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# PeopleSoft Enterprise eProfile Manager Desktop 9.1 PeopleBook

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PeopleSoft Enterprise eProfile Manager Desktop 9.1 PeopleBook
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# PeopleSoft Enterprise eProfile Manager Desktop Preface

This preface discusses:

- PeopleSoft products.

- PeopleSoft Enterprise HRMS Application Fundamentals.

- Common elements used in this PeopleBook.

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

## PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise eProfile Manager Desktop.

## PeopleSoft Enterprise HRMS Application Fundamentals

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

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

### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

## PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.

- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.

- Typographical conventions and visual cues used in PeopleBooks.

- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.

- Common elements used in PeopleBooks.

- Navigating the PeopleBooks interface and searching the PeopleSoft online library.

- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the locally installed PeopleSoft online library, including web site folders.

- Understanding documentation integration and how to integrate customized documentation into the library.

- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

## Common Elements Used in this PeopleBook

| | |
|---|---|
| **administrator** | Refers to PeopleSoft power users. Power users generally have access to the core PeopleSoft Human Resources Management System. Depending on the organization, any of the following system delivered roles are recognized as a power user: Benefits Administrator, Federal Self-Service Administrator, HR Administrator, HR Processor, Payroll Administrator, and Personnelist. |
| **approval level** | A step in the approval process. The number of steps is defined by the organization's needs. Once a request is submitted, it may go through an approval level where a reviewer will approve or deny the request. |
| **federal PAR CI** (federal personnel action request component interface) | This component interface, CI_EE_HR_PROC, reads data from the self-service tables and copies it to the federal PAR tables. |
| **federal PAR tables** (federal personnel action request tables) | Tables which hold the personnel action request information required by the government for auditing purposes: GVT_JOB, GVT_PERS_DATA, or GVT_EMPLOYMENT, to name a few. |

| | |
|---|---|
| **originator** | The person who makes the initial request. For self-service transactions, this is usually an employee or manager. |
| **PAR** (personnel action request) | Used to describe the entire federal transaction process flow: request to approval to human resources processing. |
| **PAR Push** (personnel action request push) | This process, FGPAR_PU, pulls data from the federal PAR tables and updates the PeopleSoft Human Resources tables. |
| **reviewer** | The person who either approves or denies a submitted request. |

**Chapter 1**

# Getting Started with eProfile Manager Desktop

This chapter discusses:

- eProfile Manager Desktop overview.

- eProfile Manager Desktop business processes.

- eProfile Manager Desktop implementation.

## eProfile Manager Desktop Overview

eProfile Manager Desktop is a collaborative application that gives managers greater control over employee information. With eProfile Manager Desktop, managers in your organization can perform routine tasks necessary to manage direct reports.

## eProfile Manager Desktop Business Processes

eProfile Manager Desktop supports the following business processes:

- Review employee information.

- Change employees' reporting manager.

- Transfer employees.

- Promote employees.

- Change employees' location.

- Change employees' full-time or part-time status.

- Retire employees.

- Terminate employees.

- Request job changes requiring Works Council approval.

- Review military rank change requests.

- Add and review hires.

(USF) With this application, you can also:

• Reassign employees.

• Separate employees.

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

# eProfile Manager Desktop Implementation

PeopleSoft Enterprise 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.

### Other Sources of Information

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

### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

*Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager*

**Chapter 2**

# Managing Direct Reports

This chapter provides an overview of managing direct reports, and discusses how to:

- View direct reports personal information.

- Change part-time or full-time status.

- Change reporting managers.

- Change work locations.

- Promote employees.

- Retire employees.

- Terminate employees.

- Transfer employees.

- Change jobs requiring Works Council approval.

- Review military rank change requests.

- Add and review hires.

## Understanding the Management of Direct Reports

This section provides an overview of eProfile Manager Desktop transactions, prerequisites, and the process flow for these transactions.

### eProfile Manager Desktop Transactions

Managers can use the following eProfile Manager Desktop transactions to:

- View a direct report's information on one page.

- Change an employee's status to full-time or part-time.

- Change an employee's reporting manager.

- Assign an employee to another work location.

- Promote an employee.

- Initiate the employee retirement process.

- Initiate the employee termination process.

- Transfer an employee.

- Request an employee job change that requires works council approval.

- Review military rank change requests.

- Add employees and contingent workers using templates and view the hire status.

## Process Flow for Transactions

Most of the transactions in eProfile Manager Desktop can be configured to either:

- Use an approval process.

- Automatically update the database.

- Send notifications to an administrator.

The following table lists each of the self service transactions and the features that can be configured for each:

| Transaction | Use Approval Process | Automatic Database Update | Send Notifications |
|---|---|---|---|
| Change Full/Part Time Status | No | Yes | Yes |
| Change Reporting Managers | Yes | Yes | Handled by approval process. |
| Change Work Locations | No | Yes | Yes |
| Promote Employees | Yes | Yes | Handled by approval process. |
| Retire Employees | No | Yes | Yes |
| Terminate Employees | No | Yes | Yes |
| Transfer Employees | Yes | Yes | Handled by approval process. |
| View Employees' Information | Not Applicable | Not Applicable | Not Applicable |
| Change Jobs (Works Council) | Not Applicable | Not Applicable | Not Applicable |

| Transaction | Use Approval Process | Automatic Database Update | Send Notifications |
|---|---|---|---|
| Military Rank Change | Yes | Yes, based on Military Processing Definition<br><br>See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Understanding the Military Change Rank and Notification Process. | Handled by approval process. |
| Template-Based Hire | Not Applicable | Yes, based on the Template Create - Configuration<br><br>See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Understanding the SmartHire (Template-Based Hire) Process. | Not Applicable |

The following diagram illustrates the process flow that begins when a self-service user submits a request. The diagram shows both the basic process flow and the alternate flows for approvals, database updates, and notifications:
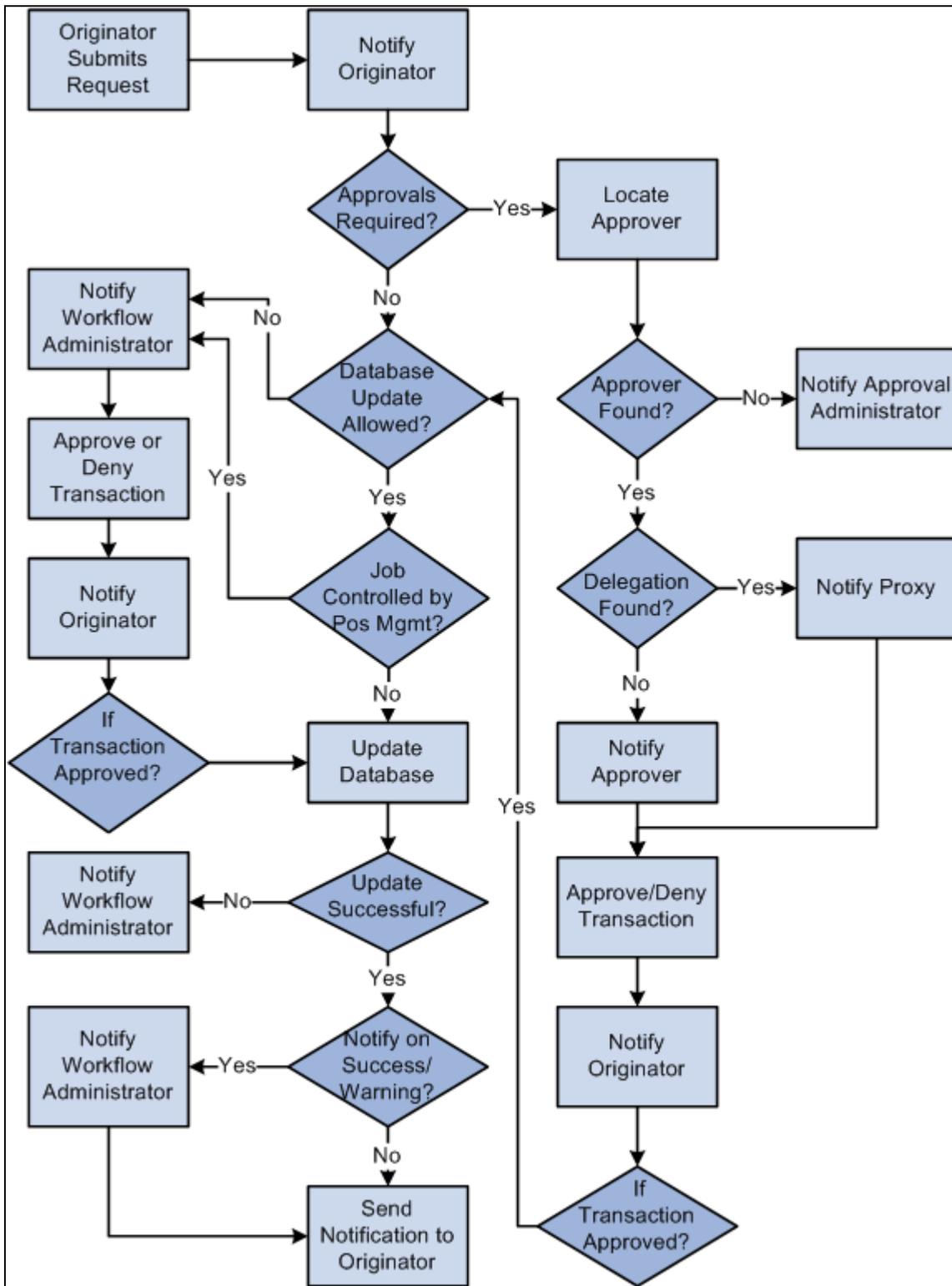
Process flow for self-service transactions with optional approvals, database updates, and notifications

