in the rating model defined for that item.

Important! When running a search and compare, the rating models used for the profile items in the source and target profiles must have the same number of rating levels. If the rating models are not consistent, the scores will not be accurate.

This table shows an example of a rating model and the rating levels that are assigned by the system for the search and compare:

Rating	Description	Rating Level
A	Excellent	5
B	Very Good	4
C	Good	3
D	Fair	2
E	Poor	1

When you assign a rating to a profile item, the system compares the level of the requested rating to the target rating level in the search and compare. For this example, the source profile has the following item and associated rating:

Item ID	Rating	Rating Level
0102 (Conceptual thinking)	B (Very Good)	4

This table lists target profiles that include the same item and the ratings for that item:

Profile	Item ID	Rating	Rating Level
01000	0102 (Conceptual thinking)	B (Very Good)	4
02000	0102 (Conceptual thinking)	A (Excellent)	5
03000	0102 (Conceptual thinking)	C (Good)	3

The system calculates the difference between the desired rating level (in the source) and the actual rating level in the target profiles as follows:

ABS (Desired Rating Level – Actual Rating Level)

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ABS (absolute value) means that the system ignores the sign of the number that results from the calculation of Desired Rating Level – Actual Rating Level. By calculating the difference in this way, if the actual rating has a higher value than the desired rating the system doesn't use a negative number in the calculation of the rating score.

This table lists the difference between the desired rating and the actual rating in the example profiles:

Profile	Item ID	Desired Rating Level	Actual Rating Level	ABS (Desired – Actual Rating)
01000	0102	4	4	0
02000	0102	4	5	1
03000	0102	4	3	1

This difference value is used in the calculation of the rating score, which the system calculates using the following formula:

Rating Score = 100 – ABS (Desired Rating Level – Actual Rating Level) x Rating Weight

The Rating Weight is calculated as follows:

Rating Weight = 100 / (total number of rating levels in rating model)

In the example rating model, the total number of rating levels is 5 and the rating weight is therefore 20 = 100/5.

This table lists the rating score for the example profiles:

Profile	Item ID	ABS (Desired – Actual Rating Level)	Rating Score
01000	0102	0	100
02000	0102	1	80
03000	0102	1	80

The highest rating score is 100 and this is assigned only if the item has the same rating in both the source and the target. If the actual rating in the target is lower or higher than the desired rating, the rating score is less than 100. In the example, you can see that profile 02000 and 03000 have the same rating score even though the ratings are different. This is because the difference between the desired and actual rating is the same for these profiles.

The system applies weightings to items with the rating model property in the same way that it applies weightings to items without the rating model property.

To illustrate how this works, the next example shows how the system calculates scores for items with the rating model property. In this example, the search criteria includes three competency items and desired rating, with Importance values as listed in this table:

Item ID	Rating	Rating Level	Importance
0102 (Conceptual thinking)	C (Good)	3	2-Below Average

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Item ID	Rating	Rating Level	Importance
0110 (Time management)	A (Excellent)	5	4-Above Average
0203 (Confidence & maturity)	B (Very Good)	4	3-Average

The target profiles for the search and compare are person profiles. This table summarizes the competency ratings for Nicola Richardson:

Item ID	Rating	Rating Level
0102 (Conceptual thinking)	B (Very Good)	4
0110 (Time management)	A (Excellent)	5
0203 (Confidence & maturity)	D (Fair)	2

In this search and compare, the system calculates two property scores for each item:

- Item ID.

  The profiles that have the same competency item score 100. If the competency is missing, the item score is 0.
- Rating score for the Rating property.

The first step in the search and compare is to calculate the property scores for each competency item. This table lists the property scores for Nicola Richardson:

Item ID	Rating Level	Item ID Score	Rating Score
0102	4	100	80 = 100 – ABS(3–4) * 20
0110	5	100	100 = 100 – ABS(5–5) * 20
0203	2	100	60 = 100 – ABS(4–2) * 20

Next the system calculates these values:

- Total property scores.

  The total property score for each item is the sum of the property scores for item ID and rating.
- Average item score.

  This is calculated as follows:

  Total property score/Property Count

  In this example, the property count is 2 (item ID and rating).

This table lists the item scores for Nicola:

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	Property Scores			
Item ID	Item ID Score	Rating Score	Total Property Score	Average Item Score
0102	100	80	180 = 100 + 80	90 = 180/2
0110	100	100	200 = 100 + 100	100 = 200/2
0203	100	60	160 = 100 + 60	80 = 160/2

Next the system calculates applies the weighting to the average item scores. To do this, the system calculates the weighting for each item based on the Importance assigned to the item using this formula:

Importance % = (Item Importance / Total Importance) x 100

In this example, the total importance is 9 = 2 + 4 + 3.

This table lists the weightings for the competency items:

Item ID	Importance	Importance %
0102	2	22.22% = 2/9 x 100
0110	4	44.44% = 4/9 x 100
0203	3	33.33% = 3/9 x 100

The system calculates the weighted item score as follows:

Item Score (weighted) = Item score x Importance %

This table lists the weighted item scores for Nicola:

Item ID	Average Item Score	Item score (weighted)
0102	90	20 = 90 x 22.22%
0110	100	44 = 100 x 44.44%
0203	80	27 = 80 x 33.33%

Finally, the system calculates the overall profile score by summing all the weighted item scores:

Total Profile Score = 91 = 20+ 44 + 27

Calculating the Interest Level Property Score

If the search criteria include items with the interest level property (JPM_INTEREST_LEVEL), the system calculates the property score in the same way as the rating property. The interest level property score depends on how closely the interest level in the target profile matches the interest level specified in the search criteria:

Interest Level Score = 100 – ABS (Desired Interest Level – Actual Interest Level) x Rating Weight

The Rating Weight is calculated as follows:

Rating Weight = 100 / (total number of rating levels in rating model)

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The delivered interest level model (which is delivered as a rating model) has 5 levels and the rating weight is therefore 20 (100/5).

Calculating Item Scores for Mandatory Items

The system automatically includes the Mandatory check box for each item in the search criteria. If you select this check box for an item, the system searches for profiles that include the item and all the properties specified for that item. Profiles must include the item and an exact match for the requested item properties for the profile to be included in the search results. Profiles that have different item properties are not included.

For this example, the search criteria includes two competency items and a degree as shown in the table:

Item ID	Rating	Country	Mandatory
0110 (Time management)	3		Y
0203 (Confidence & maturity)	4		N
BA (Bachelor of Arts)		USA	N

This table lists the items in the target profile and the item scores:

Item ID	Rating	Country	Item Score (unweighted)
0110 (Time management)	2		0
0203 (Confidence & maturity)	4		100
BA (Bachelor of Arts)		USA	50

Note that the target profile scores 0 for item 0110 because the rating does not match the search criteria and the item is specified as Mandatory. If the mandatory item receives a score of 0, then the profile will not be returned as a search result.

Pages Used to Search and Compare Profiles

Page Name	Object Name	Navigation	Usage
Search for Profiles	JPM_SRCH_TRANSFER	Workforce Development, Profile Management, Profiles, Search and Compare Profiles Select *Search and Compare Profiles* in the Profile Action field on the Non-person Profile page or the Person Profile page.	Lists the search types that are defined for administrators. Select the type of search that you want to run. Use the Search Configuration page to set up searches for administrators, employees, and managers.

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Page Name	Object Name	Navigation	Usage
Select a Profile	JPM_COM_PROF_SRCH	Select a search on the Search for Profiles page.	Select the profile that you want to use as the source for the search. The source profile that you select provides the default search criteria. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default and Display* and the source profile type is a non-person profile type. If the criteria rule is *No Default, Display,* the system doesn't display this page because there are no default search criteria. Instead you enter the search criteria manually on the Search Criteria page.
Person Search	HR_PSS_SEARCH	Select a search on the Search for Profiles page.	Select the person profile that you want to use as the source for the search. This page is displayed only if the search selected has a criteria rule of *Default, No Display* or *Default, Display* and the source profile type is for a person profile.
Search Criteria	JPM_SRCH_CRITERIA	Select a search on the Search for Profiles page. Click the Modify Search Criteria link on the Search Results page.	View and modify the search criteria for the search and compare. If the search selected on the Search for Profiles page has a criteria rule of *Default and Display* or *No Default, Display (Adhoc)*, this page is displayed before you run the search. If the criteria rule is *Default, No Display,* the system runs the search without first displaying the Search Criteria page.
Search Results	JPM_SRCH_RESULT	Click the Search button on the Search Criteria page. Select a profile on the Select a Profile page.	Displays the results of the search.

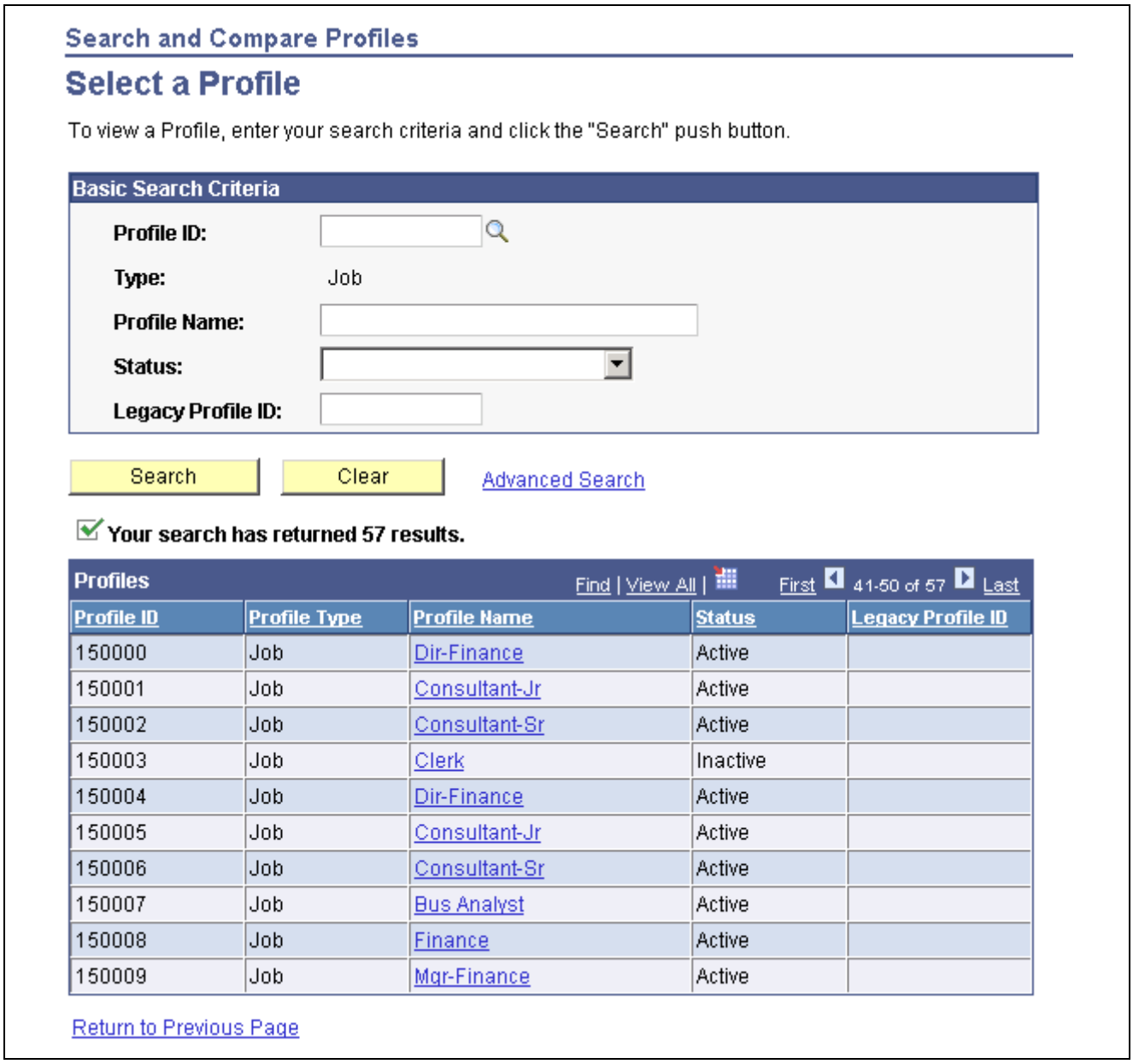
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Page Name	Object Name	Navigation	Usage
Add to Interest List — Confirmation	JPM_INT_CONFIRM	Select profiles on the Search Results page and click the Add to Interest List button.	Confirms that the non-person profiles that you selected on the Search Results page have been added to the person's interest list. The Add to Interest List button is available only if the search that you ran has a target profile type that is a non-person profile type.
Select Profiles to Compare	JPM_COMPARE_MAIN	Workforce Development, Profile Management, Profiles, Compare Profiles	Select the source and the target profile types that you want to compare.
Compare Results, , Match Results	JPM_COMPARE_RESULT	• Select source and target profiles on the Compare Profiles — Select Profiles to Compare page and click the Compare Profiles button. • Select profiles on the Search Results page, click the Select for Compare button and then click the Compare Profiles button. • Click the score link on the Search Results page.	View a summary of the comparison of the profiles you selected.

Selecting a Source Profile

Access the Select a Profile page.

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Select a Profile page

Basic Search Criteria

Profile ID Select the profile, or enter part of the profile ID.

Type Displays the profile type defined as the source for the search. The source and target profile types are configured on the Search Configuration page.

Profile Name Enter the profile name, or part of the profile name, to search for profiles with matching names.

Status Select a status to list profiles of one status only.

Legacy Profile ID Enter the legacy profile ID if you want to search for a profile that existed in earlier versions of Human Resources. The legacy profile ID is assigned to the profile during upgrade.

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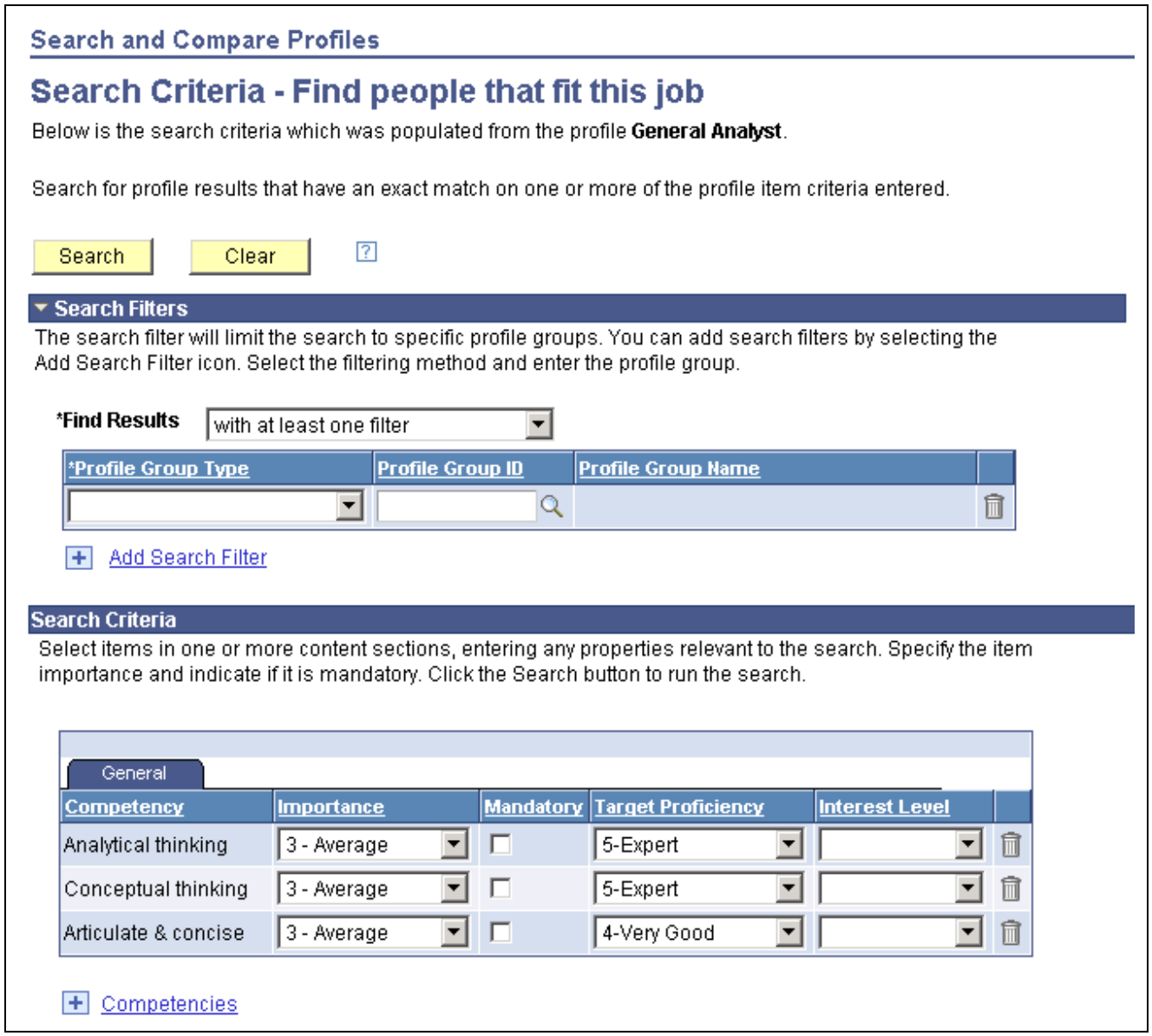
Search Click this button to list profiles that match the search criteria.

