
PeopleSoft HCM 9.2: eDevelopment

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PeopleSoft HCM 9.2: eDevelopment

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If you are setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See [Oracle Support Document 2205540.2 \(PeopleTools Elasticsearch Home Page\)](#) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help >Managing Locally Installed PeopleSoft Online Help >Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has

a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| <i>Typographical Convention</i> | <i>Description</i> |
|--|---|
| Key+Key | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (). |
| [] (square brackets) | Indicate optional items in PeopleCode syntax. |

| Typographical Convention | Description |
|---------------------------------|--|
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables. |
| => | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

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

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

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

Related Links for PeopleSoft HCM

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with eDevelopment

eDevelopment Business Processes

eDevelopment is comprised of self-service transactions that interface with the PeopleSoft Human Resources (HR) system.

Employees use eDevelopment to:

- Maintain their personal profiles.
- View job profiles.
- Search and compare job profiles.
- Create an interest list of job profiles in which they are interested.
- Review approval history of profiles
- Request training.
- Review their training information.

Managers use eDevelopment to:

- Review and update profiles for their direct reports.
- Approve profile changes.
- Search and compare profiles.
- View and maintain job profiles.
- Complete reviews and observations for regulated individual reports.
- Request training for their direct reports.
- Review training information for their direct reports.

Faculty members use eDevelopment to enter the following training and development information:

- Professional training.
- Activities, administrative posts, and teaching responsibilities.
- Presentations and publications.
- Committees.

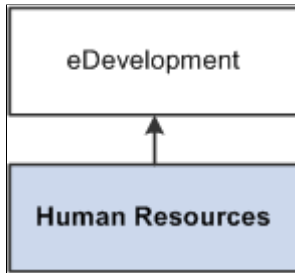
- Student advising.

eDevelopment Integrations

eDevelopment integrates with PeopleSoft HR.

Image: eDevelopment integration with HR

This diagram shows information flowing from HR to eDevelopment.



eDevelopment Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps. A complete list of these resources appears in the *Application Fundamentals* documentation with information about where to find the most current version of each.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID [2342162.1](#)) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See the product documentation for *PeopleSoft HCM: Application Fundamentals*.

Chapter 2

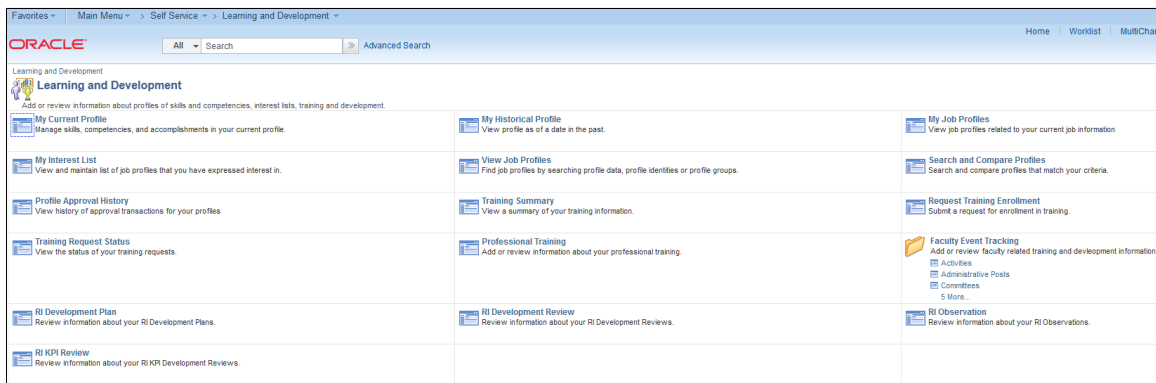
Maintaining Person Profiles

Navigating in eDevelopment

The standard menu-driven navigation path is the standard access method for eDevelopment. Employees access eDevelopment by selecting Self Service > Learning and Development. Managers access eDevelopment by selecting Manager Self Service > Learning and Development.

Image: eDevelopment navigation path for an employee

This is an example of an eDevelopment navigation path for an employee.



Roles

The self-service components can be used by both the employee and the manager; therefore, PeopleSoft delivers definitions for these roles and defines a menu for each role.

These delivered roles for employees and managers are configured specifically for profile management self service:

- Profile Mgmt Employee
- Profile Mgmt Manager

Note: In this documentation, the term *employee* refers to all people who work for and report time in the organization. This can include regular employees as well as contractors and other temporary assignment workers.

Security

The user profile that you create for each individual who accesses the self-service components determines the components that the user can access by default. Create user profiles by using the User Profiles component (USERMAINT). Assign a role to each user profile, which is linked to permission lists. Each

permission list identifies components that individuals can access. To modify the access for specific components for each role, modify the permission list for the user's role. Define which data the user can access in the user profile.

See the product documentation for *PeopleTools: Security Administration*.

Understanding Profile Maintenance

eDevelopment provides employees and managers with self-service options that integrate with the Manage Profiles business process in PeopleSoft HR. eDevelopment profiles are divided into two categories:

- Person profiles.

Person profiles describe a person's skills, competencies, accomplishments and performance. Person profiles are linked to a person ID.

- Job profiles.

Job profiles (known as non-person profiles in the Manage Profiles business process) describe the competencies, qualifications, and responsibilities of a job. You can link job profiles to a variety of entities, not just job codes. For example, job profiles can be linked to job codes, positions, job families, and salary grades.

The format of profiles is the same in eDevelopment and the Manage Profiles business process. Profile content is divided into tabs and content sections that are defined by the profile type used to create the profile.

See "Understanding Profiles and Profile Types" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

The next topics discuss the self-service profile management options available to employees and managers that enable them to:

- Create and maintain person profiles.

Employees use the My Current Profile transaction to view and edit their existing person profiles and create new profiles. Employees also use the My Historical Profile option to view historical rows of their profile.

Managers can create, view, and update the person profiles for their team. The manager Team Historical Profile transaction displays historical profile items in effect for direct reports as of the as of date.

Depending on the configuration of your profile types, approvals workflow is triggered when employees update their person profiles and changes are typically approved by managers.

- Approve changes to person profiles.

Managers use the Approve Profiles option to review changes to their employees' person profiles that require approval, and approve or deny the changes.

- View approval history.

Employees use the Profile Approval History option to view the approval status of profile changes that they have submitted for approval and view the history of profile approvals.

- Manage interest lists.

An interest list is a collection of job profiles that is associated with an employee. Typically interest lists are used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile, or jobs that an employee wants to include in a career planning discussion with their manager. Employees can add to and remove job profiles from their interest list. Managers can also view and update their employees' interest lists.

- View job profiles.

Employees have two options for viewing job (non-person) profiles, My Job Profiles lists job profiles related to their current jobs, and View Job Profiles is a general option for viewing any job profile.

- Create and maintain job profiles (manager only).

Managers can create and update job profiles. Depending on the configuration of your profile types, approvals workflow is triggered when managers update job profiles. The typical approver for job profiles is the profile administrator, although this can be configured according to your business needs.

- Search and compare profiles.

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

Prerequisites

Before employees and managers can use the profile management self-service transactions, you must set up the following:

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

The use of approval processing for profiles is optional. You associate approvals workflow to profile types.

- Define search types and run the Build Manager List and Build Profile Search Indexes processes required by the profile search and compare feature.
- Set up the text on the self-service pages.

The profile management self-services pages use the Text Catalog. You can modify the delivered text to meet your organization's business needs. See "Configuring the Text Catalog" (PeopleSoft HCM 9.2: Application Fundamentals).

- Configure the Direct Reports functionality for your organization.

The manager self-service options for profile management use the direct reports functionality to determine managers' direct reports. See "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals).

Related Links

- "Understanding the Content Catalog" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)
- "Understanding Profile Management" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)
- "Understanding Search and Compare Profiles" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)
- "Understanding PeopleSoft HCM Common Components" (PeopleSoft HCM 9.2: Application Fundamentals)

Maintaining Person Profiles

Pages Used to Review and Update Person Profiles

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| Current Team Profiles Page Team Historical Profiles Page | HR_DR_ADDL_INFO | Displays the instructions for the transaction and the effective date field. Managers can change the default effective date to view profiles of a different effective date. |
| Current Team Profiles - Select Employees to Process Page Team Historical Profiles - Select Employees to Process Page | HR_DR_SELECT_EMPS | Displays a list of the people who report to the manager. Managers select the person whose profile they want to view and click Continue. |
| Select Profile Type Page | JPM_JP_SEL_PRF_EMP | Displays a list of the person profile types. Employees and managers select the profile type. This page is only displayed if there are two or more active person profile types. If there is only one active person profile type, this page is not displayed. |

| Page Name | Definition Name | Usage |
|--|------------------------|--|
| My Current Profile Page View Historical Profile Page Current Team Profiles Page Team Historical Profiles Page | JPM_JP_PROFL2_EMP | <p>Displays the profile of the person. Employees or managers can add items on the profile or they can view item detail, modify, and delete existing profile items they entered themselves. The structure of a profile and the items that are available to add to the profile are determined by the profile type and the content catalog. When employees and managers click the Save and Submit buttons, approval processing is initiated for those changes that require approval. The profile type definition determines which changes require approval.</p> <p>The profile pages shows only approved items in the content sections. Any new profile items, changes to existing items, or deletions of profiles that need approval do not appear within the profile content section tabs after clicking Save and Submit. Links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or have been denied approval. Use these links to view the items that are unapproved.</p> |
| Copy Items from Job Profile Page | JPM_COPY_PROFL_SEC | <p>Displays the job profiles associated with the employee's job data. The system determines which job profiles are related to the employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the active jobs for matching job profiles. Employees or managers select the job profile that they want to copy items from, and click the Select button. This page only appears if there are two or more active job profiles associated with the employee's job data. The system copies and adds the profile item keys in the job profile that are not already in the employee's profile.</p> |
| Search for Profiles Page | JPM_SRCH_TRANSFER | <p>Lists the profile search types that are defined for employees or managers. Select the type of search that you want to run.</p> |
| Select New As Of Date Page | JPM_JP_SELECT_DATE | <p>Employees and managers enter a different effective date and click OK to view the profile as of the new effective date. All profile items in effect as of that date will display as long as the employee is still a direct report of the manager."</p> |

| Page Name | Definition Name | Usage |
|---|------------------------|--|
| Profile Information Page | JPM_PROF_INFO_SEC | Enter or view additional profile information such as comments or the owner ID for job profiles. |
| Add New <content type> Page View <content type> Page Update <content type> Page | JPM_ITM_EMPDTL_SEC | Employees and managers use this page to add, view, or update profile item details. The fields on the page vary according to the content type of the item and the profile type definition. Changes that require approval are submitted for approval processing when the employee or manager clicks the Submit button on the Summary of Changes page. |
| Content Item Details Page | JPM_CAT_ITEMS_DSP | View details about a specific content item. |
| Rating Model Page | HCR_RATEMDL_POPUP | Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, the you can modify the rating as well. |
| Related Items Page | JPM_PROF_SSRELITMS | Displays details of the selected profile item that is related to the profile item. |
| Items Awaiting Submission Page Pending Items Page Denied Items Page | JPM_JP_PRF_VW_CHGS | This page lists saved items awaiting to be submitted for approval, items awaiting approval (pending items), or items that were not approved (denied items). Employees and managers can only delete their own saved items; the Pending Items page and the Denied Items page are display-only. |
| View Historical Items Page | JPM_PROF_HIST_SEC | View all effective-dated rows for an item on a person's profile or a job profile. This page lists the current, future, and historical rows for a profile item. Employees and managers use this page to track the history of a profile item. They click the profile item link to view details of the profile item for the selected effective date. Future dated rows do not appear in the Historical Profiles page. Only the Current Profile page displays future dated rows. |
| View <content type> Page | JPM_APR_DTL_SEC | Displays the details of the saved but not submitted, pending, or denied item. Employees and managers can delete saved items. However, they cannot update pending or denied items. |

| Page Name | Definition Name | Usage |
|--------------------------|------------------------|---|
| Summary of Changes Page | JPM_JP_PERSUMM_SEC | Lists the changes made to the profile. There is a scroll area for each section of the profile that was modified, which lists any items added, deleted, or edited. Only items requiring approval are displayed on this page. Changes to items not requiring approval have already been saved. Employees and managers can enter comments for the approver before clicking the Submit button. The comments box is only displayed if there are items requiring approval. |
| Submit Confirmation Page | JPM_JP_PROFL_APPR | Displays a confirmation of the approval submission. The Approval Routing group box provides a summary of the approval routing. |

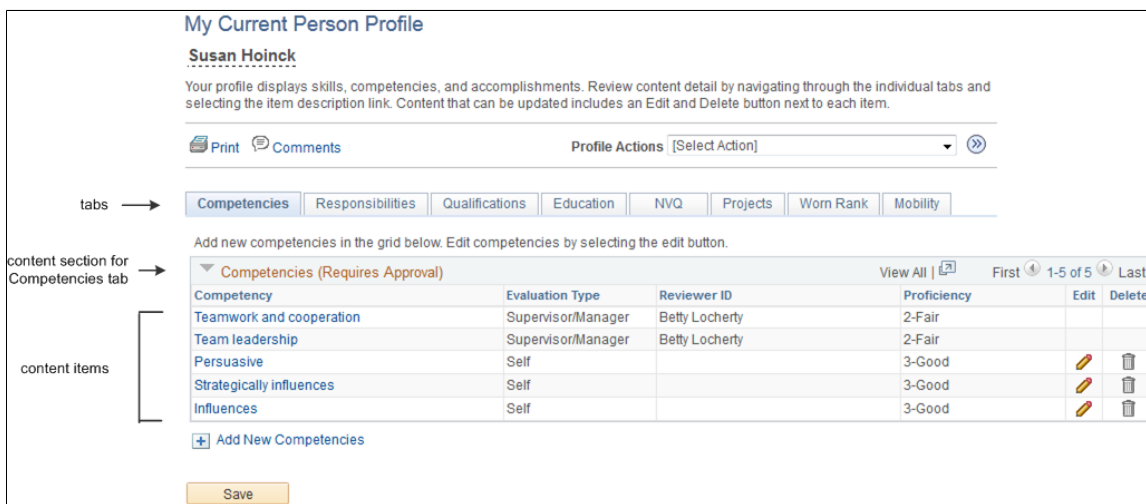
Understanding Person Profiles

Employees can have one or more profiles, but only one profile per profile type. The PeopleSoft application delivers the profile type PERSON to create person profiles, but you can create other profile types according to your organizational requirements. For further information about creating profile types see "Creating Profile Group Types and Profile Groups" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Employees and managers use the Profile Details page to view and update person profiles.

Image: Example of the person profile and its structure

This is an example of a person profile.



Profile content is divided into tabs which appear as links in navigation bars. Between the navigation bars, the page lists the content sections of the tab that is currently selected. When the employee or manager selects a different tab, the system updates the page to show the content sections for that tab. The content sections that employees and managers can view and update is determined by the security settings for the

content sections in the profile type definition. This means that the profile content can vary according to the role accessing the profile.