There are four main sections to this process flow:

- A request is submitted.

- The request uses an approval process.

- The request allows automatic updates to the database.

- The request doesn't allow automatic updates to the database.

### Request is Submitted

When a manager submits a request, an email notification confirming that the request was successfully submitted may be sent to the manager. The following table lists the eProfile Manager Desktop transaction, the criteria that determines whether a notification is sent, and the template that is used:

| Transaction | Criteria | Notification Template |
|---|---|---|
| Change Full/Part Time Status<br><br>Change Location<br><br>Retire Employee<br><br>Terminate Employee | Notify User - Entry check box is selected on the System Workflow Rules page. | See Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 47. |
| Promotion<br><br>Transfer | Handled by approval process. The email that is sent depends on is determined by the following conditions:<br><br>• Are approvals required?<br><br>• Are database updates allowed?<br><br>• Is the changed controlled by position management? | For requests that:<br><br>• Require an approval process, HR_SUBMIT_SINGLE_EE<br><br>• Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_ SINGLE_EE. The notification is sent when the transaction is saved successfully to the database.<br><br>• Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_APV_MANUAL_ PROC_SINGL.<br><br>• Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_SINGLE _EE |

| *Transaction* | *Criteria* | *Notification Template* |
|---|---|---|
| Reporting Change | Handled by approval process. The email that is sent depends on is determined by the following conditions:<br><br>• Are approvals required?<br><br>• Are database updates allowed?<br><br>• Is the changed controlled by position management? | For requests that:<br><br>• Require an approval process, HR_SUBMIT_MULTI_EE.<br><br>• Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_ MULTI_EE. The notification is sent when the transaction is saved successfully to the database.<br><br>• Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_MANUAL_PROC _REPCH.<br><br>• Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_REPCH G_EE. |

### Approval Process Required

Approvals apply only to the Change Reporting Manager, Promote Employee, Transfer Employee, and Military Rank Change transactions. PeopleSoft delivers the following approval process IDs that are set up using the Register Transactions (EOAW_TXN) component.

• ReportingChgEmployee

• PromoteEmployee

• TransferEmployee

• MilitaryRankChange

When approvals are required, the system uses the following rules to identify the approving manager:

• For promotions and transfers, the originator must select a promotion or transfer method. If the method is By Position, the Reports To field on the Job Information page determines the approving manager. If the method is By Job Title/Department, the Supervisor ID field on the Job Information page for the new position determines the approving manager.

• For reporting changes, the Supervisor ID corresponding to the reporting change determines the approving manager.

- For rank changes, the Career Manager (or clerk) creates the rank change request, identifying approvers and reviewers by role in the Rank Change MIL component. The unit commanders method is configured on the Military Processing Definition page. If the method is By Position, the Reports To field on the Job Information page determines the approving manager. If the method is By Job Title/Department, the Supervisor ID field on the Job Information page for the new position determines the approving manager.

  See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Creating and Managing Military Rank Change Requests and *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Defining Military Rank Change Processing Rules.

**Note.** If an approving manager cannot be found, Approval Framework automatically routes the transaction to any person who is in the administrator role listed on the process definition.

Once the approving manager is determined, the system checks to see if a proxy is active for the manager. If so, that proxy becomes the approving manager. A notification is sent to either the approving manager or the proxy that states there is a request that requires his or her attention.

| For | Notification Template |
|---|---|
| Promote Employee<br>Transfer Employee | HR_APPROVAL_REQUEST_SINGLE_EE |
| Reporting Change | HR_APPROVAL_REQUEST_MULTI_EE |
| Military Rank Change | MIL_RANK_CHNG_APPROVAL_REQUEST |

The approving manager either approves or denies the request. If the manager approves the request, the following notification is sent to the originator stating that the request has been approved.

| For | Notification Template |
|---|---|
| Promote Employee<br>Transfer Employee | HR_STEP_APPROVAL_SINGLE_EE |
| Reporting Change | HR_STEP_APPROVAL_MULTI_EE |

If the manager denies the request, the following notification is sent to the originator stating the request has been denied.

| For | Notification Template |
|---|---|
| Promote Employee<br>Transfer Employee | HR_STEP_DENY_SINGLE_EE |
| Reporting Change | HR_STEP_DENY_REPCHG_EE |

You can add more approvers to the approval process by modifying the approval process.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

### *Database Update Not Allowed*

The system checks to see if automatic updates to the database are allowed. If the Allow DB Update check box on the self service Workflow Configurations page is not selected, the system sends the following notification to the administrator stating the transaction requires their approval:

| For | Notification Template |
|---|---|
| Change Full/Part Status<br><br>Change Location<br><br>Retire Employee<br><br>Terminate Employee | See Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 47. |
| Promote Employee<br><br>Transfer Employee | HR_ADMIN_APV_REQ_SINGLE_EE |
| Reporting Change | HR_ADMIN_APV_REQ_MULTI_EE |

If the administrator approves the transaction, the system sends the following email to the originator stating the request has been approved and applied to the database:

| For | Notification Template |
|---|---|
| Change Full/Part Status<br><br>Change Location<br><br>Retire Employee<br><br>Terminate Employee | See Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 47. |
| Promote Employee<br><br>Transfer Employee | HR_ADMIN_APV_MANUAL_PROC_SINGL |
| Reporting Change | HR_ADMIN_APV_MANUAL_PROC_REPCH |

If the administrator does not approve the transaction, the system sends the following email to the originator stating the request has been denied:

| For | Notification Template |
|---|---|
| Change Full/Part Status<br><br>Change Location<br><br>Retire Employee<br><br>Terminate Employee | See Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 47. |
| Promote Employee<br><br>Transfer Employee | HR_ADMIN_DENY_SINGLE_EE |

| *For* | *Notification Template* |
|---|---|
| Reporting Change | HR_ADMIN_DENY_REP_CHG_EE |

### *Database Updates Allowed*

The system checks to see if automatic updates to the database are allowed. This processing occurs if the Allow DB Update check box on the self service Workflow Configurations page is selected.

If automatic updates are allowed, the system also checks to see if the transaction involves an employee whose job is controlled by position management. If the job is controlled by position management, an administrator must update the database. The following email notification is sent to the workflow administrator stating that a transaction requires his or her attention:

| *For* | *Template* |
|---|---|
| Change Full/Part Status<br><br>Change Location<br><br>Retire Employee<br><br>Terminate Employee | See Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 47. |
| Promote Employee<br><br>Transfer Employee | HR_MANUAL_PROC_REQ_SINGLE_EE |
| Reporting Change | HR_MANUAL_PROC_REQ_REPCHG_EE |

If the update to the database is a success, the system sends the following email to the originator:

| *For* | *Template* |
|---|---|
| Change Full/Part Status<br><br>Change Location<br><br>Retire Employee<br><br>Terminate Employee | See Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 47. |
| Promote Employee<br><br>Transfer Employee | HR_TRANSACTION_SAVED_SINGLE_EE |
| Reporting Change | HR_TRANSACTION_SAVED_MULTI_EE |

If the update to the database is a success, the system checks to see if the administrator needs to be notified. The system sends the following email, if the check boxes for Notify On Success or Notify on Warnings on the Admin Notification Setup page are selected, or if the system updated the database with a future dated row:

| For | Template |
|---|---|
| Change Full/Part Status<br>Change Location<br>Retire Employee<br>Terminate Employee | See <u>Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 47.</u> |
| Promote Employee<br>Transfer Employee | HR_CI_UPDATE_SUCCESS<br>HR_CI_WARNINGS_SINGLE<br>HR_CI_FUTURE_ROWS_EXIST |
| Reporting Change | HR_CI_UPDATE_SUCCESS_MULT<br>HR_CI_WARNINGS_MULTI<br>HR_CI_FUTURE_ROWS_EXIST_MULTI |

## Prerequisites for Managing Direct Reports

Before you can use the eProfile Manager Desktop transactions you must:

1.  Activate eProfile Manager Desktop on the Installation table.

    See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting PeopleSoft Applications for Your Installation.