Profiles

This scroll area lists the profiles that match the search criteria you selected. Click the profile name that you want to use as the source for the search and compare. Depending on the search type, the system either displays the Search Criteria page or runs the search using the selected profile. If the criteria rule for the search is *Default, Display* the system displays the Search Criteria page and you can modify the search criteria before running the search. If the criteria rule for the search is *Default, No Display* the system runs the search and displays the results on the Search Results page.

Setting Up Search Criteria

Access the Search Criteria page.



Search Criteria page

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Use this page to define the search criteria. If the search that you selected has the criteria rule of *Default, Display,* the system automatically displays the default search criteria based on the source profile you selected on the Select a Profile page or the Person Search page. Review and modify the search criteria as required.

However, if the search you selected doesn't have the profile types defined, you must first specify the source and target profile types to use, and then define the search criteria manually.

Note. The content types listed on this page and the fields for each content type are determined by the search type selected, the profile type definitions, and the content types definitions.

See Chapter 4, "Setting Up Search and Compare Profiles," page 73.

See Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54.

See Chapter 2, "Setting Up the Content Catalog," Setting Up Content Types, page 16.

Source Profile Type, Target Profile Type Select the profile types that you want to use in the search. The source profile type is used as the basis for the search criteria. The target is the profile type from which the system searches for matching profiles.

These fields appear for searches that don't have the source or target profile types defined on the Search Configuration page.

When you complete these fields, the system displays the content sections and search filters that you can use in the search.

Search Click to initiate the search based on the criteria you have specified on this page. The system performs the search and displays the matching profiles on the Search Results page.

Clear Click this button to clear the search criteria.

Importance Select a value that indicates the importance of the profile item. The default value is *3 — Average*. The system uses the Importance value to determine how well profiles match the search criteria. If you select a high importance value, those profiles that include the profile item are considered a better match than the profiles without the profile item.

Mandatory If you want matching profiles to include certain profile items, select this check box for those items. When you run the search, the system searches for target profiles with the mandatory items and the same item properties that are specified in the search criteria. For example, if the search criteria includes a mandatory competency item and you specify a proficiency rating for the competency, the search results include only those profiles with the competency item and the same proficiency rating.

Search Filters

Use this group box to limit the search to selected profile groups. The group box is displayed only if the target profile type belongs to searchable profile groups.

See Chapter 3, "Setting Up Profile Management," Creating Profile Group Types, page 66.

Viewing Search Results

Access the Search Results page.

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Search Results page

Modify Search Criteria Click this link to view and modify the search criteria if you want to rerun the search with different search criteria. The system displays the Search Criteria page.

Search for Profiles Click this link to run a new search. The system returns you to the Search for Profiles page that lists all the searches available.

Select for Compare Click this button to add the profiles you have selected to the Profile Comparison section.

Add to Interest List Click this button to add the profiles you have selected to a person's interest list. This button is displayed when the target profile type for the search is a non-person profile type.

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Select Select this check box to select the profile. Use this check box in conjunction with the Select for Compare or Add to Interest List buttons. You can select up to ten profiles to compare.

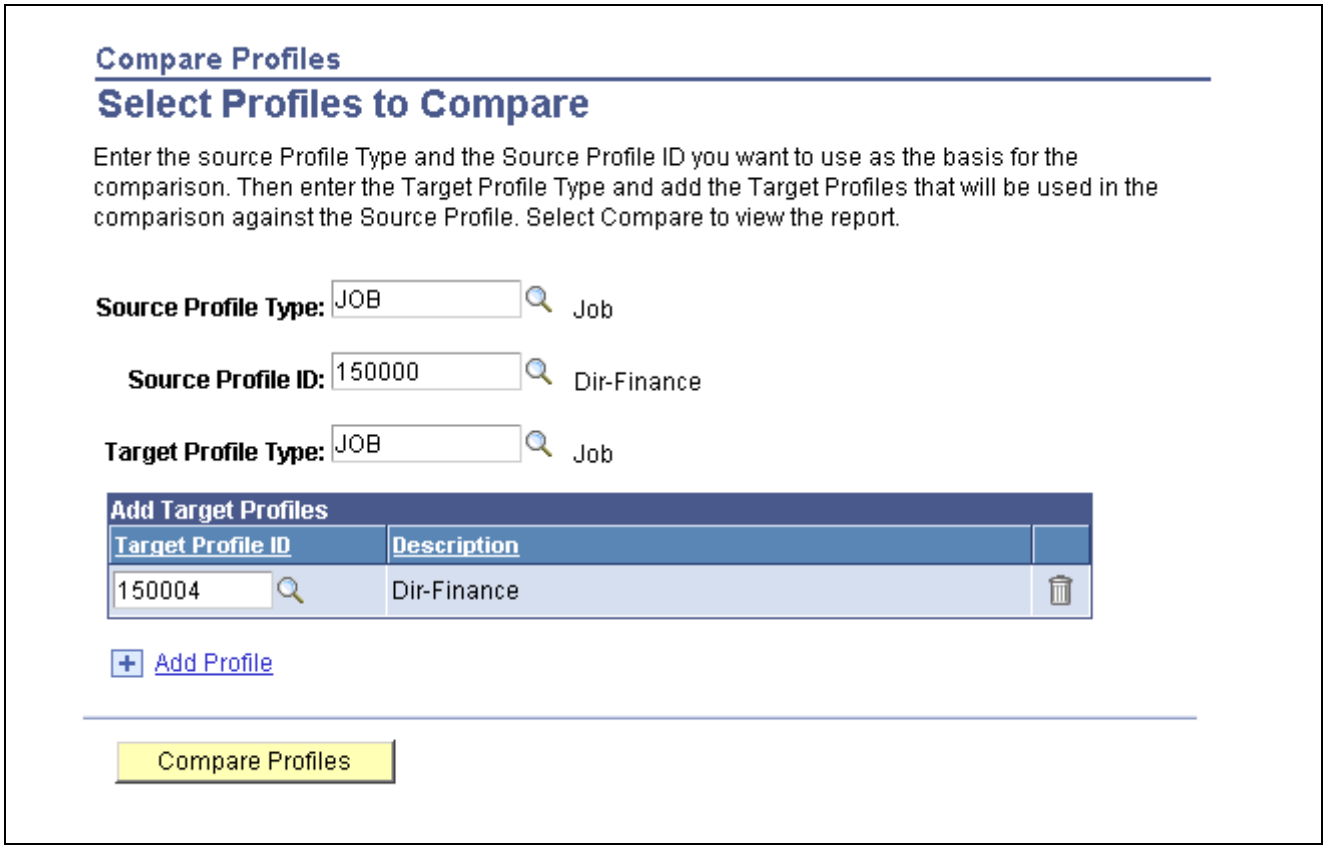
Score Click the score link to view the Match Results page. This page lists the items in the search criteria and the corresponding item score for the profile that you selected.

Profile Name Click the profile name link to view the profile. The system displays the Person Profile page or the Non-person Profile page depending on the profile type.

Compare Profiles Click this button to run the comparison. The system displays the Compare Results page, which lists the items in the search criteria and the corresponding item scores for the profiles that you selected.

Selecting Profiles to Compare

Access the Select Profiles to Compare page.



Select Profiles to Compare page

Source Profile Type Select the profile type that you want to use for the source of the compare.

Source Profile ID Select the profile that you want to compare the target profiles against.

Target Profile Type Select the profile type from which the target profiles are selected.

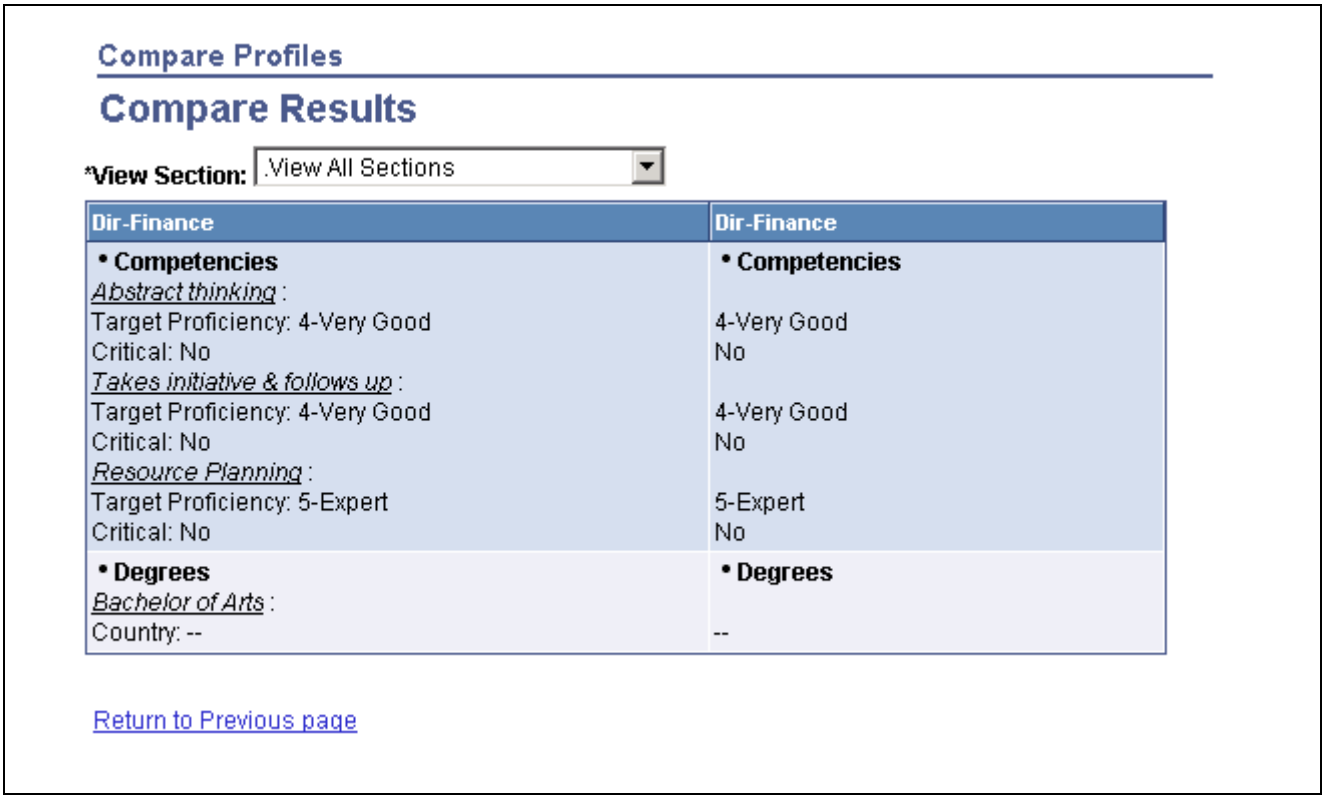
Target Profile ID Select the target profile ID. The system compares the target profiles with the profile selected in the Source Profile ID field.

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Add Profile Click to add another target profile.

Viewing Comparison Results

Access the Compare Results page.



Compare Results page

This page displays the results of the compare. You access this page from the Search Results page or using the Compare Profiles option. In the left hand column the system displays the content sections and content items in the source profile or search criteria. The remaining columns show the corresponding data in the target profiles. If you access this page from the Search Results page, the system shows the item scores for each target profile.

View Section Select *View All Sections* to list all the sections in the profiles or select a section to view the information for one content section. The default is *View All Sections*.

Managing Interest Lists

This section provides an overview of interest lists, lists common elements, and discusses how to:

- Manage employees' interest lists.
- View interest lists by profile.

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Understanding Interest Lists

Interest lists enable employees to maintain a list of the non-person profiles that are of interest. The interest list can include any profile. For example, employees could add profiles for jobs that they want to include in their career planning, or job profiles that are similar to their own profile. Each employee has one interest list that can be modified by the employee, the employee's manager, and the profile administrator:

- Employees maintain their own interest list using the self-service options provided in eDevelopment.

  The interest list shows who added each profile to the interest list, and employees can remove any profiles that they added. Employees cannot remove profiles added by their manager or the profile administrator.

- Managers can view and modify interest lists for their direct reports using the manager self-service options in eDevelopment.

  Managers can remove profiles that they added to an interest list only. They cannot remove profiles that are added by the employee or the profile administrator.

- Administrators have access to interest lists based on the row-level security permissions associated with their role.

  Administrator can remove any profile from an interest list, including those added by the employee and manager.

See Also

PeopleSoft Enterprise eDevelopment 9.0 PeopleBook, "Maintaining My Profiles," Maintaining Interest Lists

Common Elements Used in this Section

Profile Click the profile link to view the profile. From the Interest List page, the link takes you to the Non-person Profile page and from the Interest List — View by Profile page, the link takes you to the Person Profile page.

Assigned By Displays the name of the person who added the profile to the interest list. This can be the employee, the employee's manager, or an administrator.

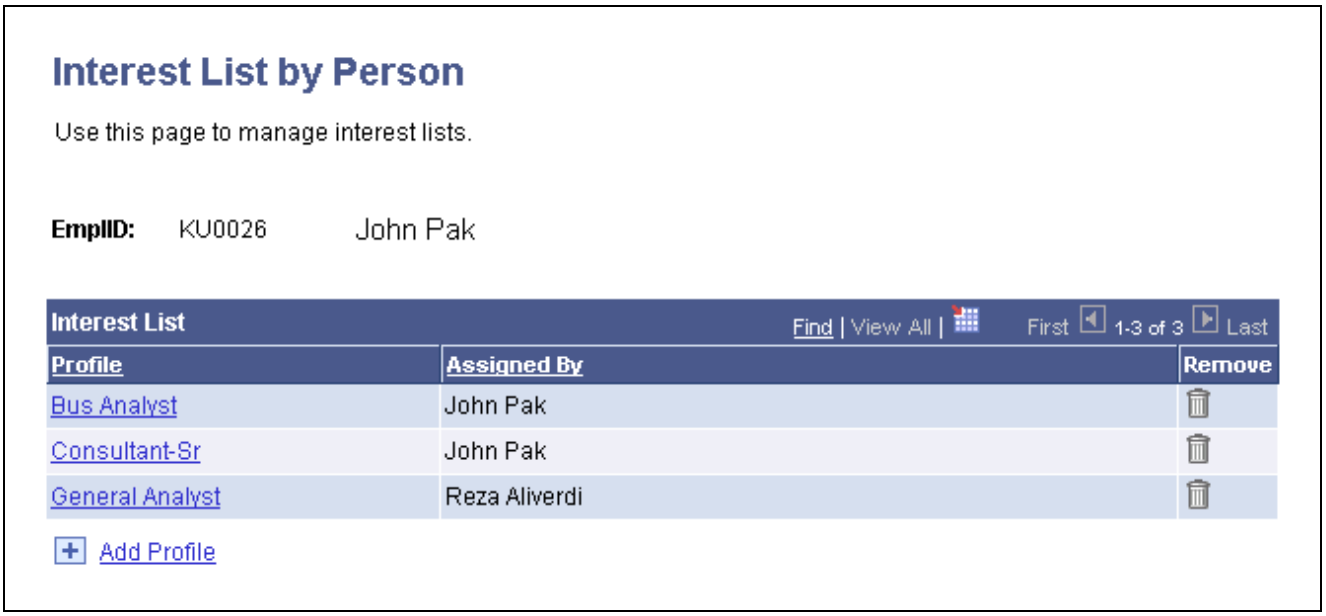
Pages Used to Manage Interest Lists

Page Name	Object Name	Navigation	Usage
Interest List by Person	JPM_INTEREST_PERS	Workforce Development, Profile Management, Profiles, Interest List by Person	View an employee's interest list and add profiles to the list.
Interest List — View by Profile	JPM_INTEREST_PROF	Workforce Development, Profile Management, Profiles, Interest List by Profile	View a list of employees who have a selected profile on their interest list. You can also add the selected profile to an employee's interest list.