Employees and managers add items to the person profile from the content catalog that you set up in Manage Profiles. They can also copy items from job profiles that are related to the employee's job, by selecting *Copy From Job Profile* in the Profile Actions field and clicking the Go icon. The system searches for job profiles that match the employee's job data. There could be more than one profile related to the employee's job data. For example, if you have set up profiles for job codes and positions and the person has a position selected in job data, the system lists these profiles and the employee or manager selects the profile that they want to use.

The profile pages list the approved items only within the content sections of the page. If changes have been made to the profile but not yet approved, links appear on the profile pages to indicate that there are items that are saved but awaiting submission for approval, pending approval, or denied. When the employee or manager clicks the link, the system displays a list of the items with that approval status.

Content requiring approval whose items are added, updated, or deleted from a profile are assigned a saved status when the employee or manager clicks the Save button. The changes are submitted for approval when they click the Submit button.

For changes that don't require approval, the items are automatically set to approved when the employee or manager clicks the Save button and the profile page is updated with the changes.

Warning! After those items requiring approval are submitted, the content section on the profile page is refreshed to show approved items only. This means that the changes that were saved are no longer visible because these items do not have an approved status. However, a link appears to indicate that there are items pending approval.

Related Links

"Understanding the Content Catalog" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

"Understanding Profile Management" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)





Using the PeopleSoft Fluid User Interface to Maintain Person Profiles

This topic provides an overview of using fluid pages for viewing profiles and discusses how employees and managers use the PeopleSoft Fluid User Interface to view and maintain profile data.

Note: The fluid pages discussed in this topic do not have an exact classic equivalent, but they function much like the My Current Profile and View Current Team Profiles pages that are discussed in the topic [Maintaining Person Profiles](#).

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

These videos demonstrate the Manage Profile enhancements:

| | |
|---|---|
|  | Image Highlights, PeopleSoft HCM Update Image 25: Manage Profile Enhancements |
|  | Image Highlights, PeopleSoft HCM Update Image 27: Attachment Capability Added to Profile Management |
|  | Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Viewing Historical Profile Items in Fluid |
|  | Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Support for Multiple Profiles |

Pages Used to Maintain Person Profiles Using the PeopleSoft Fluid User Interface

| Page Name | Definition Name | Usage |
|--|---|---|
| Talent Profile Tile | HC_JPM_PROFILE_XFR_FL_GBL2 (this is the cref for the tile) | Select this tile to access the fluid pages where you can view and update your person profile. |
| Team Talent Profile Tile | HC_JPM_PROFILE_XFR_FL_GBL (this is the cref for the tile) | Select this tile to access the fluid pages where you can view and update your team member's talent profiles. |
| Team Talent Profile - Select Employee Page (for Managers) | HR_PSEL_FLU | Select a direct report to view summary information about an employee's profile data. |
| (Smartphone) Employee Details Page | HR_PSEL_SCF | View additional information about an employee. |
| Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers) | JPM_PERS_PROFL_FLU | View summary information about your own profile data or one of your direct report's profile data. |
| Select Profile Type Page | JPM_PROFTYP_SEL_FL | Choose from a list of valid <i>Person</i> profile types for which you want to view or update profile information for yourself (from the Talent Profile pages) or for one of your direct reports (from the Team Talent Profile pages). |
| View Profile Item History Page | JPM_ITM_HIST_SCF | Select from a list of effective dated rows for a given profile content item to view historical data. |
| <Content Type> Page | JPM_ITMDTL_SCF | Add, update, or delete a content item. You can also add attachments to support the content item information. |

| Page Name | Definition Name | Usage |
|--|------------------------|---|
| <u><Related Content Item> (Summary) Page</u> | JPM_RLITMSUM_SCF | View a list of related items assigned to this person for this content item. |
| <u><Related Content Item> (Details) Page</u> | JPM_ITMDTL_SCF | Add, view details, or delete related items for a profile content item. |
| <u>Request Approval Page</u> | JPM_APPROVAL_FLU | Submit profile content changes for approval. |

Understanding Fluid Pages for Viewing Profiles

Users can have many profiles. The Talent Profile and Team Talent Profile pages display by default information from the profile that is defined as the system's primary person profile default type. The primary person default profile type is specified on the "Assign Profile Type Defaults Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles). After an employee or manager accesses the profile pages for the employee, they can select the View Another Profile link in the header (sub-banner) of the page so select from other valid profile types.

The fluid pages for viewing profiles are simplified for usability. In particular:

- Users do not have "Save as Draft" functionality for content items, nor can users access content items that were saved as draft in classic pages.
- When a new profile is created, there is no automation to copy items from a person's job profile.
- Users cannot copy content items from their job profile.
- Fluid pages show only the fields (properties) where the Detail attribute is selected on the "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles), regardless of whether the Summary attribute is selected.
- Fluid pages do not observe the setting that can make a content type required within a profile.

The PeopleSoft application delivers the following roles to access the profile tiles and pages:

- Employees need to be assigned the *Profile Mgmt Employee Fluid* to access the Talent Profile tile and pages.
- Managers need to be assigned the *Profile Mgmt Manager Fluid* to access the Team Talent Profile tile and pages.

Talent Profile Tile

As an employee, use the Talent Profile tile to access the fluid pages where you can view and update your person profile.

Note: You must be assigned the *Profile Mgmt Employee Fluid* role to access this tile and pages.

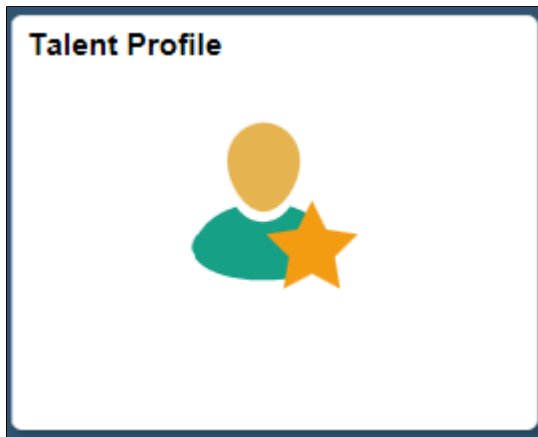
Navigation

Select Fluid Home under the main menu. On the page that appears, select *Employee Self Service*. The Talent Profile tile is available on the Employee Self Service landing page.

As an employee, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

Image: Talent Profile tile

This example illustrates the Talent Profile tile.



Select the Talent Profile tile to access the employee self-service profile data transactions easily without using traditional menu navigations.

Team Talent Profile Tile

As a manager, use the Team Talent Profile tile to access the fluid pages where you can view and update your team member's talent profiles.

Note: You must be assigned the *Profile Mgmt Manager Fluid* role to access this tile and pages.

Important! As delivered, the Team Talent Profile tile for the manager is not delivered as part of a fluid home page. As a manager, you will need to add the tile, through personalizations, to a home page. See the "Adding the Team Talent Profile Tile to a Fluid Home Page" section within this topic on how to add this tile to a home page.

Navigation

Select the Team Talent Profile tile from a home page to which you have added the tile.

Image: Team Talent Profile tile

This example illustrates the Team Talent Profile tile.



Click the Team Talent Profile tile to access the employee self-service profile data transactions easily without using traditional menu navigations.

Adding the Team Talent Profile Tile to a Fluid Home Page

As delivered, a manager will not see the Team Talent Profile tile from any fluid home page . However, you can add this tile to a fluid home page to quickly access the Team Talent Profile pages.

To do this:

1. From the PeopleSoft Fluid User Interface banner, click the Actions List button in the top right corner.
2. Select Personalize Homepage.
3. On the Personalize Homepage page, select the home page in the left panel to indicate where you want to add the Team Talent Profile tile (for example, *Manager Self Service*).
4. Click the Add Tile button.
5. Select Manager Self Service >Team Talent Profile.
6. From the Personalize Homepage page, click Save.

This will return you to the fluid landing page where you added the tile.

To remove the tile from the home page, from the Personalize Homepage page, click the Delete Team Talent Profile icon (red X) in the top right corner of the tile and save.

Team Talent Profile - Select Employee Page (for Managers)

Use the Team Talent Profile- Select Employee page (HR_PSEL_FLU) to select a direct report to view summary information about an employee's profile data.

Navigation

- Click the Team Talent Profile tile on the home page to which you added the tile.
- Click the Select Different Employee link in the sub-banner of the Team Talent Profile pages.

Image: (Tablet) Team Talent Profile - Select Employee Page

This example illustrates the Team Talent Profile - Select Employee page for the tablet.

Team Talent Profile

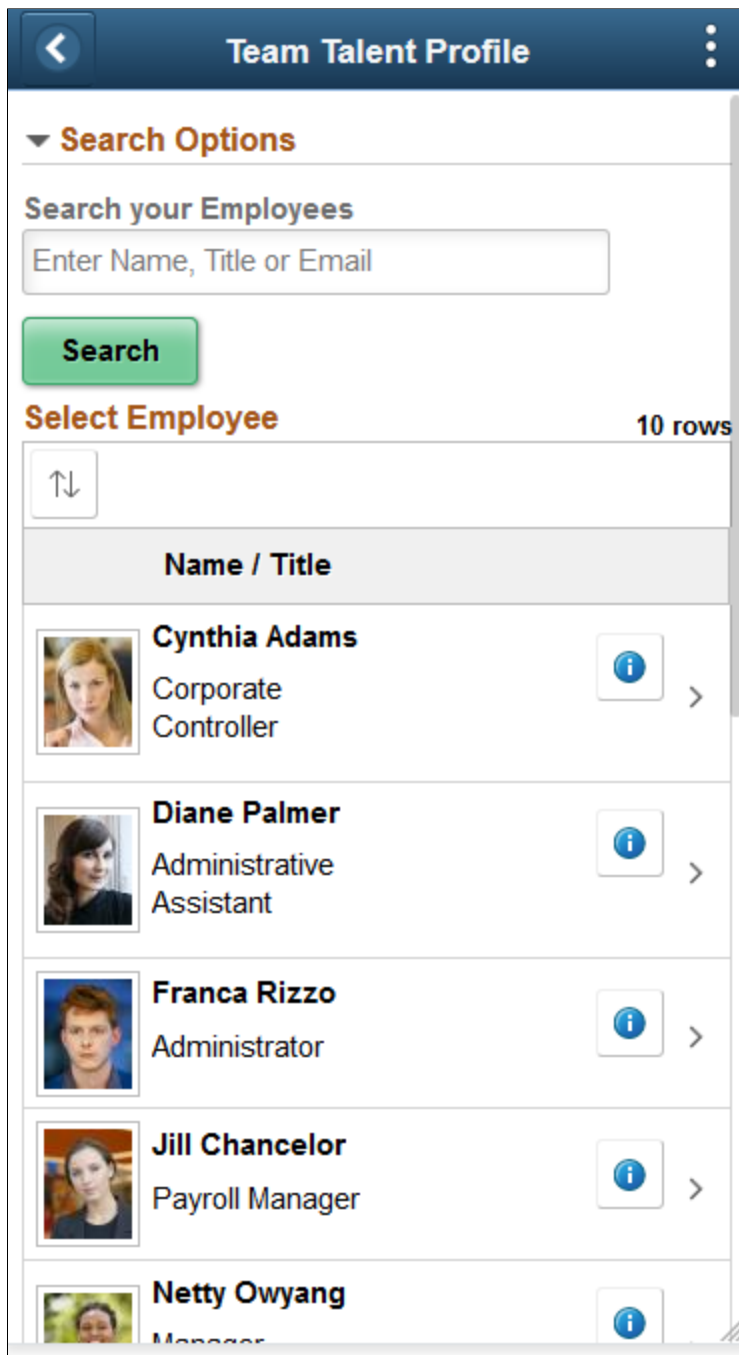
Search your Employees

Select Employee 10 rows

| Name / Title / ID - Record | Status / Type | Position / Department |
|---|--------------------|----------------------------------|
| Cynthia Adams Corporate Controller KU0101 - 0 | Active Employee | 19000074 Corporate Accounting |
| Diane Palmer Administrative Assistant KOMTX005 - 0 | Active Employee | Corporate Finance |
| Franca Rizzo Administrator N40007 - 0 | Active Employee | Finance and Administration |
| Jill Chancelor Payroll Manager KUL702 - 0 | Active Employee | Payroll |
| Netty Owyang Manager-Accounting KU0055 - 0 | Active Employee | International Accounting |

Image: (Smartphone) Team Talent Profile - Select Employee Page

This example illustrates the fields and controls on the Team Talent Profile - Select Employee page for the smartphone.



The Team Talent Profile - Select Employee page displays all direct reports of the logged-in manager based on that manager’s job. To view a person’s profile data, click his or her row on the grid.

To search for a specific employee, expand the Search Options section and enter the name of a direct report and click Search.

Use the Sort button to sort employees by column headings.



More icon button

(Smartphone) When using a small form factor, like a smartphone, click this button to access the [\(Smartphone\) Employee Details Page](#) to view additional information about this person, such as their department, location, and job title.

(Smartphone) Employee Details Page

Use the Employee Details page (HR_PSEL_SCF) to view additional information about an employee.

Navigation

Click the More icon button from the [Team Talent Profile - Select Employee Page \(for Managers\)](#) when using a small form factor device, like a smartphone.

Image: (Smartphone) Employee Details Page

This example illustrates the fields and controls on the Employee Details page for a smartphone.

| Employee Details | |
|------------------|------------------------|
| Name | Vickie Harper |
| Job Title | Sr Financial Analyst |
| Status | Active |
| Type | Employee |
| Employee ID | B-ERISA04 |
| Department | Multijob Department |
| Location | Corporate Headquarters |

Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)

Use the Talent Profile or Team Talent Profile page (JPM_PERS_PROFL_FLU) to view summary information about your own profile data or one of your direct report's profile data.

Although employees and manager access the talent profile pages differently and the header page name varies, the pages are the same. However, the security configuration settings for the role of employee and manager may vary. For information on role security for profiles, see the "Setting Up Profile Types," "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) documentation.

Navigation

As an employee:

- Click the Talent Profile tile on the delivered Employee Self Service home page (or any other home page with the tile).
- Self Service >Learning and Development >Talent Profile
- Select the Talent Profile tab from within the OnBoarding pages.

Note: This option is available only when the employee has an OnBoarding instance open.

As a manager:

- Select the Related Actions button next to your employee's name and select Development >Team Talent Profile.
- After adding the Team Talent Profile tile to a home page and selecting the tile, select an employee from the Team Talent Profile - Select Employee Page (for Managers).
- Manager Self Service >Learning and Development >Team Talent Profile
- Select the Related Actions button next to your employee's name and select the OnBoarding Status item link. Select the Talent Profile tab pages.

Note: The OnBoarding Status item displays in the Related Actions menu only when the employee has an OnBoarding instance open.

Image: (Tablet) Talent Profile page: Competencies tab for an Employee

This example illustrates the Talent Profile page for Competencies for the tablet when approvals are required and an employee makes changes to competencies, so this example shows approval-related fields.