2.  Define position management on the HRMS Options page.

    The position management setting determines whether automatic updates, by nonadministrators, are allowed for certain transactions. Automatic updates can only occur if position data is not affected.

    See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting HRMS Options.

    See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions."

3. Set up security.

   eProfile Manager Desktop uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. PeopleSoft delivers the following permission lists and roles for eProfile Manager Desktop:

   | Permission Lists | Roles |
   |---|---|
   | HCCPSS2000 | Manager |
   | HCCPFE2000 | Manager Self-Service - Fed |
   | HCCPFE1060 | Personal Info-Employee - Fed |

   **Note.** Remember to enter an email address for each user profile, otherwise, email routings used by workflow will not work.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security."

4. Define whether a transaction uses an approval process.

   You can activate an approval process for the Promote Employee, Reporting Change, and Transfer Employee transactions using the self service Workflow Configurations page. If the system identifies that an approval process is used by a transaction, the HCM Approval Framework for the transaction is followed. PeopleSoft delivers the PromoteEmployee, TransferEmployee, and ReportingChgEmployee approval processes.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Approvals and Database Updates.

5. Define if a transaction automatically updates the database.

   Use the self service Workflow Configurations page to define whether the transaction will update the database without an administrator's intervention.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Approvals and Database Updates.

6. Link the self-service transaction to the approval process ID in the Approve Workflow Engine (AWE) and Transaction section on the Workflow Transactions page.

   PeopleSoft delivers the PromoteEmployee, ReportingChgEmployee, and TransferEmployee approval processes already linked to their appropriate self-service transaction.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

7. Define rules for workflow notifications.

   Workflow can be set up to notify the administrator when a transaction successfully updates the database and when the system detects a warning with the update.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Administrator Notification Rules.

8.   Set up the manager's data access to their direct reports.

eProfile Manager Desktop uses access types to control a manager's access to employee data. Normally, the manager who initiates a transaction can only view data for his or her direct reports. Access types enable the system to determine who reports to the initiating manager.

**Note.** This does not apply to the Promote Employee, Reporting Change, and Transfer Employee transactions.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Direct Reports Functionality.

# Viewing Direct Reports' Personal Information

This section provides an overview of viewing personal information for direct report and lists the pages used to view employees' personal information for those direct reports.

## Understanding View Personal Information

The View Employee Personal Information transaction enables managers to view information about their direct reports. The View Employee Personal Information page displays basic job information and provides links to other information such as:

*   Email addresses.

*   Phone numbers.

*   Emergency contacts.

*   Profile information.

## Pages Used to View Personal Information

| Page Name | Definition Name | Navigation | Usage |
| --- | --- | --- | --- |
| View Employee Personal Information | HR_DR_ADDL_INFO | <ul><li>Manager Self Service, Job and Personal Information, View Employee Personal Info, View Employee Personal Information</li><li>Click the Return to Select Employees link at the bottom of the Employee Information page.</li></ul> | Enter the date to use to view the information. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| View Employee Personal Information - Select Employee | HR_DR_SELECT_EMPS | Click theContinue button on the View Employee Personal Information page. | Select the direct employee whose information you want to review. |
| Employee Information | HR_EE_INF_HOME | Click the Continue button on the View Employee Personal Information - Select Employee page. | View job information for a specific direct report.<br><br>**Note.** To view another employee's information, click the Return to Select Employees link at the bottom of the page. The system displays the View Employee Personal Information page, where you need to enter the as of date you wish to view the employee's information prior to selecting the employee. |
| Home and Mailing Addresses | HR_EE_ADDRESS_MGR | Click the Home and Mailing Addresses link on the Employee Information page. | View the employee's home and mailing address information. |
| Email Addresses | HR_EMAIL_ADDRESSES | Click the Email Addresses link on the Employee Information page. | View the employee's home and mailing address information. |
| Phone Numbers | HR_PERSONAL_PHONE | Click the Phone Numbers link on the Employee Information page. | View the employee's phone numbers. |
| Emergency Contacts | HR_EMERGENCY_CNTCT | Click the Emergency Contacts link on the Employee Information page. | View the employee's emergency contact information. |
| Birthday | HR_EE_BIRTHDATE | Click theBirthday link on the Employee Information page. | View the employee's birth date information. |
| Compensation History | HR_SS_MG_COMP_HIST | Click the Compensation History link on the Employee Information page. | View the employee's salary, variable cash, and variable noncash information. |
| Total Compensation | HR_SS_TC_MG_REVIEW | Click the Total Compensation link on the Employee Information page. | View the employee's total compensation information. |

| Page Name | Definition Name | Navigation | Usage |
|-----------|-----------------|------------|-------|
| Person Profile | JPM_JP_PROFL2_EMP | Click the Person Profile link on the Employee Information page. | View the employee's profile information, such as competencies, education, and so forth. |
| Training Summary | HR_TRN_SUMMARY | Click the Training link on the Training page. | View the employee's internal and professional training information. |

# Changing Full-Time or Part-Time Status

This section provides an overview of part-time or full-time status changes and lists the pages used to change part- or full-time status.

## Understanding Changing Full-Time or Part-Time Status

PeopleSoft provides the Change Full/Part Time Status transaction that enables managers to change employees from part-time status to full-time status and back. To change the full or part-time status, managers.

1. Access the Change Full/Part Time Status page.

2. Enter the effective date for the change and click the Continue button.

3. Select the employee and click the Continue button.

   You may select more than one employee.

4. Select the new status and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Change Part- or Full-Time Status.

See Chapter 2, "Managing Direct Reports," Understanding the Management of Direct Reports, page 3.

## Pages Used to Change Part- or Full-Time Status

| Page Name | Definition Name | Navigation | Usage |
|-----------|-----------------|------------|-------|
| Change Full/Part Time Status | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Change Full/Part Time Status, Change Full/Part Time Status | Enter the effective date for the change. |
| Change Full/Part Time Status - Select Employee | HR_DR_SELECT_EMPS | Click the Continue button on the Change Full/Part Time Status page. | Select the employee whose status you want to change. |

| Page Name | Definition Name | Navigation | Usage |
|-----------|-----------------|------------|-------|
| Full/Part Time Status Change - Employee | HR_MGR_FULL_PART | Click theContinue button on the Change Full/Part Time Status - Select Employee page. | Initiate the request to change an employee's status to full or part-time. |
| Submit Confirmation | EO_SUBMIT_CONFIRM | Click the Submit button on the Full/Part Time Status Change - Employee page. | Confirms the request was successfully submitted. |

# Changing Reporting Managers

This section provides an overview of change reporting managers and list the pages used:

## Understanding Changing Reporting Managers

PeopleSoft provides three transactions to facilitate the changing of an employee's reporting manager:

- Request Reporting Change.

- Approve Reporting Change.

- View Reporting Change Status.

### Requesting a Reporting Change

To request a change in an employee's reporting manager, managers:

1. Access the Reporting Change page.

2. Enter the effective date for the change and click the Continue button.

3. Select the check box next to the name of the employee or employees for which the change is to be made and click the Continue button.