Managing Employees' Interest Lists

Access the Interest List by Person page.

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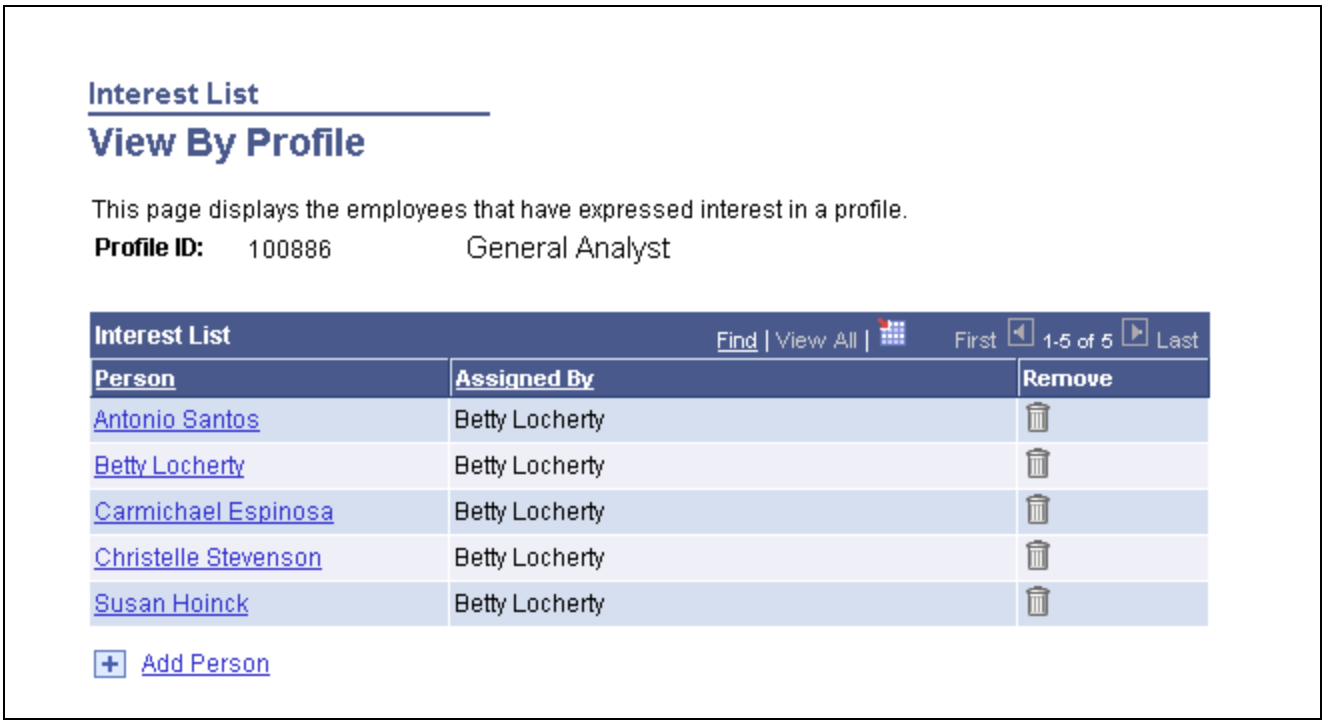


Interest List by Person page

Add Profile Click this link to add another profile to the employee's interest list.

Viewing Interest Lists by Profile

Access the Interest List — View by Profile page.



Interest List — View by Profile page

Add Person Click this link to add the profile to another employee's interest list.

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Tracking Training

This section provides an overview of how to track employee training and discusses how to track employee training.

Understanding How to Track Employee Training

The Administer Training business process enables you to set up training courses and manage course sessions. If you use Administer Training to manage your training courses, the Training History page gives you a summary of employees' training history. This page is described in detail in the *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training*

Use the Training Summary page (EDUCAT_TRAIN_GBL) to track other training that is not managed using Administer Training. You can use this page to track training that an employee is enrolled in, or has completed.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training, "Tracking Student Training," Entering or Reviewing Student and Course Information

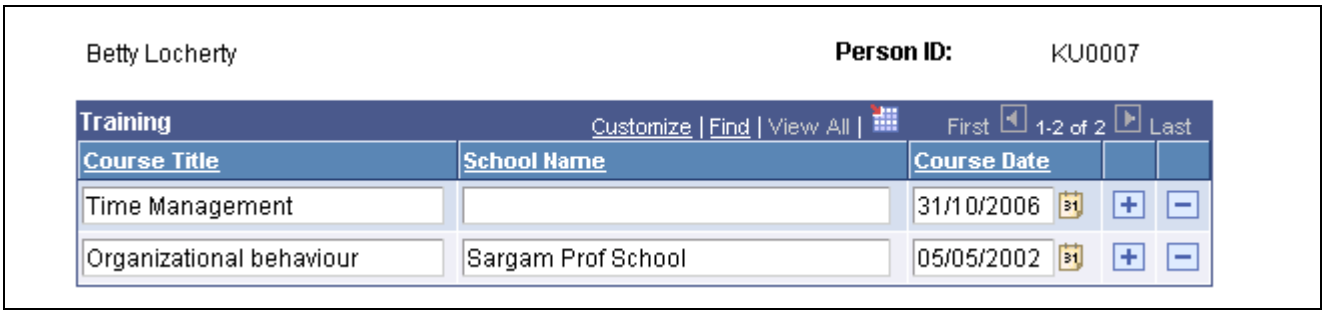
Pages Used to Track Employee Training

Page Name	Object Name	Navigation	Usage
Training History	COURSE_STUDNT_ENRL	Workforce Development, Profile Management, Profiles, Training, Training History	View details of training courses that the employee has completed, enrolled in, or on the waiting list. This page displays course sessions that you manage using the Administer Training business process.
Training Summary	EDUCAT_TRAIN_GBL	• Workforce Development, Profile Management, Profiles, Training Summary, Training Summary • Enterprise Learning, Result Tracking, Manage Person Profiles, Training Summary, Training Summary	Record employee training that is not maintained using the Administer Training business process.

Tracking Employee Training

Access the Training Summary page.

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Training Summary page

Course Title Enter the name of the training course.

School Name Enter the name of educational establishment or training company that runs the course.

Course Date Enter the date on which the course was completed, or the course start date.

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CHAPTER 6

Matching Competencies to Roles

This chapter provides overviews of profile comparisons and role matching and discusses how to:

- Set up match evaluation types.
- Match employees to roles.
- Match roles to employees.
- Match teams to projects.

Understanding Profile Comparisons

The Manage Profiles business process provides three ways to compare profiles:

- Search and Compare Profiles.
- Compare Profiles.
- Role matching.

Search and Compare Profiles

Using the Search and Compare Profiles option you can configure searches to suit your content catalog, profile types, and users. Users select the search that they want to run and the search returns the profiles that best match the search criteria. Each profile in the search results is assigned a score that indicates how well the profile matches all the item properties specified in the search criteria. You can also compare profiles in the search results with the search criteria. Depending on the search type, users can also modify the search criteria, which makes the Search and Compare Profiles more flexible than role matching.

Use the Search and Compare Profiles option if you have a specific profile or profile item criteria and you want to search for matching profiles within a profile type.

See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 118.

Compare Profiles

The Compare Profiles option provides an online comparison of the profile items in a source profile with one or more target profiles. Unlike the role matching options, you can select any of the profile types in the system; you are not limited to PERSON and ROLE profile types.

See Chapter 5, "Managing Profiles," Viewing Comparison Results, page 137.

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Role Matching

The options on the Workforce Development, Profile Management, Matching Competencies to Roles menu enable you to compare the competencies and accomplishments of an employee's PERSON profile against those required by a ROLE profile, or a group of PERSON profiles against a ROLE profile for a job task. The degree of fit is displayed based on item proficiency and importance. The points assigned as a match score are based on the importance points of the matching items.

Role matching is limited to these content types in the ROLE and PERSON profile types:

- Competencies
- Degrees
- School education
- Honors and awards
- Licences and certifications
- Language skills
- Memberships
- Test/examinations
- NVQ units

Note. Any other content types you have defined in the profiles are not considered in the role match.

The role matching is configured to compare these profile types only:

- PERSON profiles.
- ROLE profiles.

You are recommended to use Search and Compare Profiles if you want to:

- Include other content types or profile types in your search.

  Search and Compare Profiles enables you to configure searches for any profile type defined in your system and the searches compare all content types that are common to the profiles being compared.

  See Chapter 4, "Setting Up Search and Compare Profiles," page 73.

- Search person or non-person profiles for best matches.

  With role matching you select the person profile and the role profile that you want to compare. With Search and Compare Profiles, you have greater flexibility to set up search criteria and the searches return the profiles that best match those criteria.

  See Chapter 5, "Managing Profiles," Searching and Comparing Profiles, page 118.

- Make searches available to employees and managers.

  If you have eDevelopment installed you can set up searches for self-service users. The competency and accomplishment matching options are available to administrators only.

  See *PeopleSoft Enterprise eDevelopment 9.0 PeopleBook*, "Maintaining My Profiles," Searching and Comparing Profiles.

Use the role matching options if you want to compare a specific PERSON profile with a specific ROLE profile and you want fit-gap information on each profile item based on proficiency and importance only.

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Understanding Role Matching

This section discusses:

- Point awards and importance levels.
- Multiple evaluations.

Point Awards and Importance Levels

You run different inquiries to match:

- Employees to roles.
- Roles to employees.
- Teams to job tasks.

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

The system assigns the following point values to importance levels:

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

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

Competency	Importance Level	Points Assigned
Communication	High	5
Leadership	Average	3

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

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

Employee Points for Accomplishments

Accomplishment points are calculated by the system. If the accomplishment exists in an employee's profile, the system awards points to the employee based on the importance value that you assign to the accomplishment. Accomplishments include the following content types: degrees, school education, honors and awards, licences & certifications, language skills, memberships, and tests/examinations, and NVQs. Other content types are not included in the comparison.

Employee Points for Competencies

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

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

Here are the match indicator icons:



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



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



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

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

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

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

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

See Also

Chapter 3, "Setting Up Profile Management," Setting Up Profile Types, page 54

Chapter 2, "Setting Up the Content Catalog," Defining Rating Models, page 28

Chapter 5, "Managing Profiles," Maintaining Profiles, page 88

Multiple Evaluations

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

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

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

Competency	Manager Evaluation	Peer 1 Evaluation	Peer 2 Evaluation	Average Rating
Communication	5	4	5	4.67
Leadership	4	3	3	3.33
Interpersonal Effectiveness	5	5	5	5

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Competency	Manager Evaluation	Peer 1 Evaluation	Peer 2 Evaluation	Average Rating
Planning	NA	NA	NA	NA
Decision Making	3	2	3	2.67
Adaptability to Change	2	1	2	1.67

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

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

Competency	Importance	Points Assigned	Rating Required	Employee Rating	Employee Match	Employee Points
Communication	High	5	5	4.67	Green half-filled circle	0
Leadership	Average	3	4	3.33	Green half-filled circle	0
Interpersonal Effectiveness	Above Average	4	3	5	+ Blue filled circle	4
Planning	Low	1	3		None	0
Decision Making	Above Average	4	2	2.67	Blue filled circle	4
Adaptability to Change	Below Average	2	3	1.67	Red circle outline	0

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

Setting Up Match Evaluation Types

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

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This section discusses how to define match evaluation types.

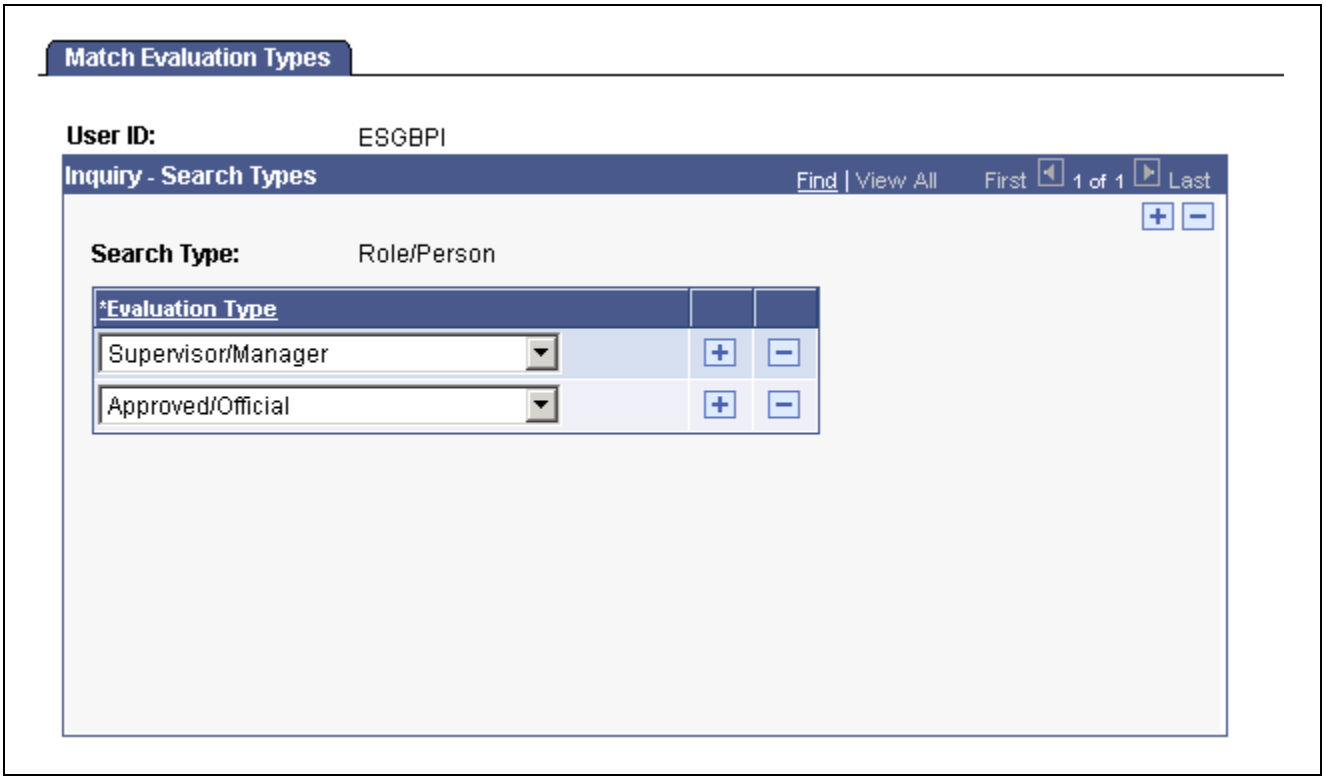
You must set up match evaluation types that correspond to the users for whom you want to run match analyses. Evaluation types determine which evaluations are included in each analysis.