The screenshot shows the Talent Profile page for Betty Locherty, Finance Director. The 'Competencies' tab is active, displaying a table of skills and their evaluation status. A green 'Submit for Approval' button is visible in the top right corner of the table area.

| Competency | Evaluation Type | Reviewer ID | Proficiency | Status | Sub-Competencies | View History | Edit/View |
|-------------------------------|-----------------|----------------|---|--------|----------------------|--------------|-----------|
| Abstract thinking | Self | | <div style="width: 20%; background-color: orange;"></div> | | | | > |
| Develop & implement solutions | Self | Betty Locherty | <div style="width: 40%; background-color: green;"></div> | | | | > |
| Financial Analysis | Self | Betty Locherty | <div style="width: 40%; background-color: green;"></div> | | | | > |
| Financial Planning | Self | Betty Locherty | <div style="width: 40%; background-color: green;"></div> | | | | > |
| Forecasting | Self | Betty Locherty | <div style="width: 30%; background-color: green;"></div> | | | | > |
| Managerial Efficiency | Self | Betty Locherty | <div style="width: 40%; background-color: green;"></div> | | | | > |
| Project Management | Self | | <div style="width: 40%; background-color: green;"></div> | New | Sub-Competencies (2) | | > |
| Provides Direction | Self | Betty Locherty | <div style="width: 40%; background-color: green;"></div> | | | | > |
| Resource Planning | Self | | <div style="width: 20%; background-color: orange;"></div> | | | | > |
| Takes initiative & follows up | Self | | <div style="width: 10%; background-color: grey;"></div> | | | | > |

Image: (Tablet) Team Talent Profile page: Competencies tab for a Manager

This example illustrates the Team Talent Profile page for Competencies for the tablet when approvals are required and the manager makes changes to competencies, so this example shows approval-related fields.

The screenshot shows the 'Team Talent Profile' page for Rosanna Channing, a Senior Accounting Manager. The 'Competencies' tab is active, displaying a list of skills with their evaluation types, reviewer IDs, proficiency levels, and approval statuses. A 'Submit for Approval' button is visible in the top right of the table area.

| Competency | Evaluation Type | Reviewer ID | Proficiency | Status | Edit/View |
|-------------------------------|--------------------|-------------|---|------------------|-----------|
| Ability to manage own time | Supervisor/Manager | | <div style="width: 100%; background-color: green;"></div> | New | > |
| Analytical thinking | Self | | <div style="width: 50%; background-color: gray;"></div> | Pending Approval | > |
| Business Banking | Approved/Official | | <div style="width: 75%; background-color: green;"></div> | | > |
| Develop & implement solutions | Approved/Official | | <div style="width: 60%; background-color: green;"></div> | | > |
| Directiveness/Assertiveness | Approved/Official | | <div style="width: 80%; background-color: green;"></div> | | > |
| Financial Accounting | Approved/Official | | <div style="width: 70%; background-color: green;"></div> | | > |
| Financial Analysis | Approved/Official | | <div style="width: 65%; background-color: green;"></div> | | > |
| Financial Planning | Approved/Official | | <div style="width: 70%; background-color: green;"></div> | | > |
| Managerial Efficiency | Approved/Official | | <div style="width: 50%; background-color: orange;"></div> | | > |

Image: (Smartphone) Talent Profile page: Competencies tab

This example illustrates the Talent Profile page for Competencies for the smartphone when approvals are required and an employee makes changes to competencies, so this example shows approval-related fields. The manager Team Talent Profile page works the same.

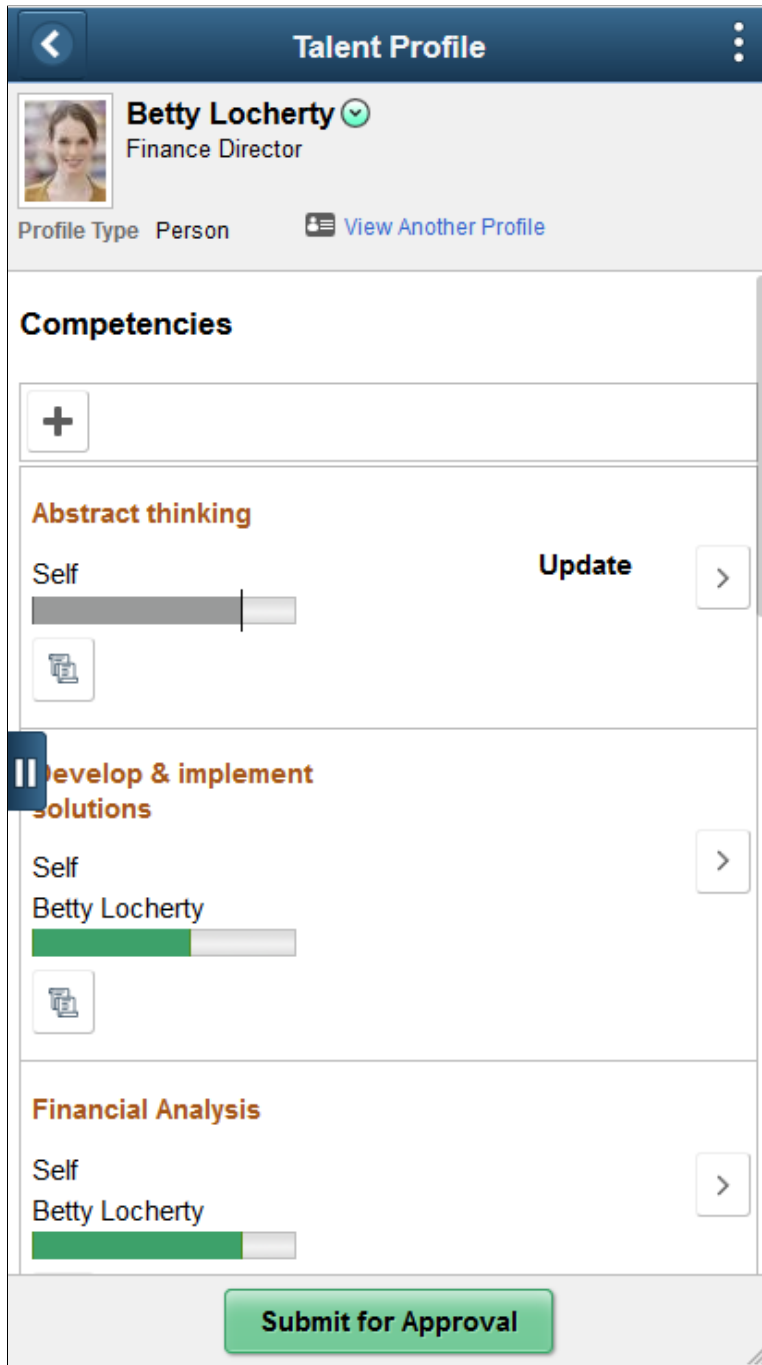


Image: (Smartphone) Talent Profile page: Qualifications category tab heading

This example illustrates the Talent Profile page for the Qualifications tab and categories for the smartphone when an employee is viewing his or her own profile. The Qualifications tab includes multiple content types, so this example shows the page when the Qualifications tab has been expanded to show the list of included content types on the left, and the page with the Qualifications tab collapsed. The manager Team Talent Profile page works the same.

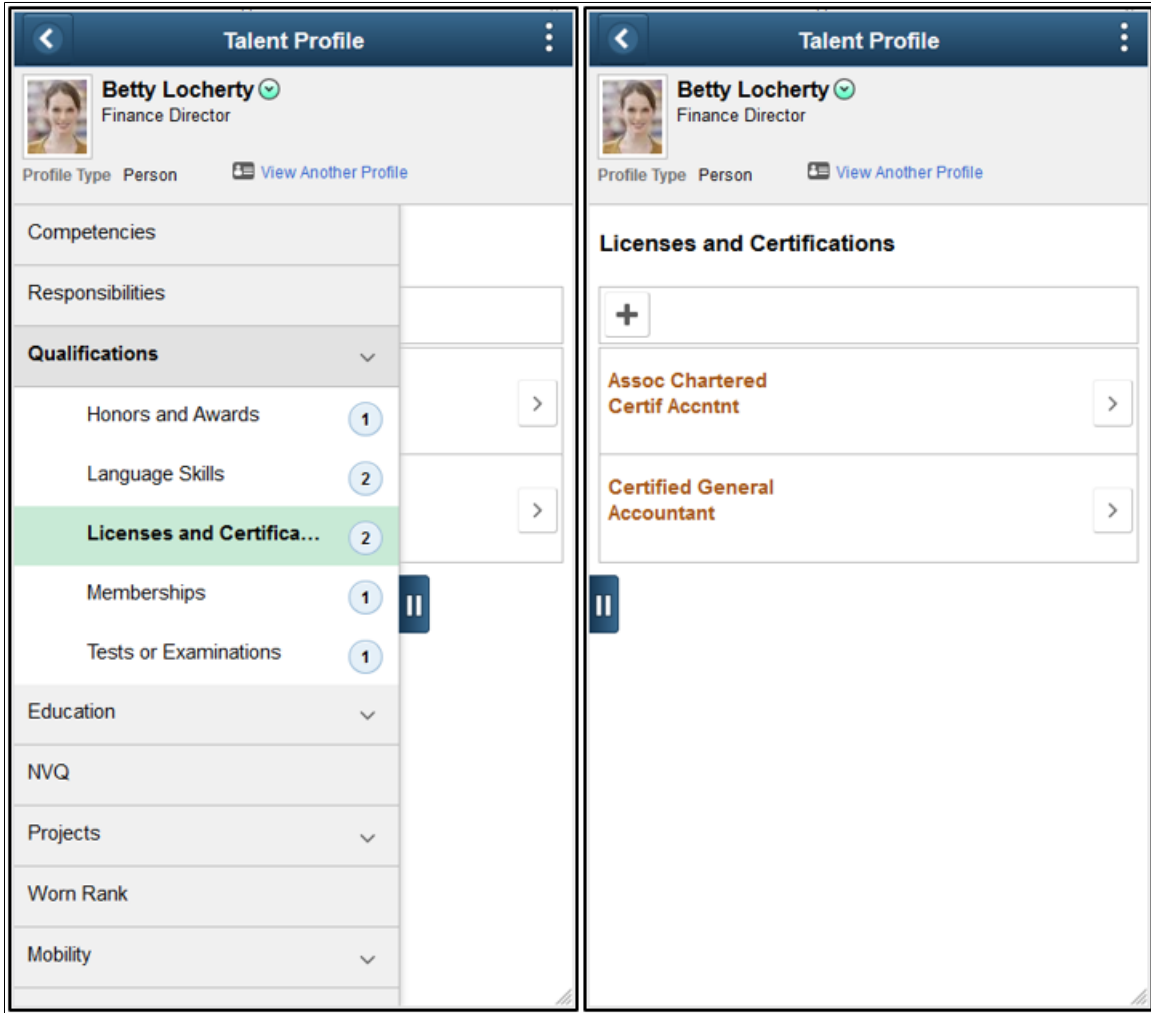
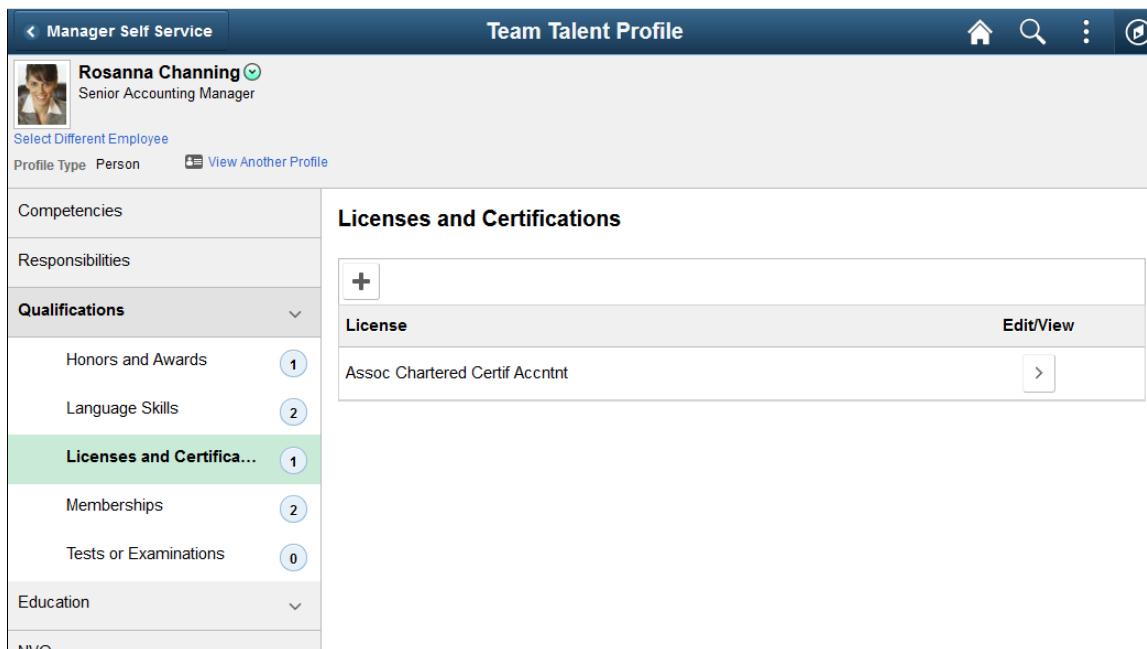


Image: (Tablet) Team Talent Profile page: Qualifications tab

This example illustrates the Team Talent Profile page for Qualifications tab for the tablet when a manager is viewing the profile. The Qualifications tab includes multiple content types, so this example shows the page when the Qualifications tab has been expanded to show the list of included content types. The employee Talent Profile page works the same.



Header (Sub-Banner)

The Talent Profile and Team Talent Profile pages include the common employee self-service header. This header includes the employee's name, job title, and photo (if available),

See "Common Header for Employee Self-Service Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

The header will also contain the following, depending on whether you are accessing the profile data as an employee or manager:

 Related Action icon button

Click the related actions icon next to the employee's name to access additional self-service transactions.

Select Different Employee

(Manager view only) Click the Select Different Employee link in the sub-banner of the Team Talent Profile pages to return to the [Team Talent Profile - Select Employee Page \(for Managers\)](#) to choose another person for viewing profile data.

Profile Type and View Another Profile

The header displays by default the primary person profile type as defined on the "Assign Profile Type Defaults Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles). To view or update information for a different profile type for this person, select the View Another Profile link to open the [Select Profile Type Page](#).

This video demonstrates the support for multiple profiles:



[Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Support for Multiple Profiles](#)

Content Types

The administrator who sets up a profile type chooses which content types to include and organizes those content types into category *tabs*.

On the Talent Profile and Team Talent Profile pages, the tabs for the specified person profile type are listed in the left panel. If a tab represents one content type, selecting the tab name displays summary information about the content items in the profile. Tabs with multiple content types expand when you select them, and the included content types are listed underneath the main tab heading, and the first one is selected (that is, its content appears to the right). For these second-level content types, the number of content items appears as part of the tab label.

Tabs and subsections appear in the order that is defined for the profile type.

Content Items

Selecting a content type on the left panel displays the associated content items in the main panel. For example, selecting the Competencies content type on the left panel causes the main panel to list the specific competencies in the profile. These content items then appear in alphabetical order.