4. Select the new Supervisor or Department ID and click the Submit button.

### Approving a Reporting Change

To approve a request:

1. Access the Approve Reporting Change - Select a Reporting Change Request page.

2. Select the reporting change you want to approve.

3. Enter a comment relevant to the approval or denial of the request.

4. Click the Approve or Deny button.

### *Viewing a Reporting Change Status*

To view the status of a reporting change request:

1.  Access the Reporting Change Status - Select a Reporting Change Request page.

2.  Select the transaction you want to view.

## Pages Used to Change Reporting Managers

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Reporting Change | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Request Reporting Change, Reporting Change | Enter the effective date for the change. |
| Reporting Change - Select Employees | HR_DR_SELECT_EMPS | Click the Continue button on the Reporting Change page. | Select the employee whose reporting you want to change. |
| Reporting Change - Selected Employees | HR_MGR_REPORT_CHNG | Click the Continue button on the Reporting Change page. | Select the ID of the new manager or supervisor. |
| Approve Reporting Change - Select a Reporting Change Request | HR_MGR_REP_APPR_L | Manager Self Service, Job and Personal Information, Approve Reporting Change, Approve Reporting Change - Select a Reporting Change Request | Select the transaction to approve or deny. |
| Reporting Change Details | HR_MGR_REPORT_CHNG | Click the transaction number link on the Approve Reporting Change - Select a Reporting Change Request page or the Reporting Change Status - Select a Reporting Change Request page | Approve or deny the request. View the status of reporting change requests that you have submitted. |
| Confirmation | HR_REPORT_CONFIRM | Click the Approve or Deny button on the Reporting Change Details page. | Confirms the request was successfully submitted. |
| Reporting Change Status - Select a Reporting Change Request | HR_MGR_REP_VW_L | Manager Self Service, Job and Personal Information, View Reporting Change Status, Reporting Change Status - Select a Reporting Change Request | Select the transaction to view. |

# Changing Work Locations

This section provides an overview of the changing work locations process and lists the pages used:

## Understanding Changing Work Locations

PeopleSoft provides the Request Location Change transaction that enables managers to initiate the work location change process. To change the work location for an employee, managers:

1. Access the Change Location page.

2. Enter the effective date for the change and click the Continue button.

3. Select the employee and click the Continue button.

   You may select more than one employee.

4. Select the new location and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Change Locations.

See <u>Chapter 2, "Managing Direct Reports," Understanding the Management of Direct Reports, page 3.</u>

## Pages Used to Change Locations

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Location Change | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Request Location Change, Location Change | Enter the effective date for the change. |
| Location Change - Select Employees | HR_DR_SELECT_EMPS | Click theContinue button on the Location Change page. | Select the employee or employees whose location you want to change. |
| Change Location | HR_MGR_LOCATION | Click the Continuebutton on the Location Change - Select Employees page. | Initiate the request to change the employee's location. |
| Submit Confirmation | EO_SUBMIT_CONFIRM | Click the Submit button on the Change Location page. | Confirms the request was successfully submitted. |

# Promoting Employees

This section provides an overviews of employee promotions, promoting employees, approving promotions, and viewing promotion status, and list the pages used for employee promotions.

## Understanding Employee Promotions

PeopleSoft provides three self-service transactions to facilitate employee promotions:

- Promote Employees, which enables managers to submit a promotion request.

- Approve Promotion, when enables approving managers to either approve or deny the request.

- View Promotion Status, which enables managers to review where the request stands in the approval process.

### Requesting a Promotion

To request an employee's promotion, managers:

1. Access the Promote Employee page.

2. Enter the effective date and click the Continue button.

3. Select the employee or employees to promote and click the Continue button.

4. Enter the reason for the promotion and the promotion method, and click the Submit button.

   If position management is set to None, then the only promotion method allowed is *By Department and/or Job Title*. If position management is set to Full, then *By Position* is the only promotion method allowed.

### Approving a Promotion

To approve a promotion, the approving manager or proxy:

1. Access the Approve Promotion page.

2. Click the Approve or Deny button.

3. To add an approver, click the (+) plus button and select the approver from the list.

4. Click the Submit button.

### Viewing a Promotion Status

To view the status of an employee's promotion:

1. Access the Promotion Status - Select a Transaction page.

2. Select the transaction you want to view.

## Pages Used to Promote Employees

| Page Name | Definition Name | Navigation | Usage |
| --- | --- | --- | --- |
| Promote Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Promote Employee, Promote Employee | Enter the effective date of the promotion. |
| Promote Employee - Select Employee | HR_DR_SELECT_EMPS | Click the Continue button on the Promote Employee page. | Select the employee to promote. |
| Promotion Details | HR_PROMOTE_EE | Click the Continue button on the Promote Employee - Select Employee page. | Request a promotion for one of your direct report employees. |
| Submit Confirmation | HR_PROMOTE_CONFIRM | Click the Submit button on the Promotion Details page. | Confirms the request was successfully submitted. |
| Approve Promotion - Select a Transaction | HR_PROMOTE_APPR_L | Manager Self Service, Job and Personal Information, Approve Promotion, Approve Promotion - Select a Transaction | Approve or deny a request to promote an employee. |
| Promotion Status - Select a Transaction | HR_PROMOTE_VW_L | Manager Self Service, Job and Personal Information, View Promotion Status, Promotion Status - Select a Transaction | View the status of an employee's promotion request that you have submitted. |

# Retiring Employees

This section provides an overview of retiring employees and list the pages used to retire employees.

## Understanding Retiring Employees

PeopleSoft provides the Retire Employee transaction that enables managers to initiate the retirement process. To retire an employee, managers

1. Access the Retire Employee page.

2. Enter the effective date for the retirement and click the Continue button.

3. Select the employee to retire and click the Continue button.

4. Enter the reason for the retirement and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Retire Employees.

## Pages Used to Retire Employees

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Retire Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Retire Employee, Retire Employee | Enter the effective date for the retirement. |
| Retire Employee - Select Employee | HR_DR_SELECT_EMPS | Click theContinue button on the Retire Employee page. | Select the employee to retire. |
| Retire Employee - Employee | HR_RETIRE_EE | Click the Continue button on the Retire Employee - Select Employee page. | Initiate the retirement process for one of your direct reports. |
| Submit Confirmation | EO_SUBMIT_CONFIRM | Click the Submit button on the Retire Employee - Employee page. | Confirms the request was successfully submitted. |

# Terminating Employees

This section provides an overview of terminating employees and lists the pages used:

## Understanding the Terminating Employees Process

PeopleSoft provides the Terminate Employee transaction that enables managers to initiate the termination process. To terminate an employee, managers

1.  Access the Terminate Employee page.

2.  Enter the effective date for the termination and click the Continue button.

3.  Select the employee to terminate and click the Continue button.

4.  Enter the reason for the termination and click the Submit button.

After you click the Submit button, the system proceeds according to the parameters that have been set up for Terminate Employees.

## Pages Used to Terminate Employees

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Terminate Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Terminate Employee, Terminate Employee | Enter the effective date for the termination. |
| Terminate Employee - Select Employee | HR_DR_SELECT_EMPS | Click the Continue button on the Terminate Employee page. | Select the employee to terminate. |
| Terminate Employee - Employee | HR_EE_TERMINATE | Click theContinue button on the Terminate Employee - Select Employee page. | Initiate the termination process for one of your direct reports. |
| Submit Confirmation | EO_SUBMIT_CONFIRM | Click the Submit button on the Terminate Employee - Employee page. | Confirms the request was successfully submitted. |

# Transferring Employees

This section provides an overview of transferring employees and list the pages used:

## Understanding Transferring Employees

PeopleSoft provides three transactions to facilitate the transfer of an employee:

• Transfer Employee

• Approve Transfer

• View Transfer Status

### Transferring an Employee

To request an employee transfer:

1. Access the Transfer Employee page.

2. Enter the effective date for the transfer and click the Continue button.

3. Select the employee to transfer and click the Continue button.

4. Enter the detail information about the transfer and click the Submit button.

> **Note.** If you enter a supervisor ID that indicates that the employee would report to him or herself, the system issues a warning message to confirm that this is what you intended to do. If you do not change the supervisor ID and click Submit again, the system will process this request with the employee reporting to him or herself.

