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PeopleSoft eProfile 9.1 PeopleBook

March 2012

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PeopleSoft eProfile 9.1 PeopleBook
SKU hcm91fp2hepl-b0312

Contents

PeopleSoft eProfile Preface

This preface discusses:

- PeopleSoft products.

- PeopleSoft HCM 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 eProfile.

PeopleSoft HCM Application Fundamentals

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

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

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM 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 (HR) 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.
originator	The person who makes the initial request. For self-service transactions, this is usually an employee or manager.
reviewer	The person who either approves or denies a submitted request.

Chapter 1

Getting Started with eProfile

This chapter provides an overview of PeopleSoft eProfile and discusses:

*   eProfile business processes.

*   eProfile implementation.

PeopleSoft eProfile Overview

eProfile is a collaborative application that enables employees to maintain their own profiles, thereby decreasing administrative time, costs and increasing data integrity. eProfile ensures that data changes comply with your organization's requirements.

With this application, employees can view, update, and request changes to their personal data, such as:

*   Email address.

*   Emergency contacts.

*   Ethnicity.

*   Home and mailing addresses.

*   Instant message IDs.

*   Marital status.

*   Name change.

*   Personal information.

*   Phone numbers.

*   Completing and submitting I-9 information.

For U.S. federal customers, additional transactions include:

*   Checking the status of requests they have submitted.

*   Requesting a leave of absence.

*   Requesting a termination.

PeopleSoft eProfile Business Processes

PeopleSoft eProfile supports these business processes:

- Maintaining name, address, phone number, marital status, date of birth, and other data.

- Requesting leaves of absence or terminations (U.S. federal employees).

- Determining how workflow notifications are received.

PeopleSoft eProfile 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.

Other Sources of Information

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

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook.

Chapter 2

(USF) Setting Up Approvals

This chapter provides an overview of transactions and approvals and discusses how to:

* Define WIP statuses for approval steps.

* Define Personnel Action Request (PAR) tracking data.

* Identify self-service administrators and define notification details.

Understanding Transactions and Approvals

This overview discusses:

* Approvals and the Approval Framework.

* Employee self-service transactions with approvals.

* Work in progress statuses for approval steps.

* PAR defaults for approved transactions.

* Delivered approval flows.

Approvals and the Approval Framework

The system uses the generic Approval Framework to manage approvals for federal self-service transactions. The Approval Framework is a tool 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 Approval Framework approval transactions and to perform various actions on submitted transactions.

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

Employee Self-Service Transactions With Approvals

PeopleSoft eProfile includes three federal self-service transactions that include Approval Framework approval processing:

* Name change.

- Address change.

- Marital status change.

Note. The Change Phone Number transaction does not use the approval process. When the request is submitted, it automatically updates the PeopleSoft HR tables.

The Request Leave of Absence and Request Termination transactions use the USFED approval transaction definitions that write directly to the PAR tables. The USFED transaction uses PeopleSoft Workflow (and not the Approval Framework) to manage approvals

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

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 Approval Framework is a generic workflow approval engine, additional setup outside of the Approval Framework is necessary so that you can associated federal work in progress statuses with approval steps.

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 Approval Framework process definitions.

PAR Defaults for Approved Transactions

In PeopleSoft HR, the Personnel Action Request (PAR) system automatically routes a wide variety of requests to reviewing officials in human resources. PAR processing is separate from the Approval Framework approval process and occurs only after all Approval Framework approvals are complete, at which point a component interface automatically pushes the transaction data to the PAR tables.

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.