Page Used to Set Up Match Evaluation Types

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

Defining Match Evaluation Types

Access the Match Evaluation Types page.



Match Evaluation Types page

Search Type Displays *Role/Person.* This enables the selected user ID to match roles to employees, employees to roles, and teams to projects.

Evaluation Type Select evaluation types.

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

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

Matching Employees to Roles

This section lists prerequisites and discusses how to:

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

Prerequisites

Before you run the Person to Role match, set up:

- A profile for the employee using the PERSON profile type.
- A profile for the role using the ROLE profile type.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the role match.

See Also

Chapter 5, "Managing Profiles," page 87

Chapter 6, "Matching Competencies to Roles," Setting Up Match Evaluation Types, page 148

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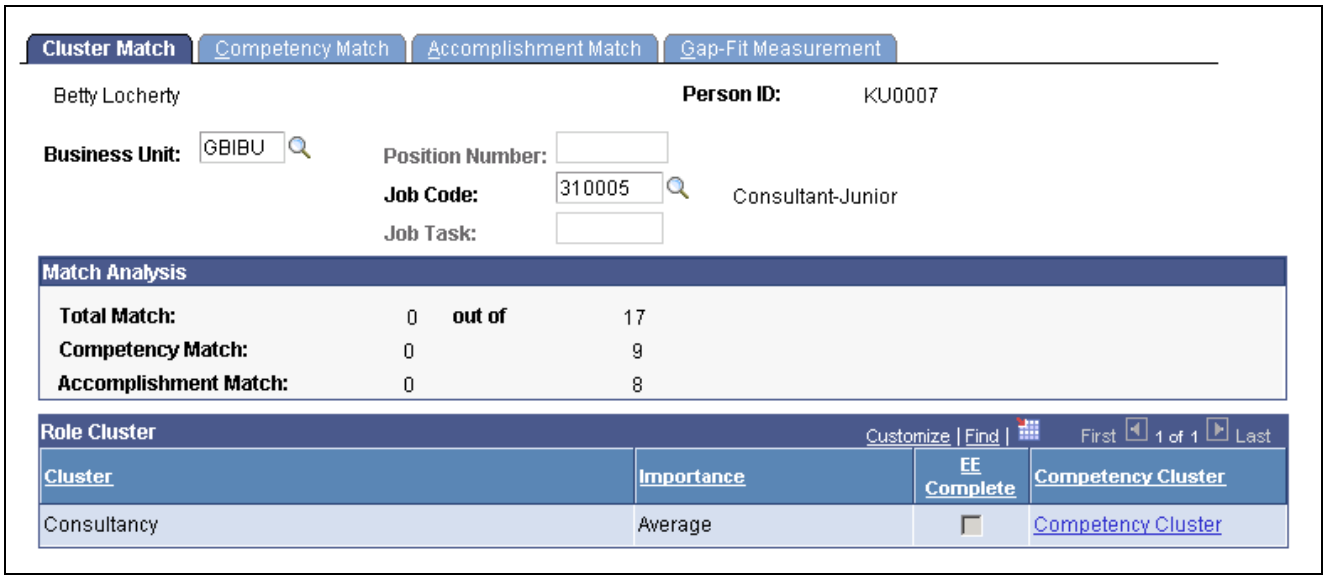
Pages Used to Match Employees to Roles

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

Specifying a Role and Analyzing Cluster Matches

Access the Person to Role Match - Cluster Match page.

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Person to Role Match - Cluster Match page

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

Position Number, Job Code and **Job Task**

Select a position, job code, or job task.

The system compares the employee's competencies and accomplishments with the role that you selected and displays the results of the analysis.

Match Analysis

Total Match

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

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

Competency Match

Indicates how many of the total points are from competencies.

Accomplishment Match

Indicates how many of the total points are from accomplishments.

Role Cluster

In earlier versions of PeopleSoft Enterprise HRMS, clusters were groups of competencies and accomplishments that were assigned to roles. During the upgrade to HRMS 9.0, clusters are converted to profile items assigned to profiles of type ROLE. The upgrade process assigns these profile items a legacy profile ID. When you run the role matching options, the system searches for profiles of type ROLE with profile items that have a legacy profile ID.

EE Complete (employee complete)

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

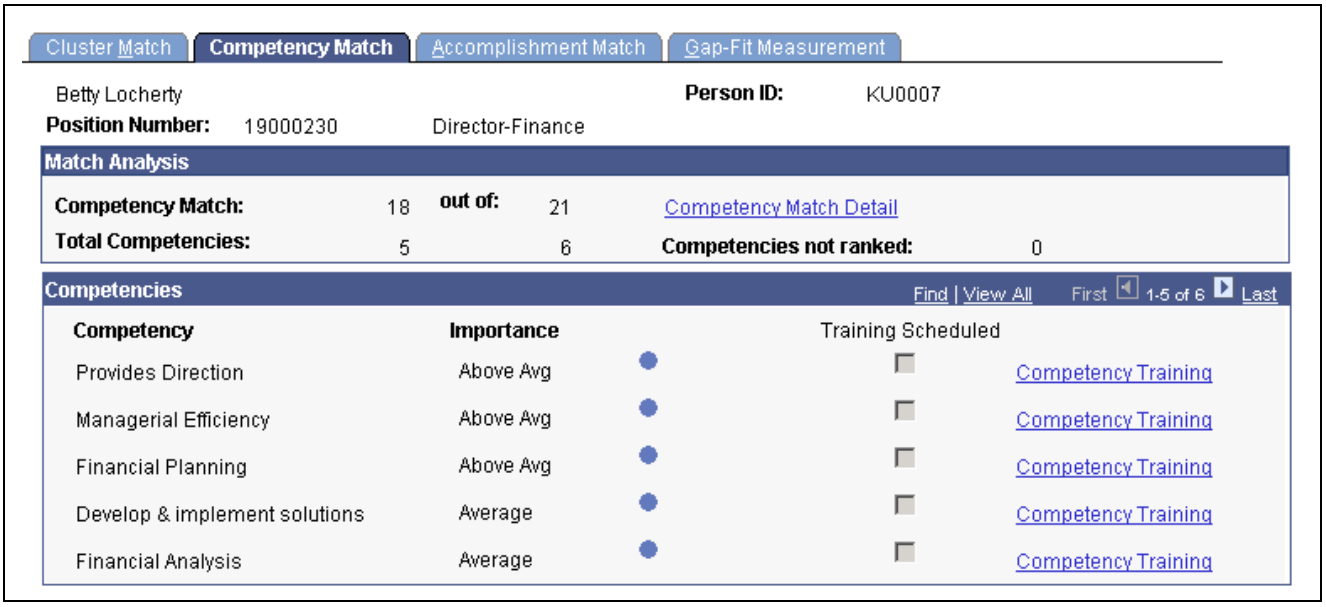
Competency Cluster

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

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Analyzing Competency Matches

Access the Person to Role Match - Competency Match page.



Person to Role Match - Competency Match page

Match Analysis

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

Competency Match Detail Click to view the breakdown of each competency and its match with the person and role.

Total Competencies Displays the number of employee competencies that match the competencies required for the role.

Competencies not ranked Displays the number of competencies required by the role that are not included in the employee's evaluations.

Competencies

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

Importance Displays the importance levels that are assigned to the competencies in the ROLE profile.

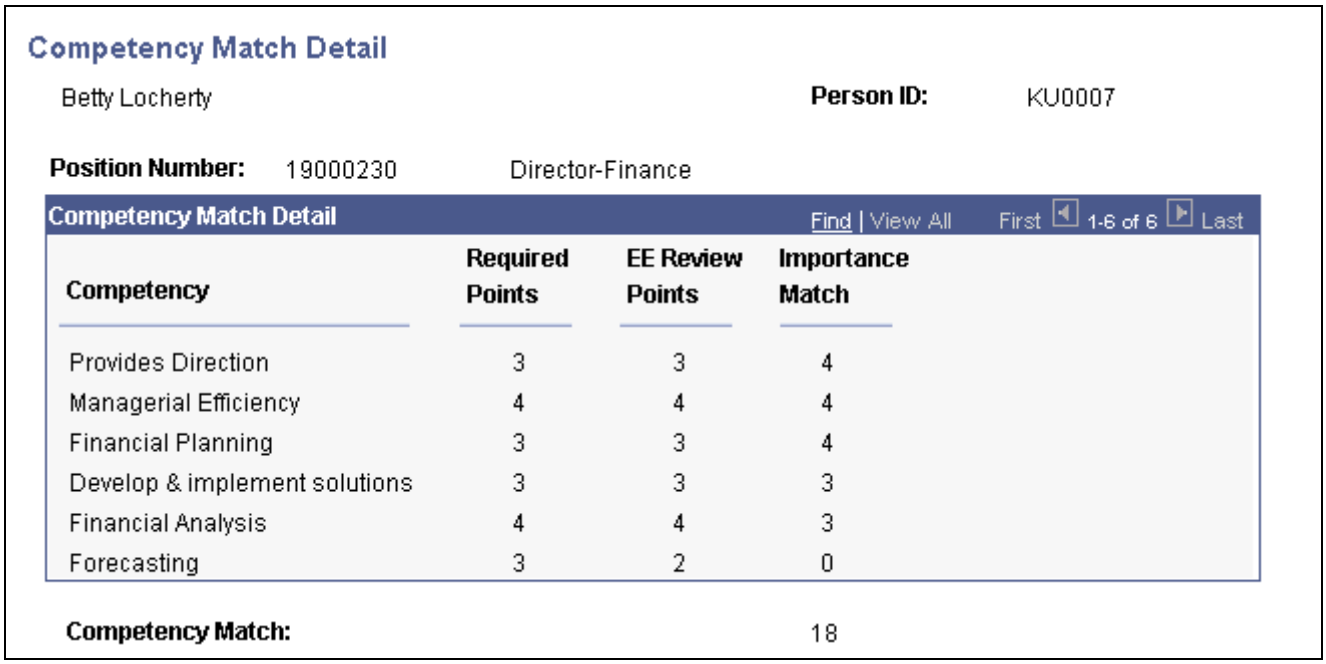
Training Scheduled Indicates whether the employee is already scheduled for training in the competency.

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

Viewing Competency Match Details

Access the Competency Match Detail page.

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Competency Match Detail

Betty Locherty **Person ID:** KU0007

Position Number: 19000230 Director-Finance

Competency Match Detail — Find | View All — First 1-6 of 6 Last

Competency	Required Points	EE Review Points	Importance Match
Provides Direction	3	3	4
Managerial Efficiency	4	4	4
Financial Planning	3	3	4
Develop & implement solutions	3	3	3
Financial Analysis	4	4	3
Forecasting	3	2	0

Competency Match: 18

Competency Match Detail page

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

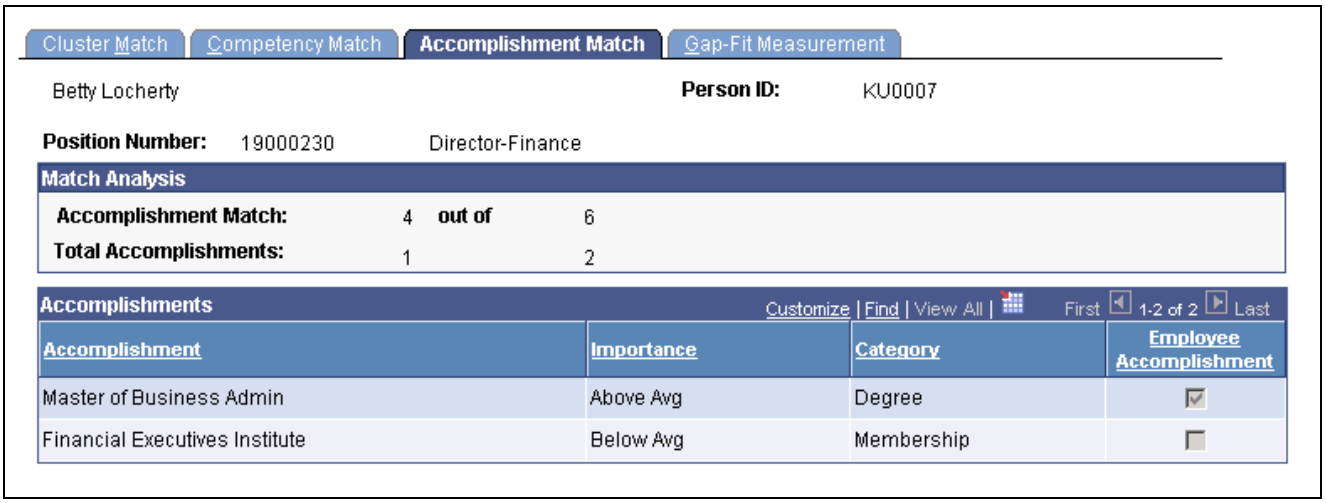
EE Review Points (employee review points) Displays the employee's point rating for the competency. Employee review points are the point translation of the rating that the employee receives for the competency, and these points are specified for each rating using the Review Points field on the Rating Model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

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

Analyzing Accomplishment Matches

Access the Person to Role Match - Accomplishment Match page.

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Person to Role Match - Accomplishment Match page

Match Analysis

Accomplishment Match Indicates the number of accomplishment importance points for those accomplishment matches between the employee and the role.

Total Accomplishments Displays the number of employee accomplishments that match the accomplishments required for the role.

Accomplishments

Accomplishment Lists each accomplishment assigned to the role, from highest to lowest importance.

Importance Displays importance levels assigned to the accomplishment in the role profile.

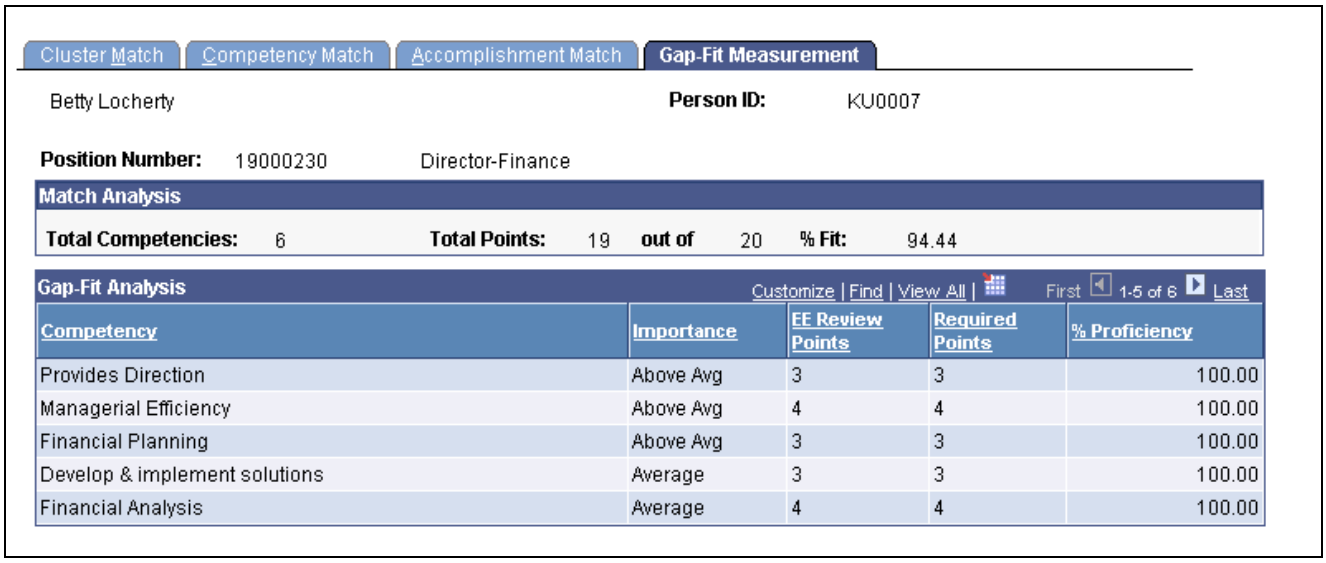
Category Displays the accomplishment category.

Employee Accomplishment Indicates whether the employee possesses the accomplishment.