### Approving a Transfer

To approve an employee transfer:

1. Access the Approve Transfer - Select a Transaction page.

2. Select the transaction you want to approve or deny.

3. Click the Approve or Deny button.

### Viewing a Transfer Status

To view an employee transfer:

1. Access the Transfer Status - Select a Transaction page.

2. Select the transaction you want to view.

## Pages Used to Transfer Employees

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Transfer Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Transfer Employee, Transfer Employee | Enter the effective date for the transfer. |
| Transfer Employee - Select Employee | HR_DR_SELECT_EMPS | Click theContinue button on the Transfer Employee page. | Select the employee to transfer. |

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Transfer Details | HR_TRANSFER_EE | • Click theContinue button on the Transfer Employee - Select Employee page.<br><br>• Click the OK button on the Submit Confirmation page.<br><br>• Click the name link on the Select a Transaction page.<br><br>• Click the name link on the View Transfer Status page. | Request a transfer for one of your direct report employees. View summary information for submitted transfers. Approve or deny a transfer. |
| Submit Confirmation | HR_TRANSFER_CONFRM | • Click theSubmit button on the Transfer Details page.<br><br>• Click the Approve or Deny button on the Transfer Details page. | Confirms the request was successfully submitted. |
| Approve Transfer - Select a Transaction | HR_TRANSFER_APPR_L | Manager Self Service, Job and Personal Information, Approve Transfer, Approve Transfer - Select a Transaction | Select a transaction to approve or deny. |
| Transfer Status - Select a Transaction | HR_TRANSFER_VW_L | Manager Self Service, Job and Personal Information, View Transfer Status, Transfer Status - Select a Transaction | Select a transfer transaction to view. |

# Changing Jobs Requiring Works Council Approval

This section provides an overview of requesting job changes requiring Works Council approval and lists the pages used:

## Understanding Job Changes

The Request Job Change transaction is the self-service transaction that works with Manage Labor Administration. Managers use this transaction to enter the regulatory region, action code, and reason for the action. The HR administrator is notified and reviews the request. If the HR administrator approves the request, the Works Council is notified.

Managers can use the Review Job Change Request transaction to see the status of the request.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Requesting Works Councils Approval."

## Pages Used to Change Jobs

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Job Change Request - Select Employee | WC_JCR_SEARCH | • Manager Self Service, Job and Personal Information, Request Job Change, Job Change Request - Select Employee<br><br>• Workforce Administration, Job Information, Manager Self Service, Job and Personal Information, Request Job Change, Job Change Request - Select Employee | Enter the required data and initiate the job change request. The Job Change Request page requires different data entry depending on the type of request—either hire, transfer or termination.<br><br>See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Setting Up Works Councils," Defining Job Changes per Regulatory Region. |
| Job Change Request Status<br><br>Review My Job Change Request | WC_JCR_STATUS_INQ | • Manager Self Service, Job and Personal Information, Review Job Change Request, Review Job Change Request<br><br>• Workforce Administration, Labor Administration, Review My Job Change Request, Review My Job Change Request | Review Job Change requests. Enter the search criteria and click Search. |
| Review My Job Change Request | WC_JCR_STATUS2_INQ | Workforce Administration, Job Information, Review My Job Change Request, Review My Job Change Request | Review the status of a job change request requiring Works Councils approval. |
| Job Change Request | WC_JOB_CHG_REQ | Workforce Administration, Job Information, Review All Job Change Request, Job Change Request | Review the status of job change requests requiring Works Councils approval. |
| Job Change Request Approval | WC_JCR_APPR_INQ | Workforce Administration, Labor Administration, Job Change Request Approval, Job Change Request Approval | Mass-approve job change requests. |

# Reviewing Military Rank Change Requests

This section provides an overview of reviewing military rank change requests and lists the page used:

## Reviewing Military Rank Change Requests

Stakeholders view rank change request transactions on the Review Rank Change Request MIL page, where they can approve or deny the request.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Managing Military Rank Change Requests.

## Page Used to Review Military Rank Change Requests

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Review Rank Change Request MIL | MIL_RANK_CHNG_APPR | Manager Self Service, Job and Personal Information, Review Rank Change Request MIL, Review Rank Change Request MIL | Review, approve, or deny a rank change request. View the status monitor of the approval chain. |

# Adding and Reviewing Hires

This section provides an overview of adding and reviewing hires and lists the pages used:

## Adding and Reviewing Hires

The SmartHire process (template-based hires) offers a way to streamline the repetitive data entry by reducing the current data entry and enabling managers to expedite the hiring process without needing to access the Personal and Job Data pages. Hire templates are set up by a template administrator and are intended for end-user to enters data for persons being added to the database. The amount of data an end-user enters is dependant on the types of templates created. The template determines whether the end-user's data will automatically update the HR system, or if it requires an HR administrator to review it first. Also, the HR administrator is sent any errors that occur when the end-user saves a person's data to the database for completion.

To view a detailed description of the template-based hire pages, see the Increasing the Workforce chapter of *PeopleSoft Enterprise Human Resources PeopleBook: Administer Workforce.*

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Increasing the Workforce Through SmartHire Templates.

## Page Used to Add and Review Hires

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Template-Based Hire | HR_TBH_EULIST | Manager Self Service, Job and Personal Information, Add Template-Based Hire, Template-Based Hire | Select a template or person to process a template-based hire. |
| Enter Hire Details | HR_TBH_ADD | • Select a template from the Select Template field on the Template-Based Hire page and click Go.<br><br>• Select a name link from the Name field on the Template-Based Hire page. | Enter hire details to start the template hire process for a person, such as the persons's job effective date. |
| Enter Employee Information | HR_TBH_DATA | Click Next on the Enter Hire Details page | Enter worker information details for the person being hired. Only the fields that have been defined on the template you associated with this employee will display for data entry. |
| Person Match Found | HR_TBH_SRMATCH | Click Save and Submit on the Enter Employee Information page. | Complete a hire when a person match is found. When saving and submitting the person to the database, if a match is found on the person's name or national ID, this page displays and allows you to select an existing person in the database or continue with the hire. |
| Select an Action | HR_TBH_ACTION | Click the Select button on the Person Match Found page. | Select an action if a matching person is found in the database. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Confirmation<br><br>Further Processing Required | HR_TBH_CONFIRM | Click Save and Submit on the Template-Based Hire pages. | Displays the type of confirmation after saving a template-based hire. When the hire is saved successfully and automatic database updates is turned on, the Contract Data link displays the Update Contracts link, which enables users with security access to the contract pages to update contract information for a new hire. |
| Template Hire Status | HR_TBH_STATUS | • Manager Self Service, Job and Personal Information, Template-Based Hire Status, Template Hire Status<br><br>• Click the Template-Based Hire Status link on the Template-Based Hire page. | View the status of a template-based hires of the people with a pending, cancelled, or processed status. |

**Chapter 3**

# (USF) Managing Direct Reports

This chapter provides an overview of self-service transactions and approvals, lists prerequisites, and discusses how to:

- Change part-time or full-time status.

- Change work location.

- Promote employees.

- Reassign employees.

- Request reporting changes.

- Retire employees.

- Separate employees.

- Approve change requests.

- Administer approvals

## Understanding Self-Service Transactions and Approvals

This overview describes:

- Manager self-service transactions.

- Approvals and the Approval Workflow Engine.

- Work in progress statuses for approval steps.

- Personnel Action Request (PAR) defaults for approved transactions

## Manager Self-Service Transactions

PeopleSoft Enterprise eProfile Manager Desktop provides seven self-service transactions for managing direct reports.

- Change part-time or full-time status.

- Change work location.

- Promote employees.

- Reassign employees.

- Request reporting changes.

- Retire employees.

- Separate employees.

# Approvals and the Approval Workflow Engine

The system uses the generic Approval Workflow Engine (AWE) to manage approvals for federal self-service transactions. The AWE provides a framework for creating, running, and managing approval processes. Approval workflow is triggered when a requester submits a transaction, such as a promotion. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow. The approval process definition controls who must approve the transaction and in what order. Administrators have the ability to monitor the status of AWE approval transactions and to perform various actions on submitted transactions.

### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals"

# Work In Progress Statuses for Approval Steps

The federal work-in-progress (WIP) management system works in tandem with approval processing to automate the tracking and processing of personnel action requests as they move through the steps of the approval process. Each transaction is configured to use specific WIP statuses at each stage of the approval process.

Because the AWE is a generic workflow approval engine, additional setup outside of the AWE is necessary so that you can associated federal work in progress statuses with approval steps. The setup for manager self-service transactions is the same as the setup for employee transactions.

**Note.** When associating WIP statuses with approval steps, you manually set up the steps that represent your approval processing steps. If you modify the delivered approval process, take care to keep these step definitions in sync with the AWE process definitions.

### See Also

*PeopleSoft Enterprise eProfile 9.1 PeopleBook*, "(USF) Setting Up Approvals," Defining WIP Statuses for Approval Steps

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "(USF) Setting Up the Work-in-Progress Management System"

# PAR Defaults for Approved Transactions

In PeopleSoft Enterprise Human Resources, the PAR system automatically routes a wide variety of requests to reviewing officials in human resources. PAR processing is separate from the AWE approval process and occurs only after all AWE approvals are complete.