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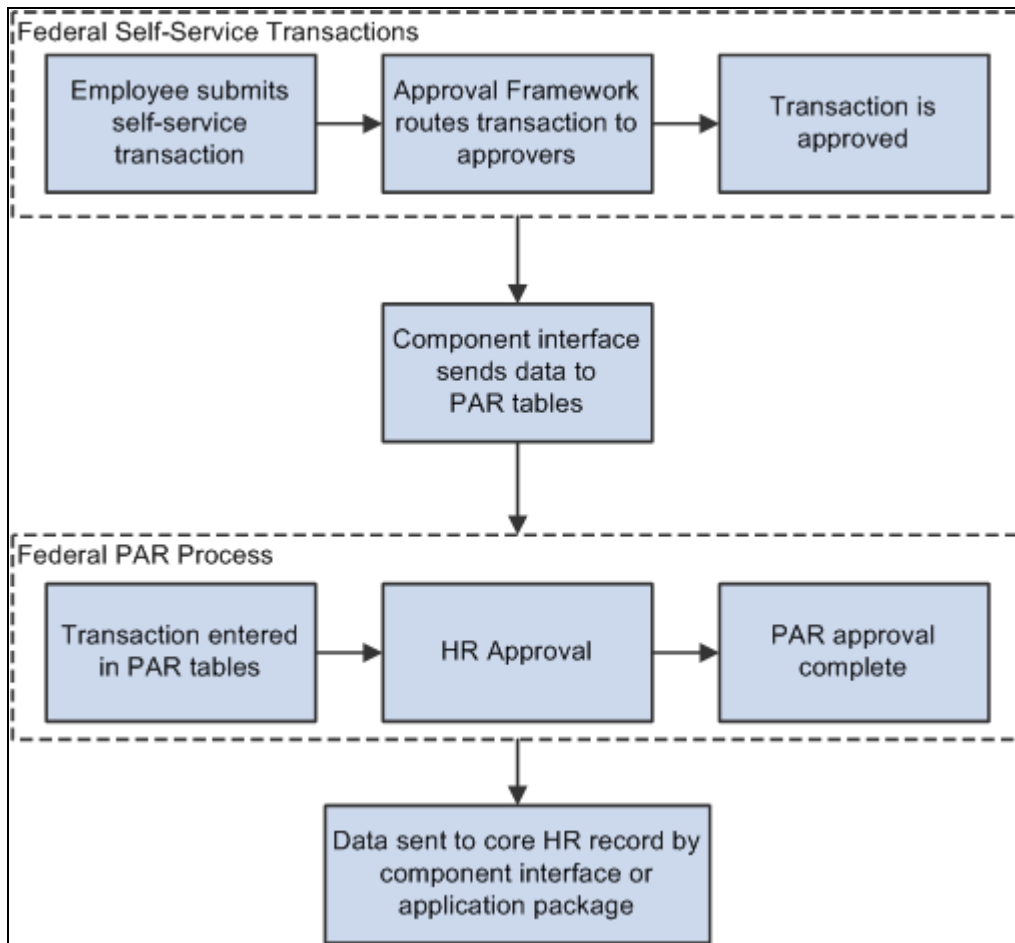
Process flow for employee self-service transactions

Delivered Approval Flows

The Approval Framework controls the approval processes for both manager and employee transactions. PeopleSoft delivers fully configured approval processes (including WIP statuses) 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 Approval Framework pages to review (or modify) the delivered configuration.

Approval Framework Process Definitions

These are the Approval Framework process definitions for the PeopleSoft eProfile federal transactions:

Transaction	*Approval Framework Process ID*
Name change	FederalNameChg
Address change	FederalAddrChg
Marital status change	FederalMarChg

Approval Framework process definitions include steps for each approver. (The initial request does not get defined as a step.) All three of the delivered process definitions provide a two-step approval process, and each approver has the option to approve or deny the transaction. If either approver denies the transaction, the system closes the request and notifies the originator of the denial.

If both approvers approve the transaction, the system updates the PAR tables (the Federal Job, Federal Personal Data, and the employee tracking tables), which in turn triggers a workflow notification to the person assigned to the Personnelist role.

Defining WIP Statuses for Approval Steps

To define WIP statuses for approval steps, use the Approval Transactions (GVT_WIP_RECORD) and Approval Flow (GVT_WIP_ACTVTY) components.

This section provides an overview of WIP statuses and approval steps and discusses how to:

*   Define WIP statuses for a transaction.

*   Associating WIP statuses with approval steps and actions.

Understanding WIP Statuses and Approval Steps

You define the approval steps for your self-service transactions using the Approval Framework. However, additional setup is necessary so that you can associate federal WIP statuses with approval steps.

To define the WIP statuses for approval steps, you must first set up the WIP statuses. Each self-service transaction has its own set of WIP statuses. Oracle delivers a complete set of statuses, but you can review and modify them as necessary.

After defining WIP statuses for each transaction, you need to associate the statuses with the possible actions that can be taken during specific approval steps. When you do this, you to create a row of data for each approval step in the Approval Framework process definition *and* create one additional row to represent the initial request, which does not exist as a step in the Approval Framework process definition. Then, for each approval step, you create a matrix that associates possible actions (such as request, approve, or deny) with the available WIP statuses.

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 Approval Framework process definitions.