The configuration option to allow self-service updates can apply to an entire content type. Alternatively, it can be applied on an instance qualifier such as the evaluation type field for Competencies. For example, with the delivered configuration for Competencies, employees can update content times where the evaluation type is *Self* but they cannot update content items where the evaluation type is *Supervisor/Manager* or *Approved/Official*. Likewise, managers can update content times where the evaluation type is *Supervisor/Manager* but they cannot update content items where the evaluation type is *Self* or *Approved/Official*. Under this configuration, selecting self-evaluated competencies opens an editable detail page ([<Content Type> Page](#)), but selecting an official competency evaluation opens it as a read-only detail page.



or **Add** button

If self-service updates are not allowed, the list of content items does not include an Add button or icon, and selecting an existing content item displays a read-only detail page that does not have a Delete button.

Click this button to access the [<Content Type> Page](#) and add item details.

Proficiency

This column or graph displays for certain content types, such as competencies, where you rate an employee ability.

Displays a graphical representation of the user's proficiency. In this graph, green indicates that the user's proficiency exceeds the job requirement, gray indicates that the proficiency meets the job requirement, and red indicates that the proficiency is below the job requirement.

**View History** button

A row displays this button when multiple effective dated rows exist for the content item.

Click this button to access the [View Profile Item History Page](#) and select from a list of historical rows to view.

Note: You cannot make changes to an item when you access it from the View History button. Select the Edit/View button to make changes to a non-historical row.

This video demonstrates viewing historical data:



[Image Highlights, PeopleSoft HCM Update Image 28: Manage Profiles-Viewing Historical Profile Items in Fluid](#)

**Edit/View** button

Click this button to view the current row of information for this item.

If a content type is configured to allow employees or managers to make updates in self-service, the employee or manager can add, update, and delete content items for their corresponding evaluation type. Selecting an individual item opens an editable detail page ([<Content Type> Page](#)). However, updates cannot be made to evaluation types that do not match the user's evaluation type or to historical rows.

To delete an item, use the Delete button on the detail page.

Content items are effective-dated, so deleting a content item that has historical data causes the most recent historical row to become current.

When employees or managers have attachments enabled, they can also view attachments. To add, update, or delete attachments for a content item, the manager or employee must be assigned the *Update Attachments* value for their role within the profile for this content section.

For information on setting up role access to update or add attachments to a content item, see the "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Related Items

When set up to use related items, the page will display an additional column. Related items (parent/child relationships) must be set up for a content item on the "Content Items - Relationships Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) and added as a sub-section on a person profile type "Profile Types - Content Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) for the content type in order for this column and related item link to appear. The name of the link varies based on the child relationship of the content type. For example, if a profile type is set up to use the *Sub-Competencies* sub-section under the *Competencies* content type, then the column heading will display *Sub-Competencies* when viewing the *Competencies* items, as shown in the previous example. Select this link to manage the related content items (see [<Related Content Item> \(Summary\) Page](#)).

This video demonstrates the Manage Profile enhancements for related items:



[Image Highlights, PeopleSoft HCM Update Image 25: Manage Profile Enhancements](#)

Approvals

Submit for Approval

If approvals are required for content item changes, the detail page where the user makes changes has a Continue button instead of a Save button. When the user clicks the Continue button to return to the main Talent Profile or Team Talent Profile page, the list of content items displays a Submit for Approval button. The user can continue to update additional content items (for a single content type) without submitting changes. When the user clicks the Submit for Approval button, the [Request Approval Page](#) appears. The user can add comments on this page and then submit the consolidated approval request.

After a user modifies a content item that requires approval, the detail page for that content item is read-only, even if the changes have not yet been submitted. The user cannot make further modifications until the original changes are submitted and approved.

To cancel changes without submitting, the user can navigate to another tab and then click No in the message asking whether to save changes first.

Note: Approving managers review approval requests for *Person Profile* and *Non-Person Profile* fluid transactions using the [Pending Approvals - Person Profile Page](#) or [Pending Approvals - Non-Person Profile Page](#).

Status

This column is visible only if the user has made changes that have not yet been approved.

Before the changes are submitted for approval, the status indicates the type of change that the user made: *New*, *Update*, or *Delete*.

After the changes are submitted, the status is *Pending Approval*. After the changes are approved, the Status field is blank. If the Status field is blank for all content items, the Status column is not visible.

Actions Menu

From the Talent Profile and Team Talent Profile pages, the main fluid Actions List menu (on the PeopleSoft Fluid User Interface banner) and the Related Actions menu (next to the employee's name in the standard fluid page header) have extra options.

- (Available for the manager and employee) The main fluid Actions menu includes one page-specific action, *Print Profile*.

Perform this action to generate the Person Profile report (JPM_JPPP_RPT). This is a PDF that shows all current items in a person's profile. It is the same report that administrators run from the Person Profile Report page (Workforce Development >Profile Management >Reports >Person Profile Report).

- (Available for the employee) The Related Actions menu gives the user access to several pages used to view profile data. These actions take the user to classic pages for performing profile comparisons and viewing and managing profile data.

There are two page-specific actions for "Searching and Comparing Profiles" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) listed as menu items when you first select the Related Actions menu next to the employee's name:

- *Compare My Profile* is for comparing the user's own person profile with his or her own job profile.
- *Search and Compare Profiles* enables a user to compare a variety of profile comparisons.

There are three additional Manage Profile related actions listed when you first select the Development menu item from the Related Actions menu:

- *View My Historical Profile* provides the user the ability to view his or her own profile data as of a given date.
- *View My Job Profiles* is for viewing all the job profiles that the system identifies as related to the users' Job Data.
- *View My Interest List* enables a user to view and add job profiles in which he or she may have an interest.

Related Links

[Understanding Profile Maintenance](#)

"Managing Interest Lists" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Select Profile Type Page

Use the Select Profile Type page (JPM_PROFTYP_SEL_FL) to choose from a list of valid *Person* profile types for which you want to view or update other profile information for yourself (from the Talent Profile pages) or for one of your direct reports (from the Team Talent Profile pages).

Navigation

Select the View Another Profile link from the sub-banner header of the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#).

Image: Select Profile Type page

This example illustrates the Select Profile Type page.

| Profile Type | Description |
|--------------|-------------------------------|
| HOEPER | ePerformance Person profile |
| HXCSP_PP1 | SP- Person profile type |
| JPMREP | Reports Profile(Req Approval) |
| KOLM2 | Person (Learning) |
| PERSON | Person |
| PERSON-GHN | China Specific Fields |

The page displays valid person profile usage types. The profile usage type of *Person* is assigned to profile types on the "Profile Types - Attributes Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Select a profile type row to open the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#) and view or update the items associated with this profile for this person.

View Profile Item History Page

Use the View Profile Item History page (JPM_ITM_HIST_SCF) to select from a list of effective dated rows to view historical data for a profile content item.

Navigation

Select the View History button for a content item on the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#).

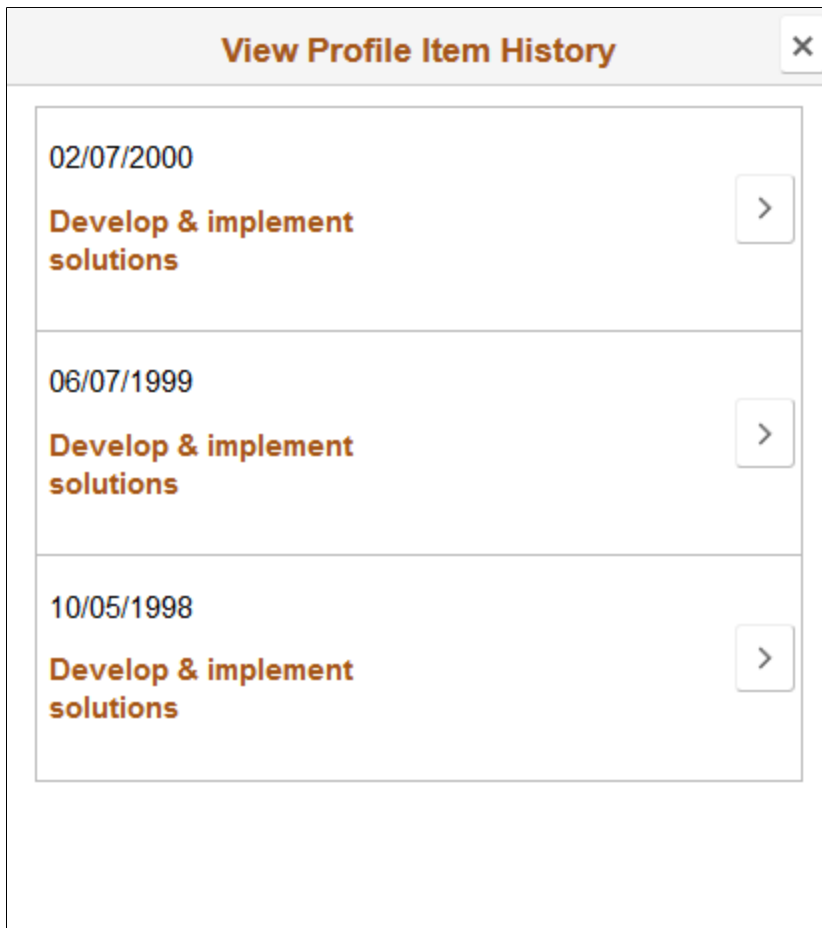
Image: (Tablet) View Profile Item History page

This example illustrates the View Profile Item History page for a tablet.

| Effective Date | Competency |
|----------------|-------------------------------|
| 02/07/2000 | Develop & implement solutions |
| 06/07/1999 | Develop & implement solutions |
| 10/05/1998 | Develop & implement solutions |

Image: (Smartphone) View Profile Item History page

This example illustrates the View Profile Item History page for a smartphone.



Click the arrow button at the end of the row to access the [<Content Type> Page](#) and view details for an effective dated row. Historical rows are display only with a message at the top of the page stating that they cannot be updated.

Note: You cannot make changes to an item when you access it from the View Profile Item History page. Select the Edit/View button from the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#) to make changes to a non-historical row.

<Content Type> Page

Use the [<Content Type> page \(JPM_ITMDTL_SCF\)](#) to add, update, or delete information for a profile content item. You can also add attachments to support the content item information.

Note: The page title changes based on the content type.

Navigation

Select a content item on the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#) or the [View Profile Item History Page](#), or click the Add button.

Note: This page is display only when you access it through the View History button navigation. To make updates to an item, you must use the Edit/View button navigation for a non-historical item to which you have been granted update access.

Image: <Content Type> page when no approval is required

This example illustrates the <Content Type> page when changes do not require approval.

The screenshot shows a web form titled "Language Skills". At the top left is a "Cancel" button and at the top right is a "Save" button. The form contains the following fields and controls:

- Evaluation Date:** 07/24/2006, with an "Add New Version" button next to it.
- Language:** Spanish
- *Status:** Active (dropdown menu)
- Rating Model:** Language Ratings
- Reading Proficiency:** 2 - Moderate (dropdown menu)
- Speaking Proficiency:** 2 - Moderate (dropdown menu)
- Writing Proficiency:** 2 - Moderate (dropdown menu)
- Native Language:** Radio button selected for "No"
- Able To Translate:** Radio button selected for "Yes"
- Able To Teach:** Radio button selected for "No"

A "Delete" button is located at the bottom center of the form.

Image: <Content Type> page when approval is required

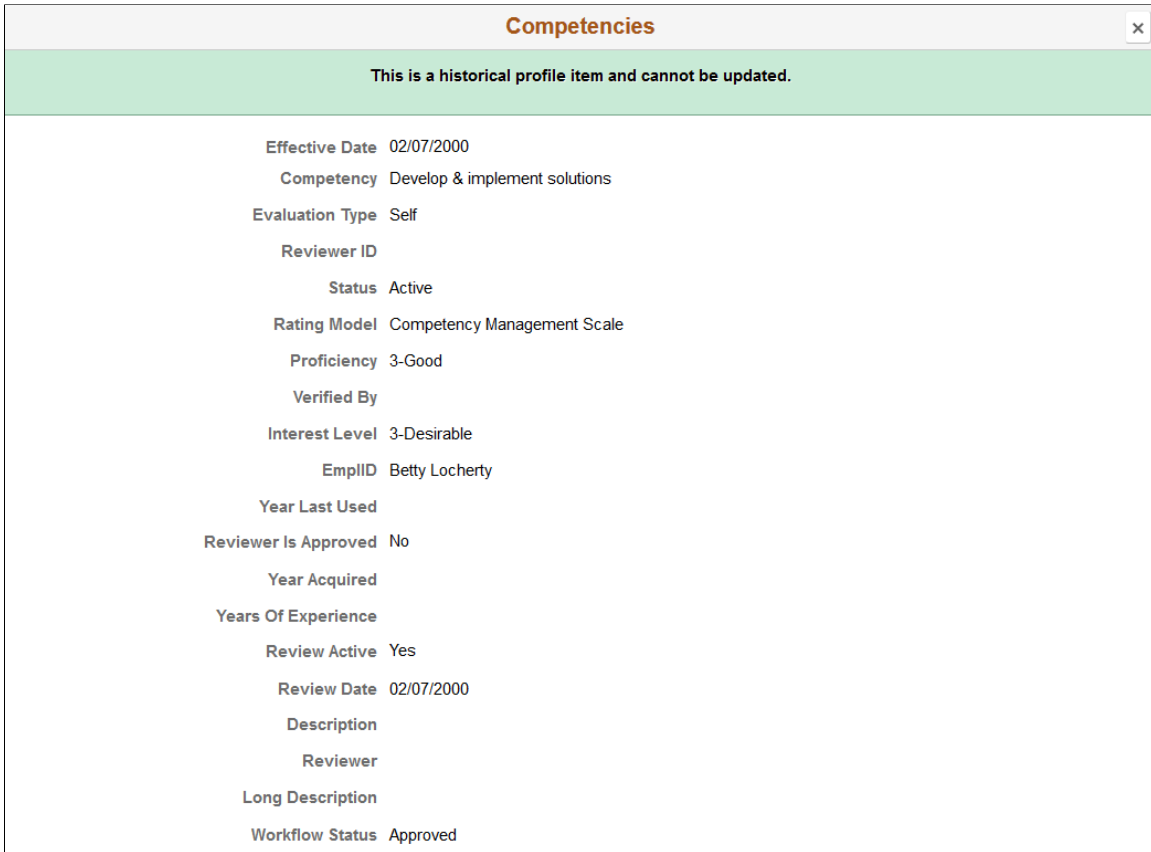
This example illustrates the <Content Type> page when changes require approval. The Delete button at the bottom of the page is not shown here.

The screenshot shows a web form titled "Competencies" with a "Cancel" button on the left and a "Continue" button on the right. The form contains the following fields and controls:

- Effective Date: 01/01/2000, with an "Add New Version" button.
- Competency: Financial Accounting
- Evaluation Type: Self
- Reviewer ID: Daryl Reese
- *Status: Active (dropdown menu)
- *Rating Model: Competency Management Scale
- *Proficiency: 3-Good (dropdown menu)
- Verified By: (dropdown menu)
- Interest Level: 2-No Preference (dropdown menu)
- EmpID: Daryl Reese
- Year Last Used: (text input)
- Reviewer Is Approved: Radio button set to "No"
- Year Acquired: (text input)
- Years Of Experience: (text input)
- Review Active: Radio button set to "Yes"
- Review Date: 01/01/2000
- Description: (text input)

Image: <Content Type> page for a historical row

This example illustrates the <Content Type> page for a profile item accessed through the historical view. These items are view only.