Four of the seven manager self-service transactions are automatically transferred to the PAR system after all approvals are complete. The system uses a component interface for this transfer. To support the push to the PAR system, you must provide default values for certain fields that are required in the PAR tables and that are not normally entered by the employee who originates the self-service request. You provide these defaults in the Transaction Setup component (the same component where you associate approval steps with WIP statuses).
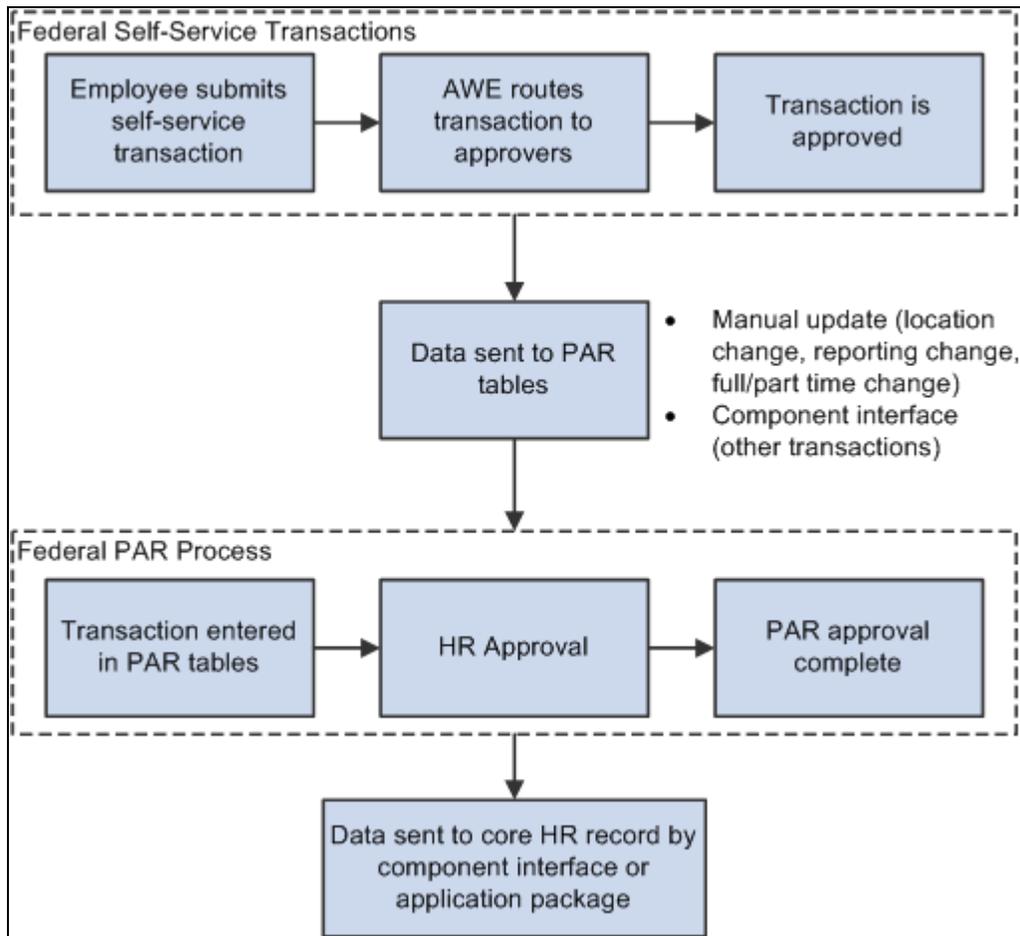
See *PeopleSoft Enterprise eProfile 9.1 PeopleBook*, "(USF) Setting Up Approvals," Defining PAR Tracking Data and *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "(USF) Setting Up the Work-in-Progress Management System."

Three other transactions are position-controlled, so changes are made to the position and then propagated out to the persons in the positions. These transactions are not automatically pushed to the PAR system. Instead, the Personnelist / Federal Self Service Administrator must enter the information in the PAR system manually.

The following table shows which transactions are automatically pushed to the PAR tables and which ones require an administrator to manually enter data into the PAR tables:

| PAR Table Update Method | Transactions |
|---|---|
| Manual (administrator) | • Request reporting changes.<br>• Change part-time or full-time status.<br>• Change work location. |
| Automatic (component interface) | • Promote employees.<br>• Reassign employees.<br>• Retire employees.<br>• Separate employees. |

This process flow diagram illustrates how self-service transactions first go through AWE approvals, then get sent to federal PAR processing before any data changes are made to core HR tables:

Process flow for federal self-service transactions

# Prerequisites for Managing Direct Reports

Before you can use the eProfile Manager Desktop transactions, you must:

1. Activate eProfile Manager Desktop on the Installation Table.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting PeopleSoft Applications for Your Installation.

2. Define position management on the HRMS Options page.

   The position management setting determines whether automatic updates, by nonadministrators, are allowed for certain transactions. Automatic updates can occur when position data is not affected.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Selecting HRMS Options.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions."

3. Set up security.

   eProfile Manager Desktop uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. The following tables lists the delivered permission lists and roles for eProfile Manager Desktop:

   | *Permission Lists* | *Roles* |
   |---|---|
   | HCCPSS2000 | Manager |
   | HCCPFE2000 | Manager Self Service - Fed |
   | HCCPFE1060 | Personal Info-Employee - Fed |

   **Note.** Remember to enter an email address for each user profile; otherwise; the email routings that are used by workflow will not work.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security."

4. Configure the AWE for approval processing.

   Oracle delivers preconfigured approval processing for all U.S. federal manager self-service transactions, but you should review the delivered configuration and modify it as necessary.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

5. Set up the manager's data access to his or her direct reports.

   eProfile Manager Desktop uses access types to control a manager's access to employee data. Normally, the manager who initiates a transaction can view only data for his or her direct reports. Access types enable the system to determine who reports to the initiating manager.

6. Set up group build if you plan to use Group ID as the access type for a manager's direct reports.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions."

7. Configure the USFED WIP transaction.

   See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "(USF) Setting Up the Work-in-Progress Management System."

# Changing Part-Time or Full-Time Status

This section provides an overview of the process flow for part-time or full-time status changes and lists the pages that are used to change part-time or full-time status.

## Understanding the Process Flow for Part-Time or Full-Time Status Changes

To change an employee's part-time or full-time status, managers:

1.  Access the Change Full/Part-time Status page.

2.  Enter the effective date for the change, and click Continue.

3.  Select the employee for whom the change in part-time or full-time status is being requested, and click Continue.

    The Change Full/Part-time Status page appears with the employee's current job data. The New Status fields are populated by default with the new status for the employee.

4.  Enter any relevant comments, and click Submit.

    When the Submit button is clicked, the system invokes the AWE approval process and displays a confirmation page that shows the chain of approvers.

## Pages Used to Change Part-Time or Full-Time Status

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Change Full/Part-time Status | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Change FTPT Status (USF), Change Full/Part time Status | Enter the effective date for the change. |
| Change Full/Part-time Status – Select Employee | HR_DR_SELECT_EMPS | Click Continue on the Change Full/Part-time Status page. | Select the employee to have the full/part-time status changed. |
| Full/Part Time Status Change | FE_MGR_FULL_PART | Click Continue on the Change Full/Part-time Status - Select Employee page. | Submit a change to the employee's full/part-time status. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction. |

## Changing Work Location

This section provides an overview of work location changes and lists the pages that are used to change work location.

## Understanding Work Location Changes

Requests can be made for an individual employee or a group of employees. To request a change to work location, managers:

1. Access the Location Change page.

2. Enter the date that the change in reporting structure goes into effect, and click Continue.

3. Select the employee or employees for whom the change in location is being requested, and click Continue.

   The Location Change page appears with the employee or employees' current job row data.

4. Enter the new location and any relevant comments, and then click Submit.

   When the Submit button is clicked, the system invokes the AWE approval process and displays a confirmation page that shows the chain of approvers.