Pages Used to Define WIP Statuses for Approval Steps

Page Name	Definition Name	Navigation	Usage
Transaction Setup	GVT_WIP_RECORD1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup	Define statuses and status types.
Define Steps	GVT_WIP_ACTVTY4	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, Define Steps Select a transaction beginning with *FE* as the Transaction value in the search page.	Associate WIP statuses with steps in the approval process for federal self-service transactions. **Note.** You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Framework to define the approval process.

Defining WIP Statuses for a Transaction

Access the Transaction Setup page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup).

Transaction Setup page

| Transaction | Displays the self-service transaction whose WIP statuses you are defining. |

Avail to Manager Self-Service (available to manager self-service)   Select this option when setting up approvals for self-service transactions. It is recommended that you not change this field for the delivered self-service transactions.

Valid WIP Statuses

WIP Status(work-in-progress status)   Enter a three-character code to represent the status. Each code represents a WIP status that is available for use as the transaction goes through the approval process. Each WIP status has a status type that indicates whether the status represents work in progress, completed work, or cancelled work.

Note. These codes must be defined as valid statuses for the USFED transaction. This enables the system to process the request using the existing HR Processing USF component when the request has reached final approval in the self-service approval process.

Status Type   Select one of these values for each WIP status:

- *Work-in-progress:* The status is used for a request that is neither complete nor canceled.

- *Cancelled:* The status is used for a request that has been denied.

- *Completed (Final Self Svc Step):* The status is used for a request that has been approved.

Associating WIP Statuses With Approval Steps and Actions.

Access the Define Steps page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, Define Steps).
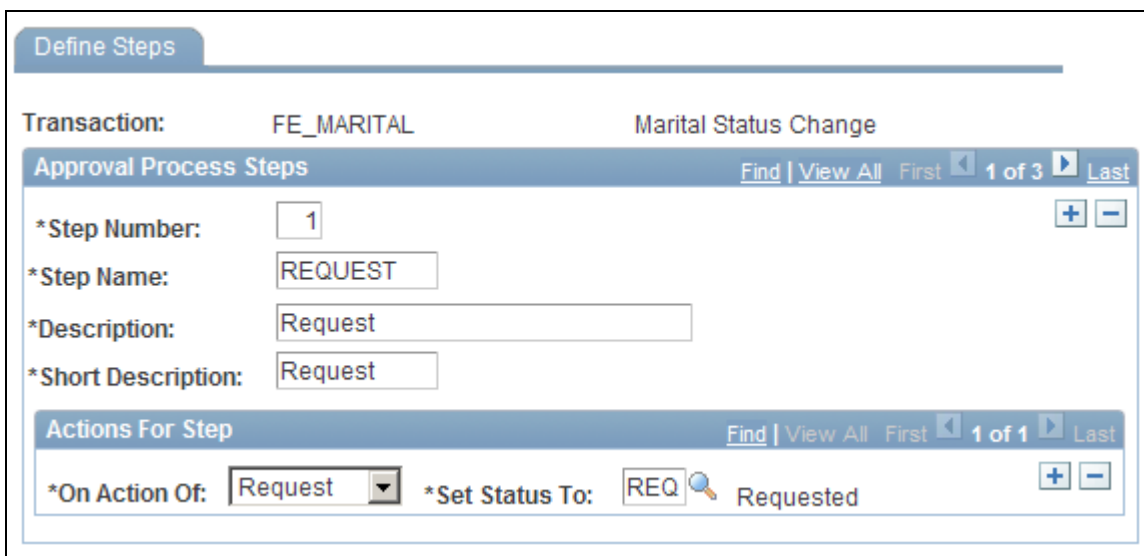
Define Steps page

Approval Process Steps

Step Number

Enter a number that identifies the order that the approval process will follow. The numbering of the approval steps must be sequential and begin with the number 1. Step 1 must represent the initial request, and subsequent steps must represent the approval steps as defined in the Approval Framework.

Important! For each federal self-service transaction, this page must list every approval step that was defined in the Approval Framework process definition and an additional step for the initial transaction request.

Step Name

Enter a name for this step. The name can be up to 10 characters long.

Actions For Step

On Action Of

Add or modify the action for which you are defining a WIP status. Valid actions are *Approve, Deny,* or *Request.*

For the first step (which always represents the initial request), create one row for the Request action. For subsequent steps, which represent approver actions, create one row for the Approve action and one row for the Deny action. (The other action in the drop-down list box, *Pending,* is not valid for the Approval Framework approval process, so you do not need to define a WIP status for this action for any of the approval steps.)