Buttons

The page displays these buttons when the role of the user has been granted permission to update the profile content type for the evaluation type and is a non-historical row. For information on setting up role access to update a content item, see the "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Cancel

Click to return to the Talent Profile or Team Talent Profile page without making any changes.

Save

This button appears when changes do not require approvals.

Click to save changes and return to the Talent Profile or Team Talent Profile page.

Continue

This button appears when changes require approval.

Click to tentatively save your changes and return to the Talent Profile or Team Talent Profile page. This will not submit the proposed changes. You can continue making changes to other content items (within the same content type category). However, to finalize and submit the changes within a content type category, you will need to click the Submit for Approval button

on the Talent Profile or Team Talent Profile page. Changes you do not submit for approval will be discarded if you move to another content type category or when you leave the profile pages.

Effective Date and Add New Version Enter updates directly on the current effective dated row without entering a new date to make changes to the existing row.

Click the Add New Version button to enter a new effective dated row. The Talent Profile or Team Talent Profile page will show this newer row instead of the older row. Note that when updating profile data, you cannot change the effective date to a date earlier than the date of the current record.

When a new effective-dated row is added and the previous effective-dated row has related content items associated with it, these related content items are automatically copied forward. The Effective Date field for the related content item detail cannot be updated since it must match the effective date of the parent item.

Delete This button appears for non-historical rows.

Click this button to delete the content item from the profile.

Profile Data

The fields on the page vary depending on the content type. If a content item has country-specific fields, those fields appear within a collapsible country-specific section at the bottom of the page.

Attachments

The page displays the Attachments section when the role of the user has attachments enabled for the profile content type. For information on setting up role access to add attachments to a content item, see the "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Image: <Content Type> page when attachments are enabled for viewing only

This example illustrates the <Content Type> page when attachments are enabled for viewing only for the role of the user.

Cancel
Licenses and Certifications
Save

Issue Date 01/30/2009 Add New Version

License Assoc Chartered Certif Accntnt

*Status Active ▾

Country United States 🔍

State 🔍

Renewal Required No

Renewal In Progress No

License Verified Yes

Expiration Date 📅

License/Certification Number

Issued By

▼ **Attachments**

| File Name ▾ | Description ▾ | Attached On ▾ |
|--------------------------------------|--------------------|----------------------|
| ACCA_certificate.png | ACCA Certification | 09/07/2018 3:36:55PM |

Delete

Image: <Content Type> page when attachments are enabled for updating

This example illustrates the <Content Type> page when attachments are enabled for updating for the role of the user.

Use this section to manage attachments by uploading, deleting, or updating attachments.

Add Attachment or 

Click this button to access the File Attachment page and upload files.

Attachments

Displays the file name. Select the file link to download and view the attachment.

Description


(Optional) Enter a description when you first add the file. This field is not available for edit after you have saved the page.

Delete Attachment

Click this button to remove an attachment from this content type item.

Managers use fluid Approvals to view content item attachments for a *Person Profile* transaction request using the Profile Item Details Page.

The following video provides an overview and demonstration of the Fluid Attachment framework:


[Image Highlights, PeopleSoft HCM Update Image 27: Attachment Capability Added to Profile Management](#)

<Related Content Item> (Summary) Page

Use the <Related Content Item> (Summary) page (JPM_RLITMSUM_SCF) to view a list of related items assigned to this person for this content item.

Navigation

Select the <related content item (#)> link for the content type on the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#).

Note: Related items (parent/child relationships) must be set up for a content item on the "Content Items - Relationships Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) and added as a sub-section on the Person profile type "Profile Types - Content Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) for the content type in order for a related item link to appear. The name of the link varies based on the child relationship of the content type.

Image: <Related Content Item> (Summary) page when no approval is required

This example illustrates the <Related Content Item> (Summary) page when changes do not require approval.

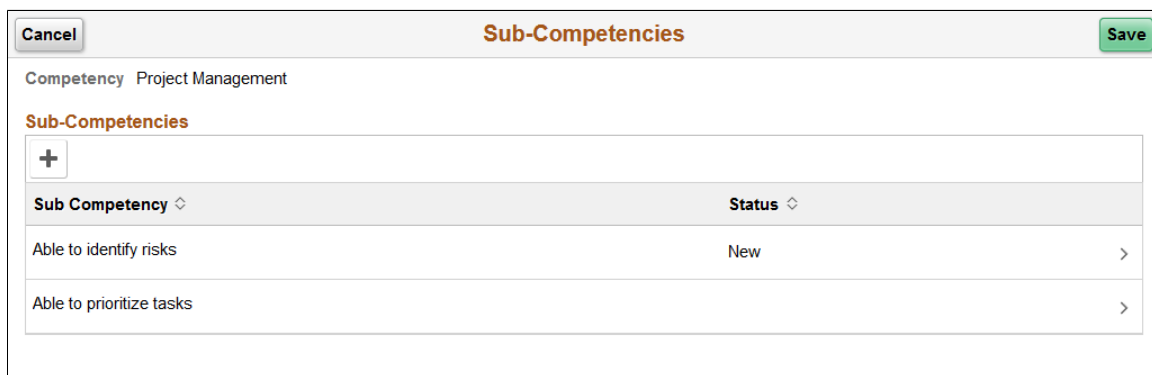
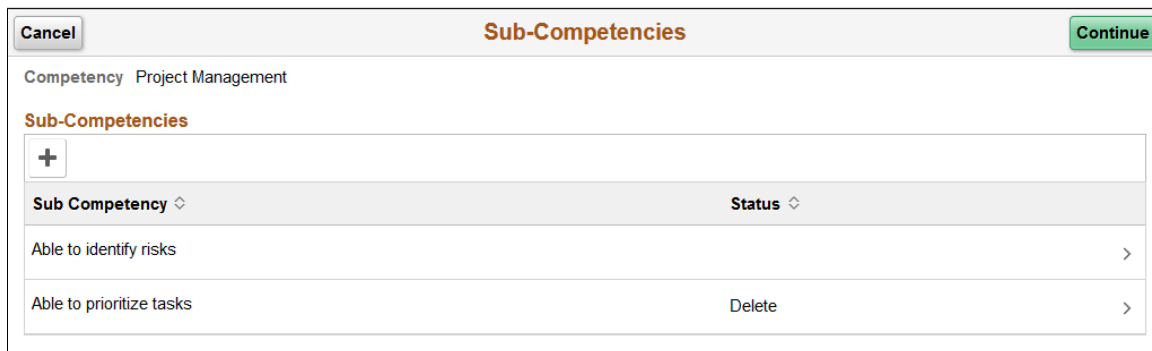


Image: <Related Content Item> (Summary) page when approval is required

This example illustrates the <Related Content Item> (Summary) page when changes require approval.



The top of the page displays the content type and content item. The bottom of the page displays a list of this person's related items for this content item, if any.

Click the Add (+) button or click a related item row to access the <Related Content Item> (Details) Page and add, view details, or delete an existing related item.

| | |
|-----------------|--|
| Cancel | Click to return to the Talent Profile or Team Talent Profile page without making any changes. |
| Save | This button appears when changes do not require approval. Click to save changes and return to the Talent Profile or Team Talent Profile page. |
| Continue | This button appears when changes require approval. When you click this button, the system will return you to the Talent Profile or Team Talent Profile page without submitting changes. You can continue making changes to other content items (within the same content type). To submit the changes, click the Submit for Approval button on the Talent Profile or Team Talent Profile page. |

Note: You must click the Submit for Approval button to save the changes to the profile with a *Pending Approval* status. If you do not select the Submit for Approval button prior to navigating away from the content type, you will lose your changes.

<Related Content Item> (Details) Page

Use the <Related Content Item> (Details) page (JPM_ITMDTL_SCF) to add, view details, or delete related items for a profile content item.

Navigation

Select the Add button or click a related item row on the [<Related Content Item> \(Summary\) Page](#).

Image: <Related Content Item> (Details) page

This example illustrates the <Related Content Item> (Details) page.

The screenshot shows a web interface for editing a sub-competency. At the top, there are 'Cancel' and 'Continue' buttons. The title is 'Sub-Competencies'. Below the title, the 'Effective Date' is set to '10/16/2017' and the 'Sub Competency' is 'Able to prioritize tasks'. A 'Delete' button is located at the bottom center of the form area.

When adding a new related item, the fields will be available for entry. Only those content items that have been set up on the "Content Items - Relationships Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) will be available for selection.

| | |
|---------------|--|
| Cancel | Click to return to the <Related Content Item> (Summary) Page without making any changes. |
|---------------|--|

Continue

Click this button to keep the changes you have entered.

The system will return you to the [<Related Content Item> \(Summary\) Page](#) where:

- If the change does not require approval, you will click the Save button to make the change in the system.
- If the change requires approval, you should click the Continue button. You can continue making changes to other content items (within the same content type). To submit the changes, click the Submit for Approval button on the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#).

Note: You must click the Save button from the [<Related Content Item> \(Summary Page\)](#) or the Submit for Approval button from the Talent Profile or Team Talent Profile page in order to save your changes. Those changes not requiring approval will be automatically updated in the system upon save, while those requiring approval will be saved with a *Pending Approval* status upon submitting for approval.

Delete

When viewing an existing related item, the Delete button is available.

Click this button to remove this related item from the person's profile.

Request Approval Page

Use the Request Approval page (JPM_APPROVAL_FLU) to submit profile changes for approval.

Navigation

Click the Submit for Approval button on the [Talent Profile Page \(for Employees\)](#) or [Team Talent Profile Page \(for Managers\)](#).

Image: Request Approval page

This example illustrates the Request Approval page.

Cancel
Request Approval
Submit

Competencies

| Competency | Evaluation Type | Reviewer ID | Status |
|-------------------------------|-----------------|----------------|--------|
| Develop & implement solutions | Self | Betty Locherty | New |
| Financial Analysis | Self | Betty Locherty | Update |
| Resource Planning | Self | | Delete |

Comments

Submit Click to submit a consolidated approval request for all the changes listed on the page.

Comments Optionally enter comments about the changes you made.

Managers can review approval requests for *Person Profile* and *Non-Person Profile* fluid transactions using the [Pending Approvals - Person Profile Page](#) or [Pending Approvals - Non-Person Profile Page](#).

Approving Person Profile Changes and Viewing Approval History

Pages Used to Approve Profile Changes and View Approval History

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------|------------------------|---|
| Select Approval Transaction Page | JPM_JP_MNG_APPRVL | Managers use this page to view a list of profiles that are waiting for approval. Managers click the profile name to view the Approve Profiles page that lists the changes and approve or deny pending changes. |
| Profile Approval History Page | JPM_JP_APPRVL_HIST | Lists profile approval transactions that the employee submitted. Employees can search for transactions within a specific date range and restrict the search to transactions with a specific status (<i>Pending, Denied, or Approved</i>). |
| Approve Profiles Page | JPM_JP_PERS_APPR | View a list of the changes to the person profile and details of the approvals processing. Managers click the Approve button to approve the changes or click the Deny button to reject the changes. |

| Page Name | Definition Name | Usage |
|--|------------------------|---|
| Approval Confirmation Page Deny Confirmation Page | JPM_JP_PER_APR_CNF | Displays a confirmation message when managers click the Approve button to approve profile changes or click the Deny button to reject profile changes submitted for approval |

Understanding Profile Approvals

The use of approvals processing with profiles is optional. If your organization uses approvals processing, it is configured at the profile type level. An approval definition is selected for a profile type on the Profile Types - Attributes page and you then specify whether a role for a content section requires approval on the Content Section page. For further information about defining profile types see "Creating Profile Group Types and Profile Groups" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

If approval is required for a content section role, any additions, updates or deletions trigger approvals workflow. The PeopleSoft application delivers approval definitions for person profiles that are configured so that when employees update or create a profile, their manager approves changes. However, you can create approval definitions to configure approvals according to your requirements.

Managers use the Approval Profiles page to view approvals and they approve or deny changes at the profile level. Employees can track their own approvals using the Profile Approval History component - Approve Profiles page.

Related Links

"Understanding Profile Management" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

"Understanding Approvals" (PeopleSoft HCM 9.2: Application Fundamentals)

Using Fluid Approvals to Approve Profile Items

This topic provide an overview of approvals for person and non-person profiles and discusses how managers approve profile requests using Fluid Approvals.

For using the common Pending Approvals and Approvals History pages, see also "Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (PeopleSoft HCM 9.2: Application Fundamentals).

Pages Used to Approve Member Participation in Matrix Teams Using Fluid Approvals

| Page Name | Definition Name | Usage |
|---|------------------------|--|
| <u>Pending Approvals - Person Profile Page</u> or <u>Pending Approvals - Non-Person Profile Page</u> | EOAWMA_TXNHDTL_FL | Review and take action on person or non-person profile requests using Fluid Approvals. |
| <u>Profile Item Details Page</u> | JPM_ITM_DTL_FL | Review additional profile item details. |

Understanding Approvals for Person and Non-Person Profiles

Fluid Approvals supports the following Profile approval transaction requests that are generated from the following self service pages:

Employee Self Service:

- My Current Profile
- Talent Profile

Manager Self Service:

- Current Team Profiles
- Maintain Job Profiles

Fluid Approvals supports the following Manage Profile approval transaction types for a manager:

- *Person Profile:* When a new content item that requires an approval is added to a person's profile.
- *Non-Person Profile:* When a new content item that requires an approval is added to a non-person profile, such as a profile for a job.

These videos discuss the PeopleSoft Fluid User Interface enhancements for the person and non-person transaction types:



[Image Highlights, PeopleSoft HCM Update Image 25: Manage Profile Enhancements](#)



[Image Highlights, PeopleSoft HCM Update Image 27: Attachment Capability Added to Profile Management](#)

For a list of delivered AWE transactions for HCM, see "Understanding the Approval Transaction Registry" (PeopleSoft HCM 9.2: Application Fundamentals).

Approvals Process

The approval processes, which determines who approves the transaction, is defined using the common Approval Framework. For more information, see "Understanding Approvals" (PeopleSoft HCM 9.2: Application Fundamentals).

The following navigation options provide direct access to the fluid Pending Approvals page:

- Click the Approvals tile on the Manager Self Service home page.
- Click the Notifications icon in the banner that appears across the top of PeopleSoft pages, then click an approval notification.

Pending Approvals - Person Profile Page or Pending Approvals - Non-Person Profile Page

Use the Pending Approvals - Person Profile page or Pending Approvals - Non-Person Profile page (EOAWMA_TXNHDTL_FL) to review and take action on person or non-person profile requests using Fluid Approvals. The page title and content varies depending upon the profile type.

Navigation

Click the Approvals tile on the Manager Self-Service home page or the Notifications button in the Oracle banner to access the Pending Approvals page. Then click a Person Profile or Non-Person Profile transaction row on the Pending Approvals page.

Note: Person Profile transaction rows display the Employee name, Profile Type description, and a list of updated profile item counts within content type while the Non-Person Profile displays the job.

Image: Pending Approvals - Person Profile Page

This example illustrates the Pending Approvals - Person Profile page.