Viewing a Gap Analysis of the Employee and Role

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

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Person to Role Match - Gap-Fit Measurement page

Match Analysis

Total Competencies Displays the number of competencies that are assigned to the role.

Total Points Indicates how many importance points the employee has been awarded out of the total possible for the role. These values do not include points associated with accomplishments.

% Fit (percentage fit) Displays the employee's points as a percentage of the total possible. The system only includes points associated with competencies in this calculation.

For example, if the employee has 5 points and the total possible for the role is 20 points, then the percentage fit is 25%.

Gap-Fit Analysis

EE Review Points (employee review points) Displays the employee's proficiency point rating for the competency. For example, if you use the PSCM rating model, a rating of 5 has an associated review point value of 5.

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

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

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

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Matching Roles to Employees

This section lists prerequisites and discusses how to:

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

Prerequisites

Before you run the Role to Person match, set up:

- A profile for the role using the ROLE profile type.
- A profile for the employee using the PERSON profile type.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the matching.

See Also

Chapter 5, “Managing Profiles,” page 87

Chapter 6, “Matching Competencies to Roles,” Setting Up Match Evaluation Types, page 148

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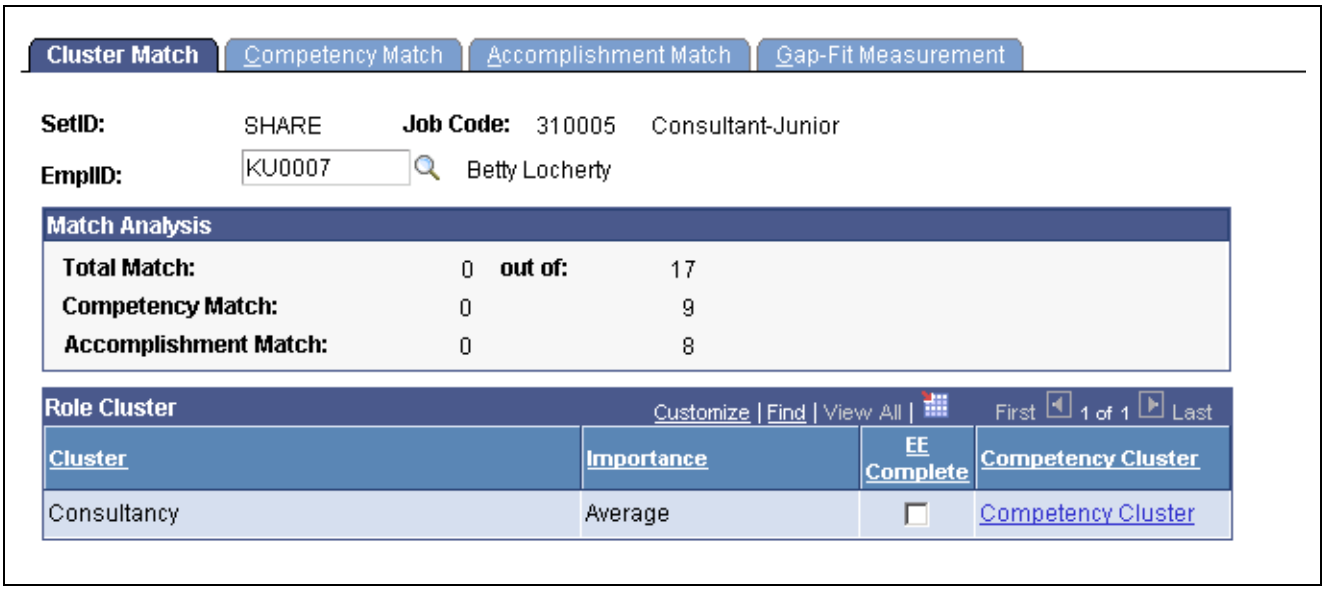
Pages Used to Match Roles to Employees

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

Specifying an Employee and Analyzing Cluster Matches

Access the Role to Person Match - Cluster Match page.

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Role to Person Match - Cluster Match page

EmplID (employee ID) Select an employee.

The system compares the employee's competencies and accomplishments with the selected role and displays the results of the analysis.

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

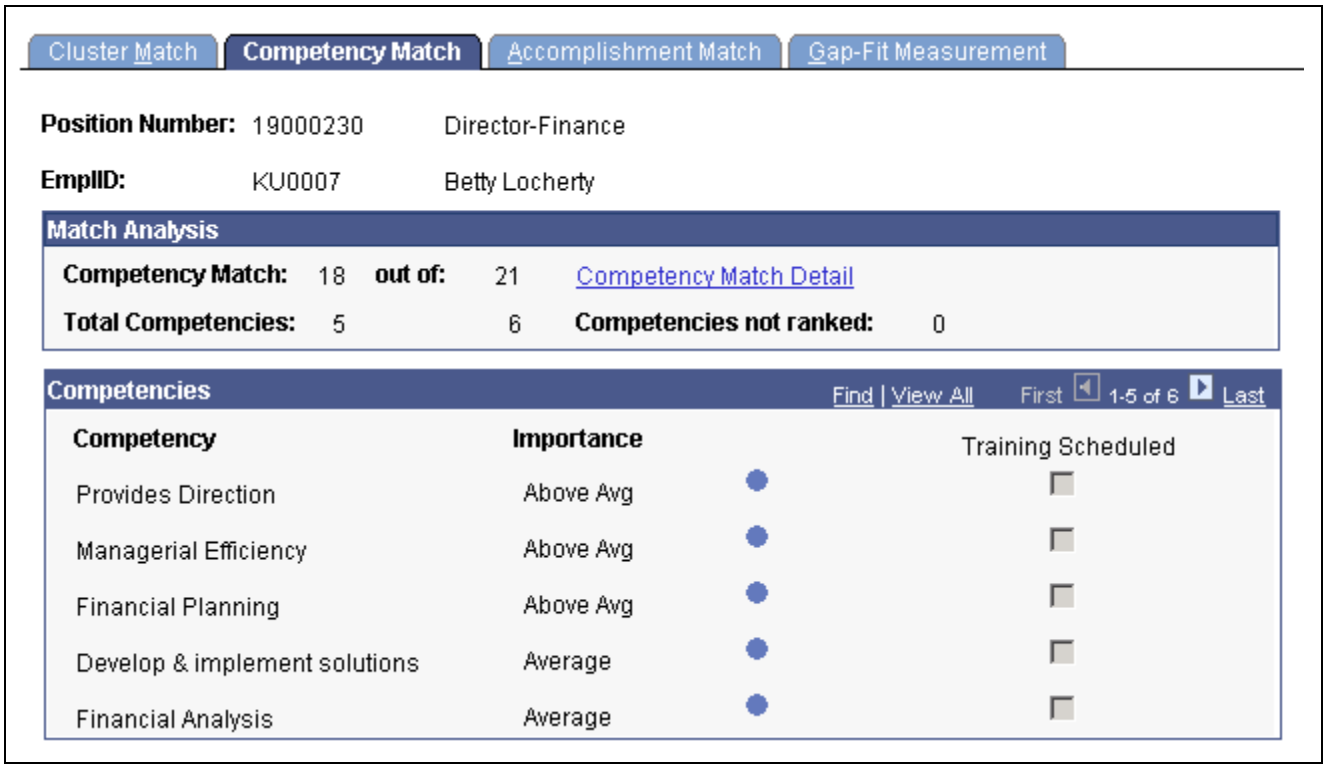
See Also

Chapter 6, "Matching Competencies to Roles," Specifying a Role and Analyzing Cluster Matches, page 151

Analyzing Competency Matches

Access the Role to Person Match - Competency Match page.

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Role to Person Match - Competency Match page

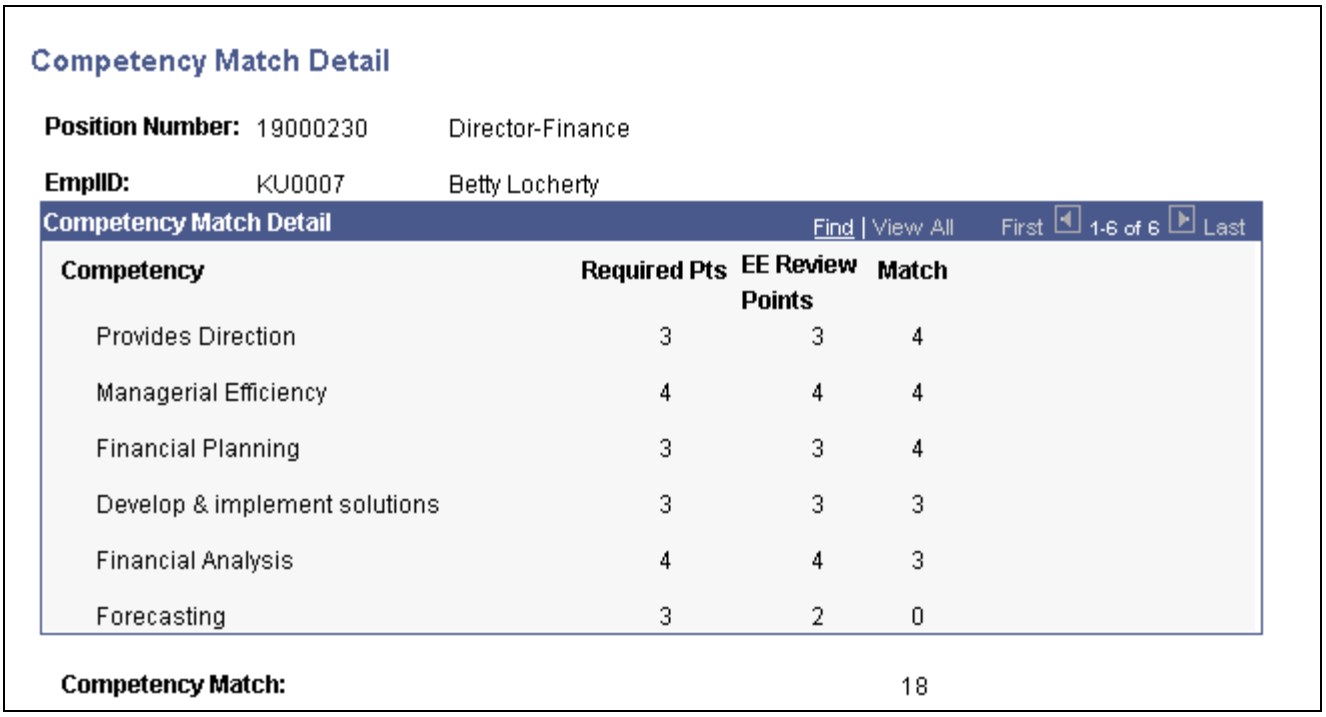
This page displays details of the selected role and employee ID.

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

Viewing Competency Match Details

Access the Competency Match Detail page.

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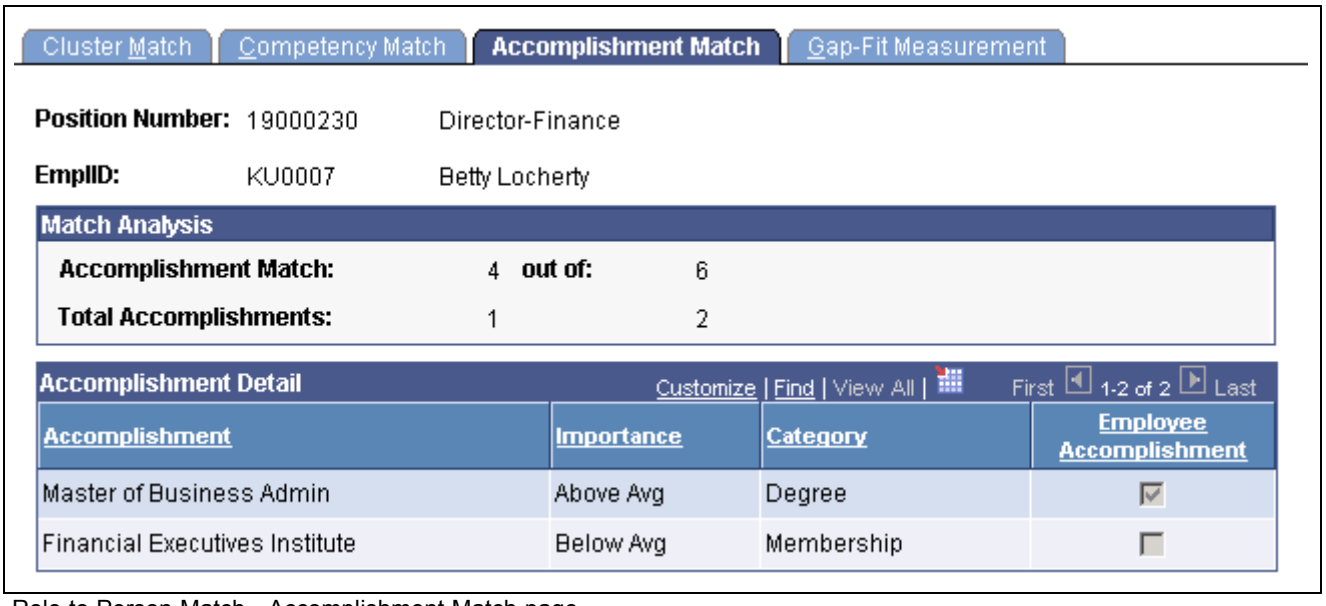
Competency Match Detail page

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

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

Analyzing Accomplishments

Access the Role to Person Match - Accomplishment Match page.



Role to Person Match - Accomplishment Match page

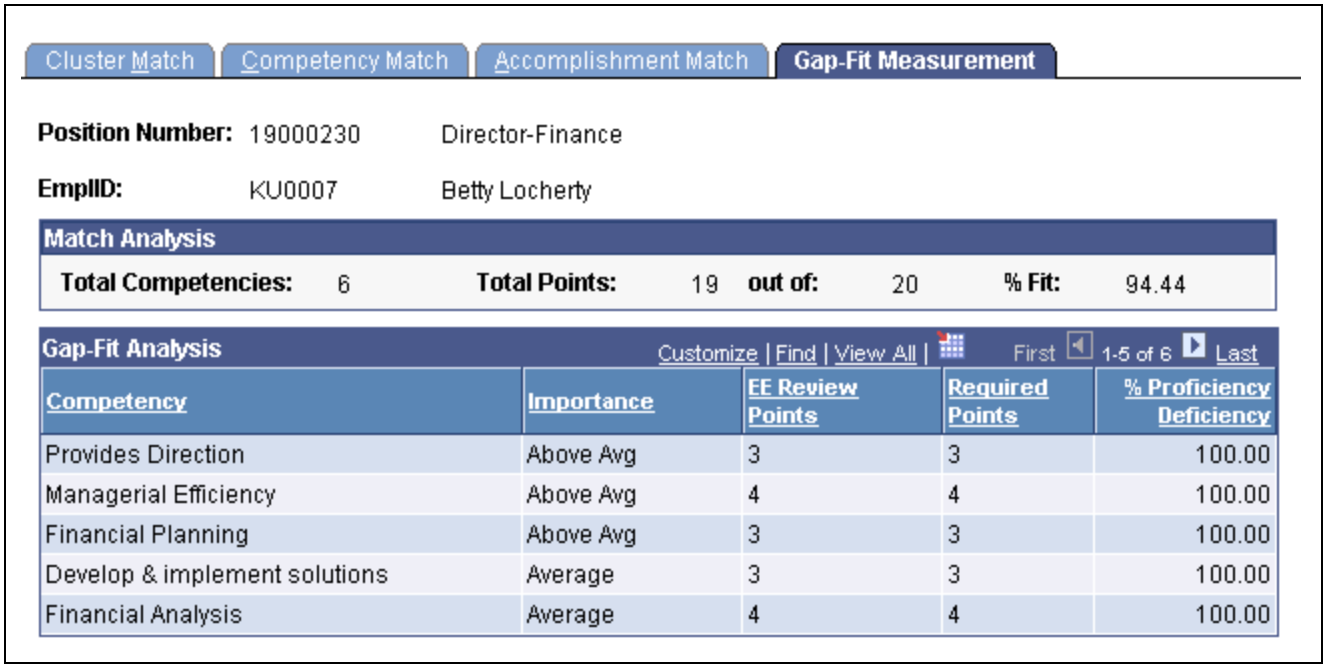
This page displays the selected role and employee ID, along with the role description and the employee's name.