Set Status To

Select the WIP status to assign to the transaction when the selected action takes place. This field prompts against the transaction-specific WIP statuses that you define on the Transaction Setup page. As delivered, the transactions that you configure using this page (that is, all transactions other than USFED) have these four statuses: *1st* (first authorization), *2nd* (second authorization), *DNY* (denied), and *REQ* (requested).

Defining PAR Tracking Data

To define PAR tracking data, use the Approval Transactions (GVT_WIP_RECORD) component.

This section provides an overview of default PAR data and describes how to enter the PAR tracking data for federal self-service transactions.

Understanding PAR Tracking Data

Self-service transactions are designed so that employees can easily enter requests to change their own personal data and managers can enter requests to change their direct reports' job data. The government requires that certain information be included with each personnel action request. However, this data would not ordinarily be known by the self-service user.

To ensure that this information is recorded accurately, the system enables you to define the appropriate action/reason codes, Notice of Action (NOA) codes, legal authorities, and PAR remarks for each transaction. This default information is automatically written to the government PAR records when the federal component interface is run at the completion of the final self-service step for the transaction.

See Also

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests"

Page Used to Define PAR Tracking Data

Page Name	Definition Name	Navigation	Usage
Defaults / Admin	GVT_WIP_RECORD3	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin	Define PAR tracking data.

Defining PAR Tracking Data

Access the Defaults / Admin page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin).

Defaults / Admin page

PAR Defaults

Action	Select the action that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reasons page.
Reason Code	Select the reason code that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reasons page.
Nature of Action Code	Select the nature of action code that you want written to the government PAR tables for the transaction. These codes are defined on the Nature of Action Table page.
Legal Authority (1)	Select the legal authority (1) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page.

Legal Authority (2)	Select the legal authority (2) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page.
PAR Remarks	Select the PAR remarks that you want written to the government PAR tables for the transaction. These codes are defined on the Personnel Action Rqst Rmks page.

Identifying Self-Service Administrators and Defining Notification Details

To identify self-service administrators and define notification details, use the Approval Transactions (GVT_WIP_RECORD) component.

This section provides an overview of the self-service administrator's role and discusses how to:

• Identify the self-service administrator.

• Define notification details.

Understanding the Self-Service Administrator's Role

Problems may occur when the federal component interface updates the federal PAR tables. The system is designed to recognize:

• Errors

• Warnings

• Successful completions

You use the Defaults / Admin page to define the role of the person that you want to receive the notification when any of these conditions occur.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions"

Pages Used to Identify the Self-Service Administrator and Define Notification Details

Page Name	Definition Name	Navigation	Usage
Defaults / Admin	GVT_WIP_RECORD3	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin	Identify the self-service administrator and define PAR tracking data.
CI / Notification Details (component interface / notification details)	FE_CI_DETAIL	Click the CI / Notification Details link on the Defaults / Admin page.	Define notification and self-service administrator details.

Identifying the Self-Service Administrator

Access the Defaults/Admin page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin).

Defaults/Admin page

Self-Service Administrator

Administrator Role	Select the role that you want notified when an error, warning, or success occurs.
Notify on CI Success (notify on component interface success)	Select this check box to have the person who is identified in the Administrator Role field notified when the process runs successfully.
Notify on CI Warning (notify on component interface warning)	Select this check box to have the person who is identified in the Administrator Role field notified when a warning occurs during processing.
CI / Notification Details	Click this link to open the CI / Notification Details page.

Defining Notification Details

Access the CI / Notification Details page (click the CI / Notification Details link on the Defaults / Admin page).

CI / Notification Details page

Note. It is recommended that you not change the information on this page for the delivered federal self-service transactions.

Component Interface

Component Interface   Select the name of the component interface process that is used for this
                              transaction.

Collection   Select the name collection that is used by the component interface process
                              for this transaction.

Record   Select the name of the record that is used by the component interface
                              process for this transaction.

Exception Table   Select the name of the exception table that is used by the component
                              interface process to store errors and warnings for this transaction.

SS Administrator Notification

Business Process   Select the name of the business process that is triggered to send component
                              interface notifications to the self-service administrator.

Activity   Select the name of the activity that is triggered to send component interface
                              notifications to the self-service administrator.