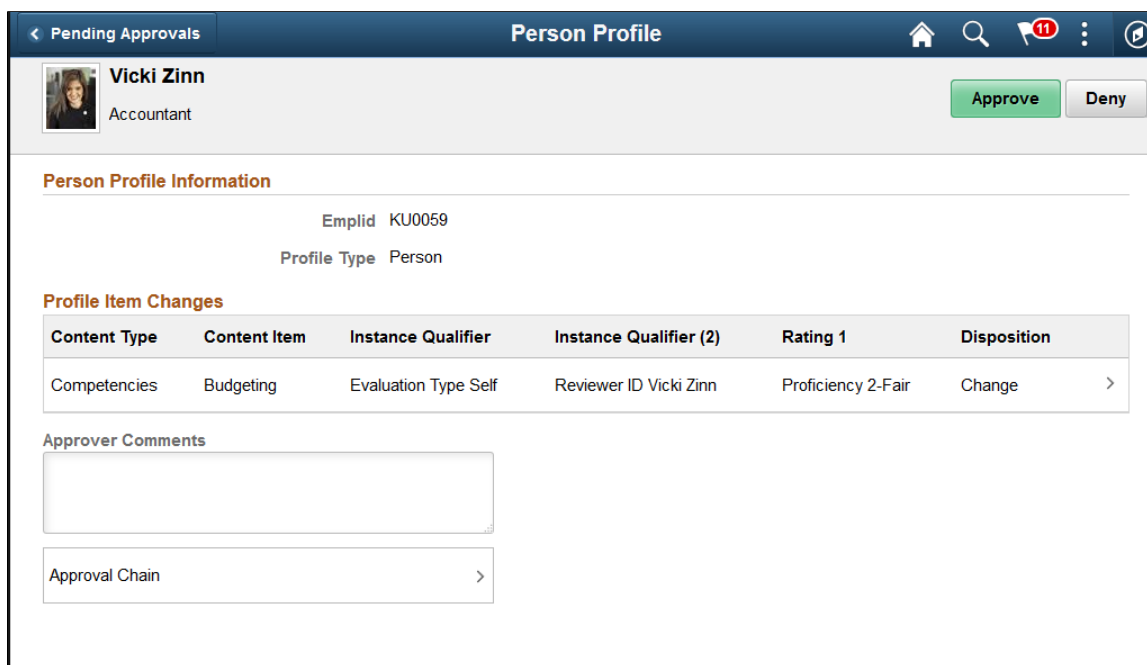


Image: Pending Approvals - Non-Person Profile Page

This example illustrates the Pending Approvals - Non-Person Profile page.

The screenshot shows a web interface for a 'Non-Person Profile'. At the top, there's a navigation bar with 'Pending Approvals' and 'Non-Person Profile'. Below this, there are 'Approve' and 'Deny' buttons. The main content area is divided into sections:

- Non-Person Profile Information:**
 - Profile ID: 100000
 - Description: Superintendent
 - Profile Type: Job
- Profile Item Changes:** A table with columns: Content Type, Content Item, Rating 1, and Disposition.

| Content Type | Content Item | Rating 1 | Disposition |
|-----------------------------|--------------------------------|---------------------------|-------------|
| Competencies | Analytical thinking | Target Proficiency 3-Good | Add > |
| Degrees | Bachelor of Engineering | | Add > |
| Licenses and Certifications | Integrated Resource Management | | Add > |
- Approver Comments:** A text input field.
- Approval Chain:** A dropdown menu with a right arrow.

Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the "Pending Approvals - <Transaction Details> Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Approve and **Deny** Use these buttons to take action on the requested approval.

Person Profile Information or Non-Person Profile Information

The section header will vary depending on the type of profile approval request: *Person Profile* or *Non-Person Profile*.

Use this section to view a summary of the profile impacted by the transaction request.

Employee ID This field appears for a *Person Profile* type request, and displays the ID of the employee being affected by this transaction request.

Profile ID and Description These fields appear for a *Non-Person Profile* type request, and displays the ID and description of the profile that was updated by this transaction request.

Profile Type Displays the profile type of the profile updated by this transaction request, such as *Person* or *Job*.

Profile Item Changes

Use this section to view summary information identifying each profile item that was updated in the transaction that you are being asked to approve. The section will show either content type changes requested for the person or for the non-person profile. For example, the preceding Non-Person Profile screen shot displays an example of a transaction that shows three profile items that have been added.

The fields correspond to the fields that were entered or updated for the profile and vary by content type and item. Not all fields apply to all content items.

| | |
|---|---|
| Content Type | Displays the content type description of the profile item with updates. |
| Content Item | Displays the profile item description. |
| Instance Qualifier and Instance Qualifier (2) | Displays the configured JPM_CAT_ITEM_QUAL and JPM_CAT_ITEM_QUAL2 label for that content type with its value for that profile item. For more information see on instance qualifiers, see "Defining Instance Qualifiers" (PeopleSoft HCM 9.2: Human Resources Manage Profiles) and the "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles). |
| Rating 1, Rating 2, and Rating 3 | Displays the configured JPM_RATING1, JPM_RATING2, and JPM_RATING3 labels and profile item values for that item when the content type uses a rating model. |
| Disposition | Display the type of modification being requested for the profile. Values include <i>Add</i> , <i>Change</i> , or <i>Delete</i> . |
| Click a row within this grid to access the Profile Item Details Page , where you can review item details. | |
| Approver Comments | Enter any comments related to the approval action you take. |
| Approval Chain | Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction. |

Related Links

"Maintaining Profiles" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)
[Maintaining Person Profiles](#)

Profile Item Details Page

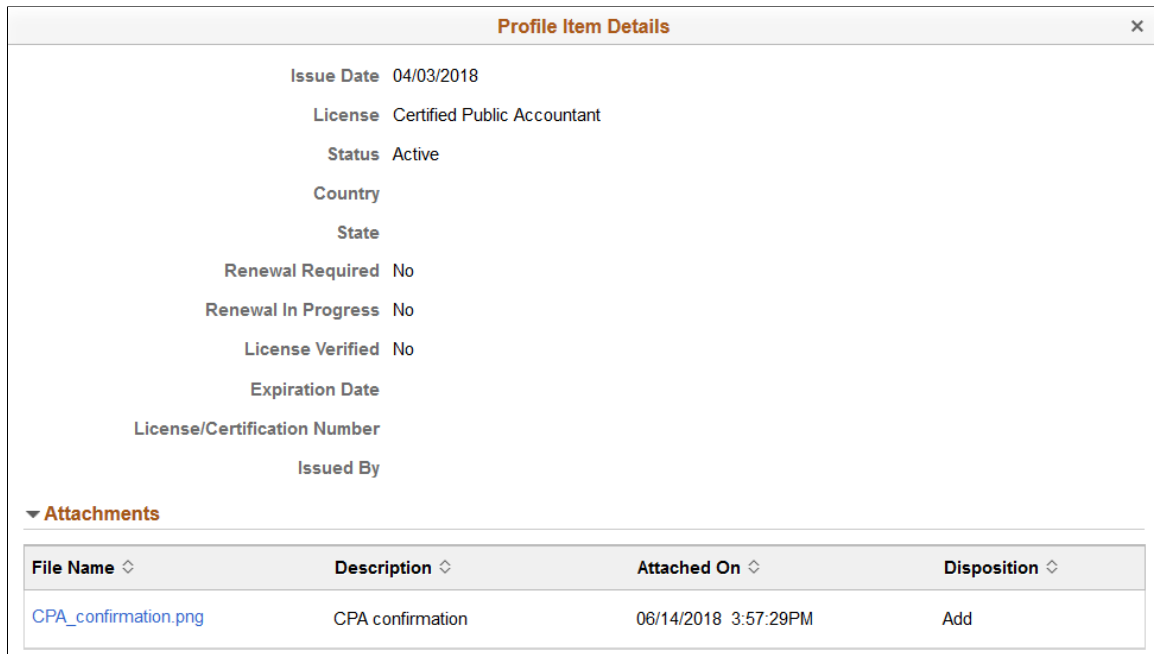
Use the Profile Item Details page (JPM_ITM_DTL_FL) to review additional profile item details.

Navigation

Click one of the Profile Item Changes rows on the [Pending Approvals - Person Profile Page](#) or [Pending Approvals - Non-Person Profile Page](#).

Image: Profile Item Details Page for a Person Profile Item

This example illustrates the fields and controls on the Profile Item Details page showing a person profile item.



Attachments

The page displays the Attachments section and link when the requestor has attached information to the content item and the manager has been granted the ability to view or update attachments for the profile content type.

Select the link to view the attachment.

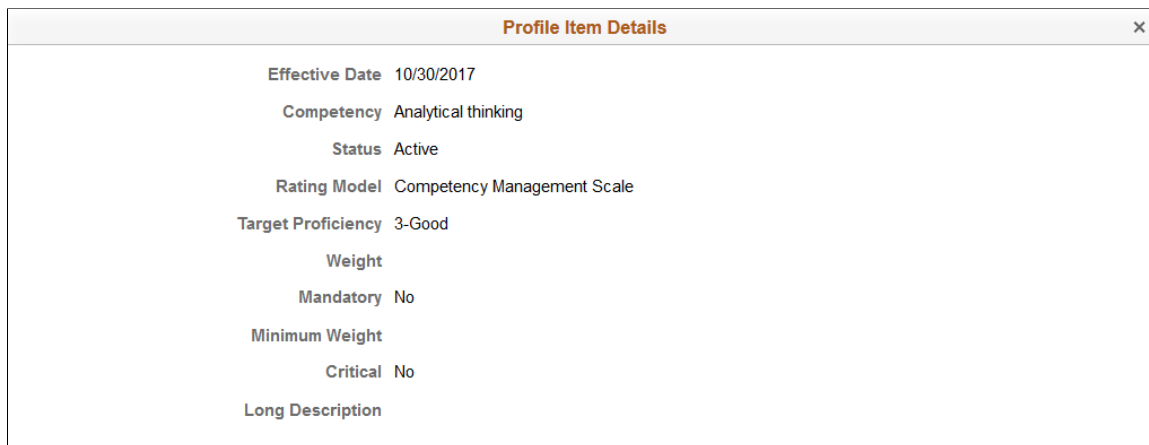
For information on setting up role access to enable attachments for profile content types, see the "Content Section Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

The following video provides an overview and demonstration of the Fluid Attachment framework:

[Image Highlights, PeopleSoft HCM Update Image 27: Attachment Capability Added to Profile Management](#)

Image: Profile Item Details Page for a Non-Person Profile Item

This example illustrates the fields and controls on the Profile Item Details page showing a non-person profile item.



Fields and information will vary by the item setup.

Related Links

"Add New <content type>, Update <content type>, or View <content type> Page" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Viewing and Updating Job Profiles

Pages Used to View Job Profiles

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------|------------------------|---|
| Select Profile Page | JPM_JP_REL_PRF_EMP | <p>Lists the profiles that are associated with the employee's job. Employees select the job profile that they want to view or use in the search and compare.</p> <p>This page is only displayed if there are two or more active job profiles related to the employee. If there is only one active job profile, this page is not displayed.</p> <p>The system determines which job profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching profiles.</p> |

| Page Name | Definition Name | Usage |
|---|------------------------|---|
| Select a Profile Page Add Profiles Page Add Profiles for a team member Page | JPM_COM_PROF_SRCH | <p>Employees and managers search for a job profile by either selecting a profile type or entering a profile name. They can view job profiles that are defined as end profiles. This is defined in the profile type definition on the Profile Type - Attributes page. From the list of profiles, employees and managers click the profile name to view the profile details.</p> <p>Managers can create a new profile by clicking the Add a Profile link on this page through the Maintain Job Profiles component. This link is not available to employees.</p> |
| Maintain Job Profiles Page | JPM_MGRSS_PROFLIC | <p>Managers select the profile type for the new profile. The system then displays the content sections that are set up for the selected profile type.</p> <p>The system displays only those content sections that are authorized for the manager role in the profile type definition. Managers can also use this page to create and edit job profiles. If the manager clicks the Edit icon for the item, the system opens up the Update <content type> page and makes the fields available for edit. Managers can only update content sections to which they have update access, as defined on the Content Section page in the profile type definition.</p> |
| My Job Profiles Page | JPM_MGRSS_PROFLIC | <p>Displays the job profile that the employee selected.</p> <p>The system displays only those content sections that are authorized for the employee role in the profile type definition.</p> |
| View Job Profiles Page | JPM_MGRSS_PROFLIC | <p>Displays the job profile that the employee selected.</p> <p>The system displays only those content sections that are authorized for the employee role in the profile type definition.</p> |

| Page Name | Definition Name | Usage |
|---|------------------------|---|
| View <content type> Page Add New <content type> Page Update <content type> Page | JPM_ITM_EMPDTL_SEC | Displays the details of a profile item. The fields on this page vary according to the content type of the item. Managers can update this information. Changes that require approval are submitted for approval processing when the manager clicks the Submit button on the Job Profiles - Summary of Changes page. |
| Content Item Details Page | JPM_CAT_ITEMS_DSP | View details about a specific content item. |
| Rating Model Page | HCR_RATEMDL_POPUP | Displays the rating model details of the selected profile item. When accessing the page from the update or add new pages, the you can modify the rating as well. |
| Related Items Page | JPM_PROF_SSRELITMS | Displays details of the selected profile item that is related to the profile item. |
| Add New Profile Identity Page Update Profile Identity Page | JPM_MGRPID_SEC | Add or edit profile identities associated with the profile. |
| Summary of Changes Page | JPM_JP_NPSUMM_SEC | Lists the changes that the manager has made to the job profile that require approval. The manager clicks the Submit button next to the Items awaiting submission link to submit the changes for approval or click Cancel to return to the Maintain Job Profiles page. The Cancel button will retain the changed items with a <i>Saved</i> status. |

Maintaining Interest Lists

Page Used to Maintain Employee Interest Lists

| Page Name | Definition Name | Usage |
|---|------------------------|---|
| Team Interest List Page | HR_DR_ADDDL_INFO | Displays the instructions for the transaction and the effective date field. Managers can change the default effective date. |
| Team Interest List - Select Employees to Process Page | HR_DR_SELECT_EMPS | Displays a list of the people who report to the manager. Managers select the person whose interest they want to view and click Continue. Managers can also click the Drill Down icon to view employees under the employee listed on that row. |

| Page Name | Definition Name | Usage |
|---|------------------------|---|
| My Interest List Page Team Interest Lists Page | JPM_INTEREST | Lists the job profiles in the employee's interest list. The Assigned By column shows who added the profile to the interest list. Employees can add profiles to their interest list, managers can add job profiles to their employees' interest lists, and profile administrators can add profiles to employees' interest lists. Employees and managers can only delete a job profile from the interest list if they added the profile to the list. |

Understanding Interest Lists

Interest lists enable employees and managers to identify jobs that are of interest to the employee. Each employee has one interest list that is accessed by the employee, the employee's manager, and the profile administrator.

Employees can add profiles to their interest list using the My Interest List component, when viewing job profiles, or from the Search Results page. Similarly, managers can view and update their employees' interest lists using the Team Interest Lists component or they can add a profile to an employee's interest list while viewing job profiles.

Employees and managers can only delete a job profile from the interest list if they added the profile to the list (shown in the Assigned By field).