## Pages Used to Change Work Location

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Location Change | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Location Change (USF), Location Change | Enter the effective date for the change. |
| Location Change - Select Employees | HR_DR_SELECT_EMPS | Manager Self Service, Job and Personal Information, Location Change (USF), Location Change - Select Employees | Select one or more employees requiring a change in their work location. |
| Location Change - Employee | FE_MGR_LOC_CHG | Click the Continue button on the Location Change - Select Employees page. | Enter the location and submit the location change request. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction. |

## Promoting Employees

This section provides an overview of employee promotions and lists the pages that are used to promote employees.

## Understanding Employee Promotions

To request a promotion, managers:

1.  Access the Promote Employee page.

2.  Enter the date that the promotion goes into effect, and click Continue.

3.  Click the name of the employee for whom the promotion is being requested.

    The Promote Employee page appears and displays the employee's current job data.

4.  Enter the information on the page, and click Submit.

    When the Submit button is clicked, the system invokes the AWE approval process and displays a confirmation page that shows the chain of approvers.

## Pages Used to Promote Employees

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Promote Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Promote Employee (USF), Promote Employee | Enter the effective date for the change. |
| Promote Employee - Select Employee | HR_DR_SELECT_EMPS | Click the Continue button on the Promote Employee page. | Select an employee for whom you want to request a promotion. |
| Promote Employee - Employee | FE_MGR_PROMOTE | Click the Continue button on the Promote Employee - Select Employee page. | Submit a promotion request. |
| Promote Employee - Confirm | FE_PROMOTE_CONFIRM | Click the Submit button on the Promote Employee - Employee page. | Confirm that the transaction has been submitted and review the approval process for the transaction. |

# Reassigning Employees

This section provides an overview of employee reassignments and lists the pages that are used to reassign employees.

## Understanding Employee Reassignments

To reassign an employee, managers:

1.  Access the Reassign Employee page.

2.  Enter the effective date for the reassignment, and click Continue.

3.  Select the employee for whom the reassignment is being requested, and click Continue.

    The Reassign Employee page appears with the employee's current job data.

4.  Enter the new position number, the reason for the reassignment, any comments, and click Submit.

    When the Submit button is clicked, the system invokes the AWE approval process and displays a
    confirmation page that shows the chain of approvers.

## Pages Used to Reassign Employees

| Page Name | Definition Name | Navigation | Usage |
|-----------|-----------------|------------|-------|
| Reassign Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Reassign Employee (USF), Reassign Employee | Enter the effective date for the change. |
| Reassign Employee - Select Employee | HR_DR_SELECT_EMPS | Click the Continue button on the Reassign Employee page. | Select an employee for whom you want to request a reassignment. |
| Reassign Employee | FE_MGR_REASSIGN | Select an employee on the Reassign Employee - Select Employee page. | Submit a request for reassignment. |
| Reassign Employee - Employee | FE_REASSIGN_CONFRM | Click the Submit button on the Reassign Employee page. | Confirm that the transaction has been submitted and review the approval process for the transaction. |

## Requesting Reporting Changes

This section provides an overview of reporting changes and lists the pages that are used to request reporting
changes.

## Understanding Reporting Changes

Requests can be made for an individual employee or a group of employees. To request a reporting change,
managers:

1.  Access the Reporting Change page.

2.  Enter the date that the change in reporting structure goes into effect, and click Continue.

3. Select the employee or employees for whom a change in reporting structure is being requested, and click Continue.

   The Reporting Change page appears with the employee or employees' current job data.

4. Enter the new reporting position, any relevant comments, and then click Submit.

   When the Submit button is clicked, the system invokes the AWE approval process and displays a confirmation page that shows the chain of approvers.

## Pages Used to Request Reporting Changes

| Page Name | Definition Name | Navigation | Usage |
|-----------|-----------------|------------|-------|
| Reporting Change | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Reporting Change (USF), Reporting Change | Enter the effective date for the change. |
| Reporting Change - Select Employees | HR_DR_SELECT_EMPS | Click the Continue button on the Reporting Change page. | Select one or several employees for whom you want to request a reporting change. |
| Reporting Change - Employee | FE_MGR_REPORT_CHNG | Click the Continue button on the Reporting Change - Select Employees page. | Submit the request for a reporting change. After you submit the transaction, use this page to confirm that the transaction has been submitted and to review the approval process for the transaction. |

## Retiring Employees

This section provides an overview of retiring employees and lists the pages that are used to retire employees.

## Understanding Retiring Employees

To request an employee's retirement, managers:

1. Access the Retire Employee page.

2. Enter the effective date for the retirement, and click Continue.

3. Select the employee for whom the retirement is being requested, and click Continue.

   The Retire Employee page appears with the employee's current job data.

4. In the Retirement Type field, select the reason for the retirement and click Submit.

   When the Submit button is clicked, the system invokes the AWE approval process and displays a confirmation page that shows the chain of approvers.

## Pages Used to Retire Employees

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Retire Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Retire Employee (USF), Retire Employee | Enter the effective date for the change. |
| Retire Employee - Select Employee | HR_DR_SELECT_EMPS | Click the Continue button on the Retire Employee page. | Select one or several employees for whom you want to request a retirement. |
| Retire Employee - Employee | FE_MGR_RETIRE | Click the employee name link on the Retire Employee - Select Employee page. | Submit the retirement request. |
| Retire Employee - Confirm | FE_RETIRE_CONFIRM | Click the Submit button on the Retire Employee page. | Confirm that the transaction has been submitted and review the approval process for the transaction. |

## Separating Employees

This section provides an overview of separating employees and lists the pages that are used to separate employees.

## Understanding Separating Employees

To request an employee's separation, managers:

1. Access the Separate Employee page.

2. Enter the effective date for the separation, and click Continue.

3. Select the employee for whom the separation is being requested, and click Continue.

   The Separate Employee page appears with the employee's current job data.

4. Select the reason for the separation.

   If Transfer to New Agency is selected as the reason for the separation, the Agency field appears.

5. If Transfer to New Agency was selected as the reason for the separation, select an agency.

6.  Enter any relevant comments, and click Submit.

    When the Submit button is clicked, the system invokes the AWE approval process and displays a confirmation page that shows the chain of approvers.

## Pages Used to Separate Employees

| Page Name | Definition Name | Navigation | Usage |
|-----------|-----------------|------------|-------|
| Separate Employee | HR_DR_ADDL_INFO | Manager Self Service, Job and Personal Information, Separate Employee (USF), Separate Employee | Enter the effective date for the change. |
| Separate Employee - Select Employee | HR_DR_SELECT_EMPS | Click Continue on the Separate Employee page. | Select the employee to be separated. |
| Separate Employee - Employee | FE_MGR_SEPARATE | Select the employee on the Separate Employee - Select Employee page. | Submit a request for separation. |
| Separate Employee - Confirm | FE_SEPARATE_CONFRM | Click the Submit button on the Separate Employee - Employee page. | Confirm that the transaction has been submitted and review the approval process for the transaction. |

## Approving Change Requests

This section provides an overview of approvals and lists the pages that are used to approve change requests.

## Understanding Approvals

This section describes how you approve change requests that have been submitted by employees or managers.

### Employee and Manager Transactions

Managers approve change requests submitted by their direct reports, whether those direct reports are employees who submit requests through PeopleSoft eProfile or other managers who submit requests through eProfile Manager Desktop.

The AWE controls the approval processes for both manager and employee transactions. PeopleSoft delivers fully configured approval processes for all of the U.S. federal self-service transactions. As long as you use the delivered approval processes, no additional configuration is necessary, but you can use the common AWE pages to review (or modify) the delivered configuration.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

These are the delivered U.S. federal self-service transactions and their AWE process definitions:

| *Transaction* | *Transaction Type* | *Navigation* | *AWE Approval Process ID* |
|---|---|---|---|
| Name change | Employee | Self Service, Personal Information, Name Change (USF) | FederalNameChg |
| Address change | Employee | Self Service, Personal Information, Address Change (USF) | FederalAddrChg |
| Marital status change | Employee | Self Service, Personal Information, Marital Status (USF) | FederalMarChg |
| Full time/part-time status change | Manager | Manager Self Service, Job and Personal Information, Change FTPT Status (USF) | FederalFTPTChange |
| Location change | Manager | Manager Self Service, Job and Personal Information, Location Change (USF) | FederalLocationChg |
| Promote employee | Manager | Manager Self Service, Job and Personal Information, Promote Employee (USF) | FederalPromoteEmployee |
| Reassign employee | Manager | Manager Self Service, Job and Personal Information, Reassign Employee (USF) | FederalReassignEmployee |
| Reporting change | Manager | Manager Self Service, Job and Personal Information, Reporting Change (USF) | FederalRportingChg |
| Retirement | Manager | Manager Self Service, Job and Personal Information, Retire Employee (USF) | FederalRetireEmployee |
| Separation | Manager | Manager Self Service, Job and Personal Information, Separate Employee (USF) | FederalSeparateEmployee |

### Transaction Review and Approval

To review status information for transactions that use the AWE to manage approval processing, use the generic AWE transaction review pages. These pages displays grids that list all of the user's approval transactions, including transactions that the user submitted and transactions that the user is being asked to approve. There are separate grids for each transaction type.