Event   Select the name of the event that is triggered to send component interface
                              notifications to the self-service administrator.

Chapter 3

Using eProfile

This chapter lists prerequisites and discusses how to:

• Review and update personal information.

• (USF) Request leave of absence.

• (USF) Request termination.

• (USF) Review change requests.

• Review workflow inquiries.

Prerequisites for Using eProfile

Before you can use the eProfile transactions,

1. Activate eProfile on the Installation Table.

   See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HCM," 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 only if position data is not affected.

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

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

3. Set up security.

   eProfile uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. The following table lists the permissions and roles delivered with eProfile:

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 that are used by workflow will not work.

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

4. Define whether 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 HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Approvals and Database Updates.

5. 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 HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Administrator Notification Rules.

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

   eProfile 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.

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

7. Configure the USFED WIP transaction.

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

Reviewing and Updating Personal Information

This section provides an overview of reviewing and updating personal information and lists the pages that are used to review and update personal information.

Understanding Reviewing and Updating Personal Information

PeopleSoft delivers the following transactions that enable employees to view, add, change, and delete personal information in the PeopleSoft database.

Commercial	Federal
Personal Information Summary	Personal Information Summary
Complete and Submit I-9 Form	Address Change
Email Addresses	Email Addresses
Emergency Contacts	Emergency Contacts
Ethnic Groups	Ethnic Groups
Home and Mailing Address	Marital Status
Instant Message IDs	Name Change
Marital Status	Phone Number Change
Name Change	
Phone Numbers	

The following transactions can be configured to automatically update the database and send notifications to the administrator:

• Name change

• Marital status change

• Address change

If workflow is activated, when a user performs one of these transactions, the system automatically routes the transaction request to the appropriate person for approval. Updating your personal information becomes a two-step process:

1. The employee submits the change request.

2. The administrator finalizes the change request.

(USF) When the request has been submitted, employees can review the status of the change requests that they have submitted.

Pages Used to Review and Update Personal Information

Page Name	Definition Name	Navigation	Usage
Personal Information Summary	HR_EE_PERS_INFO	Self Service, Personal Information, Personal Information Summary, Personal Information Summary	Employees view a summary of and are able to change their personal information in the PeopleSoft database. **Note.** Available fields for an employee may vary by country.
Address Change	HR_HOME_MAILING	Self Service, Personal Information, Address Change (USF), Address Change	Initiate the address change request. **Note.** You can enter only current or future effective-dated address changes to avoid processing issues with benefits and payroll.
Address Change - Submit	FE_ADDRESS_STS	Click the Submit button on the Address Change page.	Confirms that the request was submitted.
Email Addresses	HR_EMAIL_ADDRESSES	• Self Service, Personal Information, Email Addresses, Email Addresses • Click the Change email addresses button on the Personal Information Summary page.	Employees view, add, change, and delete email addresses in the PeopleSoft database. Employees can view business emails, if available, but cannot add, change, or delete business email addresses; only the system administrator can do this.
Emergency Contacts	HR_EMERGENCY_CNTCT	• Self Service, Personal Information, Emergency Contacts, Emergency Contacts • Click the Change emergency contacts button on the Personal Information Summary page.	Employees view, add, change, and delete emergency contact information in the PeopleSoft database.

Page Name	Definition Name	Navigation	Usage
Emergency Contact Detail	HR_EMERG_CNTCT_DET	• Click a contact name on the Emergency Contacts page. • Click the Add Emergency Contact button on the Emergency Contacts page. Click the edit icon on the Emergency Contacts page.	View, add, and change emergency contact address and telephone information.
Ethnic Groups	HR_ETHNIC_GROUPS	• Self Service, Personal Information, Ethnic Groups, Ethnic Groups • Click the Change ethnic groups button on the Personal Information Summary page.	Employees self-identify their ethnic groups by adding data to the Ethnic Groups grid. Non-U.S. employees always see this version of the Ethnic Groups page, but U.S. employees see this version only if the Two-Question Format (Ethnicity) check box on the Installation Table - Country Specific page is *not* selected.
Ethnic Groups (USA)	HR_ETHNIC_GROUPS2	Self Service, Personal Information, Ethnic Groups, Ethnic Groups	U.S. Employees self-identify their ethnic groups by answering two questions about their race and ethnicity. U.S. employees see this version of the Ethnic Groups page only if the Two-Question Format (Ethnicity) check box on the Installation Table - Country Specific page is selected. See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HCM," Entering Country-Specific Installation Information.