Related Links

[Viewing and Updating Job Profiles](#)

Searching and Comparing Profiles

Pages Used to Search and Compare Profiles

| Page Name | Definition Name | Usage |
|--------------------------|------------------------|--|
| Search for Profiles Page | JPM_SRCH_TRANSFER | Lists the search types that are available to the employee or manager. Searches are defined on the Search Configuration page. Employees or managers select the search that they want to run by clicking the search name link. |

| Page Name | Definition Name | Usage |
|--|------------------------|---|
| Search and Compare Profiles - Select a Profile Page | JPM_COM_PROF_SRCH | This page is displayed if an employee or manager selects a search that has a source profile type with profile usage of <i>End/Final/Job</i> (non-person profile). The page displays the default source profile type that is defined for the search. Employees and managers use this page to search for, and select, the profile that they want to use as the source profile. |
| My Job Profiles - Select Profile Page | JPM_JP_REL_PRF_EMP | Lists the profiles that are associated with the employee's job. Employees select the job profile that they want to use in the search and compare. This page is only displayed if there are two or more active job profiles related to the employee. If there is only one active job profile, this page is not displayed. The system determines which job profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching profiles. |
| Search and Compare Profiles Page | HR_DR_ADDL_INFO | This page is available when a manager selects a search that populates criteria from a team member's profile. Displays the instructions for the transaction and the effective date field. Managers can change the default effective date. |
| Search and Compare Profiles - Select Employees to Process Page | HR_DR_SELECT_EMPS | Displays a list of the people who report to the manager. Managers select the person to use in the search and click Continue. |

| Page Name | Definition Name | Usage |
|--|------------------------|--|
| Search Criteria Page | JPM_SRCH_CRITERIA | <p>Displays the search criteria for the search that the employee or manager selected on the Search for Profiles page. If the search selected has a criteria rule of <i>Default, No Display</i> the system runs the search without displaying this page; for this type of search employees and managers can view the search criteria after running the search by selecting the Modify Search Criteria link on the Search Results page.</p> <p>Employees and managers use this page to view and modify the search criteria before running the search. They also use this page after running a search to modify the search criteria and rerun a search. When the employee or manager clicks the Search button, the system runs the search using the criteria defined on the page.</p> |
| Search Results Page | JPM_SRCH_RESULT | <p>Displays the results of the search. The page lists the profiles that best match the search criteria. The value in the score column indicates how well the profile matches the criteria. The system lists the matching profiles according to their score, the highest score listed first and then in descending order of score.</p> |
| Match Result Page | JPM_COMPARE_RESULT | <p>Displays a comparison of the search criteria and the selected profiles. The left hand column lists each search criterion. The remaining columns list the percentage scores for each profile that indicate how well the profile matches that criterion.</p> |
| Add to Interest List - Confirmation Page | JPM_INT_CONFIRM | <p>Displays the profiles that have been added to the employee's interest list.</p> |

Understanding Search and Compare Profiles

Employees and managers use the Search and Compare Profiles component to search for profiles that match certain search criteria. When employees and managers select this option, the system lists the search types that are defined for their role. Search types are configured on the Search Configuration page (Set Up HCM > Product Related > Profile Management > Define Search Configuration) for the profile types that you have defined. For further information about setting up Search and Compare Profiles, see "Understanding Search and Compare Profiles" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Depending on how the search is configured, employees and managers can set up or modify the search criteria before running the search. The system assigns matching profiles a score that indicates how well the profile matches the search criteria. For further information about how the system calculates the scores,

see "Understanding Search and Compare Profile Scores" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

The Search Results page lists the matching profiles in descending score order, with the highest scoring profile listed first. Employees and managers can compare profiles listed on the Search Results page with the search criteria either by clicking the score link for a profile or using the Compare Profiles button to compare more than one profile. The comparison provides a list of each item in the search criteria with the score for the matching profile.

Chapter 3

Entering Faculty Member Training and Development Information

Entering Training Information

Pages Used to Enter Training Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| Professional Training Page | EG_SSTRAINING_L | Faculty members add detailed information about the training course. |
| Professional Training - Change a Course Page Professional Training - Add a Course Page Professional Training - Training Detail Page | EG_SSTRAINING_D | Faculty members add detailed information about the training course. |

Managing Activity Information

Pages Used to Manage Activity Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|--|
| Activities Page | EG_SSACTIVITY_LIST | Faculty members review, add, update, or delete information about their academic activities, such as activity type, sponsor, and beginning and end dates. |
| Change Activity Page Add Activity Page Activity Detail Page | EG_SSACTIVITY_DET | Faculty members create new activity records, and review and edit details about activity records already assigned to them. |

Understanding the Activities Transaction

Faculty members use the Activities self-service transaction to review, add, update, or delete records about their academic activities. The Activity Detail page enables faculty members to record information about their academic activities, such as activity type, sponsor, and beginning and end dates.

Setting Up Administrative Post Information

Pages Used to Set Up Administrative Post Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|--|------------------------|--|
| Administrative Posts Page | EG_SSADMIN_POSTS_L | Faculty members review, add, update, or delete information about their administrative posts, such as post type, begin and end dates, and organization. |
| Change Administrative Post Page Add Administrative Post Page Administrative Post Detail Page | EG_SSADMIN_POSTS_D | Faculty members create new administrative post records, and review and edit details of administrative post records already assigned to them. |

Understanding the Administrative Posts Self-Service Transaction

Faculty members use the Administrative Posts self-service transaction to review, add, update, or delete Administrative Post records. The Administrative Post Detail page enables faculty members to enter details about their administrative posts, such as post type, begin and end dates, and organization.

Before you can track administrative posts, define administrative posts on the Administrative Post Table. Examples of an administrative post are Department Head and Chairperson.

Related Links

"Tracking Faculty Events" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Manage Committee Information

Pages Used to Manage Committee Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------|------------------------|--|
| Committees Page | EG_SSCOMMIT_MBR_L | Faculty members review their committee membership information. |
| Committee Details Page | EG_SSCOMMIT_MBR_D | Faculty members review details about administrative post records already assigned to them. |

Understanding the Committee Self-Service Transaction

Faculty members use the Committee self-service transaction to review their committee membership information. The Committee Detail page displays the committee name, the dates of membership, and role in the committee.

For faculty members to view their committee memberships, you need to set up these tables:

- Use the Committee Type Table page to maintain different committee types and committee roles within each type.

The committee types that you set up on this page are used in the Committee page.

- Use the Committee page to establish a committee and attach a committee type to it.

For example, you can establish the research Committee Type and attach it to the research and development committee.

- Use the Committee Members page to assign faculty members to a committee type within the committee.

Related Links

"Tracking Faculty Events" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Managing Presentation Information

Pages Used to Manage Presentation Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| Presentations Page | EG_SSPRESENTATN_L | Faculty members review, add, update, or delete information about the presentations they have given. |
| Change Presentation Page Add Presentation Page Presentation Detail Page | EG_SSPRESENTATN_D | Faculty members create new presentation records, and review and edit details about presentation records already assigned to them. This includes the presentation type, date, title, and the audience or function at which they gave the presentation. |

Understanding the Presentations Transaction

Faculty members use the Presentations self-service transaction to review, add, update, or delete records of their presentations. The Presentation Detail page enables faculty members to record information about the presentations they have given, including the presentation type, date, title, and the audience or function at which they gave the presentation.

Reviewing, Updating, and Adding Student Advising Information

Pages Used to Review, Update, and Add Student Advising Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|--|
| Student Advising Page | EG_SSADVISING_LIST | Faculty members review, add, update, or delete information about their student advisees. |
| Change Student Advising Page Add Student Advising Page Student Advising Detail Page | EG_SSADVISING_DET | Faculty members create new student advising records, and review and edit details about student advising records already assigned to them. This includes the level at which they are advising the students, the dates they will be advising the students, and the student's projects. |

Understanding the Student Advising Self-Service Transaction

Faculty members use the Student Advising self-service transaction to review, add, update, or delete student advisee records. The Student Advising Detail page enables faculty members to record information about their student advisees, including the level at which they are advising the students, the dates they will be advising the students, and the student's projects.

Entering Teaching Responsibility Information

Pages Used to Enter Teaching Responsibility Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|--|------------------------|---|
| Teaching Responsibilities Page | EG_SSTEACH_RESP_L | Faculty members review, add, update, or delete information about their teaching responsibilities. |
| Change Teaching Responsibility Page Add Teaching Responsibility Page Teaching Responsibility Detail Page | EG_SSTEACH_RESP_D | Faculty members create new teaching responsibility records, and review and edit details about teaching responsibility records already assigned to them. |

Understanding the Teaching Responsibilities Self-Service Transaction

Faculty members use the Teaching Responsibilities self-service transaction to review, add, update, or delete Teaching Responsibilities records. The Teaching Responsibility Detail page enables faculty members to record information about their teaching responsibilities, including course type and description, units, term, percent taught (if they are sharing teaching with another faculty member) and the type of enrollment.

Requesting Employee Training

Understanding the Self-Service Training Development Process

Prerequisites

Before employees and managers can submit training requests, complete the following:

1. Activate workflow.
2. Set up group build if you plan to use group ID as the access type for a manager to request training for his or her direct reports.
3. Set up the access type for HR_DR_TRN_SUMMARY and TRN_REQUEST_LNK on the Direct Reports Setup page.
4. Define the rules for Training Enrollment and Training Enrollment by Manager on the Configuration Options, Notification Setup, and Component Interface Setup pages.

Related Links

"Configuring Self-Service Transactions" (PeopleSoft HCM 9.2: Application Fundamentals)

"Understanding Group Build" (PeopleSoft HCM 9.2: Application Fundamentals)

The Self-Service Training Development Process

eDevelopment provides four self-service transactions that improve the efficiency of employee development:

- Request Training Enrollment.

An employee, person of interest (POI) with a Job record, or manager accesses the Request Training Enrollment transaction. Employees or POIs request training on their own behalf and managers request training for their direct reports. Whether you are an employee, POI, or manager submitting the request, the system considers you the originator.

The originator selects a method for searching for course sessions that are set up in PeopleSoft HR: Administer Training. The system displays a list of available courses and the originator can pick the course and session that meets their needs.

The system checks to see if there are any prerequisites that must be met. For managers, the system displays either a list of their direct reports who meet the prerequisites and or a list of those who don't. If an employee is scheduled to take a course that meets the prerequisite for the selected course, the system considers this employee as meeting the requirement.

Managers select the employees they want to enroll in the course. The system displays a summary of the course. Employees or managers can enter any relevant comment and request to be placed on a waiting list if the course is full.

- Approve Training Request.

Managers use the Approve Training Request transaction to either approve or deny a request. Information about the request cannot be changed; however, the approver can enter a comment.

- Training Request Status.

Employees and managers can check the status of a request using the View Training Request Status transaction.

- Training Summary.

Employees and managers can access the Training Summary transaction. Employees can view a summary of the training courses that they have completed, and courses for which they are enrolled or on the waiting list. Managers view the same information for their direct reports.

Note: If a manager requests training for a group of direct reports and the class exceeds the number allotted during the enrollment process, the system enrolls the entire group into the class and updates their statuses to enrolled. The system then notifies an administrator to handle this situation.

Submitting Training Requests

Pages Used to Submit Training Requests

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------|------------------------|---|
| Request Training Enrollment Page | TRN_SELCOURSE_MGR | Employees, POI's with a Job record, or managers select the method by which they want to search for training courses. Any training enrollment through eDevelopment requires a job record for the candidate requesting the training. |
| Course Search Page | HR_TRN_SRCH_COURSE | Employees or managers enter the appropriate information to display a list of courses that match their criteria. |
| Course Detail Page | HR_TRN_ENROLL_DESC | Employees or managers review detailed information about the course. |
| View Available Sessions Page | HR_TRN_COURSE_SESS | Employees or managers review the available course sessions and select the desired session. |

| Page Name | Definition Name | Usage |
|----------------------------|------------------------|---|
| Prerequisites Not Met Page | EO_ERR_CONTINUE | Displays the prerequisites for the course selected. This page is displayed if the employee does not meet the prerequisites. |
| Session Detail Page | HR_TRN_SESS_DETAIL | <p>Employees or managers review the details of a course session. This page displays the session location, start date, and language of the session.</p> <p>Employees click Continue to process the training request or be placed on the waiting list.</p> <p>Managers click Continue to select the employees that they want to enroll in this course or place on a waiting list.</p> |
| Select Employees Page | TRN_OPRROWS_MULTI | Lists the manager's direct reports who meet the course prerequisites and those who don't meet the prerequisites. Managers select the employees that they want to enroll in the selected course from the list of employees who meet the course prerequisites. |
| Submit Request Page | TRN_REQUEST_MGR | Managers or employees enter any comments and click the Submit button to submit the request. If the request was successfully submitted, this page is re-displayed with details of the submitted request. |
| Submit Confirmation Page | EO_SUBMIT_CONFIRM | View the submission status of your request. |

Approving Training Requests

Pages Used to Approve Training Requests

| Page Name | Definition Name | Usage |
|-------------------------------|------------------------|---|
| Approve Training Request Page | SS_LIST | Managers view a list of employees that require training approval. |
| Approve Transaction Page | TRN_REQUEST_MGR | Managers approve or deny each employee's training request and enter comments. |
| Save Confirmation Page | EO_SAVE_CONFIRM | Managers approve or deny the request. |

| Page Name | Definition Name | Usage |
|----------------------------------|------------------------|---|
| Administer Training Request Page | TRN_REQUEST_ADM | <p>Training administrators use this page to approve or deny training requests. In the Administrator Actions group box, the administrator has three options:</p> <p>To approve the training request and allow the system to automatically enroll or add the employee to the waiting list for the selected course session.</p> <p>To approve the training request, without the automatic update. If the training administrator selects this option, the system does not enroll the employee. The training administrator must do this manually.</p> <p>To deny the training request.</p> |

Understanding Training Request Approval Processing

When employees and managers submit training requests, the requests may require one or both of the following before the employee is enrolled in, or added to the waiting list for, a course session:

- Manager approval.

Managers approve training requests for their employees using the Approve Training Request self-service transaction.

- Processing by the training administrator.

Training administrators use the Administer Request page (Enterprise Learning > Approve Training Request) to approve the training request. Depending on the option selected on the Administer Request page, the training administrator may also need to manually enroll the employee in the session.

You configure training request processing on the Self Service Workflow Configurations page (Set Up HCM > Common Definitions > Self Service > Workflow Configuration > Self Service Workflow Configurations).

The training request self-service transactions are:

- Training Enrollment.
- Training Enrollment by Manager.