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

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Viewing a Gap Analysis of the Role and Employee

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



Role to Person Match - Gap-Fit Measurement page

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

See Also

Chapter 6, "Matching Competencies to Roles," Viewing a Gap Analysis of the Employee and Role, page 155

Matching Teams to Projects

This section lists prerequisites and discusses how to:

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

Prerequisites

Before you can run the Compare Team to Job Task option, set up:

- A profile for the job task using the ROLE profile type.
- Profiles for the employees in the team using the PERSON profile type.
- Match evaluation types for the user ID of the person running the search to control which evaluations are considered in the comparison.

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See Also

Chapter 5, “Managing Profiles,” page 87

Chapter 6, “Matching Competencies to Roles,” Setting Up Match Evaluation Types, page 148

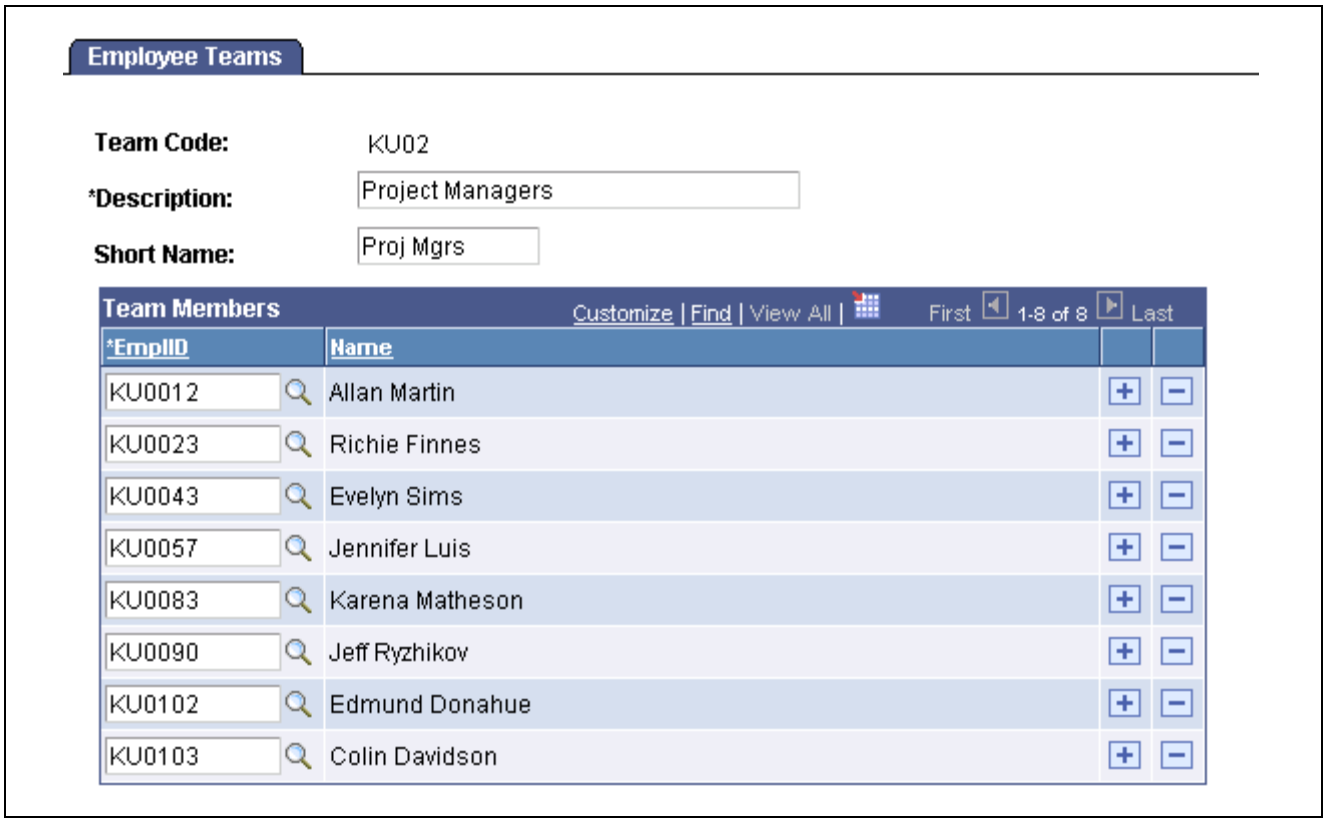
Pages Used to Match Teams to Projects

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

Setting Up Employee Teams

Access the Employee Teams page.

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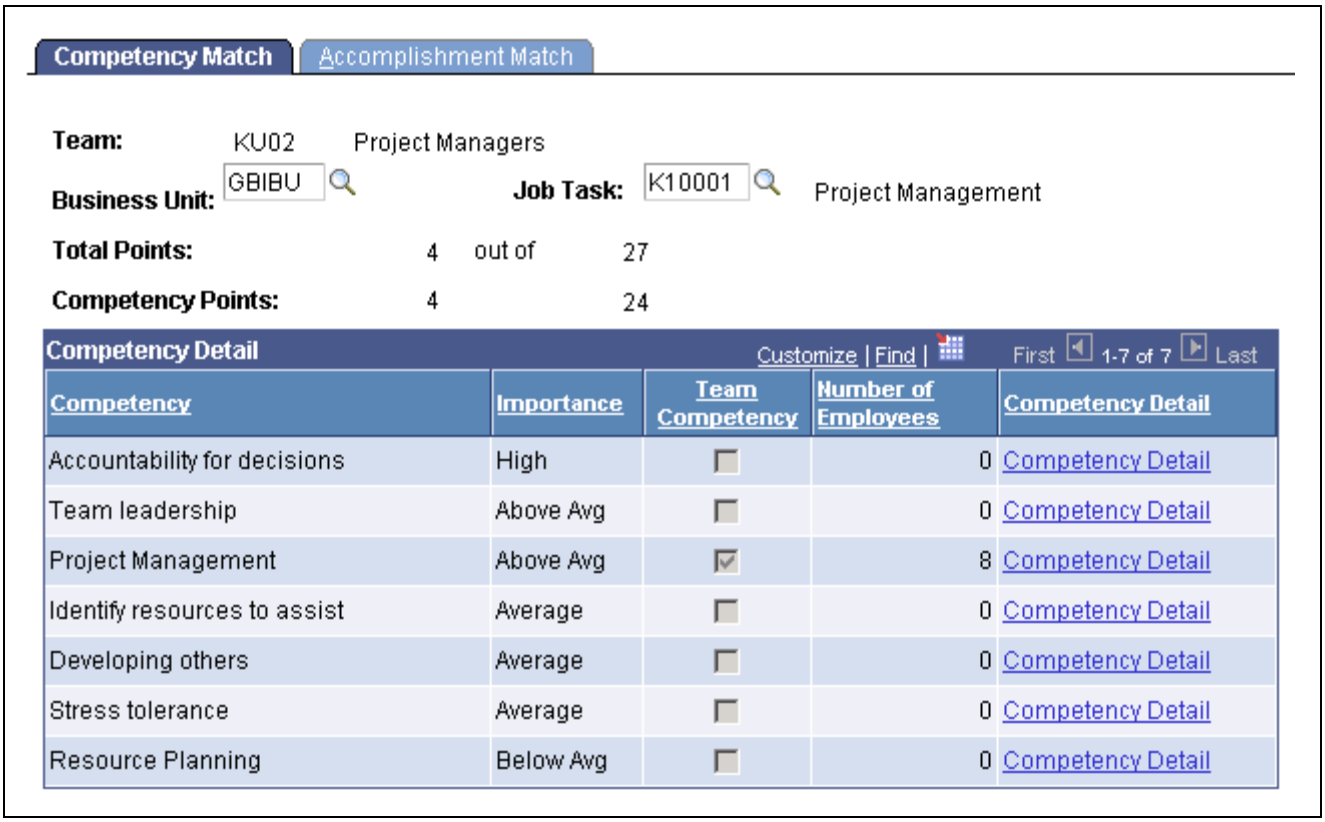
Employee Teams page

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

Analyzing Team Competency Matches

Access the Compare Team to Job Task - Competency Match page.

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Compare Team to Job Task - Competency Match page

Total Points Indicates how many points the team has been awarded out of the total points possible for the task.

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

Team Competency Indicates whether any member of the team has the competency at the required proficiency.

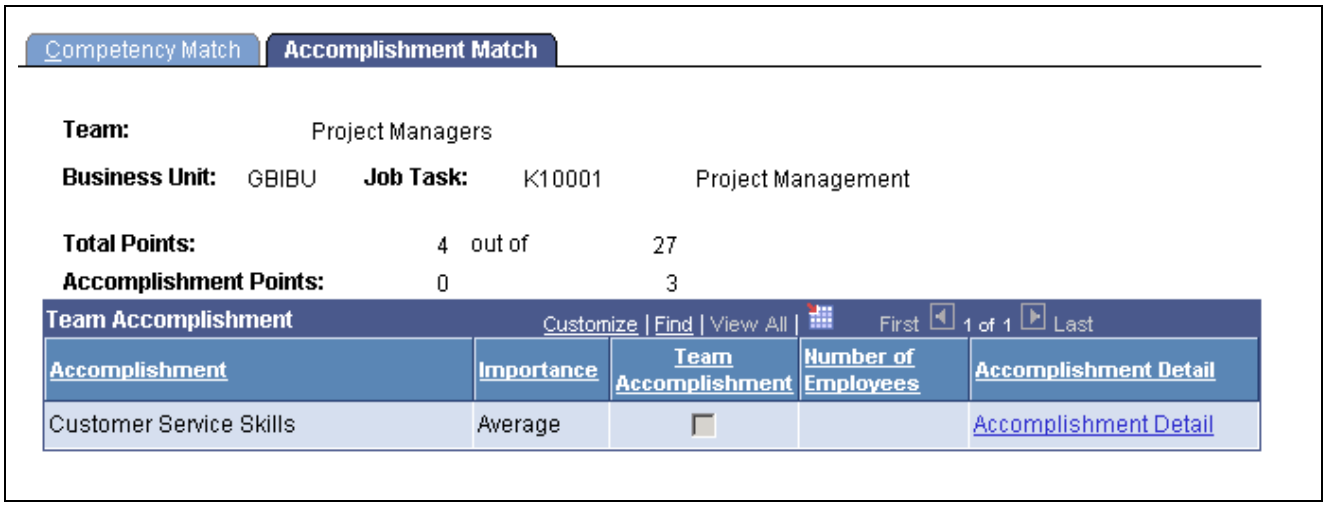
Number of Employees Displays how many team members have the competency at the required proficiency level.

Competency Detail Click to determine which team members have the required competency.

Analyzing Team Accomplishment Matches

Access the Compare Team to Job Task - Accomplishment Match page.

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Compare Team to Job Task - Accomplishment Match page

Total Points Indicates how many points the team has been awarded out of the total points possible for the task.

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

Team Accomplishment

Team Accomplishment Indicates whether any team member has the required accomplishment.

Number of Employees Displays how many team members have the accomplishment.

Accomplishment Detail Click to determine which team members have the required accomplishment.

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CHAPTER 7

Running Content Catalog and Profile Reports

This chapter discusses how to:

- Report content catalog items.
- Run profile reports.

See Also

Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 67

Reporting Content Catalog Items

This section discusses how to run the Content Catalog Listing report.

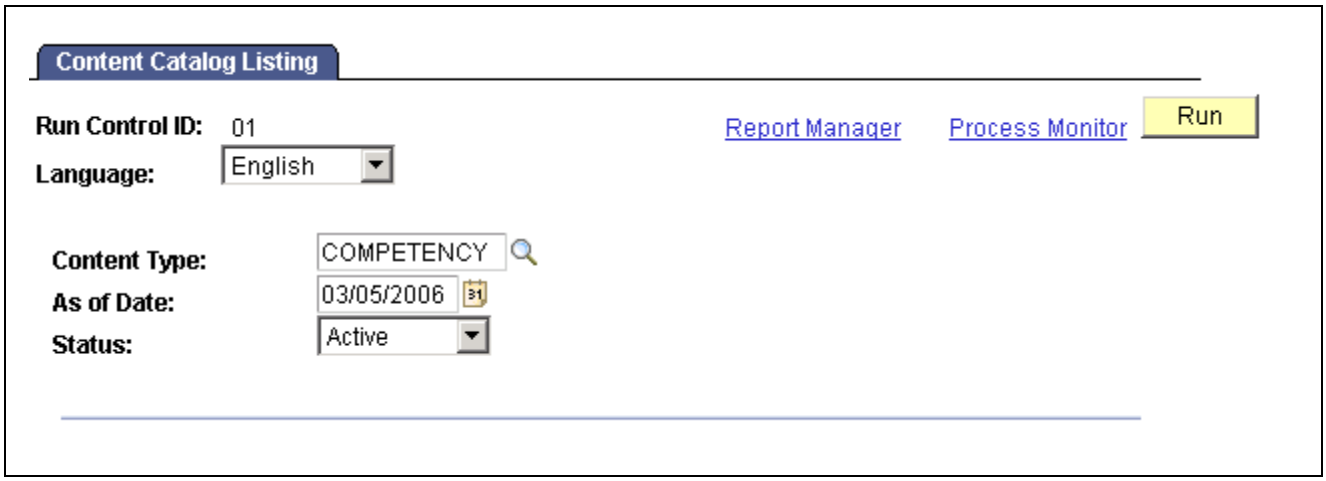
Page Used to Run the Content Catalog Report

Page Name	Object Name	Navigation	Usage
Content Catalog Listing	JPM_CATLIST_RPT	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Catalog Listing	Run the Content Catalog Listing report (JPM_CATI_RPT) that lists the content items that have been set up for a selected content type or for all content types. Access the report in Report Manager.
Competency Summary	CM_COMPETENCY_SUMM	Set Up HRMS, Product Related, Profile Management, Content Catalog, Competency Summary	Review the category that is assigned to competencies. You can view competencies in a selected competency category or a competency type.

Running the Content Catalog Listing Report

Access the Content Catalog Listing page.

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Content Catalog Listing page

Content Type Select the content type you want the report to include. Leave this field blank to generate a report of content items for all content types.

As of Date Select a date to generate a list of content items effective as of the date specified. Leave this field blank to generate a report of content items for all dates.

Status Select *Active* to include only items with an *Active* status in the report, *Inactive* to include only Inactive items, or leave the field blank to include both active and inactive items.