Page Name	Definition Name	Navigation	Usage
Home and Mailing Address	HR_HOME_MAILING	• Self Service, Personal Information, Home and Mailing Address, Home and Mailing Address • Click the Change home/mailing addresses button on the Personal Information Summary page.	Employees view and change home and mailing addresses in the PeopleSoft database.
Instant Message IDs	HR_IM_CHAT_IDS	• Self Service, Personal Information, Instant Message IDs, Instant Message IDs • Click the Change Instant Message Ids button on the Personal Information Summary page. • Manager Self Service, Job and Personal Information, View Employee Personal Info, Employee Information Click the Instant Message IDs link on the Employee Information page	Add or update your own instant message IDs through the self-service pages. When you save this page, the system updates the Contact Information page for personal data in HR. Managers can view the instant message IDs through the manager self-service pages for their employees.
Marital Start	W3EB_MARR_START	• Self Service, Personal Information, Marital Status, Marital Start • Click the Change marital status button on the Personal Information Summary page.	Employees view current marital status and can begin the process to request a change to marital status in the PeopleSoft database.
Marital Status Change	HR_EE_MAR_STATUS	Click Start on the Marital Start page.	Employees view current marital status and submit a request to change marital status in the PeopleSoft database.
Marital Status Change (USF)	FE_MARITAL	Self Service, Personal Information, Marital Status (USF), Marital Status Change	Submit a marital status change.

Page Name	Definition Name	Navigation	Usage
Marital Status Change	FE_MARITAL_STS	Click the Submit button on the Marital Status Change (USF) page.	Confirms that the request was submitted.
Name Change	HR_EE_NAME	• Self Service, Personal Information, Name Change, Name Change • Click the Change name button on the Personal Information Summary page.	Employees submit a name change request. **Note.** (USA) All name changes for USA employees must match the name provided on their social security card.
Name Change (USF)	FE_EE_NAME	Self Service, Personal Information, Name Change (USF), Name Change	Federal employees submit a name change request.
Name Change (USF)	FE_EE_NAME_STS	Click the Submit button on the Name Change (USF) page.	Confirms that the request was submitted.
Phone Numbers	HR_PERSONAL_PHONE	• Self Service, Personal Information, Phone Numbers, Phone Numbers • Click the Change phone numbers button on the Personal Information Summary page.	Employees view, add, change, and delete personal phone numbers in the PeopleSoft database.
Phone Number (USF)	FE_EE_PHONE_CHG	Self Service, Personal Information, Phone Number Change (USF), Phone Numbers	Submit a phone number change.
Save Confirmation	EO_SAVE_CONFIRM	Click the Save button on the Phone Numbers (USF) page.	Confirm that the phone number change was saved.

(USF) Requesting Leave of Absences

This section provides an overview of the requesting leave of absence process and lists the page that is used to request leave of absences.

Page Used to Request Leave of Absences

Page Name	Definition Name	Navigation	Usage
Federal Request for Leave	FG_EE_LEAVE_REQ	Self Service, Personal Information, Request Leave of Absence (USF), Federal Request for Leave	Enter a request for leave of absence.

(USF) Requesting Termination

This section provides an overview of the termination process and lists the page that is used to request termination.

Page Used to Request Termination

Page Name	Definition Name	Navigation	Usage
Federal Termination Request	FG_EE_TERMINATION	Self Service, Personal Information, Request Termination, Federal Termination Request	Federal employees enter a request for termination.

(USF) Reviewing Change Requests

This section provides an overview of reviewing change requests and lists the page that is used to review change requests.

Page Used to Review Change Requests

Page Name	Definition Name	Navigation	Usage
Select a Request	FE_EE_CHG_REQ_STAT	Self Service, Personal Information, Review Change Requests (USF), Select a Request	Select a change request to review.

Reviewing Workflow Inquiries

This sections provides an overview of workflow inquiries and lists the pages that are used to review self-service activity.

Understanding Workflow Inquiries

The Workflow Inquiry page enables the self-service administrator to:

• Review the status of any self-service transaction, except phone number changes.

• Review errors and warnings that occurred during the component interface processing.

• Change the workflow status of a transaction.

Reviewing the Status

Workflow Inquiry enables the self-service administrator to review a transaction for any employee for whom the self-service administrator has security. The self-service administrator searches by transaction name, request date, workflow status, or employee ID.