Links in the grids provide access to detail pages where you can see a graphical representation of the approval steps.

If you are the current approver, there is an Approve/Deny link that you use for accessing the detail page. In this mode, the detail page displays buttons that you use to either approve or deny the request.

If you are not the current approver, there is a View Details link instead of an Approve/Deny link. In this mode, the detail page displays transaction and approval details, but the Approve and Deny buttons are not available.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Working with Self-Service Approval Transactions.

### Pre-AWE Approval Data

Before federal self-service transactions began using the AWE to manage approval processing, managers used a federal-specific review component to view lists of submitted transactions. This component is still available, but it does not display approval processes that use the AWE. Use this component only to review transactions that were submitted for approval before the conversion to the AWE.

Like the page for reviewing AWE transactions, this page lists the user's transactions and provides links to detail pages for reviewing the transaction. The detail pages display the approval steps in a grid format rather than using the AWE's graphical representation.

**Note.** Pre-AWE submissions are view-only; you cannot take any approval-related action.

## Pages Used to Approve Change Requests

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Review Transactions | HCM_APPR_STATUS | • Manager Self Service, Review Transactions <br><br> • Self Service, Review Transactions | Search for and view summary information for self-service transactions that you submitted or for which you are an approver. <br><br> See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Working with Self-Service Approval Transactions. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Name Change<br><br>Marital Status Change<br><br>Address Change<br><br>Full/Part Time Status Change<br><br>Approve Location Change<br><br>Promote Employee<br><br>Reassign Employee<br><br>Approve Reporting Change<br><br>Separate Employee | FE_EE_NAME_STS<br><br>FE_MARITAL_STS<br><br>FE_ADDRESS_STS<br><br>FE_MGR_FULL_PART<br><br>FE_MGR_LOC_CHG<br><br>FE_PROMOTE_APPROVE<br><br>FE_REASSIGN_APPROV<br><br>FE_MGR_REPORT_CHNG<br><br>FE_SEPARATE_APPRVE<br><br>FE_RETIRE_APPROVE | On the Review Transactions page, click the Approve Deny link or the View Details link for an approval transaction. | Review transaction details and the status of the approval process. If you are the current approver, use this page to approve or deny the transaction. |
| Review Change Requests - Select a Request | FE_MGR_CHG_REQ_STAT | Manager Self Service, Job and Personal Information, Review Change Requests (USF), Review Change Requests - Select a Request | Review information about change requests that were processed before federal self-service transactions began using the AWE to manage approval processing. |

# Administering Approvals

This section provides an overview of approval administration and lists the pages used to administer approvals.

## Understanding Approval Administration

The AWE provides its own approval monitor that you can use to review and, if necessary, perform the actions that have been configured as allowable for the federal transactions.

Additionally, the Workflow Inquiry (USF) page that you previously used to monitor federal self-service transactions is still available and has been updated to supports both AWE approval transactions and transactions that predate the conversion to AWE processing.

### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Administering Approvals

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," (USF) Reviewing Federal Self-Service Transactions

## Pages Used to Administer Approvals

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Monitor Approvals | EOAW_ADM_MON_SRC | Workforce Administration, Self Service Transactions, Approvals and Delegation, Administer Approvals | Review all AWE transactions, including federal-self service transactions, and take action to resolve routing errors. |
| Workflow Inquiry (USF) | FE_SS_STAGED | Workforce Administration, Self Service Transactions, Workflow Inquiry (USF), Workflow Inquiry | Review activity for federal self-service transactions |

**Appendix A**

# Delivered Workflow for eProfile Manager Desktop

This appendix discusses the delivered workflow for:

- Changing work location.

- Changing part-time and full-time status.

- Retiring employees.

- Terminating employees.

- Reviewing military rank change

## Changing Work Location

This section discusses requesting a work location change workflow.

### *Description*

| | |
|---|---|
| **Event Description** | Managers submit a request to change the work location of one of their direct report employees using the Change Location transaction. |
| **Action Description** | After completing the transaction, workflow routes an email and worklist entry to the authorized approvers for approval or denial. |
| **Notification Type** | Email and Worklist. |

### *Workflow Objects*

| | |
|---|---|
| **Event** | HR_MGR_LOCATION |
| **Workflow Action** | Automatic |
| **Role** | Personnel Administrator |
| **Email Template** | Location Change |

| Business Process | Initiate Location Change |
|---|---|
| Business Activity | HR_LOCATION_CHANGE |
| Business Event | Change Location |

# Changing Part-Time or Full-Time Status

This section discusses requesting an employee status change workflow.

### Description

| Event Description | Managers submit a request to change an employee's status to full or part time using the Full/Part Time Status Change page. |
|---|---|
| Action Description | After submitting the request, workflow routes an email and worklist entry to authorized approvers for approval or denial. |
| Notification Type | Email and Worklist. |

### Workflow Objects

| Event | HR_MGR_FULL_PART |
|---|---|
| Workflow Action | Automatic |
| Role | Personnel Administrator |
| Email Template | Status Change |
| Business Process | Full Part Time Status Change |
| Business Activity | HR_MGR_FULLPART |
| Business Event | Status Change |

# Retiring Employees

This section discusses retiring employees workflow.

### *Description*

| Event Description | Managers use the Retire Employee page to initiate the employee retirement process. They can enter the reason for the retirement request and the effective date of the retirement. |
|---|---|
| Action Description | An email and worklist entry are routed to the authorized approvers for approval or denial. |
| Notification Type | Email and Worklist. |

### *Workflow Objects*

| Event | HR_RETIRE_EE |
|---|---|
| Workflow Action | Automatic |
| Role | Personnel Administrator and Roleuser By Roleuser Qry |
| Email Template | RETIRE_EMAIL, RETIRE_EE, Notify Originator, Retirement Email |
| Business Process | RETIRE_EE, Initiate Retirement |
| Business Activity | HR_RETIRE_EE, HR_SS_CI_ADMIN_ORIG |
| Business Event | RETIRE_EE, Notify Originator, Retirement CI Notify |

# Terminating Employees

This section discusses terminating an employee workflow.

### *Description*

| Event Description | Managers can use the Terminate Employee page to explain and submit their requests to terminate employees that report to them. |
|---|---|
| Action Description | Once the request is submitted, a confirmation message is displayed. The system creates a workflow email and worklist entry for the human resources department, notifying them to begin the termination process, as well as, an email back to notify the Originator that the transaction was sent to HR.<br><br>**Note.** The sending of workflow is not contingent upon clicking OK on the Confirmation page, workflow is sent before the confirmation page is displayed. |
| Notification Type | Email and Worklist. |

### *Workflow Objects*

| | |
|---|---|
| **Event** | HR_EE_TERMINATE |
| **Workflow Action** | Automatic |
| **Role** | Roleuser By Roleuser Qry and Personnel Administrator |
| **Email Template** | TERM_EMAIL |
| **Business Process** | TERMINATE_EE |
| **Business Activity** | HR_EE_TERMINATE |
| **Business Event** | Terminate Employee |

# Reviewing Military Rank Change

This section discusses reviewing, approving, or denying military rank change workflow.

### *Description*

| | |
|---|---|
| **Event Description** | After the creation of an employee rank change request, and military approvals are enabled, notifications are sent to roles within the organization to take action. |
| **Action Description** | After submitting the request, Approval Framework uses the MilitaryRankChange approval process to route an email and worklist entry to authorized reviewers and approvers for approval or denial. |
| **Notification Type** | Email and Worklist. |

### *Workflow Objects*

| | |
|---|---|
| **Event** | HR_MIL_RANK_CHG |
| **Workflow Action** | Automatic |
| **Role** | Role name identified on the Stakeholder page of the Rank Change MIL component and unit commander method configured on the Military Processing Definition page. |
| **Email Template** | MIL_RANK_CHNG_APPROVAL_REQUEST |

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