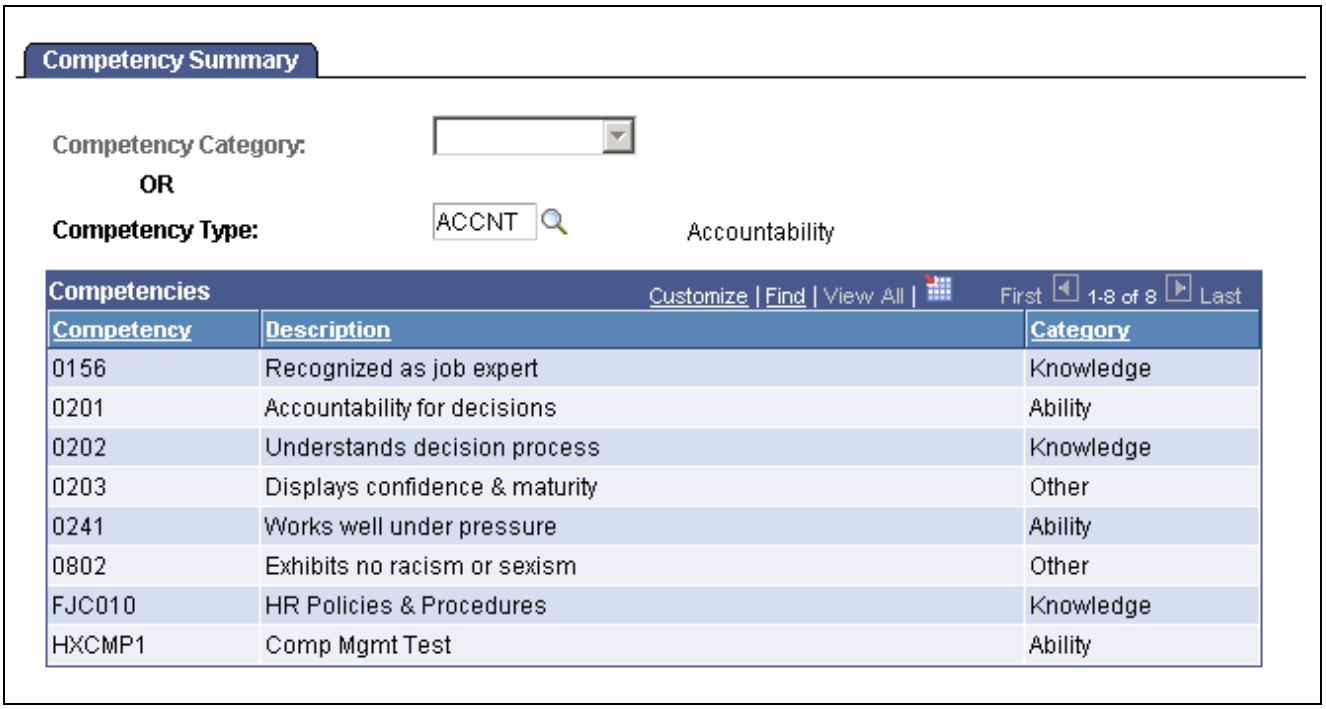
See Also

Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 67

Reviewing Competency Categories

Access the Competency Summary page.

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Competency Summary page

Select a competency category or type to list the competencies in that category or type. The competencies are listed in order of competency code.

Running Profile Reports

This section discusses how to:

- Run the Person Profile report.
- Run the Non-Person Profile report.

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Pages Used to Run Profile Reports

Page Name	Object Name	Navigation	Usage
Person Profile Report	JPM_PPROF_RPT	Workforce Development, Profile Management, Reports, Person Profile Report, Person Profile Report	Run the Person Profile report (JPM_JPPP_RPT) to generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the employee ID in brackets in the report description.
Non-Person Profile Report	JPM_NPPROF_RPT	Workforce Development, Profile Management, Reports, Non-Person Profile Report, Non-Person Profile Report	Run the Non-Person Profile report (JPM_JPNP_RPT) to generate a PDF file for each profile listed in the run parameters. Each report shows all items in the profile that are effective as of the date specified in run parameters. The Report Manager lists each report file separately with the profile ID in brackets in the report description.

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Page Name	Object Name	Navigation	Usage
Competency Inventory	RUNCTL_PER011	Workforce Development, Profile Management, Reports, Competency Inventory, Competency Inventory	Run the Competency Inventory report (PER011) that lists employees in a department and their competencies. Run the Refresh Employees Table Application Engine process (PER099) before running this report to include any new employees and their associated competencies. To run this process navigate to Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report. See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Refreshing Tables to Facilitate Reporting.
License/Certificate Report	RUNCTL_CMM007	Workforce Development, Profile Management, Reports, Licenses/Certificate Renewal	Run the Licenses, Certificates Renewal report (CMM007) that lists employees who need to renew a license or certificate.
Internal Resume	RUNCTL_PER034	Workforce Development, Profile Management, Reports, Internal Resume, Internal Resume	Run the Internal Resume report (PER034) that creates a resume-like document from the data contained in PeopleSoft tables, including the employee's PERSON profile. Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards.

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Running the Person Profile Report

Access the Person Profile Report page.



Person Profile Report page

As of Date The report lists the person's profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Person Profile page.

Profile Type Select the profile types associated with profiles you want to print, adding a row for each profile type. The system displays person profile types only.

Note. After you select a profile type, you cannot change it.

EmplID For each profile type, select the person IDs for the profiles that you want to print. You must select at least one person.

See Also

Chapter 3, "Setting Up Profile Management," Setting Up to Use XML Publisher Reports and Profiles, page 67

Running the Non-Person Profile Report

Access the Non-Person Profile Report page.

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Non-Person Profile Report page

As of Date The report lists the profile items that are effective as of the date you select. If you enter the current date, the report is identical to the current printable profile generated from the Non-person Profile page.

Profile Type Select the profile types associated with the profiles that you want to print, adding a row for each profile type. The system displays non-person profile types only.

Profile ID For each profile type, select the profiles that you want to print.

See Also

Chapter 3, “Setting Up Profile Management,” Setting Up to Use XML Publisher Reports and Profiles, page 67

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CHAPTER 8

(GBR) Managing National Vocational Qualifications

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

- Set up NVQ information.
- Track employees' NVQs.
- Review NVQ summaries.
- Run NVQ reports.

Understanding NVQs

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

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

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

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

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NVQ competence levels include the following:

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

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

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

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

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Setting Up NVQ Information

This section provides an overview of NVQ setup and discusses how to assign awarding bodies to NVQs.

Understanding NVQ Setup

To track NVQs, you need to define the following:

- NVQ content items.
- NVQ Unit content items.
- Element content items.

  NVQ units are divided into elements and you track an employee's progress for each element separately.
- Awarding bodies.

NVQs, NVQ units, and elements are stored in the content catalog. Use the following delivered content types for NVQs:

Content Type	Description
ELEMENT	Use to define the elements associated with NVQ units.
NVQ UNIT	Use to define the NVQ units that are required by NVQs.
NVQ	Use to define the NVQ codes.

The content types are related as follows:

- ELEMENT is a child of NVQ UNIT. This enables an element content item to be defined for different NVQ Unit content items. Satisfying the element only satisfies it within a specific NVQ Unit.
- NVQ UNIT is required by NVQ.

  This enables one NVQ unit to be linked to more than one NVQ. Satisfying one NVQ Unit qualifies as completion within all NVQs that require the NVQ Unit.

When you set up NVQs, NVQ units, and elements use the Relationship page in the Content Item component to link these items.

Set up NVQ data as follows:

1. Set up the NVQs, NVQ Units, and elements in the content catalog.
2. Set up awarding body name and location using the Award Body component (NVQ_AWARD_BODY).
3. Assign awarding bodies to NVQs using the NVQ Award Bodies component (NVQ_DETAILS).

See Also

Chapter 2, "Setting Up the Content Catalog," page 9

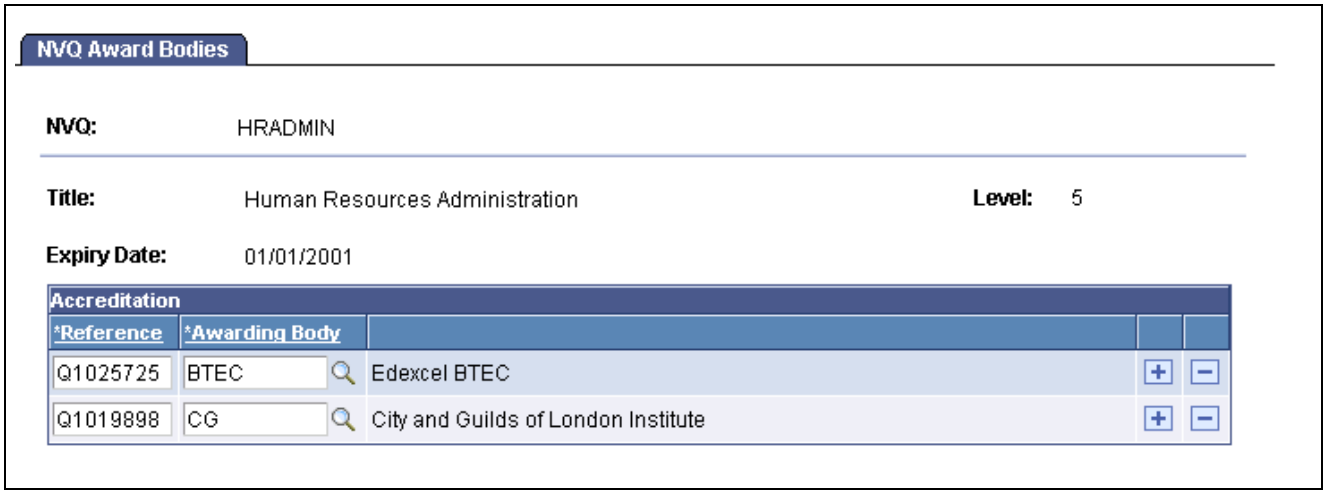
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Pages Used to Set Up NVQ Awarding Bodies

Page Name	Object Name	Navigation	Usage
Awarding Body	NVQ_AWARD_TBL	Set Up HRMS, Product Related, Profile Management, Content Catalog, Award Body, Awarding Body	Define name and location information for NVQ awarding bodies.
NVQ Award Bodies	NVQ_DETAILS	Set Up HRMS, Product Related, Profile Management, Content Catalog, NVQ Award Bodies, NVQ Award Bodies	Specify awarding bodies for NVQs that you have defined in the content catalog. You must set up NVQs and Award Bodies before you can use this page.

Assigning Awarding Bodies to NVQs

Access the NVQ Award Bodies page.



NVQ Award Bodies page

Level Displays the NVQ level that is defined for the NVQ in the content catalog.

Expiry Date Displays the date on which current NVQ details will be reviewed by the awarding bodies.

Reference and **Awarding Body** Select one or more awarding bodies. Enter the reference numbers for each awarding as provided by the NVQ.

Tracking Employees' NVQs

When you have defined NVQ data as content items in the content catalog, you can track employees who are enrolled in NVQs by assigning the appropriate NVQs, NVQ Units, and elements to their profiles.

The delivered PERSON profile type is configured for tracking NVQ information. You must use this profile type to record employees' NVQ progress if you want to use the NVQ reports or inquiry pages.

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The PERSON profile type includes a tab called NVQ that has three content sections, NVQs, NVQ Units, and Competency Elements. Set up an employee's NVQ information on this tab:

1. Add the NVQs in which the employee has enrolled.

   Click the Add New NVQs link to display the Add New NVQs page. Select the NVQ code, the NVQ status (*Enrolled*, *Achieved*, *Cancelled*, or *Prev. Ach* (previously achieved)), start and completion dates, and registration information.

2. Add the NVQ Units that are required for the NVQs.

   From the Add New NVQs page, click the NVQ Units link. This takes you to the Related Items page where the NVQ units are displayed. Select the NVQ unit status (*Planned*, *Not Started*, *In Progress*, *Submitted,* and *Completed*), and dates for the stages of the NVQ unit.

3. Add the elements that comprise the NVQ units you added in the previous step.

   From the Person Profile page, click the NVQ Unit link to display the Update NVQ Units page. Click the Competency Elements link. This takes you to the Related Items page where the Elements related to the NVQ Units are displayed. Enter the start date, expected completion date, and the remaining fields as required.

See Also

Chapter 5, "Managing Profiles," Creating and Updating Person Profiles, page 97

Reviewing NVQ Summaries

This section discusses how to:

- Review an employee's NVQs.
- Review employees associated with an NVQ.

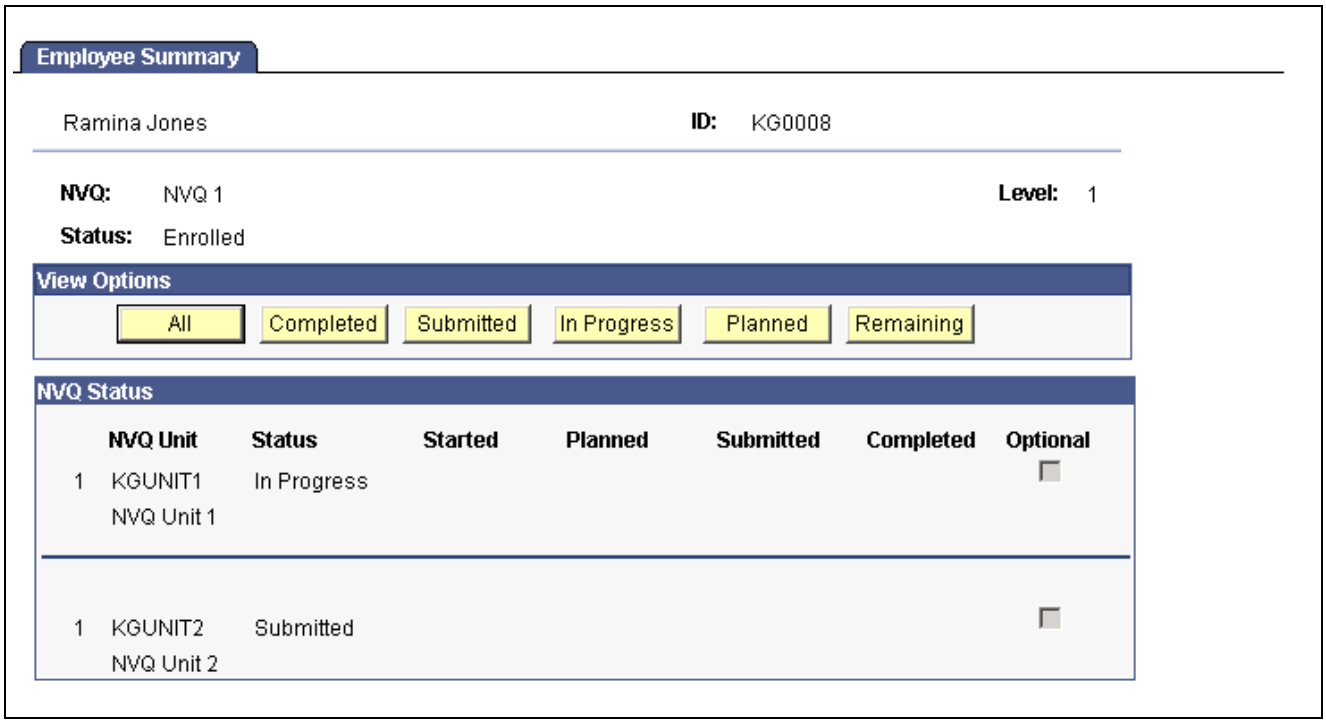
Pages Used to Review NVQ Information

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

Reviewing an Employee's NVQs

Access the Employee Summary page.

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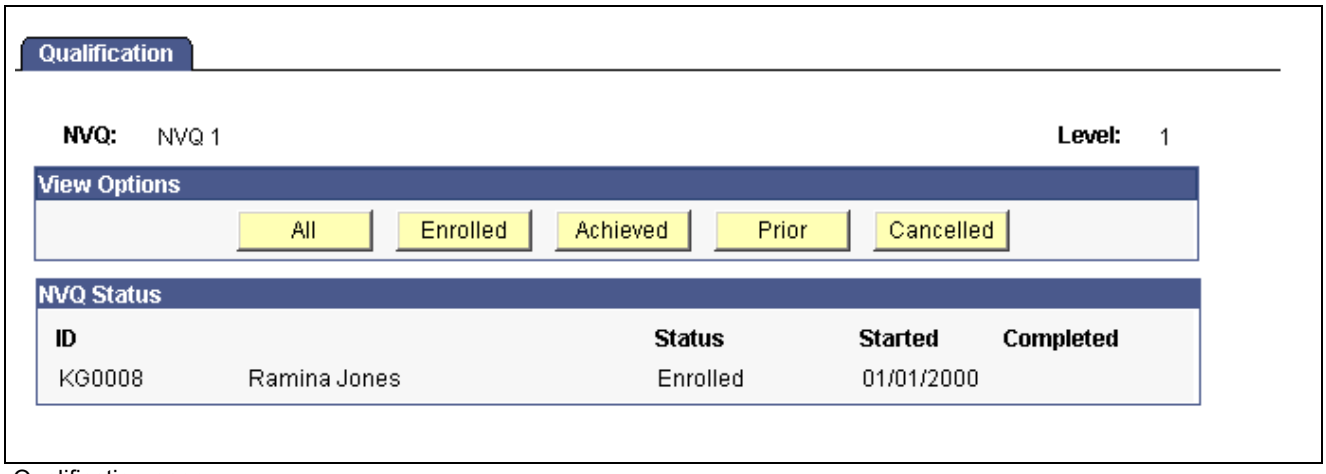
Employee Summary page

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

Note. Only those NVQ units listed in the employee's PERSON profile are included. The system does not check employees' profiles of any other type.