Reviewing Errors and Warnings

The Workflow Inquiry enables the self-service administrator to review errors or warnings that occur during the processing of the component interface. The self-service administrator must process the request using the Workflow Inquiry page.

Errors can occur when:

• The email or worklist notification fails to be generated.

• The system tried to route the transaction to the next reviewer in the approval process, but could not find that person. This means a problem occurred in the reporting structure based on what was entered in the Route To field on the Define Steps page.

If a warning occurs, the self-service administrator can be notified if the Notify on CI Warning check box is selected on the Defaults/Admin page. Warnings don't stop the tables from being updated.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions"

Pages Used to Review Self-Service Activity

Page Name	Definition Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry, Workflow Inquiry	Review submitted requests and correct errors and warnings.
Workflow Inquiry	FE_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry (USF), Workflow Inquiry	(USF) Review submitted requests and correct errors and warnings.
Transaction Errors/Warning	FE_JOB_ERR_WRN_ALL	Click the Error link on the Workflow Inquiry page.	Review error and warning messages.

Appendix A

Delivered Workflows for PeopleSoft eProfile

This appendix discusses delivered workflows for PeopleSoft eProfile.

Delivered Workflows for PeopleSoft eProfile

This section discusses eProfile workflows. The workflows are listed alphabetically by workflow name.

Address Changes - Requesting

This section discusses the address change request workflow.

Description

Event Description	An employee uses the Home and Mailing Address page to review and update their current address information in the database.
Action Description	Upon saving their change, an email and worklist entry is sent to the Personnel Administrator to review, and upon approval, enter into the system.
Notification Type	Email and Worklist.

Workflow Objects

Event	HR_HOME_MAILING
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	ADDR_CHANGE_NOTIFICATION
Business Process	HR_EE_ADDR
Business Activity	HR_EE_ADDR

Business Event	EE_ADDR_CHANGE

Address Changes - Processing

This section discusses the address change processing workflow.

Description

Event Description	HR processes the address change request.
Action Description	An email is sent to the originating employee notifying them that HR has processed their address change.
Notification Type	Email.

Workflow Objects

Event	HR_HOME_MAILING
Workflow Action	Automatic
Role	Roleuser By Roleuser Qry
Email Template	Notify Originator
Business Process	HR_EE_ADDR
Business Activity	HR_EE_ADDR
Business Event	Notify Originator

Marital Status - Updating

This section discusses the marital status update workflow.

Description

Event Description	An employee uses Self-Service to update their Marital status.
Action Description	An email and worklist item are sent to the Personnel Administrator indicating the employee's change in status.
Notification Type	Email and worklist.

Workflow Objects

Event	HR_EE_MAR_STATUS
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	Marital Status Change
Business Process	Marital Status Change Request
Business Activity	HR_MAR_STATUS_CHANGE
Business Event	Request Marital Status Change

Marital Status - Processing

This section discusses the marital status processing workflow.

Description

Event Description	HR processes the employees Marital Status change.
Action Description	An email is sent to the originating employee notifying them that the marital status change has been processed.
Notification Type	Email.

Workflow Objects

Event	HR_EE_MAR_STATUS
Workflow Action	Automatic
Role	Roleuser By Roleuser Qry
Email Template	Notify Originator
Business Process	Marital Status Change Request
Business Activity	HR_MAR_STATUS_CHANGE
Business Event	Notify Originator

Name Changes - Requesting

This section discusses requesting a name change workflow.

Description

Event Description	An employee uses the Name Change page to review and update their name in the database.
Action Description	Upon saving their change, the request is sent by email and worklist item to the Personnel Administrator to review, and upon approval, entry into the system.
Notification Type	Email and Worklist.

Workflow Objects

Event	EE_NAME_CHANGE
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	NAME_CHANGE_NOTIFICATION
Business Process	HR_EE_NAME
Business Activity	HR_EE_NAME
Business Event	EE_NAME_CHANGE

Name Changes - Processing

This section discusses processing a name change request workflow.

Description

Event Description	HR processes the name change request.
Action Description	An email is sent to the originating employee notifying them that HR has processed the name change request.
Notification Type	Email.

Workflow Objects

Event	HR_EE_NAME
Workflow Action	Automatic
Role	Roleuser By Roleuser Qry
Email Template	Notify Originator
Business Process	HR_EE_NAME
Business Activity	HR_EE_NAME
Business Event	Notify Originator

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