The check boxes Approval Process? and Allow DB Update on the Self Service Workflow Configurations page affect the way that the training requests are processed. This table describes the training request processing for the different configurations:

| Approval Process? | Allow DB Update | Manager Approval | Training Administrator Approval |
|--------------------------|------------------------|-------------------------|--|
| Selected | Not Selected | Required | Required |

| Approval Process? | Allow DB Update | Manager Approval | Training Administrator Approval |
|--------------------------|------------------------|-------------------------|--|
| Not Selected | Not Selected | Not required | Required |
| Selected | Selected | Required | Required |
| Not Selected | Selected | Not required | Not required |

Related Links

"Configuring Self-Service Transactions" (PeopleSoft HCM 9.2: Application Fundamentals)

Viewing the Status of Training Requests

Pages Used To View the Status of Training Requests

| Page Name | Definition Name | Usage |
|---|------------------------|---|
| Training Request Status Page Training Request Status List Page | SS_LIST | Displays current status summary information for each training request. |
| Training Request Status Page | TRN_REQUEST_MGR | Displays details of the current status for the selected training request. |

Reviewing Training History Information

Page Used to Review Training History

| Page Name | Definition Name | Usage |
|---|------------------------|---|
| Training Summary - Employee Selection Criteria Page | HR_DR_DIRECTREPORT | Displays a list of the employees who report to the manager. Managers select the employee whose training summary they want to review. See also "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals). |
| Training Summary Page | HR_TRN_SUMMARY | Displays a summary of training courses that the employee has completed, is enrolled in, or on the waiting list. You can also initiate enrollment into another course by clicking the Internal Training Enrollment link. |
| Training Summary - Course Detail Page | HR_TRN_CRSDISC | Displays detailed information about the training course. |

Reviewing Workflow Information

Page Used to Review Workflow Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------|------------------------|---|
| Workflow Inquiry Page | WF_SS_STAGED | Administrators use this page to review transactions that successfully updated the database or require further processing. This page also provides an audit trail of who made the update to the database. Administrators either enter an employee ID or select a transaction name. For training requests, select either HR_TRAIN_ENROLL for employee requests or HR_TRAIN_ENROLL_MGR for manager requests. For training requests, if you click the Go to Enrollment link the Course Session Enrollment page is displayed with the request information. |

Chapter 5

Managing Professional Compliance

Understanding Professional Compliance

Manage Professional Compliance is a PeopleSoft HR business process that enables you to manage the professional certification of both employees and non-employees.

With Manage Professional Compliance, you can:

1. Define the certification requirements established by a regulatory authority.
2. Set up classifications used to define the status of regulated individuals.

For example, an individual can be classified as compliant or noncompliant with the requirements for certification.

3. Assign regulated individuals to compliance managers/supervisors.
4. Enroll regulated individuals in development plans designed to help individuals obtain a level of competence to attain a specified classification.
5. Monitor individuals in their progress by completing reviews, observations, KPIs, and checks.

Using Self-Service Transactions with Manage Professional Compliance

The Manage Professional Compliance business process provides self-service transactions for both compliance supervisors/managers and regulated individuals (RI):

- Supervisors/managers can view the status of their regulated individuals and perform actions such as completing development reviews, entering observations, and completing KPI reviews.
- Regulated individuals can view key data related to their compliance status and development plans.

Note: All RI direct reports display on the RI pages regardless of their assignment statuses. The assignment status also displays in the Direct Reports grids on the RI pages.

For Manage Professional Compliance transactions, individuals that a manager/supervisor can view in the Direct Reports grid are their regulated individuals. It is possible for a manager/supervisor to have direct reports who are not RIs in which case the direct report would not display in the grid.

It is also possible for a manager/supervisor to be responsible for an RI, who is not one of their direct reports. In this case, the RI would still display in the grid since it is an RI transaction. Regulated individuals who are not also a direct report of a manager/supervisor will not display in the Direct Reports grid for any self-service transactions other than those for Manage Professional Compliance.

Related Links

"Understanding Regulated Individual Data" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

"Understanding Regulated Individual Data" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Completing Regulated Individual Development Reviews

Pages Used to Complete Regulated Individual Development Reviews

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|--|--|
| Complete RI Development Review - Select Regulated Individual Page | PCMP_OPRROWS PCMP_OPRROWS2 | Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select the regulated individual for whom they want to complete a development review. |
| RI Development Review Page | HR_PCMP_T_DEVREV HR_PCMP_T_DEVREV2 HR_PCMP_T_DEVREV3 | Managers complete development reviews. Using the pages, managers select statuses for development plan areas, and add optional comments about a particular area. They can also update review dates and the review status. |

Understanding RI Development Reviews

Compliance managers and supervisors use the Complete RI Development Review transaction to select regulated individuals from a list and then review their development plans. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor, and the development plans available for review include only those for which the expected completion date (defined on the Development Record page) has not yet passed.

Before you can complete this transaction, you must define your development plans and enroll individuals in these plans as part of Manage Professional Compliance setup in HR.

Related Links

"Understanding Manage Professional Compliance Business Processes" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Completing RI Observations

Pages Used to Complete RI Observations

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|--|-------------------------------|---|
| Complete a Regulated Individual Observation - Select Regulated Individual Page | PCMP_OPRROWS PCMP_OPRROWS2 | Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual for whom they want to complete an observation. |

| Page Name | Definition Name | Usage |
|---------------------|---|---|
| RI Observation Page | HR_PCMP_T_RIOBS HR_PCMP_T_RIOBS2 HR_PCMP_T_RIOBS3 | Compliance managers/supervisors enter the observation information, including the observation models, the observation date, the statuses of observation model elements, and optional comments. |

Understanding RI Observations

Compliance managers and supervisors use the Complete RI Observation transaction to select a regulated individual from a list and complete an observation. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete an observation, you must define observation elements and construct observation models as part of the setup of Manage Professional Compliance in HR.

Related Links

"Observing Regulated Individuals" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Completing RI Key Performance Indicator Reviews

Pages Used to Complete RI Key Performance Indicator Reviews

| Page Name | Definition Name | Usage |
|--|---|--|
| Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual Page | PCMP_OPRROWS PCMP_OPRROWS2 | Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual for whom they want to complete a KPI review. |
| RI KPI Review Page | HR_PCMP_T_RIKPI HR_PCMP_T_RIKPI2 HR_PCMP_T_RIKPI3 | Compliance managers/supervisors perform a key performance indicator review by completing details for each indicator, entering the date of the review, the frequency, and optional comments about the review. |

Understanding RI Key Performance Indicator Reviews

Compliance managers and supervisors use the Complete RI KPI Review transaction to select a regulated individual from a list and then enter KPI review details. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete a review of an individual's progress against KPIs, you must define the specific indicators that you want to use as part of the setup of Manage Professional Compliance in HR. PeopleSoft includes the following broad categories of performance indicators as part of the delivered application;

within these categories, however, you must choose (and in some cases set up) the exact indicators that you want to use:

- Complaints – Number of complaints against the individual versus those against the company.
- Persistency (of business sold) – Percentage of business sold that is still in force.
- Spread of Business – Measure the range of applications being sold by the individual.
- Not Taken Up (NTU) – Number of proposals submitted, but not put into force.
- Factfind Completion – Check on accuracy, completeness and quality of service.

Note: The KPIs listed here are directly targeted at the U.K. financial services arena. However, the key structure of the KPI records, and the way that the functionality is incorporated within Professional Compliance, can be used as a guide for creating additional, modified KPIs.

Related Links

"(GBR) Monitoring KPIs" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Viewing RI Development Records

Pages Used to View RI Development Records

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|--|
| View a Regulated Individual Development Record - Select Regulated Individual Page | PCMP_OPRROWS | Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual whose development plan they want to view. |
| RI Development Record (regulated individual development record) Page Development Record Page | HR_PCMP_DEVREC2 | Compliance managers/supervisors view details of development plans for regulated individual. Employees can view details of their own development plans. |

Understanding the View RI Development Records Transaction

Compliance managers and supervisors use the View RI Development Record transaction to view details of a development plan for regulated individuals, and employees use this transaction to view details of their own development plans.

Before you can view details of a development plan, you must define your development plans and enroll individuals in them as part of the setup of Manage Professional Compliance in HR.

Related Links

"Understanding Manage Professional Compliance Business Processes" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Viewing RI Development Reviews

Pages Used to View RI Development Reviews

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| View a Regulated Individual Development Review - Select Regulated Individual Page | PCMP_OPRROWS | Select a regulated individual whose development review you want to view. |
| Development Review Page | HR_PCMP_DEVREV2 | Compliance managers/supervisors view development review histories of regulated individual. Employees can view details of their own development reviews. |

Understanding the View RI Development Review Transaction

Compliance managers and supervisors use the View RI Development Review transaction to view the development review history of regulated individuals, and regulated individuals use this transaction to see details of their own development reviews.

To view a development review, you must have already created the review using the RI Development Review page in eDevelopment, or the RI Dev Review and RI Dev Area Review pages in HR.

Related Links

"Understanding the Monitoring Process" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Viewing RI Observation History

Pages Used to View RI Observation History

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|--|------------------------|--|
| View a Regulated Individual Observation - Select Regulated Individual Page | PCMP_OPRROWS | Select a regulated individual whose observation history you want to view. |
| RI Observation Page Regulated Individual Observation Page | HR_PCMP_RIOBS | Compliance managers/supervisors view observation history. Employees view details of their own observation history. |

Understanding the View RI Observation Transaction

Compliance managers/supervisors use the View RI Observation transaction to view observations of regulated individuals, and regulated individuals use this transaction to view details of their own observations.

To view an observation, you must have already created the observation using the RI Observation page in eDevelopment, or the RI Observation and Observation Elements pages in HR.

Related Links

"Understanding the Monitoring Process" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Viewing Regulated Individual KPI Review History

Pages Used to View Regulated Individual KPI Review History

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual Page | PCMP_OPRROWS | Select a regulated individual whose KPI review you want to view. |
| RI KPI Review (regulated individual key performance indicators review) Page Regulated Individual KPI Review Page | HR_PCMP_RIKPI | Compliance managers/supervisors view regulated individual KPI reviews. Employees can view details of their own KPI reviews. |

Understanding the View RI KPI Review Transaction

Compliance managers and supervisors use this transaction to view the KPI reviews of regulated individuals, and regulated individuals use this transaction to view details of their own KPI reviews.

To view a KPI review, you must have already created the review using the RI KPI Review page in eDevelopment, or the KPI Review and KPI Statistics pages in HR.

Related Links

"Understanding the Monitoring Process" (PeopleSoft HCM 9.2: Human Resources Manage Professional Compliance)

Appendix A

Delivered Workflow for eDevelopment

Delivered Workflow for eDevelopment

This topic discusses eDevelopment workflow.

Understanding Delivered Profile Approval Workflow

Profile approvals processing uses the Approval Framework. The delivered approval definitions provide the following approval processing:

- When employees make changes to their personal profiles, the changes that require approval (as defined by the profile type definition) are routed to their manager for approval.
- When managers create or update non-person profiles, the changes are routed to the profile administrator for approval.

The delivered definitions enable you to set up a one-step or two-step profile approval process. You can use the delivered definitions or set up new approval definitions according to your business requirements. Approval definitions are linked to profile types on the Profile Types — Attributes page.

Related Links

"Understanding Profile Management" (PeopleSoft HCM 9.2: Human Resources Manage Profiles)

Non-Person Profile Approval Workflow

This topic discusses the non-person approval workflow.

Description

| <i>Information Type</i> | <i>Description</i> |
|-------------------------|--|
| Event Description | A manager creates a new job profile or updates an existing job profile using the View Job Profiles self-service option. |
| Action Description | When the profile administrator selects the worklist entry or clicks the link in the email, the system links the profile administrator to the Non-person Profile — Approval page. |
| Notification Method | Email and worklist. |

Approval Workflow Definitions

| <i>Information Type</i> | <i>Description</i> |
|-------------------------|--|
| Process ID | JPMNonpersonProfiles |
| Workflow Transaction | JPMNonpersonProfiles |
| Definition ID | <p>Two delivered definition IDs:</p> <p>ByProfileAdministrator is a one-step approval by the profile administrator (user list JPMApprovalAdministrator).</p> <p>ProfileAdminThenCompAdmin is a two-step approval. The first approver is the profile administrator (user list JPMApprovalAdministrator) and the second approver is the compensation administrator (user list JPMCompensationAdministrator).</p> |
| Email Templates | <p>JPMApproveNonpersonProfile</p> <p>JPMDenyNonpersonProfile</p> <p>JPMErrorNonpersonProfile</p> <p>JPMSubmitNonpersonProfile</p> <p>JMPPushbakNonpersonProfile</p> <hr/> <p>Note: The pushback email template JPMPushbakNonpersonProfile is not enabled in eDevelopment as delivered.</p> <hr/> |

Person Profile Approval Workflow

This topic discusses the person profile approval workflow.

Description

| <i>Information Type</i> | <i>Description</i> |
|-------------------------|---|
| Event Description | An employee creates a new person profile or updates an existing person profile using the My Profile self-service option. |
| Action Description | When the employee's manager selects the worklist entry is selected or clicks the link in the email, the system links the manager to the Person Profile — Approval page. |
| Notification Method | Email and worklist. |

Approval Workflow Definitions

| <i>Information Type</i> | <i>Description</i> |
|-------------------------|---|
| Process ID | JPMPersonProfiles |
| Workflow Transaction | JPMPersonProfiles |
| Definition ID | <p>Six delivered definition IDs for the different reporting structures:</p> <p>ByDepartmentManager for approval by the department manager defined by the Manager ID field on the Department Profile page (user list JPMDepartmentManager).</p> <p>ByReportsToOrDepartmentMgr for approval by the manager defined by the Reports To field on the Job Information page, or, if that manager is not found, the Manager ID for that department on the Department Profile page (user list JPMPartPosnMgmtDeptMgr).</p> <p>ByReportsToOrSupervisorID for approval by the manager defined by the Reports To field on the Job Information page, or, if that manager is not found, the Supervisor ID for that person (user list JPMPartPosnMgmtSupervisor).</p> <p>ByReportsToPosition for approval by the manager defined by the Reports To field on the Job Information page (user list JPMReportsToPosition).</p> <p>BySupervisorID for approval by the supervisor defined by Supervisor ID field on the Job Information page (user list JPMSupervisorID)</p> <p>TwoLevelManager is a two-step approval process. The approval is routed to the employee's manager (user list JPMPartPosnMgmtSupervisor) and then the manager's manager (user list JPMPartPosnMgmtSupervisor)</p> |
| Email Templates | <p>JPMApprovePersonProfile</p> <p>JMPMPushbackPersonProfile</p> <p>JPMDenyPersonProfile</p> <p>JPMErrorPersonProfile</p> <p>JPMSubmitPersonProfile</p> <hr/> <p>Note: The pushback email template JMPMPushbackPersonProfile is not enabled in eDevelopment as delivered.</p> <hr/> |

Professional Training

This topic discusses the Professional Training workflow that is based on PeopleTools workflow; it does not use the approvals workflow engine.

See the product documentation for *PeopleTools: Workflow Technology*.

Description

| Information Type | Description |
|-------------------------|---|
| Event Description | An employee uses self-service to update their personal development information for professional training. This generates either a worklist entry or email to the manager. |
| Action Description | When the worklist entry is selected (or the link in the email is selected), the system links the manager to the page where she can view changed personal development information for professional training. |
| Notification Method | Email, worklist, or both. |

Workflow Objects

| Information Type | Description |
|-------------------------|--------------------------|
| Event | HR_PROF_TRAINING |
| Workflow Action | Automatic |
| Role | Roleuser by EmplID query |
| Email Template | Notify Manager |
| Business Process | Professional Training |
| Business Activity | HR_PROF_TRAINING |
| Business Event | Training |