Reviewing Employees Associated with an NVQ

Access the Qualification page.



Qualification page

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

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Running NVQ Reports

This section lists the pages used to run NVQ reports and discusses how to run the Initialize Plan process.

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

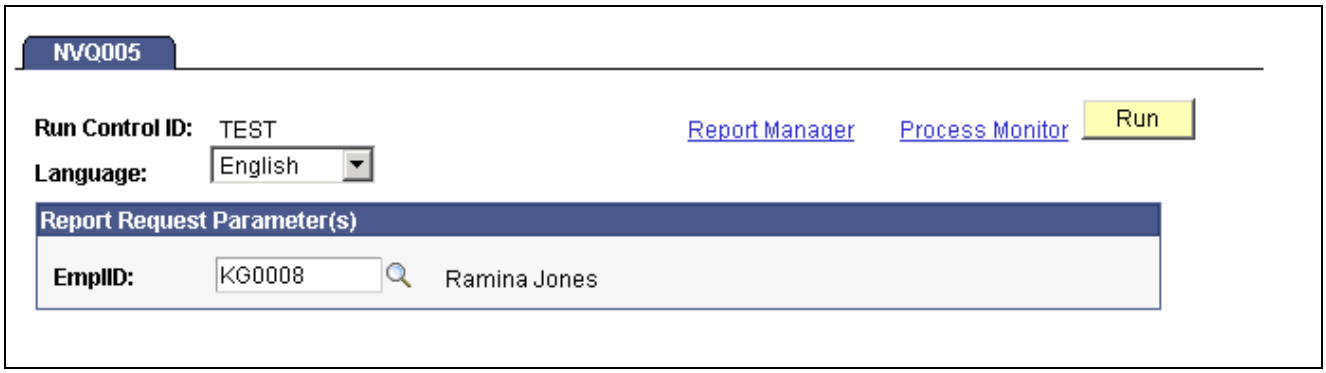
Pages Used to Run NVQ Reports

Page Name	Object Name	Navigation	Usage
NVQ001	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports UK, Employee Status	Run the (GBR) UK NVQ - Employee Status report (NVQ001). This report lists employees assigned to an NVQ and their status.
NVQ002	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports UK, Unit Listing	Run the (GBR) UK NVQ - Unit Listing report (NVQ002) that lists all defined NVQ units.
NVQ003	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports UK, NVQ Listing	Run the (GBR) UK NVQ - NVQ Listing report (NVQ003) that lists all defined NVQs.
NVQ004	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports UK, Unit/Element	Run the (GBR) UK NVQ – Unit/Element Listing report (NVQ004) that lists the elements associated with NVQ units.
NVQ005	RUNCTL_NVQ005	Workforce Development, Profile Management, NVQ Reports UK, Initialize Plan, NVQ005	Run the Initialize Plan process (NVQ005) for a selected employee. This SQR process compiles the data required for the Employee Unit Plan report (NVQ006).
NVQ006	PRCSRUNCNTL	Workforce Development, Profile Management, NVQ Reports UK, Employee Plan	Run the Employee Unit Plan report (NVQ006). This report summarizes an employee's NVQ Unit plan. **Note.** You must run the Initialize Plan process (NVQ005) before you can generate the report.

Running the Initialize Plan Process

Access the NVQ005 page.

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NVQ005 page

Use this page to run the Initialize Plan process (NVQ005) that compiles the data required to generate the Employee Unit Plan report (NVQ006).

Language Automatically populated based on the run control ID that you selected.

Override the default language if necessary.

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APPENDIX A

Content Type and Profile Type Properties

This appendix provides an overview of properties and discusses:

- Content type properties.
- Profile type properties.

Understanding Properties

When you set up a content type, you select the properties that are shared by items of that type. The system displays the properties you define for a content type as fields on the Item Details page when you set up content items.

When you add content types to profiles to create content sections, you can adjust the properties, adding new properties or removing existing properties for that content section. When users add profile items to the profile, the system displays the properties you define for the content section. Some properties can only be added at the content type (catalog) level or the profile type level, while other properties are available at both levels.

The order in which properties are displayed on the Item Details page or in profiles is determined by the system. The tables in this appendix list the properties in the order that they are displayed.

See Also

Chapter 2, "Setting Up the Content Catalog," Setting Up Content Types, page 16

Chapter 3, "Setting Up Profile Management," Defining Content Sections, page 60

Content Type Properties

This table lists the properties that you can add to a content type, the order in which the properties are displayed on the Item Details page, the default label text, and the type of information you can track using this property.

Note. The Catalog/Both column indicates whether the property can be added to the content catalog only or to both the content catalog and profile type.

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Sequence	Property	Catalog/ Both	Default Label Text	Description
1	JPM_CAT_ITEM_ID	Both	Content Item ID	The system populates this field with the item ID. **Note.** This is a required property and the system adds it to all new content types.
2	EFFDT	Both	Effective Date	The item's effective date. **Note.** This is a required property and the system adds it to all new content types.
3	EFF_STATUS	Both	Status as of Effective Date	The item status as of the effective date. **Note.** This is a required property and the system adds it to all new content types.
4	JPM_DESCR90	Catalog	Description	The item description. It is used as a related display field for the item ID in the profile. **Note.** This is a required property and the system adds it to all new content types.
5	DESCRLONG	Catalog	Long Description	A long description of the content item.
6	DESCRSHORT	Catalog	Short Description	A short description of the content item.
7	CM_CATEGORY	Catalog	Category	The category to which an item belongs. An item can belong to one category only. This property is useful for competency-related content types. However you can also use content groups to group items.
8	JPM_CAT_ITEM_SRC	Catalog	Content Item Source	Specifies the origin of a content item. Valid values are: *Customer Defined*, *DDI*, *Lominger*, or *PDI*.
9	RATING_MODEL	Both	Rating Model	The rating model. Use this field if the content type is associated with rating models.

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Sequence	Property	Catalog/ Both	Default Label Text	Description
10	COUNTRY	Both	Country	The country in which this item applies. This property is useful for content types that have country-specific items.
11	EP_SUB_LEVEL	Catalog	Level	The level of the item (*Advanced*, *Basic*, or *Intermediate*). This property is used with sub-competencies.
12	EDUCATION_LVL	Catalog	Education Level	The education level desired or required for this content item.
13	TYPE_OF_ STUDY_GER	Catalog	Type Of Study	(DEU) A German property that indicates the type of study. Valid values are: *Chemistry*, *Commerce*, *Constr/Mining*, *Electronic*, *Food*, *Forestry*, *Glass*, *Hotels*, *Mechanic*, *Other*, Printing, *Public Sector*, and *Textiles*. This property is used with degrees.
14	FIELD_OF_STUD_ GER	Catalog	Field Of Study	(DEU) A German property that indicates the field of study (*Commercial*, *Industrial*, or *Technical*). This property is used with degrees.
15	FP_DEGREE_LVL	Catalog	Level	(FRA) The degree level. This field is used for French Public Sector only.
16	HP_STATS_DEG_ LVL	Catalog	Stats-Can Degree Level	(CAN) The Canadian degree level.
17	SATISFACTION_ MTHD	Catalog	Satisfaction Method	Use to specify how an element is achieved. Valid values are: *Attend Training Course, Dispensation Given, Off Job Training*, *On Job Training*, *Possess License/Certificate*, *Recognition of Prior Learning*, *Supervisor Assessment.* This property is used with the ELEMENT content type.
18	NVQ_LEVEL	Catalog	Level	(GBR) The level of an NVQ (*1*, *2*, *3*, *4* or *5*)

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Sequence	Property	Catalog/ Both	Default Label Text	Description
19	JPM_DURATION_1	Catalog	Duration (1)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (1) field, which defines the duration unit.
20	JPM_DURATION_ TYPE1	Catalog	Duration Type (1)	Specifies the units for the Duration (1) field. Select from *Days*, *Months*, *Years*, or *Hours*.
21	JPM_DURATION_2	Catalog	Duration (2)	A generic duration field to enter the number of days, months, years, or hours. Use the field in conjunction with the Duration Type (2) field, which defines the duration unit.
22	JPM_DURATION_ TYPE2	Catalog	Duration Type (2)	Specifies the units for the Duration (2) field. Select from *Days*, *Months*, *Years*, or *Hours*.
23	JPM_YN_1	Both	User Yes/No (1)	A generic Yes/No check box. If the check box is selected, it indicates Yes, and if it is not selected this indicates No.
24	JPM_YN_2	Both	User Yes/No (2)	A generic Yes/No check box.
25	JPM_YN_3	Both	User Yes/No (3)	A generic Yes/No check box.
26	JPM_YN_4	Both	User Yes/No (4)	A generic Yes/No check box.
27	JPM_YN_5	Both	User Yes/No (5)	A generic Yes/No check box.
28	JPM_DATE_1	Both	User Date (1)	A generic date field.
29	JPM_DATE_2	Both	User Date (2)	A generic date field.
30	JPM_TEXT254_1	Both	User Text - 254 Char	A comment field of up to 254 characters.
31	JPM_TEXT254_2	Both	User Text - 254 Char	A comment field of up to 254 characters.
32	JPM_TEXT254_3	Both	User Text - 254 Char	A comment field of up to 254 characters.
33	JPM_TEXT254_4	Both	User Text - 254 Char	A comment field of up to 254 characters.

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Sequence	Property	Catalog/ Both	Default Label Text	Description
34	JPM_TEXT1325_1	Both	User Text – 1325 Char	A comment field of up to 1325 characters.
35	JPM_TEXT1325_2	Both	User Text - 1325 Char	A comment field of up to 1325 characters.

Profile Type Properties

This table lists the properties you can add to a content section in the profile type component, the order in which the properties are displayed in the profile, and the type of information you can track using this property.

Note. The system does not provide default labels when you add a property to a content section. The Profile Type/Both column indicates whether the property can be added to the profile type only or to both the content catalog and profile type.

Sequence	Property	Profile Type/Both	Description
1	JPM_CAT_ITEM_ID	Both	The system populates this field with the item ID. **Note.** This is a required property.
2	EFFDT	Both	The item's effective date. **Note.** This is a required property.
3	EFF_STATUS	Both	The item's status as of the effective date. **Note.** This is a required property.
4	JPM_ADHOC_DESCR	Profile	This field is used as the description field for free form content types only.
5	JPM_CAT_ITEM_QUAL	Profile	The instance qualifier set 1 to use for the item.
6	JPM_CAT_ITEM_QUAL2	Profile	The instance qualifier set 2 to use for the item.
7	JPM_CAT_TYPE	Profile	The system populates this field with the item's content type. **Note.** This is a required property.
8	JPM_PERSON_ID_1	Profile	Person ID and name.
9	EP_APPRAISAL_ID	Profile	ePerformance Appraisal ID
10	RATING_MODEL	Both	The rating model

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Sequence	Property	Profile Type/Both	Description
11	JPM_RATING1	Profile	The rating value. The values depend on the rating model selected.
12	JPM_INTEREST_LEVEL	Profile	Interest level
13	JPM_VERIFY_METHOD	Profile	Method of verification
14	COUNTRY	Both	Country Code
15	STATE	Profile	State Code
16	MAJOR_CODE	Profile	Major code
17	SCHOOL_TYPE	Profile	School Type
18	SCHOOL_CODE	Profile	School code
19	JPM_MINOR_CD	Profile	Minor Code
20	AVERAGE_GRADE	Profile	Average grade
21	PRACTIC_GRADE_GER	Profile	(DEU) Practical Grade
22	THEORY_GRADE_GER	Profile	(DEU) Theoretical Grade
23	IPE_SW	Profile	(DEU) Internal Professional Education
24	EDUC_LVL_AUS	Profile	(AUS) Higher Educational level
25	APS_HEDUC_CD_AUS	Profile	(AUS) Educational level used by the public sector
26	FACULTY_CODE	Profile	(JPN) Faculty code
27	SUBFACULTY_CODE	Profile	(JPN) Sub-Faculty code
28	MAJOR_CATEGORY	Profile	(JPN) Major Category
29	GVT_CREDIT_HOURS	Profile	(USF) Credit Hours
30	GVT_CRED_HRS_TYPE	Profile	(USF) Credit Hours Type
31	JPM_RATING2	Profile	Evaluation rating
32	JPM_RATING3	Profile	Evaluation rating
33	FP_SUBJECT_CD	Profile	French Public Sector (FPS) Subject Code

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Sequence	Property	Profile Type/Both	Description
34	FP_SKIL_HIR	Profile	French Public Sector (FPS) Hiring Requirements. This property indicates if an item is required for hiring.
35	FP_SKIL_PRM	Profile	French Public Sector (FPS) Promotion Requirements. This property indicates if an item is required for promotion.
36	FP_SKIL_TEN	Profile	French Public Sector (FPS) Tenure Requirements. This property indicates if an item is required for tenure validation.
37	FP_DEGR_REQUIRED	Profile	French Public Sector (FPS) Degree Required. This property indicates if a degree required.
38	BONUS_AMOUNT_FRA	Profile	(FRA) Bonus amount
39	BONUS_DT_FRA	Profile	(FRA) Bonus Date
40	NVQ_STATUS	Profile	(GBR) NVQ Status
41	JPM_IMPORTANCE	Profile	Relative importance. This field is used in Search and Compare Profiles.
42	JPM_INTEGER_1	Profile	A generic integer field
43	JPM_INTEGER_2	Profile	A generic integer field
44	JPM_PCT_1	Profile	A generic percentage field
45	JPM_PCT_2	Profile	A generic percentage field
46	JPM_DECIMAL_1	Profile	A generic decimal field
47	JPM_DECIMAL_2	Profile	A generic decimal field.
48	JPM_MANDATORY	Profile	A generic mandatory check box.
49	JPM_YN_1	Both	A generic Yes/No check box. If the check box is selected, it indicates Yes, and if it is not selected this indicates No.
50	JPM_YN_2	Both	A generic Yes/No check box.
51	JPM_YN_3	Both	A generic Yes/No check box.
52	JPM_YN_4	Both	A generic Yes/No check box.

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Sequence	Property	Profile Type/Both	Description
53	JPM_YN_5	Both	A generic Yes/No check box.
54	JPM_DATE_1	Both	A generic date field.
55	JPM_DATE_2	Both	A generic date field.
56	JPM_DATE_3	Profile	A generic date field.
57	JPM_DATE_4	Profile	A generic date field.
58	JPM_DATE_5	Profile	A generic date field.
59	JPM_DATE_6	Profile	A generic date field.
60	JPM_TEXT254_1	Both	A comments field of up to 254 characters.
61	JPM_TEXT254_2	Both	A comments field of up to 254 characters.
62	JPM_TEXT254_3	Both	A comments field of up to 254 characters.
63	JPM_TEXT254_4	Both	A comments field of up to 254 characters.
64	JPM_TEXT254_5	Profile	A comments field of up to 254 characters.
65	JPM_TEXT1325_1	Both	A comment field of up to 1325 characters.
66	JPM_TEXT1325_2	Both	A comment field of up to 1325 characters.
67	SETID_DEPT	Profile	SetID field for Department ID (DEPTID)
68	DEPTID	Profile	Department ID
69	LASTUPDDTTM	Profile	Last Updated Date/Time
70	LASTUPDOPRID	Profile	Last Updated User ID
71	JPM_SOURCE_ID2	Profile	Syndication source profile ID. Use this property to display the source profile of a syndicated item.
72	JPM_WF_STATUS	Profile	Workflow status of a profile item (*New*, *Saved*, *Pending*, or *Denied*). This property is always display-only and is populated by the system.

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Glossary of PeopleSoft Enterprise Terms

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

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

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

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budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

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incentive rule In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

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process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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